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ECONOMIC CONTRIBUTION OF CRUISE TOURISM TO THE DESTINATION ECONOMIES

A Survey-based Analysis of the Impacts of Passenger, Crew and Cruise Line Spending

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The Florida-Caribbean Cruise Association - And - The following destinations:

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- Acapulco, Mexico
- Antigua & Barbuda
- Aruba
- The Bahamas
- Barbados
- Belize
- Cabo San Lucas, Mexico
- Cayman Islands
- Cartagena, Colombia
- Costa Rica
- Cozumel, Mexico
- Curacao
- Dominica
- Dominican Republic
- Ensenada, Mexico
- Grenada
- Guatemala
- Honduras
- Huatulco, Mexico
- Jamaica
- Nicaragua
- San Juan, Puerto Rico
- St. Kitts and Nevis
- St. Lucia
- St. Maarten
- St. Vincent and the Grenadines
- Trinidad and Tobago
- Turks and Caicos
- U. S. Virgin Islands

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EXECUTIVE SUMMARY

Business Research and Economic Advisors (BREA) was engaged by the Florida-Caribbean Cruise Association (FCCA) and participating cruise destinations to conduct an analysis of cruise-related spending and its impact on the economies of the participating destinations. This is an update and expansion of a similar project undertaken in 2006. A total of 29 destinations participated in this study, an increase of 10 from the 2006 study. These destinations were located in the Caribbean, Central and South America and Mexico. The participating destinations and their sponsoring organizations are shown in **Table ES-1**.

Table ES-1 – Participating Destinations and Sponsoring Organizations

Destinations	Sponsoring Agencies
Acapulco	Administracion Portuaria Integral Acapulco
Antigua & Barbuda	Ministry of Tourism
Aruba	Aruba Ports Authority
The Bahamas	Ministry of Tourism
Barbados	Barbados Port Inc.
Belize	Belize Tourism Board
Cabo San Lucas	Fonatur Constructora
Cayman Islands	Department of Tourism
Cartagena, CO	Sociedad Portuaria Regional de Cartagena
Costa Rica	Instituto Costarricense de Tourismo
Cozumel	Explora Tours; Discover Mexico
Curacao	Curacao Ports Authority
Dominica	Dominica Air and Sea Ports Authority
Dominican Republic	Ministry of Tourism
Ensenada	Ensenada Cruiseport Village
Grenada	Board of Tourism
Guatemala	Ministry of Tourism
Honduras	Port of Roatan
Huatulco	Fonatur Constructora
Jamaica	Tourism Enhancement Fund
Nicaragua	Nicaragua Institute of Tourism
San Juan, PR	Puerto Rico Tourism Company
St. Kitts and Nevis	St. Kitts Tourism Authority
St. Lucia	Ministry of Tourism
St. Maarten	St. Maarten Harbour Holding Co.
St. Vincent and the Grenadines	Ministry of Tourism
Trinidad and Tobago	Tourism Development Company, Ltd.
Turks and Caicos	Ministry of Tourism
U. S. Virgin Islands	Department of Tourism

Economic Impacts

During the 2008/2009 cruise year[1] cruise tourism generated significant economic benefits to the 29 participating destinations. As shown in **Table ES-2 cruise tourism generated over $2.2 billion in direct expenditures, 56,000 jobs and $720 million in employee wages** among the 29 destinations included in the study.[2] Seven destinations had direct cruise tourism expenditures of $100 million or more. Twelve destinations had direct expenditures between $25 and $100 million while ten had direct expenditures less than $25 million.

Table ES-2 – Total Economic Contribution of Cruise Tourism by Destination, 2008/2009 Cruise Year

Destinations	Total Cruise Tourism Expenditures ($US Millions)	Total Employment	Total Employee Wage Income ($US Millions)
Acapulco	$ 21.4	636	$ 3.5
Antigua & Barbuda	$ 48.3	1,315	$ 11.9
Aruba	$ 54.1	1,330	$ 21.9
Bahamas	$ 246.1	6,219	$ 100.4
Barbados	$ 53.6	1,665	$ 17.2
Belize	$ 58.6	1,781	$ 17.7
Cabo San Lucas	$ 95.3	2,745	$ 16.7
Cayman Islands	$ 174.4	3,731	$ 69.5
Cartagena	$ 24.6	629	$ 3.6
Costa Rica	$ 26.3	719	$ 3.9
Cozumel	$ 255.3	7,089	$ 52.8
Curacao	$ 39.3	748	$ 13.0
Dominica	$ 14.2	405	$ 3.0
Dominican Republic	$ 23.5	788	$ 3.1
Ensenada	$ 46.4	1,279	$ 8.4
Grenada	$ 21.7	581	$ 3.9
Guatemala	$ 8.7	275	$ 1.2
Honduras	$ 28.3	632	$ 2.9
Huatulco	$ 10.1	347	$ 1.7
Jamaica	$ 101.5	3,865	$ 22.6
Nicaragua	$ 2.7	141	$ 0.4
Puerto Rico	$ 182.3	4,398	$ 63.2
St. Kitts and Nevis	$ 44.0	756	$ 5.9
St. Lucia	$ 45.7	1,203	$ 9.3
St. Maarten	$ 230.3	5,531	$ 106.3
St. Vincent and the Grenadines	$ 6.8	159	$ 1.5
Trinidad and Tobago	$ 2.9	143	$ 1.6
Turks and Caicos	$ 25.1	473	$ 7.7
U. S. Virgin Islands	$ 384.4	6,688	$ 146.6
All Destinations	**$ 2,275.9**	**56,271**	**$ 723.0**

[1] The economic contribution of cruise tourism to the 29 destinations was estimated for the 12-month period from May, 2008 through April, 2009 which is referred to as the 2008-2009 cruise year throughout this report.

[2] All monetary figures are in U.S. dollars.

The U.S. Virgin Islands led all destinations with $384.4 million, followed by Cozumel with $255.3 million, the Bahamas with $246.1 million, St. Maarten with $230.3 million, Puerto Rico with $182.3 million, the Cayman Islands with $174.4 million, and Jamaica with $101.5. Combined, these seven destinations accounted for 69 percent of the total cruise tourism expenditures among the 29 destinations.

The next twelve destinations with expenditures between $25 and $100 million accounted for 25 percent of the total cruise tourism expenditures. The remaining ten destinations with less than $25 million in direct cruise tourism expenditures accounted for 6 percent of the total among the 29 destinations.

The analysis of cruise tourism expenditures revealed the following economic impacts[3] for the top seven destinations:

- The U.S. Virgin Islands had the highest per passenger spending rate of just over $193. It also had the third highest volume of onshore passenger visits. As a consequence the U.S.V.I. had the highest economic contribution among the 29 destinations. The $384 million in cruise tourism expenditures generated an estimated 6,688 jobs paying nearly $147 million in wage income during the 2008/2009 cruise year.
- Cozumel, which ranked second in onshore cruise passenger visits and third in per passenger expenditures, generated the second highest level of cruise tourism expenditures. The $255 million in total cruise tourism expenditures generated just under 7,100 jobs and $52.8 million in wage income during the 2008/2009 cruise year.
- The Bahamas ranked first in onshore passenger visits with 2.0 million visits[4] and with an average expenditure of $83.93 per onshore passenger visit, cruise tourism expenditures totaled $246.1 million. These expenditures generated an estimated 6,219 jobs and $100.4 million in wage income.
- The $230 million in cruise tourism expenditures in St. Maarten generated total employment of 5,531 residents and wage income of $106.3 million. St. Maarten had the second highest per passenger and crew spending rates. With an estimated 1.15 million onshore passenger visits it ranked sixth in this category.
- Puerto Rico benefitted from $182 million in total cruise tourism expenditures which, in turn, generated an estimated 4,398 jobs and $63.2 million in wages during the 2008/2009 cruise year. The economic impacts of cruise tourism in Puerto Rico were generated by both homeport and port-of-call visits. In fact, Puerto Rico led the Caribbean in passenger embarkations during the 2008/2009 cruise year with over 400,000 embarkations.
- The Cayman Islands, with the fourth highest number of passenger visits, ranked sixth in direct cruise tourism expenditures. The $174 million in cruise tourism

[3] The terms economic impacts, economic contribution and economic benefits are used interchangeably throughout this report.

[4] These only include arrivals at Nassau and Freeport (GBI) and do not include passenger visits to the private islands maintained by the cruise lines.

spending in the Cayman Islands generated 3,731 total jobs and $69.5 million in wage income during the 2008/2009 cruise year.

- Jamaica ranked seventh in total cruise tourism expenditures with $101 million in spending by passengers, crew and cruise lines. Jamaica ports primarily serve as ports-of-call but homeport activity has been expanding. Combined, homeport and intransit passenger onshore visits totaled just under 883,000 visits. The direct cruise tourism expenditures generated an estimated 3,865 jobs and $22.6 million in wage income during the 2008/2009 cruise year.

Passenger, Crew and Cruise Line Expenditures

The economic benefits of cruise tourism at each destination arise from three principal sources:

- onshore expenditures by passengers which are concentrated in shore excursions and retail purchases of clothing and jewelry;
- onshore spending by crew which are concentrated in purchases of food and beverages, local transportation and retail purchases of clothing and electronics; and
- expenditures by the cruise lines for supplies, such as food and beverages, port services, such as navigation and utility services, and port fees and taxes, such as wharfage and dockage fees.

To develop estimates of the typical or average expenditures of cruise passengers and crew during their onshore visit, surveys were conducted onboard ships of the FCCA member cruise lines.[5] A total of **47,771** passenger surveys[6] and **16,630** crew surveys were completed and returned for tabulation.

The passenger and crew surveys were designed to collect data for onshore spending and visit satisfaction by both passengers and crew. While the crew survey was slightly shorter than the passenger survey, both surveys were designed to collect the following information:

- hours spent ashore;
- expenditures by category, including shore tours, food & beverages, clothing, etc.;
- visit satisfaction, including shore tour, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation; and
- demographic characteristics, including country of residence, age group, income, etc.

The survey schedule was designed to generate a representative sample of cruise passengers by cruise line at each destination. Thus, each FCCA member cruise line was scheduled to have its passengers and crew surveyed at least once at each destination at which it had a port call

[5] Surveys were conducted on the ships of the following cruise lines: Azamara Cruises, Carnival Cruise Lines, Celebrity Cruises, Disney Cruise Line, Holland America Line, MSC Cruises (USA), Inc., Norwegian Cruise Line, Princess Cruises, P&O Cruises and Royal Caribbean International.

[6] This includes both port-of-call (intransit) and port-of-embarkation (homeport) passengers.

during the survey period. The survey period commenced in the beginning of November 2008 and concluded at the end of April 2009.

On any given cruise itinerary, passengers and crew were surveyed following a single call. The surveys were placed in passenger cabins and crew living quarters during the day of a designated survey. Passengers and crew, then, first viewed the survey upon their return from their onshore visit. They were asked to complete the survey in their quarters and to return the survey to a designated crew member. At the conclusion of the cruise, the surveys were returned to BREA for tabulation.

Passenger Visits and Expenditures

As shown in **Table ES-3**, the 17.56 million cruise passengers that disembarked cruise ships and visited the 29 participating destinations spent $1.71 billion for shore excursions and other goods and services during the 2008/2009 cruise year. Average per passenger expenditures ranged from a low of $33.50 in St. Vincent and the Grenadines to a high of $193.22 in the U.S. Virgin Islands and averaged $97.26 across the 29 destinations.

The U.S. Virgin Islands with $304 million in total passenger expenditures led all destinations and accounted for 18 percent of all passenger spending among the 29 destinations. Five additional destinations had passenger expenditures in excess of $100 million. Passengers spent $205 million in Cozumel, $170 million in St. Maarten, $169 million in the Bahamas, $126 million in the Cayman Islands, and just under $119 million in Puerto Rico. Combined, these five destinations accounted for 46 percent of the direct expenditures among the 29 destinations.

Another ten destinations had passenger expenditures between $25 and $100 million. These were: Antigua & Barbuda, Aruba, Barbados, Belize, Cabo San Lucas, Curacao, Ensenada, Jamaica, St. Kitts & Nevis and St. Lucia. These destinations accounted for 27% of total passenger expenditures. Passenger spending in this group of destinations ranged from a low of $28 million in Curacao to a high of $82 million in Jamaica and averaged $45 million among the ten destinations.

The remaining thirteen destinations accounted for 9% of total passenger expenditures. Passenger spending in this group averaged just over $13 million per destination, ranging from $1.8 million in Trinidad & Tobago to $23 million in Honduras.

Table ES-3 – Passengers Onshore Visits and Expenditures by Destination, 2008/2009 Cruise Year

Destinations	Passenger Onshore Visits (Thousands)	Average Expenditure per Passenger	Total Passenger Expenditures ($US Millions)
Acapulco	165.8	$ 87.65	$ 14.5
Antigua & Barbuda	532.1	$ 72.06	$ 38.3
Aruba	487.1	$ 87.41	$ 42.6
Bahamas①	2,019.4	$ 83.93	$ 169.5
Barbados②	608.1	$ 69.10	$ 42.0
Belize	519.4	$ 87.96	$ 45.7
Cabo San Lucas	968.0	$ 79.87	$ 77.3
Cayman Islands	1,305.7	$ 96.78	$ 126.4
Cartagena②	210.6	$ 90.03	$ 19.0
Costa Rica	266.9	$ 67.28	$ 18.0
Cozumel	1,960.0	$ 104.58	$ 205.0
Curacao	344.4	$ 81.21	$ 28.0
Dominica	231.8	$ 45.87	$ 10.6
Dominican Republic②	411.4	$ 43.42	$ 17.9
Ensenada	533.1	$ 57.73	$ 30.8
Grenada	272.7	$ 49.01	$ 13.4
Guatemala	115.2	$ 63.47	$ 7.3
Honduras	329.3	$ 70.39	$ 23.2
Huatulco	125.9	$ 49.05	$ 6.2
Jamaica②	882.7	$ 92.72	$ 81.8
Nicaragua	52.3	$ 35.63	$ 1.9
Puerto Rico②	1,181.7	$ 100.55	$ 118.8
St. Kitts and Nevis	333.9	$ 99.41	$ 33.2
St. Lucia	532.0	$ 68.53	$ 36.5
St. Maarten	1,152.0	$ 147.98	$ 170.5
St. Vincent and the Grenadines	124.7	$ 33.50	$ 4.2
Trinidad and Tobago	39.3	$ 46.27	$ 1.8
Turks and Caicos	277.1	$ 67.22	$ 18.6
U. S. Virgin Islands	1,575.0	$ 193.22	$ 304.3
All Destinations	**17,557.6**	**$ 97.26**	**$ 1,707.3**

① Only includes passenger visits at Nassau and Freeport.

② Includes passengers aboard both port-of-call and homeport cruise ships.

Passenger Expenditures by Category

Passengers were asked to provide their cruise party expenditures for a variety of categories as shown in **Table ES-4**. The per party expenditures in each category were divided by the average size of the expenditure party to arrive at the average spend per passenger. The average size of a cruise expenditure party across all destinations was 2.1 passengers and ranged from 2.0 to 2.4 passengers among the 29 destinations. The "per passenger" expenditure for each category was then multiplied by the percentage (share) of all onshore visitors who actually made a purchase in that category to arrive at the weighted average spend per passenger visit. This figure was multiplied by 17.56 million total passenger visits to arrive at total passenger expenditures by category.

For example, those cruise parties that reported purchasing food and beverages in a restaurant or bar spent an average of $30.18 during a single onshore visit. Since the average party size was 2.1 passengers, the average spend for food and beverages was $14.37 per passenger (30.18÷2.1). However, not all cruise parties made such a purchase at each destination. The survey data indicated that at any individual cruise call 45.3% of the cruise parties actually purchased food and beverages. Thus, the weighted spend per passenger across all onshore passenger visits was $6.51 ($14.37×.453). Finally, total passenger purchases of food and beverages across all 29 destinations for the entire 2008/2009 cruise year was estimated by multiplying the weighted average spend per passenger ($6.51) by the total number of onshore visits (17.56 million). Thus, total passenger purchases of food and beverages for the 2008/2009 cruise year across all 29 destinations were estimated to be $114.2 million. Similar calculations were made for each category.

Table ES-4 – Average Passenger Expenditures① by Category – Average for All Destinations

Purchase Categories	Average Spend per Passenger ($US)	Share of All Onshore Visits	Weighted Average Spend per Passenger	Total Passenger Expenditures ($US Millions)
Shore Excursions②	$ 35.78	52.2%	$ 18.67	$ 327.8
F&B at Restaurants & Bars	$ 14.37	45.3%	$ 6.51	$ 114.2
Local Crafts & Souvenirs	$ 15.82	44.6%	$ 7.06	$ 123.9
Clothing	$ 21.76	44.0%	$ 9.57	$ 168.0
Taxis/Ground Transportation	$ 12.86	27.9%	$ 3.59	$ 63.1
Watches & Jewelry	$ 165.88	21.8%	$ 36.09	$ 633.6
Other Purchases	$ 45.63	20.5%	$ 9.35	$ 164.2
Retail Purchases of Liquor	$ 17.73	11.3%	$ 2.00	$ 35.0
Perfumes & Cosmetics	$ 29.60	4.2%	$ 1.24	$ 21.7
Entertainment/Night Clubs	$ 43.02	2.2%	$ 0.95	$ 16.7
Telephone & Internet	$ 5.71	2.0%	$ 0.11	$ 2.0
Lodging③	$ 134.25	1.2%	$ 1.55	$ 27.1
Electronics	$ 63.54	0.9%	$ 0.57	$ 10.0
Total			**$ 97.26**	**$ 1,707.3**

① For the purposes of this table we have combined the expenditure data for both intransit and homeport passengers. The expenditures of each group are analyzed elsewhere in this report.

② This is the effective average onshore expenditure and is a weighted average of the onshore purchases and the portion of the onboard and travel agent purchases paid to local tour operators. Actual reported average spending for shore excursions by source is as follows: cruise lines - $57.37; travel agents - $77.56; and onshore tour operators - $21.21. The weighted average actual spend across all sources was $51.42.

③ Lodging expenditures only apply to the passengers who embarked on cruises in San Juan, Barbados, the Dominican Republic, Jamaica and Cartagena. For purposes of this table the weighted average has been calculated across all passengers.

The analysis of the passenger surveys showed the following major attributes of passenger onshore spending:

- The typical cruise passenger spent an average of $97.26 at each destination call during their cruise vacation with total passenger expenditures in the 29 destinations reaching $1.71 billion during the 2008/2009 cruise year.

- Over 75 percent of passenger expenditures were made in four categories: watches and jewelry ($634 million), shore excursions ($328 million), clothing ($168 million), and other purchases ($164 million). Combined, cruise passengers spent an estimated $1.29 billion in these four categories.
- The most popular expenditure was for shore excursions with an average of 52 percent of all passengers making such a purchase at each destination. Local tour operators received an average of $35.78 per passenger directly from cruise passengers and cruise lines **(see Note below table)**. The weighted average expenditure was $18.67 per passenger. Total payments to tour operators in the 29 participating destinations were an estimated $328 million.
- Passengers that purchased watches and jewelry spent an average of $165.88 on such purchases. Since only 21.8 percent of passengers purchased watches and jewelry the average jewelry expenditure per passenger was $36.09. Total expenditures on watches and jewelry were an estimated $634 million.
- On average about half of the cruise passengers purchased food and beverages, local crafts and souvenirs, and clothing at each destination call. On average, visiting passengers spent $6.51 on food and beverages, $7.06 for local crafts and souvenirs and $9.57 on clothing at each port call. Combined, passengers spent a total of $406 million in these three categories, 24 percent of total passenger expenditures.

Crew Visits and Expenditures

As shown in **Table ES-5**, the estimated 3.24 million crew members that visited the 29 participating destinations spent just under $289 million for goods and services during the 2008/2009 cruise year. Average expenditures per crew ranged from a low of $17.61 in St. Vincent and the Grenadines to a high of $152.58 in the U.S. Virgin Islands and averaged $89.24 across all destinations. Unlike passengers, shore excursions are not a focus of crew spending; rather, crew expenditures are more heavily weighted toward food and beverages, jewelry, and electronic goods. These were followed closely by spending for clothing and entertainment.

The analysis of the crew surveys showed the following major attributes of crew onshore spending:

- The U.S. Virgin Islands had the highest crew expenditure rate ($152.58) and the third highest number of estimated crew onshore visits, 336,100. As a result, the crew visits to the island generated the highest level of crew onshore expenditures of $51.3 million during the 2008/2009 cruise year. In the U.S.V.I. crew expenditures were concentrated on retail purchases of jewelry and electronics. These were followed by purchases of food and beverages and perfumes and cosmetics.
- With the second highest average expenditure of $149.45 per crew member and the fourth highest number of crew onshore visits, St. Maarten had the second highest total expenditure among the 29 participating destinations. In St. Maarten crew expenditures were concentrated on retail purchases of electronics and jewelry. These were followed by spending for food and beverages and entertainment. The 326,000 crew members that visited St. Maarten spent an estimated $48.7 million during the 2008/2009 cruise year.

- Crew visiting Puerto Rico spent an average of $138.63, the fourth highest crew expenditure rate. With an estimated 210,900 onshore visits crew spent an estimated $29.2 million in Puerto Rico during the 2008/2009 cruise year. Crew spending in Puerto Rico was concentrated in clothing and food and beverages followed by electronics and local transportation.

- Crew visiting the Bahamas spent an estimated $28 million. A total of 359,600 crew were estimated to have made an onshore visit during the 2008/2009 cruise year and spent an average of $77.95 per visit. Crew expenditures were concentrated in entertainment venues and restaurants and bars.

Table ES-5 - Crew Visits and Expenditures by Destination, 2008/2009 Cruise Year

Destinations	Crew Visits (Thousands)	Average Expenditure per Crew	Total Crew Expenditures ($US Millions)
Acapulco	41.4	$ 69.80	$ 2.9
Antigua & Barbuda	101.4	$ 54.16	$ 5.5
Aruba	93.9	$ 69.34	$ 6.5
Bahamas①	359.6	$ 77.95	$ 28.0
Barbados②	117.9	$ 54.26	$ 6.4
Belize	68.5	$ 66.24	$ 4.5
Cabo San Lucas	120.8	$ 54.25	$ 6.6
Cayman Islands	200.0	$ 108.81	$ 21.8
Cartagena②	32.4	$ 65.64	$ 2.1
Costa Rica	47.1	$ 51.97	$ 2.4
Cozumel	403.7	$ 63.48	$ 25.6
Curacao	58.5	$ 116.88	$ 6.8
Dominica	37.3	$ 56.41	$ 2.1
Dominican Republic②	59.4	$ 47.59	$ 2.8
Ensenada	89.2	$ 65.12	$ 5.8
Grenada	46.3	$ 40.30	$ 1.9
Guatemala	15.7	$ 31.80	$ 0.5
Honduras	36.8	$ 58.66	$ 2.2
Huatulco	20.0	$ 37.02	$ 0.7
Jamaica②	150.0	$ 51.32	$ 7.7
Nicaragua	9.6	$ 29.96	$ 0.3
Puerto Rico②	210.9	$ 138.63	$ 29.2
St. Kitts and Nevis	54.5	$ 142.14	$ 7.8
St. Lucia	113.5	$ 37.66	$ 4.3
St. Maarten	326.0	$ 149.45	$ 48.7
St. Vincent and the Grenadines	19.9	$ 17.61	$ 0.3
Trinidad and Tobago	7.0	$ 66.95	$ 0.5
Turks and Caicos	57.7	$ 61.00	$ 3.5
U. S. Virgin Islands	336.1	$ 152.58	$ 51.3
All Destinations	**3,235.1**	**$ 89.24**	**$ 288.7**

① Only includes crew visits at Nassau and Freeport.

② Includes crew aboard both port-of-call and homeport cruise ships.

- Cozumel had the highest number of crew visits with an estimated 403,700 onshore crew visits. Crew spent an average of $63.48 per visit and was concentrated in food and beverages and clothing and totaled $25.6 million in onshore expenditures during the 2008/2009 cruise year.

- Crew visiting the Cayman Islands spent an average of $108.81. With an estimated 200,000 onshore visits crew spent an estimated $21.8 million during the 2008/2009 cruise year. Crew spending was concentrated in jewelry and food and beverages followed by cosmetics and clothing.

Cruise Line Expenditures

In addition to net payments to local tour operators, cruise lines also provided data for two other categories: 1) payments to ports for taxes and port services and, such as navigation and utility services, and 2) payments to local businesses for supplies and services, such as food and beverages and other stores.[7]

As shown in **Table ES-6**, total expenditures for port fees and local supplies varied considerably across destinations. This reflects the differences in the structure of port fees, the volume of cruise calls, and the availability of and need for ship supplies in each destination. In total, the cruise lines spent an estimated $279.9 million in the 29 participating destinations during the 2008/2009 cruise year for port fees and taxes, utilities, navigation services and ship supplies.

The analysis of cruise line expenditures revealed the following impacts for the top five destinations:

- The Bahamas had the highest total expenditures by cruise lines among the 29 participating destinations, $48.5 million. The expenditures by cruise lines in the Bahamas were concentrated in port fees and services which accounted for over 98 percent of total cruise line expenditures.[8]

- Puerto Rico had the second highest level of cruise line expenditures at $34.2 million. As the major Caribbean homeport, the purchase of ship supplies is more important than in most other destinations accounting for nearly 30% of the total expenditures made by cruise lines.

- The U.S. Virgin Islands were third with $28.6 million in cruise line expenditures. Even though the Virgin Islands is primarily a port-of-call, the purchase of ship supplies accounted for 30% of the total expenditures made by cruise lines.

- Cozumel and the Cayman Islands had similar cruise line expenditures during the 2008/2009 cruise year, $24.6 million and $26.1 million, respectively. In both destinations the bulk of the cruise lines expenditures were for port fees.

- Other destinations with more than $10 million in cruise line expenditures were: Jamaica ($11.9), Cabo San Lucas ($11.3) and St. Maarten ($11.0). Again, the bulk of the cruise lines expenditures were for port fees.

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[7] Because of the tremendous volatility in fuel costs, the purchases of bunker fuels have not been included in this analysis.

[8] This figure includes passenger head taxes paid for passenger arrivals at the private islands of the cruise lines.

Table ES-6 –Total Expenditures by Cruise Lines by Destination, 2008/2009 Cruise Year

Destinations	Estimated Expenditures ($US Millions)
Acapulco	$ 4.0
Antigua & Barbuda	$ 4.5
Aruba	$ 5.0
Bahamas	$ 48.5
Barbados①	$ 5.2
Belize	$ 8.4
Cabo San Lucas	$ 11.3
Cayman Islands	$ 26.1
Cartagena①	$ 3.5
Costa Rica	$ 5.9
Cozumel	$ 24.6
Curacao	$ 4.5
Dominica	$ 1.5
Dominican Republic①	$ 2.8
Ensenada	$ 9.8
Grenada	$ 6.4
Guatemala	$ 0.9
Honduras	$ 2.9
Huatulco	$ 3.1
Jamaica①	$ 11.9
Nicaragua	$ 0.5
Puerto Rico①	$ 34.2
St. Kitts and Nevis	$ 3.0
St. Lucia	$ 4.9
St. Maarten	$ 11.0
St. Vincent and the Grenadines	$ 2.3
Trinidad and Tobago	$ 0.6
Turks and Caicos	$ 3.0
U. S. Virgin Islands	$ 28.6
All Destinations	**$ 279.9**

① Includes both port-of-call and homeport cruise ships.

Passenger Attributes and Satisfaction

A total of 46,838 port-of-call passenger surveys and 933 homeport passenger surveys were completed and returned for tabulation. While the characteristics of passenger visits varied by destination, **Table ES-7** shows the major attributes of port-of-call passenger visits across all destinations as derived from the passenger surveys.[9]

[9] Homeport surveys were conducted on cruise ships embarking on their cruises from Barbados, the Dominican Republic, Jamaica and San Juan, PR. The attributes of these homeport passengers are discussed in the destination analyses.

Table ES-7 – Major Attributes of Port-of-Call Passenger Visits – All Destinations

	Number	Percent
Total Respondents	46,838	
Number Making First Visit	33,114	70.7%
Number Ashore	43,733	93.4%
Number Making Onshore Purchases:	34,750	79.4%
Average Hours Ashore	4.3	
Average Size of Expenditure Party (Persons)	2.1	
Average Onshore Expenditure per Party	$136	
Purchased a Shore Excursion (Tour)	24,960	57.0%
Purchased Onshore Tour from:		
Cruise Line	19,344	77.5%
Onshore from Tour Operator	4,424	17.7%
Travel Agent	1,192	4.8%
Average Cost of Shore Excursion per Party	$119	
Toured On Own/Did not Tour	18,813	

The major attributes[10] of passenger visits are:

- Of the 46,838 cruise parties that completed the surveys 70.7% stated that this had been their first visit to the destination.
- Ninety-three percent (93%) of the cruise parties that completed the surveys disembarked their cruise ship to visit the destination.
- Of the cruise parties that went ashore, 79.4% made at least one purchase while ashore. The typical cruise party consisted of 2.1 passengers and spent an average of 4.3 hours ashore.
- The responding cruise parties reported spending an average of $136 while ashore (excludes shore excursions).
- Fifty-seven percent (57%) of the passengers that went ashore purchased a shore excursion. Seventy-eight percent (78%) of passengers who purchased a tour did so through their cruise line, 17.7% purchased their tour onshore and nearly 5 percent purchased their tour through their travel agent.
- The typical cruise party that purchased a shore excursion spent $119 for their tour.

The passenger survey also asked the passengers to rate their satisfaction with their destination visit for a number of parameters, as shown in **Table ES-8**. A 10-point scale was used with 10 being the highest score, i.e., extremely satisfied, and 1 being the lowest score, i.e., not at all satisfied.

[10] These are unweighted results.

Among other key conclusions concerning visit satisfaction were the following:

- Cruise passengers were very satisfied with their overall destination visit with a mean score of 7.3. However, destination visits did not score as high in terms of meeting expectations. The mean score for "Visit Met Expectations" was lower at 6.9.
- Passengers felt very informed about tours and onshore activities in the destinations with a mean score of 7.6.
- "Guided Tours" (or Shore Excursions) received the highest score of all visit attributes with a mean score of 8.0. Thus, cruise passengers were very satisfied with their shore excursions.
- Passenger interactions with residents and store employees were very positive with "friendliness of residents" and "courtesy of employees" each having a mean score of 7.8.
- Categories with slightly lower scores but still above 7.0 (Very Satisfied) were: initial shoreside welcome, historic sites and local transportation.
- Categories with average scores between 6.0 and 7.0 (Somewhat Satisfied) were given for variety of things to see and do and the overall shopping experience, including the variety of shops and overall prices. Thus, while passengers thought shop employees were very courteous, the overall score for their shopping experience was brought down by lower perceptions on the variety of shops and overall prices.
- In aggregate, cruise passengers said that they were not too likely to return for a land-based vacation.

Table ES-8 – Passenger Satisfaction with Destination Visits* – Average for All Destinations

Visit Attributes	Mean Score
Overall Visit	7.3
Visit Met Expectations	6.9
Likelihood of a Return Visit	4.3
Informed of Tours and Activities	7.6
Initial Shoreside Welcome	7.5
Guided Tour	8.0
Historic Sites/Museums	7.0
Variety of Things to See and Do	6.5
Friendliness of Residents	7.8
Overall Shopping Experience	6.6
Courtesy of Employees	7.8
Variety of Shops	6.5
Overall Prices	6.5
Taxis/Local Transportation	7.3

* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows: Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3; Not At All Satisfied: 2-1.

As shown in **Table ES-9**, over 50% of the passengers that visited eleven destinations said that they were likely to return for a land-based vacation within the next three years. Over 60% of the passengers that visited Cozumel, the Bahamas, the U.S. Virgin Islands and Cabo San Lucas stated that it was likely that they would return for a land-based vacation. Less than 60% but more than 50% of cruise passengers said they would return for a land-based vacation in Honduras, St. Maarten, St. Kitts, Ensenada, the Cayman Islands, St. Lucia and Huatulco. At the other end of the spectrum less than one-third of cruise passengers said that they would return for a land-based vacation in Dominica, Trinidad, the Dominican Republic, Cartagena and Nicaragua.

Table ES-9 – Likelihood of a Return for a Land-based or Resort Vacation within 3 Years

Destinations	Mean Score	Rank	Extemely Likely	Very Likely	Somewhat Likely	Not Too Likely	Not At All Likely	Likely	Not Likely
Cozumel	5.7	1	26.6%	19.7%	18.1%	9.4%	26.2%	64.4%	35.6%
Bahamas	5.6	2	25.6%	18.3%	19.0%	11.6%	25.5%	62.9%	37.1%
U. S. Virgin Islands	5.4	3	23.6%	20.5%	17.6%	7.8%	30.5%	61.7%	38.3%
Cabo San Lucas	5.4	4	22.9%	20.7%	16.4%	11.7%	28.3%	60.0%	40.0%
Honduras	5.2	5	24.3%	18.3%	14.9%	7.7%	34.8%	57.5%	42.5%
St. Maarten	5.1	6	21.9%	18.0%	16.6%	11.6%	31.9%	56.5%	43.5%
St. Kitts and Nevis	5.0	7	20.4%	19.9%	15.2%	9.6%	34.9%	55.5%	44.5%
Ensenada	4.9	8	20.1%	14.9%	17.7%	11.0%	36.3%	52.7%	47.3%
Cayman Islands	4.7	9	17.3%	16.8%	17.2%	13.4%	35.3%	51.3%	48.7%
St. Lucia	4.6	10	16.7%	17.6%	16.4%	10.8%	38.5%	50.7%	49.3%
Huatulco	4.6	11	15.4%	18.9%	16.0%	9.6%	40.1%	50.3%	49.7%
Costa Rica	4.4	12	13.9%	17.0%	17.1%	11.9%	40.1%	48.0%	52.0%
Barbados	4.4	13	14.6%	15.8%	16.3%	12.4%	40.9%	46.7%	53.3%
Jamaica	4.2	14	14.9%	13.4%	15.0%	11.3%	45.4%	43.3%	56.7%
Guatemala	4.1	15	12.7%	14.5%	17.3%	10.6%	44.9%	44.5%	55.5%
Aruba	4.1	16	13.5%	14.8%	15.8%	11.3%	44.6%	44.1%	55.9%
Turks and Caicos	4.1	17	14.2%	13.7%	15.3%	10.3%	46.5%	43.2%	56.8%
Puerto Rico	4.1	18	12.4%	10.8%	19.5%	15.4%	41.9%	42.7%	57.3%
Antigua & Barbuda	4.1	19	12.8%	13.7%	15.7%	13.4%	44.4%	42.2%	57.8%
Curacao	4.0	20	12.1%	15.8%	15.1%	9.4%	47.6%	43.0%	57.0%
Acapulco	3.8	21	10.3%	13.8%	16.3%	11.4%	48.2%	40.4%	59.6%
Grenada	3.8	22	9.8%	14.2%	15.5%	13.6%	46.9%	39.5%	60.5%
Belize	3.8	23	10.8%	13.3%	15.0%	12.4%	48.5%	39.1%	60.9%
St. Vincent and the Grenadines	3.7	24	11.8%	15.0%	11.6%	8.2%	53.4%	38.4%	61.6%
Dominica	3.3	25	9.5%	10.0%	12.7%	11.0%	56.8%	32.2%	67.8%
Trinidad and Tobago	3.2	26	6.4%	10.9%	13.0%	12.1%	57.6%	30.3%	69.7%
Dominican Republic	3.1	27	6.9%	8.4%	14.5%	13.1%	57.1%	29.8%	70.2%
Cartagena	3.1	28	7.2%	8.8%	12.5%	11.5%	60.0%	28.5%	71.5%
Nicaragua	2.7	29	4.6%	6.7%	11.8%	11.3%	65.6%	23.1%	76.9%
All Destinations	**4.3**		**15.0%**	**15.0%**	**15.8%**	**11.3%**	**42.9%**	**45.8%**	**54.2%**
Mexico	5.0	1	20.2%	18.1%	17.0%	10.5%	34.2%	55.3%	44.7%
Western Caribbean	4.3	2	15.5%	14.7%	15.9%	11.2%	42.7%	46.1%	53.9%
Eastern Caribbean	4.3	3	15.5%	14.2%	15.7%	11.7%	42.9%	45.4%	54.6%
Southern Caribbean	3.9	4	11.6%	14.4%	15.1%	11.6%	47.3%	41.1%	58.9%

Comparison to the 2006 Study

While the current study covers significantly more destinations than the 2006 study, 29 versus 19 destinations, and the survey period in the current study was significantly longer than in the 2006 study, 6 months versus 3 months, it is possible to draw some general observations about the two studies.

As shown in **Table ES-10**, due to the larger number of destinations analyzed in the current study, the total value of cruise tourism expenditures and their subsequent economic impacts are considerably higher than those reported in the earlier study. As shown in the table, we have estimated that direct cruise tourism expenditures totaled $2.28 billion during the 2008/2009 cruise year among the 29 participating destinations.

Table ES-10 – Comparison of Cruise Tourism Expenditures – All Destinations

	2008/2009 Cruise Year	2005/2006 Cruise Year	Percent Difference
Number of Participating Destinations	29	19	--
Total Direct Cruise Tourism Spending (US $ Billions)	$2.28	$1.77	28.8%
Total Passenger Onshore Visits (Millions)	17.56	13.68	28.4%
Total Expenditures per Passenger (US $)	$129.62	$129.39	0.2%
Total Employment Impact	56,271	41,500	35.6%
Total Income Impacts (US $ Millions)	$723.0	$600.1	20.5%
Average per Passenger Expenditures	$97.26	$98.01	-0.8%
Average Per Crew Expenditures	$89.24	$74.56	19.7%

This is a 28.8 percent increase from the $1.77 billion in direct cruise tourism expenditures estimated for the 19 participating destinations during the 2005/2006 cruise year. Similarly, the employment and income impacts are also higher for the current study. The employments impacts are 35.6 percent higher while the income impacts are 20.5 percent higher.

However, if the expenditures are normalized on a per passenger basis, per passenger spending across the 29 destinations of the current study are only slightly higher than those of the 2006 study. The $2.28 billion in total expenditures among the 29 destinations of the current study equates to $129.62 per onshore passenger visit; whereas, in the 2006 study, the $1.77 billion in total expenditures among the 19 destinations equated to $129.39 per onshore passenger visit. The marginal increase of only 0.2 percent is primarily the net result of the 0.8 percent decline in per passenger spending by passengers and the 19.7 percent increase in per crew expenditures.

Second, looking at just the 16 destinations that are common to the two studies[11] the average total expenditure per passenger in the current study is even higher relative to those same destinations in the 2006 study (see **Table ES-11**). Total expenditures on a per passenger basis were 3.6 percent higher during the 2008/2009 cruise year than during the 2005/2006 cruise year, $141.67 versus $136.79. While this difference is not very large it is the result of increased spending on a per passenger basis by passengers and crew which was partially offset by a decline in expenditures by cruise lines on a per passenger basis. On a per passenger basis and among the 16 common destinations, spending by passengers increased by 1.7 percent, spending by crew was up by 20 percent and spending by cruise lines declined by 2.8 percent.

Third, since the difference in per passenger spending was higher among the sixteen common destinations, we can conclude that the additional 10 destinations reduced the per passenger spending impacts in the current study. Furthermore, since these destinations were concentrated in Central America and western

[11] These destinations are Antigua, Aruba, the Bahamas, Barbados, Belize, the Cayman Islands, Cartagena, Cozumel, Curacao, Dominica, Grenada, Puerto Rico, St. Kitts, St. Lucia, St. Maarten and the U.S.V.I.

Mexico, we can also conclude that spending in these regions tends to be lower than among the destinations of the basic Caribbean basin.

Table ES-11 – Comparison of Cruise Tourism Expenditures – Sixteen Common Destinations

	2008/2009 Cruise Year	2005/2006 Cruise Year	Percent Difference
Number of Participating Destinations	16	16	--
Total Direct Cruise Tourism Spending (US $ Billions)	$1.88	$1.45	29.7%
Total Passenger Onshore Visits (Millions)	13.27	10.60	25.2%
Total Expenditures per Passenger (US $)	$141.67	$136.79	3.6%
Total Employment Impact	44,069	38,355	14.9%
Total Income Impacts (US $ Millions)	$647.80	$552.2	17.3%
Average per Passenger Expenditures	$105.81	$104.06	1.7%
Average Per Crew Expenditures	$98.62	$82.12	20.1%

Fourth, the increase in passenger expenditures on a per passenger basis among the 16 destinations in both studies was the net result of an increase in per passenger spending in individual expenditure categories that was partially offset by a decline in the percentage of passengers making purchases in most of those categories. Thus, it appears that cruise passengers during the 2008/2009 cruise year were more selective in making purchases than during the 2005/2006 cruise year; but, when they did make a purchase they were willing to spend more.

Finally, crew spending increased substantially between the two periods. Among the sixteen common destinations, per crew expenditures averaged $82.12 during the 2005/2006 cruise year but increased by 20 percent to $98.62 during the 2008/2009 cruise year. This increase was the result of the combined impact of increased spending by crew in most categories, as well as an increase in the percentage of crew making onshore purchases.

In conclusion, the increase in the economic impacts during the 2008/2009 cruise year relative to the 2005/2006 cruise year are primarily due to i) the larger representation of destinations in the current study; ii) a slight decrease in average per passenger expenditures;[12] iii) a decline in expenditures by cruise lines on a per passenger basis; and iv) a substantial increase in crew expenditures in aggregate and on a per crew basis.

[12] The decline in the average expenditure per passenger was the result of a decline in the percentage of passengers making onshore purchases. This was partially offset by the fact that passengers who made onshore purchases actually spent more during the 2008/2009 cruise year.

INTRODUCTION

This study analyzes the contribution of cruise tourism on the economies of 29 destinations located in the Caribbean, Central and South America and Mexico.[13] The study was funded by the Florida-Caribbean Cruise Association (FCCA) and the 29 participating destinations. Utilizing onshore expenditure data collected from passenger and crew surveys, port service and navigation fees collected from the destinations and FCCA member cruise lines[14], and expenditures for provisions and other stores in the Caribbean provided by the cruise lines, total cruise tourism expenditures were estimated for each of the participating destinations. The economic contribution of these expenditures for each destination was then estimated for the 12-month period beginning in May, 2008 and ending in April, 2009 utilizing economic data collected from local, regional and international sources.

The Caribbean and Mexican Cruise Market

The Caribbean is the most popular cruise destinations in the world. According to capacity data published by Cruise Lines International Association (CLIA), the cruise industry had 40.7 million bed days deployed throughout the Caribbean, including the Bahamas, and Mexico in 2008, accounting for nearly 44 percent of the industry's global bed day capacity.[15] CLIA also reported that the average cruise length was 7.2 days. Thus, cruise ships operating in the region had sufficient capacity to carry over 5.6 million passengers in 2008.

In a separate report recently published by the Caribbean Tourist Organization (CTO)[16], the group reported that a 18.2 million cruise passengers arrived at the 23 Caribbean destinations for which it provides data, a decline of 2.7 percent from 2007. Since cruise ships call at multiple destinations on any single itinerary, passenger arrivals are always significantly higher than passenger capacity. The decline reported for Caribbean cruise passenger arrivals for 2008 reflects the increasing globalization of the cruise industry and the growing competition among regional cruise markets for cruise ship deployments.

Both, the proximity of the Caribbean and Mexico to the United States and its temperate climate during the winter months have been important factors in the growth of the cruise industry in the region. However, the region also has a strong appeal to cruisers from around the world.

[13] Participating destinations contributed to the funding of this study and also provided cruise related data, such as passenger arrivals and port fees. The 29 participating destinations are: Acapulco, MX; Antigua and Barbuda; Aruba; the Bahamas; Barbados; Belize; Cabo San Lucas, MX; the Cayman Islands; Cartagena, CO; Costa Rica; Cozumel, MX; Curacao; Dominica; the Dominican Republic; Ensenada, MX; Grenada; Guatemala; Honduras; Huatulco, MX; Jamaica; Nicaragua; San Juan, PR; St. Kitts and Nevis; St. Lucia; St. Maarten; St. Vincent and the Grenadines; Trinidad and Tobago; Turks and Caicos; the U.S. Virgin Islands.

[14] The FCCA member lines that supplied onshore expenditure data are as follows: Azamara Cruises, Carnival Cruise Lines, Celebrity Cruises, Disney Cruise Line, Holland America Line, Norwegian Cruise Line, Princess Cruises and Royal Caribbean International.

[15] CLIA, The Overview: 2009 CLIA Cruise Market Overview.

[16] CTO, 2008 Tourist Statistics, August 21, 2009.

Data obtained from our survey of cruise passengers indicated that 76 percent of the surveyed passengers were residents of the United States, 12 percent were from Canada and 9 percent were citizens of the United Kingdom. The remaining 3 percent of passengers arrived from a broad range of countries, including Germany, Australia, Mexico, the Philippines and South Africa to name a few. In the 2006 study U.S. residents accounted for 82 percent of all Caribbean cruise passengers. Thus, the Caribbean has increased its share of cruise passengers sourced outside of the United States.

Passenger and Crew Arrivals at Participating Destinations

Table 1– Estimated Passenger and Crew Arrivals (Thousands) at the Participating Destinations, 2008/2009 Cruise Year

Destinations	Passengers	Crew	Total
Acapulco	184.2	92.1	276.3
Antigua & Barbuda	626.0	253.6	879.6
Aruba	573.1	234.6	807.7
Bahamas①	2,524.2	1,027.3	3,551.5
Barbados②	718.4	294.8	1,013.2
Belize	611.0	253.7	864.7
Cabo San Lucas	1,075.6	402.6	1,478.2
Cayman Islands	1,450.8	571.3	2,022.1
Cartagena②	247.0	107.9	354.9
Costa Rica	314.0	134.6	448.6
Cozumel	2,450.0	1,009.3	3,459.3
Curacao	405.2	167.0	572.2
Dominica	272.6	106.6	379.2
Dominican Republic②	475.2	198.0	673.2
Ensenada	592.3	223.1	815.4
Grenada	320.8	132.2	453.0
Guatemala	135.5	52.4	187.9
Honduras	387.4	147.4	534.8
Huatulco	139.9	66.8	206.7
Jamaica②	977.6	357.7	1,335.3
Nicaragua	61.5	31.9	93.4
Puerto Rico②	1,267.9	485.9	1,753.8
St. Kitts and Nevis	417.4	155.8	573.2
St. Lucia	665.0	283.7	948.7
St. Maarten	1,280.0	724.4	2,004.4
St. Vincent and the Grenadines	146.7	66.2	212.9
Trinidad and Tobago	46.2	20.0	66.2
Turks and Caicos	326.0	144.2	470.2
U. S. Virgin Islands	1,750.0	672.2	2,422.2
All Destinations	**20,441.5**	**8,417.3**	**28,858.8**

① Only includes passenger arrivals at Nassau and Freeport.

② Includes passengers aboard both port-of-call and homeport cruise ships.

Source: Port Authorities, Caribbean Tourist Organization and the FCCA

Many of the participating destinations are not included in the CTO cruise passenger data; consequently, the 20.4 million passenger arrivals[17] estimated for the 29 participating destinations is 20 percent higher than the total Caribbean cruise passenger arrivals reported by the CTO (see **Table 1)**.[18] Adding the 804 million crew arrivals, the cruise industry brought nearly 29 million passenger and crew arrivals to the 29 participating destinations during the 2008/2009 cruise year.

Nine of the participating destinations, the Bahamas, Barbados, Cabo San Lucas, the Cayman Islands, Cozumel, Jamaica, Puerto Rico, St. Maarten and the U.S. Virgin Islands, had combined passenger and crew arrivals in excess of 1 million passengers. Combined, these nine destinations accounted for 66 percent of all passenger and crew arrivals among the 29 destinations.

DATA AND METHODS

To achieve the primary objective of this project, to estimate the contribution of cruise tourism to the economies of the participating destinations, the analysis was conducted in two phases. The first phase consisted of collecting data that could be used to estimate the direct spending generated by cruises in each of the destinations. This required that:

i. surveys be designed and distributed for the purpose of obtaining passenger and crew expenditure data at each of the destinations,

ii. data on total passenger arrivals and port fees be collected for each of the destinations, and

iii. data on passenger carryings; purchases from local businesses, including tour operators; and payment of fees and taxes for port and navigation services be obtained from the cruise lines.

The second phase required that economic data, such as national income accounts, employment and income be collected for each destination and that economic impact models be developed that could be used to estimate the direct and indirect employment and income generated by the cruise tourism expenditures estimated in the first phase.

The following sections discus the data and methods that were employed in both phases of this project.

[17] Throughout this report arrivals are distinguished from visits. Arrivals are the number of passengers (crew) onboard cruise ships that call at each destination. Visits are the number of passengers (crew) that disembark and visit each destination.

[18] The following participating destinations are not included in the CTO data: Acapulco, Cabo San Lucas, Cartagena, Costa Rica, Ensenada, Guatemala, Honduras, Huatulco, Nicaragua, St. Kitts, and Turks & Caicos. At the same time, the CTO data includes the following destinations which did not participate in this study: Bermuda, Bonaire, British Virgin Islands, Martinique and Montserrat.

Estimates of Total Cruise Tourism Expenditures

The total cruise tourism spending by passengers, crew and cruise lines is the source of the economic contribution of the cruise industry in each destination. Data on spending by each group had to be estimated from survey-based data in the case of passengers and crew and from data collected from ports and cruise lines in the case of cruise line expenditures.

Surveys of Passengers and Crew

Passenger and crew surveys were designed to collect data for onshore spending and visit satisfaction by both passengers and crew. (These surveys are contained in the following Appendix.) While the crew survey was slightly shorter than the passenger survey, both surveys were designed to collect the following information:

- hours spent ashore;
- expenditures by category, including shore tours, food & beverages, clothing, etc.;
- visit satisfaction, including shore tour, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation; and
- demographic characteristics, including country of residence, age group, income, etc.

A slightly different survey was given to passengers who were embarking on their cruise from Barbados, the Dominican Republic, Jamaica and San Juan. In addition to the information collected for port-of-call passengers, embarking passengers were asked to provide information on their expenditures for lodging, type of accommodation and their length of stay prior to and after the cruise.

The survey schedule was designed to generate a representative sample of cruise passengers by cruise line at each destination. Thus, each FCCA member cruise line was scheduled to have its passengers and crew surveyed at least once at each destination at which it had a port call during the survey period. The survey period commenced in the beginning of November 2008 and concluded at the end of April 2009.

On any given cruise itinerary, passengers and crew were surveyed following a single call. The surveys were placed in passenger cabins and crew living quarters during the day of a designated survey. Passengers and crew, then, first viewed the survey upon their return from their onshore visit. They were asked to complete the survey in their quarters and to return the survey to a designated crew member. At the conclusion of the cruise, the surveys were returned to BREA for tabulation.

Over 600 survey distributions were conducted. A single survey distribution is counted as a distribution on a given day, on a single ship at a designated destination. Thus, the distribution of surveys on March 12 on the Serenade of the Seas in Barbados was counted as a single distribution. Thus, on any given day surveys might have been conducted aboard multiple ships at different destinations.

Table 2 – Completed Passenger and Crew Surveys by Destination

Destinations	Passengers	Crew
Acapulco	1,742	578
Antigua & Barbuda	1,059	597
Aruba	1,380	524
Bahamas	1,102	645
Barbados①	1,781	1,366
Belize	2,110	541
Cabo San Lucas	1,959	564
Cayman Islands	2,170	697
Cartagena	1,305	396
Costa Rica	1,623	471
Cozumel	2,918	1,022
Curacao	1,366	367
Dominica	1,969	712
Dominican Republic①	1,050	874
Ensenada	1,000	30
Grenada	1,774	783
Guatemala	2,764	299
Honduras	569	316
Huatulco	1,436	432
Jamaica①	2,174	643
Nicaragua	1,986	445
Puerto Rico①	1,568	1,422
St. Kitts and Nevis	1,442	219
St. Lucia	1,301	716
St. Maarten	1,947	830
St. Vincent and the Grenadines	864	176
Trinidad and Tobago	1,611	386
Turks and Caicos	1,923	61
U. S. Virgin Islands	1,878	518
All Destinations	**47,771**	**16,630**

② Includes passengers aboard both port-of-call and homeport cruise ships.

Data Collected from Participating Destinations

Each participating destination was asked to provide the following data:

- passenger and crew arrivals;
- cruise-related port fees, including passenger-based fees, navigation fees and charges for utilities, such as water, power and sanitary services; and
- port employment and wages (total and cruise-related).

The passenger and crew arrivals data were used as the basis for estimating onshore visits of passengers and crew. The cruise-related port fees were included in the estimates of direct cruise-related spending in each destination. And, finally, the port employment and wages were included in the estimation of the direct employment and wage impacts by destination.

Data Collected from FCCA Member Cruise Lines

Each FCCA member cruise line was asked to provide data on passenger and crew counts and their expenditures for goods and services in each destination for each of the following categories:

- ship stores, including food and beverages and hotel supplies;
- port fees, including piloting and tugboats and utility services and port taxes; and
- the net value of passenger shore tours paid to local tour operators and the number of passengers purchasing such tours.

The FCCA member lines generally accounted for 80 percent or more of all passenger arrivals at each destination. Thus, the responses from the FCCA member lines were used to generate various ratios that could be used in the estimation of total activity at each port. The passenger and crew counts were used to create ratios of passengers to crew so that crew arrivals could be estimated for each destination. Each cruise line and ship has a slightly different ratio and consequently, each destination has a slightly different ratio based upon the mix of ships calling at each destination.

The various port fees and passenger counts were aggregated across cruise lines to create per passenger ratios of total port fees paid at each port. The per passenger ratios were then multiplied by total passenger arrivals to estimate port payments in each destination. Similarly, the expenditures for ship stores were aggregated and the per passenger ratios for these set of expenditures were used to estimate cruise lines' purchases of food and beverages and other supplies in each destination.

Finally, the data on net payments to local tour operators and the number of passengers purchasing tours onboard the cruise ships were aggregated and an average net payment per onboard purchase was calculated for each destination. These ratios were used in the calculation of passenger purchases of shore excursions in each destination.

Estimates of the Economic Contribution

Given the direct spending estimates developed in Phase I, the economic contribution of these expenditures, as measured by employment and wage income were then estimated for each destination. This process began with the collection of economic data for each destination from a combination of local, regional and international sources. The economic data included the following:

- national income accounts, i.e., GDP by category and industry
- employment and unemployment, aggregate and by industry as available
- wages and personal income, aggregate and by industry as available
- population and other labor force statistics.

Wherever possible, local data sources were used, followed by regional data sources and then international data sources. Among the local data sources were the following:

- Antigua: Ministry of Finance and the Economy
- Aruba: Central Bank of Aruba and Aruba Bureau of Statistics
- Bahamas: Central Bank of The Bahamas and The Bahamas Department of Statistics
- Barbados: Ministry of Labour and Government Information Network
- Cayman Islands: Cayman Islands Compendium of Statistics 2008
- Colombia: Department of National Statistics
- Grenada: Ministry of Finance
- Jamaica: Government of Jamaica Information Network
- Mexico: Institute of National Statistics
- Puerto Rico: Puerto Rico Department of Planning and the U.S. Census Bureau
- St. Maarten: Central Bureau of Statistics
- St. Vincent and the Grenadines: Ministry of Finance and Economic Planning
- Trinidad & Tobago: National Statistics Office
- Turks & Caicos: Department of Economic Planning & Statistics
- U.S. Virgin Islands: USVI Department of Labor and the U.S. Census Bureau.

Regional data sources were used to supplement gaps in local data, especially national income data and included the following:

- Caribbean Development Bank
- Eastern Caribbean Central Bank
- Economic Commission for Latin America and the Caribbean (ECLAC).

International data sources were used in most cases to develop consistent measures of GDP, aggregate employment and wage incomes across all destinations and included the following:

- The International Monetary Fund (IMF)
- The World Bank
- The CIA Fact Book.

Utilizing all of these data, a set of economic impact models were developed for each destination. These models included GDP, employment and wage estimates for each destination and were used in the estimation of destination-specific economic multipliers by major industrial sectors, i.e., agriculture, mining, manufacturing, These models were designed to reflect the economic structure of each destination, including the industrial composition of GDP, the wage share of GDP by industry and the average wage by industry, as well as, the relative importance of imports to each economy. As a result, direct and total employment and wage impacts were developed for each destination.

These economic impact models are a statistical representation of each destination's economy and were used to estimate the flow of the total cruise tourism expenditures through each destination's economy. The expenditures of the passengers, crew and cruise lines have a **direct impact** on employment and wages for local residents employed by those businesses that provide goods and services to the cruise sector. These directly impacted businesses, in turn, purchase additional goods and services to support the production and sale of goods and services to the cruise sector, creating additional jobs and income. This **indirect spending** induces further spending by other businesses in the local economy. The economic impact models quantify this flow of direct and indirect impacts for each of the participating destinations.

An important aspect of these models is the role of imports. Imports act as a leakage to the multiplier process. Thus, the greater the relative importance of imports to an economy the smaller are the indirect impacts relative to the direct impacts. The size of the economic impacts relative to the direct impacts is partially determined by the degree of economic development in a particular economy. This occurs because more developed economies import proportionately fewer goods which reduces leakages to other economies. For example, in analyses conducted by BREA of the economic impact of the cruise industry in the United States, the indirect employment impacts were 30 percent higher than the direct impacts, resulting in an implicit employment multiplier of 2.3. In each of the destinations analyzed for this study, the indirect impacts were always smaller than the direct impacts. This is due to the relatively high proportion of imported goods and services in these economies. As a consequence, the implicit employment and wage multipliers for each destination were less than 2.0.

APPENDIX A – PASSENGER AND CREW SURVEYS

Samples of the passenger (Port-of-Call and Homeport) and crew surveys follow.

CONFIDENTIAL CRUISE PASSENGER SURVEY

Welcome back from your visit to Puerto Rico, we hope you had an enjoyable onshore experience. The Florida-Caribbean Cruise Association (FCCA) and the cruise destinations of the Caribbean, Central America and Mexico are conducting surveys of cruise passengers who have visited these destinations. The objective of this survey is to provide information to the FCCA and the cruise destinations that will allow them to enhance visitors' experiences and quantify the contribution of cruise passengers to the economies of each destination. **The survey should only take a few minutes to complete and your responses will be held in strict confidence.**

Please record the date of your cruise ship's call at Puerto Rico: Day(dd)____ Month(mm)____ Year (yy)____ (Numbers please)

Q1. Are you traveling alone or in company? ❑ Alone ❑ In company with ______ other persons (Number please)

Q2. Is this your first visit to Puerto Rico? ❑ Yes ❑ No

If "No", how many times have you visited before? ❑ 1 ❑ 2 ❑ 3 ❑ 4 ❑ 5 ❑ 6 ❑ 7 ❑ 8 ❑ 9 ❑ 10 ❑ 11 ❑ 12+

Q3. If you were required to use a tender to go ashore, how did this lack of a berthing facility affect your visit to Puerto Rico?

Check all that apply

❑ Did not tender ❑ Had no effect ❑ I/we did not go ashore ❑ I/we spent less time ashore

❑ Forced me/us to change our onshore activities ❑ Negatively impacted my/our perception of this destination

Q4. How many hours did you spend ashore during your cruise call at Puerto Rico today?

❑ 0 ❑ 1 ❑ 2 ❑ 3 ❑ 4 ❑ 5 ❑ 6 ❑ 7 ❑ 8 ❑ 9 ❑ 10 ❑ 11 ❑ 12+ **(If 0, Go to Q18 on back)**

Q5. Did you purchase a tour for your visit in Puerto Rico? ❑ Yes ❑ No **(If No, Go to Q.10)**

Q6. How did you purchase this tour?

❑ Onboard the cruise ship ❑ From the cruise line over the Internet ❑ Onshore from a tour operator

❑ From a travel agent ❑ Did not purchase a tour/toured on my own

Q7. How much did you pay for this tour (in US $)? $ _______

Number of people included in this purchase: ❑ 1 ❑ 2 ❑ 3 ❑ 4 ❑ 5 ❑ 6 ❑ 7 ❑ 8 ❑ 9 ❑ 10+

Q8. How many hours did you spend on just this tour? ❑ 1 ❑ 2 ❑ 3 ❑ 4 ❑ 5 ❑ 6 ❑ 7 ❑ 8 ❑ 9 ❑ 10+

Q9. Which of the following best describes this tour: ❑ Shopping tour ❑ Guided tour of island historical and cultural sites

❑ City center tour ❑ Land-based activity tour ❑ Marine-based activity tour

Q10. Did you make any purchases during your onshore visit in Puerto Rico today?

❑ Yes ❑ No (**If No, Go to Q14 on back**)

Q11. How much in total did all persons in your cabin spend in Puerto Rico today (in US $)?

$ _______ **(Whole dollars only)**

Q12. Please record the value of all purchases (in U.S. $) that all persons in your cabin made during your **on-shore visit** to Puerto Rico today.

*** Do not include the cost of tours nor goods and services that were purchased onboard the cruise ship. (Enter whole dollars).**

Food and beverages at restaurants and bars:	$ _______	Telephone & Internet Communications:	$ _______
Taxis/Ground Transportation: (Do not include cost of sightseeing tours)	$ _______	Local Crafts and Souvenirs:	$ _______
Retail Purchases of Watches & Jewelry:	$ _______	Retail Purchases of Liquor:	$ _______
Retail Purchases of Clothing (incl. T-shirts):	$ _______	Retail Purchases of Electronics:	$ _______
Entertainment Venues/Nightclubs/Casinos:	$ _______	Any Other Purchases:	$ _______
Retail Purchases of Perfumes & Cosmetics:	$_______		

Q13. How many persons do the expenditures cover in Q11 and Q12? ❑ 1 ❑ 2 ❑ 3 ❑ 4 ❑ 5 ❑ 6 ❑ 7 ❑ 8 ❑ 9 ❑ 10+

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Q14. On a scale of 1 to 10, how satisfied were you with each of the following in Puerto Rico?

(Extremely satisfied = 10 ……. 1 = Not at all satisfied)

Initial Shoreside welcome:	❑ 10	❑9	❑8	❑7	❑6	❑5	❑4	❑3	❑ 2	❑ 1	❑ 0 Not applicable
Guided Tour:	❑ 10	❑9	❑8	❑7	❑6	❑5	❑4	❑3	❑ 2	❑ 1	❑ 0 Not applicable
Shopping Experience:	❑ 10	❑9	❑8	❑7	❑6	❑5	❑4	❑3	❑ 2	❑ 1	❑ 0 Not applicable
Historic Sites/Museums:	❑ 10	❑9	❑8	❑7	❑6	❑5	❑4	❑3	❑ 2	❑ 1	❑ 0 Not applicable
Variety of things to see and do:	❑ 10	❑9	❑8	❑7	❑6	❑5	❑4	❑3	❑ 2	❑ 1	❑ 0 Not applicable
Friendliness of the residents:	❑ 10	❑9	❑8	❑7	❑6	❑5	❑4	❑3	❑ 2	❑ 1	❑ 0 Not applicable
Overall shopping experience:	❑ 10	❑9	❑8	❑7	❑6	❑5	❑4	❑3	❑ 2	❑ 1	❑ 0 Not applicable
Courtesy of employees:	❑ 10	❑9	❑8	❑7	❑6	❑5	❑4	❑3	❑ 2	❑ 1	❑ 0 Not applicable
Variety of Shops:	❑ 10	❑9	❑8	❑7	❑6	❑5	❑4	❑3	❑ 2	❑ 1	❑ 0 Not applicable
Overall Prices:	❑ 10	❑9	❑8	❑7	❑6	❑5	❑4	❑3	❑ 2	❑ 1	❑ 0 Not applicable
Taxis/Local Transportation:	❑ 10	❑9	❑8	❑7	❑6	❑5	❑4	❑3	❑ 2	❑ 1	❑ 0 Not applicable
Overall visit in "destination":	❑ 10	❑9	❑8	❑7	❑6	❑5	❑4	❑3	❑ 2	❑ 1	❑ 0 Not applicable

Q15. On a scale of 1 to 10, how well informed were you of the tours and activities available in Puerto Rico?

Greatly Informed ❑10 ❑ 9 ❑ 8 ❑ 7 ❑ 6 ❑5 ❑ 4 ❑3 ❑ 2 ❑ 1 Not at all informed

Q16. Overall, and on a scale of 1 to 10, how did your visit to Puerto Rico meet your prior expectations?

Greatly Exceeded ❑10 ❑ 9 ❑ 8 ❑ 7 ❑ 6 ❑5 ❑ 4 ❑3 ❑ 2 ❑ 1 Fell far short

Q17. Based upon your experience in Puerto Rico today, on a scale of 1 to 10 how likely are you to return to Puerto Rico for a land-based or resort vacation within the next three years?

Extremely likely ❑10 ❑ 9 ❑ 8 ❑ 7 ❑ 6 ❑5 ❑ 4 ❑3 ❑ 2 ❑ 1 Not at all likely

The following are to better understand demographic characteristics of cruise passenger visitors at each destination.

Q18. How many persons in your cabin are: Male: ❑ 1 ❑ 2 ❑ 3 ❑ 4 ❑ 5 Female: ❑ 1 ❑ 2 ❑ 3 ❑ 4 ❑ 5

Q19. How many persons in your cabin are in each age group? **(Leave Blank if "0")**

Under 14: ❑ 1 ❑ 2 ❑ 3 ❑ 4 ❑ 5 **15 to 24**: ❑ 1 ❑ 2 ❑ 3 ❑ 4 ❑ 5 **25 to 44**: ❑ 1 ❑ 2 ❑ 3 ❑ 4 ❑ 5
45 to 64: ❑ 1 ❑ 2 ❑ 3 ❑ 4 ❑ 5 **65+** ❑ 1 ❑ 2 ❑ 3 ❑ 4 ❑ 5

Q20. Where is your permanent place of residence? ❑ US ❑ Canada ❑ UK ❑ Germany ❑ Other ______________(specify)

If the US/Canada, which state/province? _______ (please use 2 letter abbreviation)

Q21. Approximately, what is your annual gross (pre-tax) household income (in U.S. dollars)?

❑ Under $50,000	❑ $50,000 but less than $75,000	❑ $75,000 but less than $100,000
❑ $100,000 but less than $150,000	❑ $150,000 but less than $200,000	❑ $200,000 or more

Thank you very much for taking time to assist us and enjoy the remainder of your cruise.

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CONFIDENTIAL CRUISE PASSENGER SURVEY (Homeport)

Welcome to your cruise embarking from Puerto Rico, we hope you had an enjoyable pre-cruise experience. The Florida- Caribbean Cruise Association (FCCA) and the cruise destinations of the Caribbean, Central America and Mexico are conducting surveys of cruise passengers who have visited these destinations. The objective of this survey is to provide information to the FCCA and the cruise destinations that will allow them to enhance visitors' experiences and quantify the contribution of cruise passengers to the economies of each destination. **The survey should only take a few minutes to complete and your responses will be held in strict confidence.**

Please record the date of your cruise ship's embarkation at Puerto Rico:

Month(mm)____Day(dd)____ Year (yy)____ (Numbers please)

Q1. Are you traveling alone or in company? ❑ Alone ❑ In company with ______ other persons (Number please)

Q2. Are you a resident of Puerto Rico? ❑ Yes **(If Yes, Go to Q6)** ❑ No

Q3. Is this your first visit to Puerto Rico?

❑ Yes ❑ No If not, how many times have you visited before? _____

Q4. How many nights both prior to and following your cruise will you spend in Puerto Rico?

Pre-cruise stay: ______nights Post-cruise stay: ______ nights (Whole numbers please)

Q5. In what type of accommodations are you staying while in Puerto Rico?

❑ Hotel ❑ Other paid accommodation ❑ With friends or relatives ❑ Other arrangements

Q6. Did you purchase a tour prior to your cruise? ❑ Yes ❑ No **(If No, Go to Q11)**

Q7. How did you purchase this tour?

❑ Onboard the cruise ship ❑ From the cruise line prior to the cruise ❑ Onshore from a tour operator
❑ From a travel agent ❑ Did not purchase a tour/toured on my own

Q8. How much did you pay for this tour (in US $)? $ _______ Number of people included in this purchase: _____

Q9. How many hours did you spend on just this tour? ______ hours (Number please)

Q10. Which of the following best describes this tour: ❑ Shopping tour ❑ Guided tour of island historical and cultural sites
❑ City center tour ❑Land-based activity tour (golf, hiking, etc.) ❑ Marine-based activity tour (diving, parasail, submarine, etc.)

Q11. Did you make any purchases during your onshore visit in Puerto Rico prior to your cruise?

❑ Yes ❑ No (**If No, Go to Q15 on back**)

Q12. How much in total did all persons in your cabin spend (in US dollars) in Puerto Rico prior to your cruise?

$ ________ **(Whole dollars only)**

Food and beverages at restaurants and bars:	$ _______	Accommodations:	$ _______
Taxis/Ground Transportation: (Do not include cost of sightseeing tours)	$ _______	Local Crafts and Souvenirs:	$ _______
Retail Purchases of Watches & Jewelry:	$ _______	Telephone & Internet Communications:	$ _______
Retail Purchases of Clothing (incl. T-shirts):	$ _______	Retail Purchases of Liquor:	$ _______
Entertainment Venues/Nightclubs/Casinos:	$ _______	Retail Purchases of Electronics:	$ _______
Retail Purchases of Perfumes & Cosmetics:	$_______	Any Other Purchases	$ _______

Q14. How many persons do the expenditures cover in Questions 12 and 13? ___________

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Q15. On a scale of 1 to 10, how satisfied were you with each of the following in Puerto Rico?

(Extremely satisfied = 10 ……. 1 = Not at all satisfied)

Accommodations:	❑ 10	❑9	❑8	❑7	❑6	❑5	❑4	❑3	❑ 2	❑ 1	❑ 0 Not applicable
Guided Tour:	❑ 10	❑9	❑8	❑7	❑6	❑5	❑4	❑3	❑ 2	❑ 1	❑ 0 Not applicable
Shopping Experience:	❑ 10	❑9	❑8	❑7	❑6	❑5	❑4	❑3	❑ 2	❑ 1	❑ 0 Not applicable
Historic Sites/Museums:	❑ 10	❑9	❑8	❑7	❑6	❑5	❑4	❑3	❑ 2	❑ 1	❑ 0 Not applicable
Variety of things to see and do:	❑ 10	❑9	❑8	❑7	❑6	❑5	❑4	❑3	❑ 2	❑ 1	❑ 0 Not applicable
Friendliness of the residents:	❑ 10	❑9	❑8	❑7	❑6	❑5	❑4	❑3	❑ 2	❑ 1	❑ 0 Not applicable
Overall shopping experience:	❑ 10	❑9	❑8	❑7	❑6	❑5	❑4	❑3	❑ 2	❑ 1	❑ 0 Not applicable
Courtesy of employees:	❑ 10	❑9	❑8	❑7	❑6	❑5	❑4	❑3	❑ 2	❑ 1	❑ 0 Not applicable
Variety of Shops:	❑ 10	❑9	❑8	❑7	❑6	❑5	❑4	❑3	❑ 2	❑ 1	❑ 0 Not applicable
Overall Prices:	❑ 10	❑9	❑8	❑7	❑6	❑5	❑4	❑3	❑ 2	❑ 1	❑ 0 Not applicable
Taxis/Local Transportation:	❑ 10	❑9	❑8	❑7	❑6	❑5	❑4	❑3	❑ 2	❑ 1	❑ 0 Not applicable
Overall visit in Puerto Rico:	❑ 10	❑9	❑8	❑7	❑6	❑5	❑4	❑3	❑ 2	❑ 1	❑ 0 Not applicable

Q16. On a scale of 1 to 10, how well informed were you of the tours and activities available in Puerto Rico?

Greatly informed ❑10 ❑ 9 ❑ 8 ❑ 7 ❑ 6 ❑5 ❑ 4 ❑3 ❑ 2 ❑ 1 Not at all informed

Q17. Overall, and on a scale of 1 to 10, how did your visit to Puerto Rico meet your prior expectations?

Greatly exceeded ❑10 ❑ 9 ❑ 8 ❑ 7 ❑ 6 ❑5 ❑ 4 ❑3 ❑ 2 ❑ 1 Fell far short

Q18. Based upon your experience in Puerto Rico today, on a scale of 1 to 10 how likely are you to return to Puerto Rico for a land-based or resort vacation within the next three years?

Extremely likely ❑10 ❑ 9 ❑ 8 ❑ 7 ❑ 6 ❑5 ❑ 4 ❑3 ❑ 2 ❑ 1 Not at all likely

The following are to better understand demographic characteristics of cruise passenger visitors at each Puerto Rico.

Q19. How many persons in your cabin are? Male: _____ Female: _____

Q20. How many persons in your cabin are in each age group?

Under 14: ____ 15 to 24: ____ 25 to 44: ____ 45 to 64: ____ Over 64: ____

Q21. Where is your permanent place of residence? ❑ US ❑ Canada ❑ UK ❑ France ❑ Other _______(specify)

If the US/Canada, which state/province? _______ (please use 2 letter abbreviation)

Q22. Approximately, what is your annual gross (pre-tax) household income (in U.S. dollars)?

❑ Under $50,000	❑ $50,000 but less than $75,000	❑ $75,000 but less than $100,000
❑ $100,000 but less than $150,000	❑ $150,000 but less than $200,000	❑ $200,000 or more

Thank you very much for taking time to assist us and enjoy the remainder of your cruise.

CONFIDENTIAL CREW SURVEY

The Florida-Caribbean Cruise Association (FCCA) and the cruise destinations of the Caribbean, Central America and Mexico are conducting a survey of crew who have visited these destinations. The objective of this survey is to provide information to the FCCA and the destinations that will allow them to enhance visitors' experiences and quantify the contribution of cruise passengers and crew to the economies of each destination. **The survey should only take a few minutes to complete and your responses will be held in strict confidence.**

Please record the date of your cruise ship's call at Puerto Rico:

Month(mm)____Day(dd)____ Year (yy)____ (Numbers please)

Q1. Did you leave the ship and visit Puerto Rico today? ❑ Yes **(If Yes Go to Q3)** ❑ No

Q2. Have you visited Puerto Rico on any previous cruise calls in the past month? ❑ Yes ❑ No **(If No Go to Q8)**

Q3. How many hours did you spend ashore during your visit today or your most recent visit? _______ hours (Number please)

Q4. How much in total did you spend (in US dollars) in Puerto Rico today? $ ___________**(Whole dollars only)**

Q5. Please record the value of all purchases (in U.S. dollars) that you made during your on-shore visit to Puerto Rico today or for the most recent visit to Puerto Rico in the past month. *** Do not include the cost of tours or goods and services that were purchased onboard the cruise ship. (Enter whole dollars).**

Food and Beverages at bars and restaurants:	$ _______	Tours purchased **on shore or the internet only:**	$ ________
Taxis/Ground Transportation: (Do not include cost of sightseeing tours)	$ _______	Local Crafts and Souvenirs:	$ ________
Retail Purchases of Watches & Jewelry:	$ _______	Retail Purchases of Liquor:	$ ________
Retail Purchases of Clothing (incl. T-shirts):	$ _______	Retail Purchases of Electronics:	$ ________
Entertainment Venues/Nightclubs/Casinos:	$ _______	Telephone & Internet Communications:	$ ________
Retail purchases of perfume & cosmetics:	$ _______	Any other purchases:	$ ________

Q6. On a scale of 1 to 10, how satisfied were you with each of the following in Puerto Rico?

(Extremely satisfied = 10 ……. 1 = Not at all satisfied)

Guided Tour:	❑ 10	❑9	❑8	❑7	❑6	❑5	❑4	❑3	❑ 2	❑ 1	❑ 0 Not applicable
Shopping Experience:	❑ 10	❑9	❑8	❑7	❑6	❑5	❑4	❑3	❑ 2	❑ 1	❑ 0 Not applicable
Historic Sites/Museums:	❑ 10	❑9	❑8	❑7	❑6	❑5	❑4	❑3	❑ 2	❑ 1	❑ 0 Not applicable
Variety of things to see and do:	❑ 10	❑9	❑8	❑7	❑6	❑5	❑4	❑3	❑ 2	❑ 1	❑ 0 Not applicable
Friendliness of the residents:	❑ 10	❑9	❑8	❑7	❑6	❑5	❑4	❑3	❑ 2	❑ 1	❑ 0 Not applicable
Overall shopping experience:	❑ 10	❑9	❑8	❑7	❑6	❑5	❑4	❑3	❑ 2	❑ 1	❑ 0 Not applicable
Courtesy of employees:	❑ 10	❑9	❑8	❑7	❑6	❑5	❑4	❑3	❑ 2	❑ 1	❑ 0 Not applicable
Variety of Shops:	❑ 10	❑9	❑8	❑7	❑6	❑5	❑4	❑3	❑ 2	❑ 1	❑ 0 Not applicable
Overall Prices:	❑ 10	❑9	❑8	❑7	❑6	❑5	❑4	❑3	❑ 2	❑ 1	❑ 0 Not applicable
Taxis/Local Transportation:	❑ 10	❑9	❑8	❑7	❑6	❑5	❑4	❑3	❑ 2	❑ 1	❑ 0 Not applicable
Overall visit in Puerto Rico:	❑ 10	❑9	❑8	❑7	❑6	❑5	❑4	❑3	❑ 2	❑ 1	❑ 0 Not applicable

Q7. Based upon your experience in Antigua, on a scale of 1 to 10 how likely are you to recommend a land-based or resort vacation in Q7. Based upon your experience in Puerto Rico, on a scale of 1 to 10 how likely are you to recommend a land-based or resort vacation in Puerto Rico to a friend?

Extremely likely ❑10 ❑ 9 ❑ 8 ❑ 7 ❑ 6 ❑5 ❑ 4 ❑3 ❑ 2 ❑ 1 Not at all likely

The following are to better understand demographic characteristics of crew visitors at each destination.

Q8. What is your gender? ❑ Male ❑ Female

Q9. In which age group do you fall? ❑ Under 20 ❑ 21 to 30 ❑ 31 to 50 ❑ 51 to 65 ❑ over 65

Q10. Where is your permanent place of residence? ❑ US ❑ Canada ❑ UK ❑ France ❑ Other _______(specify)

Thank you for your time and assistance.

ECONOMIC CONTRIBUTION ANALYSIS

The economic contribution analysis measures the direct and total employment and wages generated by the cruise tourism expenditures in each destination. The analysis begins with the estimation of direct expenditures by passengers, crew and cruise lines in each destination for the 2008/2009 cruise year. These expenditures are entered as inputs to the destination-specific economic impact models to generate the direct and total employment and wage contributions of cruise tourism. This section provides an overview of the expenditures and economic contribution for each destination while a more comprehensive analysis for each destination is presented in Volume II of this report.

Passenger and Crew Expenditures

The expenditure data collected from the passenger and crew surveys provided several pieces of data that were critical for the economic impact analysis First, average per passenger and per crew spending figures for the 13 expenditure categories shown in **Table 3** were derived from the surveys.

Table 3 – Passenger and Crew Expenditure Categories

Expenditure Categories
Shore Excursions
F&B at Restaurants & Bars
Clothing
Local Crafts & Souvenirs
Taxis/Ground Transportation
Other Purchases
Watches & Jewelry
Perfumes & Cosmetics
Retail Purchases of Liquor
Entertainment/Night Clubs
Telephone & Internet
Lodging*
Electronics

* Only applicable for homeport passengers.

It should be noted that the expenditure component of the survey generated the actual per passenger expenditure of those tours that were purchased from the cruise line, onshore from tour operators and through travel agents. The effective net payment to local tour operators of tours purchased onboard cruise ships was estimated from data obtained from the cruise lines and was then included with the passenger onshore expenditures.

As shown in **Table 4**, the cruise industry generated nearly 20.8 million passenger and crew onshore visits during the 2008/2009 cruise year. It is these onshore visits that generate the local spending that creates employment and income in each destination.

Based upon data collected from the cruise lines, it was estimated that an average of 85 percent of cruise passengers disembarked at port calls across all destinations. This ranged from a low of about 80 percent for the smaller destinations, such as Antigua, St. Kitts and St. Lucia, to a high of 90 percent for the larger destinations, such as Cozumel, U.S.V.I. and St. Maarten. As a result, passenger onshore visits, which generate the local spending, are lower than passenger arrivals (passengers onboard cruise ships).

Table 4 – Estimated Passenger and Crew Onshore Visits (Thousands) at the Participating Destinations, 2008/2009 Cruise Year

Destinations	Passengers	Crew	Total
Acapulco	165.8	41.4	207.2
Antigua & Barbuda	532.1	101.4	633.5
Aruba	487.1	93.9	581.0
Bahamas①	2,019.4	359.6	2,379.0
Barbados②	608.1	117.9	726.0
Belize	519.4	68.5	587.9
Cabo San Lucas	968.0	120.8	1,088.8
Cayman Islands	1,305.7	200.0	1,505.7
Cartagena②	210.6	32.4	243.0
Costa Rica	266.9	47.1	314.0
Cozumel	1,960.0	403.7	2,363.7
Curacao	344.4	58.5	402.9
Dominica	231.8	37.3	269.1
Dominican Republic②	411.4	59.4	470.8
Ensenada	533.1	89.2	622.3
Grenada	272.7	46.3	319.0
Guatemala	115.2	15.7	130.9
Honduras	329.3	36.8	366.1
Huatulco	125.9	20.0	145.9
Jamaica②	882.7	150.0	1,032.7
Nicaragua	52.3	9.6	61.9
Puerto Rico②	1,181.7	210.9	1,392.6
St. Kitts and Nevis	333.9	54.5	388.4
St. Lucia	532.0	113.5	645.5
St. Maarten	1,152.0	326.0	1,478.0
St. Vincent and the Grenadines	124.7	19.9	144.6
Trinidad and Tobago	39.3	7.0	46.3
Turks and Caicos	277.1	57.7	334.8
U. S. Virgin Islands	1,575.0	336.1	1,911.1
All Destinations	**17,557.6**	**3,235.1**	**20,792.7**

① Only includes passenger and crew visits at Nassau and Freeport.

② Includes passengers and crew aboard both port-of-call and homeport cruise ships.

Data from the surveys were used to estimate the percentage of crew that disembarked on a given port call. For those destinations with insufficient survey data, data from the cruise lines were used to estimate crew visits. These data indicated that a much smaller percentage of crew onboard cruise ships were able to disembark at each port-of-call. The survey data indicated that this figure averaged about 38 percent across all destinations and ranged from a low of 30 percent in many of the smaller destinations, such as Cartagena, the Dominican Republic and Guatemala to a high of 50 percent in the U.S. Virgin Islands.

Passenger Shore Excursions

As noted previously, more passengers purchased shore excursions than any other goods or services. Also, passengers have options on how to purchase their tours. Most as discussed below purchased their excursions onboard the cruise ship. The cruise line then retained a portion of the price charged as a management fee or sales commission. Given these facts, it is important that special attention be paid to estimating the local impact of shore excursions.

The passenger survey provided a breakdown on passenger purchases of tours or shore excursions. As indicated in **Table 5**, an average of 57 percent of all intransit cruise passengers purchased shore excursions at each destination visit. The vast majority, 77.5 percent purchased their shore excursions from the cruise line, 17.7 percent purchased their tour directly from local tour operators and 4.8% percent purchased their tour through a travel agent. Forty-three percent of port-of-call passengers reported that they did not purchase a tour for their onshore visit.

The data in the table also shows a significant diversity in the percentage of passengers that purchase a formal tour across destinations and sales channel. For example, nearly 80 percent of passengers visiting Costa Rica purchased a shore excursion while only 31 percent of passengers in the Turks & Caicos did so. In terms of sales channel, 86 percent of passengers visiting Huatulco purchased their tour through the cruise line while only 65 percent of Ensenada passengers did so.

Fewer than half of visiting passengers purchased shore excursions in the following nine destination: Turks & Caicos, Puerto Rico, the Bahamas, St. Maarten, Cabo San Lucas, Antigua & Barbuda, the Dominican Republic, St. Vincent and the Grenadines and Huatulco. This is a diversified group of destinations that includes four of the most popular or major destinations (one million or more passenger arrivals), three mid-sized (between 300,000 and one million passenger arrivals) and two small or minor destinations (less than 300,000 passenger arrivals). In another seven destinations more than 65 percent of visiting passengers purchased shore excursions. These included: St. Lucia, Dominica, Honduras, Belize, Guatemala, Cartagena and Costa Rica. This group consists entirely of mid-sized and minor destinations with a heavy concentration of destinations in Central and South America.

As noted above the cruise lines dominated in the sale of shore excursions. More than 80 percent of shore excursions were purchased from the cruise lines in nine destinations: Jamaica, Cartagena, Puerto Rico, Barbados, Cozumel, St. Maarten, Costa Rica, Huatulco and Nicaragua. Again, this is a very diversified group with four major, one mid-sixed and four minor destinations.

Finally, there were only six destinations in which shore operators accounted for 25 percent or more of tour purchases. These were: Dominica, St. Lucia, the Bahamas, Antigua & Barbuda, Grenada and Ensenada. With the exception of the Bahamas, these are mostly mid-sized destinations.

Table 5 – Percentage of Intransit Passengers Purchasing Shore Excursions by Destination

Destinations	Purchased a Tour	Purchased a Tour from			Did Not Purchase a Tour
		Cruise Line	Onshore	Travel Agent	
Acapulco	62.3%	77.2%	15.4%	7.4%	37.7%
Antigua & Barbuda	48.5%	69.0%	27.5%	3.5%	51.5%
Aruba	55.2%	74.4%	18.9%	6.7%	44.8%
Bahamas	46.2%	68.3%	27.1%	4.6%	53.8%
Barbados①	57.8%	81.7%	14.6%	3.7%	42.2%
Belize	69.5%	79.4%	15.8%	4.8%	30.5%
Cabo San Lucas	47.0%	73.9%	20.8%	5.3%	53.0%
Cayman Islands	59.4%	79.0%	16.3%	4.7%	40.6%
Cartagena①	71.6%	80.7%	13.8%	5.5%	28.4%
Costa Rica	79.8%	83.3%	11.6%	5.1%	20.2%
Cozumel	50.7%	82.0%	11.5%	6.5%	49.3%
Curacao	56.0%	74.2%	21.4%	4.3%	44.0%
Dominica	67.1%	69.5%	25.8%	4.8%	32.9%
Dominican Republic①	48.8%	72.4%	23.8%	3.8%	51.2%
Ensenada	55.6%	65.2%	32.5%	2.4%	44.4%
Grenada	56.4%	67.1%	28.8%	4.1%	43.6%
Guatemala	71.3%	77.4%	19.2%	3.4%	28.7%
Honduras	67.1%	78.9%	16.0%	5.1%	32.9%
Huatulco	49.0%	86.1%	9.6%	4.3%	51.0%
Jamaica①	62.3%	80.1%	15.2%	4.6%	37.7%
Nicaragua	58.6%	89.3%	5.1%	5.6%	41.4%
Puerto Rico①	44.3%	80.8%	15.0%	4.2%	55.7%
St. Kitts and Nevis	58.4%	73.1%	23.6%	3.3%	41.6%
St. Lucia	65.4%	70.0%	26.4%	3.6%	34.6%
St. Maarten	46.9%	82.9%	13.9%	3.2%	53.1%
St. Vincent and the Grenadines	48.9%	78.4%	20.3%	1.4%	51.1%
Trinidad and Tobago	52.6%	76.1%	20.4%	3.5%	47.4%
Turks and Caicos	31.1%	79.3%	13.5%	7.2%	68.9%
U. S. Virgin Islands	51.2%	79.3%	12.8%	7.9%	48.8%
All Destinations①	**57.0%**	**77.5%**	**17.7%**	**4.8%**	**43.0%**

① Only includes passengers aboard port-of-call cruise ships.

While it is of interest to understand how passengers purchase their shore excursions and how this differs across destinations. For this study it is most important for determining the impact of shore excursion purchases on the local economy. The percentages reported above were used in estimating the average locally effective or net expenditure per passenger for onshore excursions.

Table 6 – Average Per Passenger Purchase Price of a Shore Excursion by Sales Channel and Destination

Destinations	Average Price of Tour Purchased from			Local Effective Price of a Tour
	Cruise Line	Onshore	Other①	
Acapulco	$52.55	$24.78	$ 47.09	$30.78
Antigua & Barbuda	$57.49	$22.98	$ 53.77	$31.55
Aruba	$52.40	$27.29	$ 40.21	$30.57
Bahamas	$61.97	$31.55	$ 85.34	$37.30
Barbados②	$49.43	$32.94	$100.02	$32.01
Belize	$62.88	$40.08	$ 82.48	$39.25
Cabo San Lucas	$65.23	$25.70	$ 68.66	$41.07
Cayman Islands	$45.41	$27.22	$ 58.97	$28.06
Cartagena②	$51.01	$27.91	$ 15.69	$29.21
Costa Rica	$79.73	$26.50	$ 64.20	$45.18
Cozumel	$65.61	$30.95	$ 68.76	$40.93
Curacao	$54.02	$19.51	$ 33.95	$29.36
Dominica	$58.70	$26.63	$ 50.83	$33.14
Dominican Republic②	$56.83	$22.32	$ 78.39	$32.24
Ensenada	$41.51	$16.94	$ 50.29	$22.63
Grenada	$48.84	$22.45	$ 62.72	$28.07
Guatemala	$63.27	$35.61	$ 84.48	$38.39
Honduras	$48.40	$25.78	$ 64.41	$30.40
Huatulco	$50.72	$23.26	$ 90.87	$32.50
Jamaica②	$65.54	$30.98	$ 89.09	$39.34
Nicaragua	$57.73	$34.08	$ 70.05	$35.60
Puerto Rico②	$38.74	$14.52	$ 54.00	$24.32
St. Kitts and Nevis	$69.73	$20.41	$120.55	$38.38
St. Lucia	$55.73	$29.62	$ 75.72	$33.26
St. Maarten	$45.91	$24.40	$ 76.57	$32.02
St. Vincent and the Grenadines	$57.98	$21.02	$ 35.39	$32.37
Trinidad and Tobago	$52.18	$21.67	$ 60.21	$29.83
Turks and Caicos	$57.51	$46.82	$125.20	$45.02
U. S. Virgin Islands	$48.74	$36.98	$ 85.55	$33.72
All Destinations②	**$57.37**	**$27.21**	**$77.56**	**$34.28**

① Includes purchases made through travel agents and purchases made through an unspecified channel.
② Only includes passengers aboard port-of-call cruise ships.

Table 6 shows the average per passenger price of a shore excursion by sales channel. As clearly shown in the table the price paid for a shore excursion is significantly lower for onshore purchases compared to those purchased through the cruise line or another channel. One needs to be careful in interpreting these data. These are average prices paid as reported by responding cruise passengers. While we can conclude that the cost of a typical tour purchased onshore cost less than the typical tour purchased onboard a cruise ship, we cannot conclude anything about the differential in the cost of identical tours across sales channels. We just do not know what the mix of tours is in each channel. It could be that lower value tours are purchased onshore relative to those purchased on a cruise ship.

To estimate the local effective price of a shore excursion, data was collected from the cruise lines on the payments made to local tour operators for cruises purchased onboard their ships. These data indicated that the cruise lines paid between 55 percent and 70 percent of the price paid by passengers to the local tour operators. When averaged across all lines and all destinations, the average price paid by passengers for shore excursions purchased from cruise lines and travel agents was discounted by 40 percent when calculating the local effective price. The discounts varied slightly across destinations but the destination-specific discounts ranged between 35 and 45 percent. The purchase made directly from onshore operators was not discounted at all.

Thus, on average local tour operators received an average of $34.28 for tours purchased by intransit passengers.[19] This figure is about 25 percent higher than the average price paid directly to a tour operator and 40 percent lower than the average price received by the cruise lines. The effective local price for a shore excursion ranged from a low of $22.63 in Ensenada to a high of $45.18 in Costa Rica. In addition to Costa Rica, three destinations, Cozumel, Cabo San Lucas, and the Turks & Caicos, had effective local prices in excess of $40 per passenger while six destinations, Trinidad & Tobago, Curacao, Cartagena, Grenada, the Cayman Islands and Puerto Rico, in addition to Ensenada had effective local prices less than $30 per passenger.

Total Passenger Expenditures

As shown in **Table 7**, the 17.56 million cruise passengers that disembarked cruise ships and visited the 29 participating destinations spent $1.71 billion for shore excursions and other goods and services during the 2008/2009 cruise year. Average per passenger expenditures ranged from a low of $33.50 in St. Vincent and the Grenadines to a high of $193.22 in the U.S. Virgin Islands and averaged $97.63 across the 29 destinations.

The U.S. Virgin Islands with $304 million in total passenger expenditures led all destinations and accounted for 18 percent of all passenger spending among the 29 destinations. Five additional destinations had passenger expenditures in excess of $100 million. Passengers spent $205 million in Cozumel, $170 million in St. Maarten, $169 million in the Bahamas, $126 million in the Cayman Islands, and just under $119 million in Puerto Rico. Combined, these five destinations accounted for 46 percent of the direct expenditures among the 29 destinations.

Another ten destinations had passenger expenditures between $25 and $100 million. These were: Antigua & Barbuda, Aruba, Barbados, Belize, Cabo San Lucas, Curacao, Ensenada, Jamaica, St. Kitts & Nevis and St. Lucia. These destinations accounted for 27% of total passenger expenditures. Passenger spending in this group of destinations ranged from a low of $28 million in Curacao to a high of $82 million in Jamaica and averaged $45 million among the ten destinations.

[19] This figure is lower for the small number of homeport passengers, $24.76. This is due to the fact that most of these excursions are purchased directly from local tour operators.

The remaining thirteen destinations accounted for 9% of total passenger expenditures. Passenger spending in this group averaged just over $13 million per destination, ranging from $1.8 million in Trinidad & Tobago to $23 million in Honduras.

Table 7 – Passengers Onshore Visits and Expenditures by Destination, 2008/2009 Cruise Year

Destinations	Passenger Onshore Visits (Thousands)	Average Expenditure per Passenger	Total Passenger Expenditures ($US Millions)
Acapulco	165.8	$ 87.65	$ 14.5
Antigua & Barbuda	532.1	$ 72.06	$ 38.3
Aruba	487.1	$ 87.41	$ 42.6
Bahamas①	2,019.4	$ 83.93	$ 169.5
Barbados②	608.1	$ 69.10	$ 42.0
Belize	519.4	$ 87.96	$ 45.7
Cabo San Lucas	968.0	$ 79.87	$ 77.3
Cayman Islands	1,305.7	$ 96.78	$ 126.4
Cartagena②	210.6	$ 90.03	$ 19.0
Costa Rica	266.9	$ 67.28	$ 18.0
Cozumel	1,960.0	$ 104.58	$ 205.0
Curacao	344.4	$ 81.21	$ 28.0
Dominica	231.8	$ 45.87	$ 10.6
Dominican Republic②	411.4	$ 43.42	$ 17.9
Ensenada	533.1	$ 57.73	$ 30.8
Grenada	272.7	$ 49.01	$ 13.4
Guatemala	115.2	$ 63.47	$ 7.3
Honduras	329.3	$ 70.39	$ 23.2
Huatulco	125.9	$ 49.05	$ 6.2
Jamaica②	882.7	$ 92.72	$ 81.8
Nicaragua	52.3	$ 35.63	$ 1.9
Puerto Rico②	1,181.7	$ 100.55	$ 118.8
St. Kitts and Nevis	333.9	$ 99.41	$ 33.2
St. Lucia	532.0	$ 68.53	$ 36.5
St. Maarten	1,152.0	$ 147.98	$ 170.5
St. Vincent and the Grenadines	124.7	$ 33.50	$ 4.2
Trinidad and Tobago	39.3	$ 46.27	$ 1.8
Turks and Caicos	277.1	$ 67.22	$ 18.6
U. S. Virgin Islands	1,575.0	$ 193.22	$ 304.3
All Destinations	**17,557.6**	**$ 97.63**	**$ 1,707.3**

① Only includes passenger visits at Nassau and Freeport.

② Includes passengers aboard both port-of-call and homeport cruise ships.

Intransit Passenger Expenditures by Category

Of the 17.56 million passenger visits 96%, or 16.9 million, were made by intransit passengers. Utilizing data from the passenger surveys total passenger expenditures were calculated for each category. Total expenditures per category is equal to the weighted average spend per passenger multiplied by total intransit passenger visits. For example, those cruise parties that reported purchasing food and beverages in a restaurant or bar spent an average of $13.33 per passenger during a single onshore visit. However, not all cruise parties made such a purchase at each destination. The survey data indicated that at any individual cruise call 45.9% of the cruise parties actually purchased food and beverages. Thus, the weighted spend per passenger across all onshore passengers was $6.11 ($13.33×.459). Finally, total passenger purchases of food and beverages across all 29 destinations for the entire 2008/2009 cruise year was estimated by multiplying the weighted average spend per passenger ($6.11) by the total number of onshore visits (16.9 million). Thus, total passenger purchases of food and beverages for the 2008/2009 cruise year across all 29 destinations were estimated to be $103.3 million. Similar calculations were made for each category.

Table 8 – Average Intransit Passenger Expenditures by Category – Average of All Destinations

Purchase Categories	Average Spend per Passenger ($US)	Share of All Onshore Visits	Weighted Average Spend per Passenger	Total Passenger Expenditures ($US Millions)
Shore Excursions①	$ 34.36	53.6%	$ 18.43	$ 311.5
Local Crafts & Souvenirs	$ 15.40	46.1%	$ 7.09	$ 119.9
F&B at Restaurants & Bars	$ 13.33	45.9%	$ 6.11	$ 103.3
Clothing	$ 21.46	45.4%	$ 9.74	$ 164.5
Taxis/Ground Transportation	$ 12.78	28.6%	$ 3.66	$ 61.8
Watches & Jewelry	$ 163.68	22.6%	$ 36.94	$ 624.4
Other Purchases	$ 44.79	21.0%	$ 9.39	$ 158.6
Retail Purchases of Liquor	$ 17.67	11.5%	$ 2.03	$ 34.2
Perfumes & Cosmetics	$ 28.70	4.3%	$ 1.22	$ 20.7
Entertainment/Night Clubs	$ 39.33	2.1%	$ 0.84	$ 14.1
Telephone & Internet	$ 5.13	2.0%	$ 0.10	$ 1.7
Electronics	$ 63.10	0.9%	$ 0.56	$ 9.5
Total			**$ 96.11**	**$ 1,624.2**

① This is the effective average onshore expenditure and is a weighted average of the onshore purchases and the portion of the onboard and travel agent purchases paid to local tour operators as described above.

The analysis of the passenger surveys showed the following major attributes of intransit passenger onshore spending:

- The typical intransit cruise passenger spent an average of $96.11 at each destination call during their cruise vacation with total passenger expenditures in the 29 destinations reaching $1.62 billion during the 2008/2009 cruise year, 95 percent of total passenger expenditures.
- Nearly 78 percent of intransit passenger expenditures were made in four categories: watches and jewelry ($624 million), shore excursions ($312 million), clothing ($164 million), and other purchases ($159 million). Combined, cruise passengers spent an estimated $1.26 billion in these four categories.
- The most popular expenditure was for shore excursions with nearly 54% of all intransit passengers making such a purchase. Local tour operators received an average of $34.36 per passenger directly from cruise passengers and cruise lines.

The weighted average expenditure was $18.43 per passenger. Total payments to tour operators in the 29 participating destinations were an estimated $312 million.

- Intransit passengers that purchased watches and jewelry spent an average of $163.68 on such purchases. Since only 22.6 percent of passengers purchased watches and jewelry the average jewelry expenditure per passenger was $36.94. Total expenditures on watches and jewelry were an estimated $624 million.
- Slightly less than half of the intransit cruise passengers purchased food and beverages, local crafts and souvenirs, and clothing in each destination. On average, visiting passengers spent $6.11 on food and beverages, $7.09 for local crafts and souvenirs and $9.74 on clothing at each port call. Combined, passengers spent a total of $388 million in these three categories.

Homeport Passenger Expenditures by Category

Table 9 – Average Homeport Passenger Expenditures by Category – Average of All Homeports

Purchase Categories	Average Spend per Passenger ($US)	Share of All Onshore Visits	Weighted Average Spend per Passenger	Total Passenger Expenditures ($US Millions)
F&B at Restaurants & Bars	$ 53.35	31.3%	$ 16.70	$ 10.9
Lodging	$ 146.28	28.8%	$ 42.13	$ 27.5
Shore Excursions①	$ 148.63	16.8%	$ 24.97	$ 16.3
Taxis/Ground Transportation	$ 17.16	11.6%	$ 1.99	$ 1.3
Clothing	$ 52.10	10.0%	$ 5.21	$ 3.4
Local Crafts & Souvenirs	$ 63.20	9.7%	$ 6.13	$ 4.0
Other Purchases	$ 89.68	9.4%	$ 8.43	$ 5.5
Retail Purchases of Liquor	$ 19.52	6.3%	$ 1.23	$ 0.8
Entertainment/Night Clubs	$ 93.41	4.1%	$ 3.83	$ 2.5
Watches & Jewelry	$ 640.91	2.2%	$ 14.10	$ 9.2
Perfumes & Cosmetics	$ 76.50	2.0%	$ 1.53	$ 1.0
Telephone & Internet	$ 28.75	1.6%	$ 0.46	$ 0.3
Electronics	$ 67.78	0.9%	$ 0.61	$ 0.4
Total			**$ 127.32**	**$ 83.1**

① This is the effective average onshore expenditure and is a weighted average of the onshore purchases and the portion of the onboard and travel agent purchases paid to local tour operators as described above.

The remaining 652,700 onshore passenger visits were made by homeport passengers embarking on their cruises from: San Juan, PR, Barbados, Cartagena, the Dominican Republic and Jamaica. Utilizing data from the passenger surveys total passenger expenditures were calculated for each category. Total expenditures per category is equal to the weighted average spend per passenger multiplied by total homeport passenger visits.

For example, those homeport cruise parties[20] that reported purchasing food and beverages in a restaurant or bar spent an average of $53.35 per passenger during their pre- or post-cruise

[20] The average homeport cruise party consisted of 2.2 passengers. An estimated 35 percent of the cruise parties had a pre- and/or post-cruise stay that averaged 1.4 nights. It should be noted that

stay. However, not all cruise parties made such a purchase at each port of embarkation. The survey data indicated that at any individual embarkation 31.3% of the cruise parties actually purchased food and beverages. Thus, the weighted spend per passenger across all homeport passengers was $16.70 ($53.35×.313). Finally, total passenger purchases of food and beverages across all five homeports for the entire 2008/2009 cruise year was estimated by multiplying the weighted average spend per passenger ($16.70) by the total number of embarkations (652,700). Thus, total passenger purchases of food and beverages for the 2008/2009 cruise year across the five destinations were estimated to be $10.9 million. Similar calculations were made for each category.

The analysis of the passenger surveys showed the following major attributes of homeport passenger onshore spending:

- The typical homeport cruise passenger spent an average of $127.32 at their homeport call during their cruise vacation with total passenger expenditures in the five destinations reaching $83.1 million during the 2008/2009 cruise year, 5 percent of total passenger expenditures.
- Nearly 77 percent of homeport passenger expenditures were made in four categories: lodging ($27.5 million), shore excursions ($16.3 million), food and beverages ($10.9 million), and watches and jewelry ($9.2 million). Combined, cruise passengers spent an estimated $63.9 million in these five categories.
- The most popular expenditure was for food and beverages with 31% of all homeport passengers making such a purchase. Those passengers that purchased food and beverages spent an average of $53.35. The weighted average expenditure was $16.70 per passenger. Total payments to eating and drinking establishments in the five destinations were an estimated $10.9 million.
- Homeport passengers that purchased lodging spent an average of $146.28 per passenger during their pre- and post cruise stay. Since 28.8 percent of passengers purchased accommodations the average lodging expenditure per homeport passenger was $42.13. Total expenditures on lodging were an estimated $27.5 million.
- While shore excursions are not as popular in homeports, only 16.8 percent of homeport passengers purchased a tour, the average price of these tours were considerably higher than those purchased by intransit passengers, $148.63 versus $34.28. Shore excursions by homeport passengers generated a total of $16.3 million in the five homeports.

the overnight stays were concentrated in San Juan which accounted for 91 percent of all overnight stays.

Total Crew Expenditures

Unlike passengers, shore excursions are not a focus of crew spending; rather, crew expenditures are more heavily weighted toward food and beverages, and ground transportation. These were followed by spending for clothing, local crafts, other purchases and telephone and internet. As shown in **Table 10**, the 3.24 million crew members that visited the 29 participating destinations spent nearly $289 million for goods and services during the 2008/2009 cruise year.

With 70 percent of crew purchasing food and beverages in each destination, they spent an estimated total of $68 million at bars and restaurants, accounting for 24 percent of total crew expenditures. Expenditures for watches and jewelry totaled $51.4 million and accounted for another 18 percent of total crew expenditures. Crew spent almost equal amounts on clothing and entertainment, $27.3 and $27.5 million respectively. Combined these two categories accounted for 19 percent of total crew spending during the 2008/2009 cruise year. By comparison, only 5.7 percent of crew purchased shore excursions and spent a total of $14.6 million in the 29 destinations accounting for 5 percent of the total.

Table 10 – Average Crew Expenditures by Category – Average Across All Destinations

Purchase Categories	Average Spend per Crew ($US)	Share of All Onshore Visits	Weighted Average Spend per Crew	Total Crew Expenditures ($US Millions)
F&B at Restaurants & Bars	$ 30.20	69.8%	$ 21.07	$ 68.1
Taxis/Ground Transportation	$ 15.58	32.7%	$ 5.09	$ 16.5
Clothing	$ 48.84	17.3%	$ 8.43	$ 27.3
Local Crafts & Souvenirs	$ 21.57	15.1%	$ 3.25	$ 10.5
Other Purchases	$ 47.62	13.8%	$ 6.57	$ 21.3
Telephone & Internet	$ 20.11	12.5%	$ 2.51	$ 8.1
Watches & Jewelry	$ 210.12	7.6%	$ 15.91	$ 51.4
Perfumes & Cosmetics	$ 28.09	7.6%	$ 2.14	$ 6.9
Entertainment/Night Clubs	$ 138.95	6.1%	$ 8.49	$ 27.5
Shore Excursions①	$ 78.35	5.7%	$ 4.50	$ 14.6
Retail Purchases of Liquor	$ 39.00	4.2%	$ 1.65	$ 5.4
Electronics	$ 255.64	3.8%	$ 9.63	$ 31.1
Total			**$ 89.24**	**$ 288.7**

Table 11 shows the distribution of the $284.7 billion in crew expenditures across the 29 participating destinations. Average expenditures per crew ranged from a low of $17.61 in St. Vincent and the Grenadines to a high of $152.58 in the U.S. Virgin Islands and as indicated above averaged $89.24 across all destinations.

Table 11 – Crew Expenditures by Destination, 2008/2009 Cruise Year

Destinations	Crew Onshore Visits (Thousands)	Average Expenditure per Crew	Total Crew Expenditures ($US Millions)
Acapulco	41.4	$ 69.80	$ 2.9
Antigua & Barbuda	101.4	$ 54.16	$ 5.5
Aruba	93.9	$ 69.34	$ 6.5
Bahamas①	359.6	$ 77.95	$ 28.0
Barbados②	117.9	$ 54.26	$ 6.4
Belize	68.5	$ 66.24	$ 4.5
Cabo San Lucas	120.8	$ 54.25	$ 6.6
Cayman Islands	200.0	$ 108.81	$ 21.8
Cartagena②	32.4	$ 65.64	$ 2.1
Costa Rica	47.1	$ 51.97	$ 2.4
Cozumel	403.7	$ 63.48	$ 25.6
Curacao	58.5	$ 116.88	$ 6.8
Dominica	37.3	$ 56.41	$ 2.1
Dominican Republic②	59.4	$ 47.59	$ 2.8
Ensenada	89.2	$ 65.12	$ 5.8
Grenada	46.3	$ 40.30	$ 1.9
Guatemala	15.7	$ 31.80	$ 0.5
Honduras	36.8	$ 58.66	$ 2.2
Huatulco	20.0	$ 37.02	$ 0.7
Jamaica②	150.0	$ 51.32	$ 7.7
Nicaragua	9.6	$ 29.96	$ 0.3
Puerto Rico②	210.9	$ 138.63	$ 29.2
St. Kitts and Nevis	54.5	$ 142.14	$ 7.8
St. Lucia	113.5	$ 37.66	$ 4.3
St. Maarten	326.0	$ 149.45	$ 48.7
St. Vincent and the Grenadines	19.9	$ 17.61	$ 0.3
Trinidad and Tobago	7.0	$ 66.95	$ 0.5
Turks and Caicos	57.7	$ 61.00	$ 3.5
U. S. Virgin Islands	336.1	$ 152.58	$ 51.3
All Destinations	**3,235.1**	**$ 89.24**	**$ 288.7**

① Only includes crew visits at Nassau and Freeport.

② Includes crew aboard both port-of-call and homeport cruise ships.

The analysis of the crew surveys showed the following major attributes of crew onshore spending:

- The U.S. Virgin Islands had the highest crew expenditure rate ($152.58) and the third highest number of estimated crew onshore visits, 336,100. As a result, the crew visits to the island generated the highest level of crew onshore expenditures of $51.3 million during the 2008/2009 cruise year. In the U.S.V.I. crew expenditures were concentrated on retail purchases of jewelry and electronics. These were followed by expenditures for food and beverages and perfumes and cosmetics.
- With the second highest average expenditure of $149.45 per crew member and the fourth highest number of crew onshore visits, St. Maarten had the second highest total expenditure among the 29 participating destinations. In St. Maarten crew expenditures

were concentrated on retail purchases of electronics and jewelry. These were followed by expenditures for food and beverages and entertainment. The 326,000 crew members that visited St. Maarten spent an estimated $48.7 million during the 2008/2009 cruise year.

- Crew visiting Puerto Rico spent an average of $138.63. With an estimated 210,900 onshore visits crew spent an estimated $29.2 million in Puerto Rico during the 2008/2009 cruise year. Crew spending in Puerto Rico was concentrated in clothing and food and beverages followed by electronics and local transportation.

- Crew visiting the Bahamas spent an estimated $28 million. A total of 359,600 crew were estimated to have made an onshore visit during the 2008/2009 cruise year and spent an average of $77.95 per visit. Crew expenditures were concentrated in entertainment venues and restaurants and bars.

- Cozumel had the highest number of crew visits with an estimated 403,700 onshore crew visits. Crew spent an average of $63.48 per visit, primarily for food and beverages, jewelry and clothing. Crew spending and generated $25.6 million in total onshore expenditures during the 2008/2009 cruise year.

- Crew visiting the Cayman Islands spent an average of $108.81. With an estimated 200,000 onshore visits crew spent an estimated $21.8 million during the 2008/2009 cruise year. Crew spending was concentrated in jewelry and food and beverages followed by cosmetics and clothing.

Total Passenger and Crew Expenditures for an Intransit Call

While passenger and crew spending obviously varies across destinations, we have estimated the average passenger and crew expenditures for a typical intransit port call by one of the industry's newest 3,000 passenger ships with 1,200 crew (see **Table 12**). During the typical intransit call, such a cruise ship would generate approximately 2,550 passenger visits (85 percent of passenger arrivals) and 480 crew visits (38 percent of crew arrivals). Passengers would generate $245,080 ($96.11 x 2,550) in onshore spending while crew would add an additional $40,693 ($89.24 x 456) for total onshore spending of $285,773.

Table 12 – Average Onshore Expenditures ($US) of a Intransit Call by a 3,000 Passenger Cruise Ship

	Arrivals	Onshore Visits	Average Spend	Total
Passengers	3,000	2,550	$ 96.11	$ 245,080
Crew	1,200	456	$ 89.24	$ 40,693
Total	**4,200**	**3,006**	**$ 95.07**	**$ 285,773**

Expenditures by Cruise Lines

As discussed in the **Data and Methods** section of this report, the participating destinations and the FCCA member lines provided data on port fees and taxes paid by the cruise lines. Cruise lines also provided data for two additional categories: 1) net payments to local tour operators for passenger shore excursions purchased onboard cruise ships, and 2) payments to local businesses for supplies and services. Net payments to local tour operators were discussed previously and were included in passenger expenditures for shore excursions. The second category of purchases for supplies from local businesses included:

- food and beverages;
- hotel supplies and other stores; and
- other land side purchases of goods and services.

As shown in **Table 13**, total expenditures for port fees and local supplies varied considerably across destinations. This reflects the differences in the structure of port fees, the volume of cruise calls, and the availability of and need for ship supplies in each destination. In total, the cruise lines spent an estimated $279.9 million in the 29 participating destinations during the 2008/2009 cruise year for port fees and taxes, utilities, navigation services and ship supplies.

Table 13 – Total Cruise Line Expenditures by Destination, 2008/2009 Cruise Year

Destinations	Estimated Expenditures ($US Millions)
Acapulco	$ 4.0
Antigua & Barbuda	$ 4.5
Aruba	$ 5.0
Bahamas	$ 48.5
Barbados①	$ 5.2
Belize	$ 8.4
Cabo San Lucas	$ 11.3
Cayman Islands	$ 26.1
Cartagena①	$ 3.5
Costa Rica	$ 5.9
Cozumel	$ 24.6
Curacao	$ 4.5
Dominica	$ 1.5
Dominican Republic①	$ 2.8
Ensenada	$ 9.8
Grenada	$ 6.4
Guatemala	$ 0.9
Honduras	$ 2.9
Huatulco	$ 3.1
Jamaica①	$ 11.9
Nicaragua	$ 0.5
Puerto Rico①	$ 34.2
St. Kitts and Nevis	$ 3.0
St. Lucia	$ 4.9
St. Maarten	$ 11.0
St. Vincent and the Grenadines	$ 2.3
Trinidad and Tobago	$ 0.6
Turks and Caicos	$ 3.0
U. S. Virgin Islands	$ 28.6
All Destinations	**$ 279.9**

① Includes both port-of-call and homeport cruise ships.

The analysis of cruise line expenditures revealed the following impacts for the top five destinations which accounted for 58 percent of cruise line spending among the 29 destinations:

- The Bahamas had the highest total expenditures by cruise lines among the 29 participating destinations, $48.5 million. The expenditures by cruise lines in the Bahamas were concentrated in port fees and services which accounted for over 98 percent of total cruise line expenditures.[21]
- Puerto Rico had the second highest level of cruise line expenditures at $34.2 million. As the major Caribbean homeport, the purchase of ship supplies is more important than in most other destinations accounting for nearly 30% of the total expenditures made by cruise lines.
- The U.S. Virgin Islands were third with $28.6 million in cruise line expenditures. Even though the Virgin Islands is primarily a port-of-call, the purchase of ship supplies accounted for 30% of the total expenditures made by cruise lines.
- Cozumel and the Cayman Islands had similar cruise line expenditures during the 2008/2009 cruise year, $24.6 million and $26.1 million, respectively. In both destinations the bulk of the cruise lines expenditures were for port fees.
- Other destinations with more than $10 million in cruise line expenditures were: Cabo San Lucas ($11.3), Jamaica ($11.9) and St. Maarten ($11.0). Again, the bulk of the cruise lines expenditures were for port fees.

Direct Cruise Tourism Expenditures

As shown in **Table 14**, the 20.8 million passenger and crew visits generated an estimated $2.0 billion in spending for local goods and services in the 29 destinations. The cruise lines added another $280 million in spending for port services and other local goods and services, bringing total cruise tourism expenditures to $2.28 billion during the 2008/2009 cruise year.

Seven destinations had direct cruise tourism expenditures of $100 million or more. Twelve destinations had direct expenditures between $25 and $100 million while ten had direct expenditures less than $25 million.

The U.S. Virgin Islands led all destinations with $384.4 million, followed by Cozumel with $255.3 million, the Bahamas with $246.1 million, St. Maarten with $230.3 million, Puerto Rico with $182.3 million, the Cayman Islands with $174.4 million, and Jamaica with $101.5 million. Combined, these seven destinations accounted for 69 percent of the total cruise tourism expenditures among the 29 destinations.

The next twelve destinations with expenditures between $25 and $100 million accounted for 25 percent of the total cruise tourism expenditures. The remaining ten destinations with less than

[21] This figure includes passenger head taxes paid passenger arrivals at the private islands of the cruise lines.

$25 million in direct cruise tourism expenditures accounted for 6 percent of the total among the 29 destinations.

Table 14 – Total Cruise Tourism Expenditures ($US Millions) by Destination, 2008/2009 Cruise Year

Destinations	Passengers	Crew	Cruise Line	Total
Acapulco	$ 14.5	$ 2.9	$ 4.0	**$ 21.4**
Antigua & Barbuda	$ 38.3	$ 5.5	$ 4.5	**$ 48.3**
Aruba	$ 42.6	$ 6.5	$ 5.0	**$ 54.1**
Bahamas①	$ 169.5	$ 28.0	$ 48.5	**$ 246.1**
Barbados②	$ 42.0	$ 6.4	$ 5.2	**$ 53.6**
Belize	$ 45.7	$ 4.5	$ 8.4	**$ 58.6**
Cabo San Lucas	$ 77.3	$ 6.6	$ 11.3	**$ 95.3**
Cayman Islands	$ 126.4	$ 21.8	$ 26.1	**$ 174.4**
Cartagena②	$ 19.0	$ 2.1	$ 3.5	**$ 24.6**
Costa Rica	$ 18.0	$ 2.4	$ 5.9	**$ 26.3**
Cozumel	$ 205.0	$ 25.6	$ 24.6	**$ 255.3**
Curacao	$ 28.0	$ 6.8	$ 4.5	**$ 39.3**
Dominica	$ 10.6	$ 2.1	$ 1.5	**$ 14.2**
Dominican Republic②	$ 17.9	$ 2.8	$ 2.8	**$ 23.5**
Ensenada	$ 30.8	$ 5.8	$ 9.8	**$ 46.4**
Grenada	$ 13.4	$ 1.9	$ 6.4	**$ 21.7**
Guatemala	$ 7.3	$ 0.5	$ 0.9	**$ 8.7**
Honduras	$ 23.2	$ 2.2	$ 2.9	**$ 28.3**
Huatulco	$ 6.2	$ 0.7	$ 3.1	**$ 10.1**
Jamaica②	$ 81.8	$ 7.7	$ 11.9	**$ 101.5**
Nicaragua	$ 1.9	$ 0.3	$ 0.5	**$ 2.7**
Puerto Rico②	$ 118.8	$ 29.2	$ 34.2	**$ 182.3**
St. Kitts and Nevis	$ 33.2	$ 7.8	$ 3.0	**$ 44.0**
St. Lucia	$ 36.5	$ 4.3	$ 4.9	**$ 45.7**
St. Maarten	$ 170.5	$ 48.7	$ 11.0	**$ 230.3**
St. Vincent and the Grenadines	$ 4.2	$ 0.3	$ 2.3	**$ 6.8**
Trinidad and Tobago	$ 1.8	$ 0.5	$ 0.6	**$ 2.9**
Turks and Caicos	$ 18.6	$ 3.5	$ 3.0	**$ 25.1**
U. S. Virgin Islands	$ 304.3	$ 51.3	$ 28.6	**$ 384.4**
All Destinations	**$ 1,707.3**	**$ 288.7**	**$ 279.9**	**$ 2,275.9**

Economic Contribution of Cruise Tourism Expenditures

As noted in the **Data and Methods** section, an economic impact model was developed for each participating destination. Data for these models were collected from a broad range of local, regional and international sources. These models included Gross Domestic Product (GDP) and employment and wage data. They were designed to reflect the economic structure of each destination, including the industrial composition of GDP, the wage share of GDP by industry and the average wage by industry, as well as, the relative importance of imports to each economy.

Direct Economic Contribution of Cruise Tourism Expenditures

The direct economic contribution of cruise tourism in destination ports was derived from a broad range of activities including:

- onshore expenditures by passengers which are concentrated in shore excursions and retail purchases of clothing and jewelry;
- onshore spending by crew which are concentrated in purchases of food and beverages, local transportation and retail purchases of clothing and electronics;
- expenditures by cruise lines in ports for port services, such as dockage fees and linesmen; utilities, such as water and power; and navigation services; and
- purchases of supplies, such as food, hotel supplies and other stores, by the cruise lines from local businesses.

The analysis of cruise tourism's direct expenditures shows that the cruise ship calls that brought 20.8 million passenger and crew visits to the 29 participating destinations during the 2008/2009 cruise year generated $2.28 billion in direct spending by passengers, crew and cruise lines. As shown in **Table 15** the businesses that supplied the shore excursions and other goods and services employed an estimated 33,285 employees and paid annual wages of $414.2 million. While the impacts vary across destinations, on average every $68,400 in cruise tourism expenditures generated a direct job in the destinations and that 18 percent of cruise tourism expenditures ended up as income for the impacted workers.

The U.S. Virgin Islands, with the third highest total of passenger and crew onshore visits and the highest per passenger and per crew spending rates, had the highest level of total cruise tourism expenditures. The U.S.V.I. also had the third highest direct employment contribution and the highest direct wage contribution. The $384 million in direct cruise tourism expenditures generated 3,589 jobs paying $79.9 million in wage income during the 2008/2009 cruise year. Due to the large volume of high value duty free shopping at this destination, it required over $107,000 in cruise tourism expenditures to create a direct job. At the same time, the island economy's above average wage structure resulted in 21 percent of the direct expenditures ending up as employee wages.

Cozumel, which ranked second in onshore passenger and crew visits and third in per passenger expenditures, generated the second highest level of cruise tourism expenditures. The $255 million in total cruise tourism expenditures generated 4,344 direct jobs paying $31.9 million in wage income during the 2008/2009 cruise year. The overall cost and wage structure in Cozumel is considerably lower than in either the U.S.V.I or St. Maarten. As a result, one direct job in Cozumel was created for every $58,700 in direct cruise tourism spending but only about 12 percent of these expenditures remained as wage income for the impacted workers.

Table 15 – Direct Economic Impact of Cruise Tourism by Destination, 2008/2009 Cruise Year

Destinations	Total Cruise Tourism Expenditures ($US Millions)	Direct Employment	Direct Employee Wage Income ($US Millions)
Acapulco	$ 21.4	431	$ 2.1
Antigua & Barbuda	$ 48.3	813	$ 7.3
Aruba	$ 54.1	735	$ 12.0
Bahamas①	$ 246.1	3,692	$ 60.3
Barbados②	$ 53.6	875	$ 9.5
Belize	$ 58.6	1,182	$ 11.7
Cabo San Lucas	$ 95.3	1,745	$ 10.5
Cayman Islands	$ 174.4	2,073	$ 38.7
Cartagena②	$ 24.6	406	$ 2.4
Costa Rica	$ 26.3	493	$ 2.7
Cozumel	$ 255.3	4,344	$ 31.9
Curacao	$ 39.3	432	$ 7.5
Dominica	$ 14.2	263	$ 2.0
Dominican Republic②	$ 23.5	508	$ 2.0
Ensenada	$ 46.4	797	$ 5.1
Grenada	$ 21.7	364	$ 2.4
Guatemala	$ 8.7	189	$ 0.8
Honduras	$ 28.3	424	$ 2.0
Huatulco	$ 10.1	222	$ 1.1
Jamaica②	$ 101.5	2,398	$ 14.0
Nicaragua	$ 2.7	97	$ 0.3
Puerto Rico②	$ 182.3	2,366	$ 32.5
St. Kitts and Nevis	$ 44.0	491	$ 3.8
St. Lucia	$ 45.7	797	$ 6.2
St. Maarten	$ 230.3	3,057	$ 58.6
St. Vincent and the Grenadines	$ 6.8	105	$ 1.0
Trinidad and Tobago	$ 2.9	93	$ 1.0
Turks and Caicos	$ 25.1	304	$ 4.9
U. S. Virgin Islands	$ 384.4	3,589	$ 79.9
All Destinations	**$ 2,275.9**	**33,285**	**$ 414.2**

① Only includes crew visits at Nassau and Freeport.

② Includes crew aboard both port-of-call and homeport cruise ships.

The Bahamas ranked first in onshore passenger and crew visits with an estimated 2.4 million visits[22] and with an average expenditure of $83.93 per onshore passenger visit, cruise tourism expenditures totaled $246.1 million, third highest among the 29 destinations. These expenditures generated an estimated 3,692 direct jobs and $60.3 million in wage income. One direct job was created for every $66,600 in direct cruise tourism expenditures and wages accounted for 24 percent of the direct expenditures.

[22] These only include arrivals at Nassau and Freeport (GBI) and do not include passenger visits to the private islands maintained by the cruise lines.

St. Maarten had the fifth highest level of total passenger and crew visits and the fourth highest level of cruise tourism expenditures. The $230 million in direct cruise tourism expenditures generated 3,057 direct jobs paying $58.6 million in wage income during the 2008/2009 cruise year. One direct job was generated for every $75,300 in cruise tourism expenditures in this destination. Like the U.S.V.I., St. Maarten has an above average wage structure and, consequently, the wage income of the impacted workers accounted for 25 percent of the direct expenditures.

The Cayman Islands ($174 million) and Puerto Rico ($182 million) had similar total cruise tourism expenditures. The Cayman Islands ranked fourth in passenger and crew visits while Puerto Rico ranked sixth. However, it required $84,100 of direct spending in the Cayman Islands to generate one direct job but only $77,000 in Puerto Rico. As a consequence, more direct jobs were generated in Puerto Rico (2,366) than in the Cayman Islands (2,073). The direct employment impacts generated $38.7 million in wages in the Cayman Islands and $32.5 million in Puerto Rico. With a higher average wage structure in the Cayman Islands, direct wages were a higher percentage of direct cruise tourism expenditures in the Cayman Islands relative to Puerto Rico, 22 percent and 18 percent, respectively.

Jamaica ranked seventh in total cruise tourism expenditures with $101 million in spending by passengers, crew and cruise lines. This western Caribbean destination ranked eighth in total passenger and crew onshore visits and had the seventh highest per passenger expenditure rate. These expenditures generated an estimated 2,398 direct jobs and $14.0 million in wage income. One direct job was created for every $42,300 in direct cruise tourism expenditures and wages accounted for 14 percent of the direct expenditures.

Total Economic Contribution of Cruise Tourism Expenditures

The economic contribution of cruise tourism expenditures is the sum of the direct, discussed above, and the indirect contributions. The indirect contribution results from the spending of the local businesses that serve the cruise sector for those goods and services that they require to conduct their business. For example, tour operators must purchase or rent vehicles and equipment to transport passengers; fuel to operate their vehicles; utility services, such as electricity and water, for their offices; and insurance for property and employees.

The estimated indirect economic contribution was developed by destination by utilizing the economic impact models discussed previously. The size of the economic impacts relative to the direct impacts is primarily determined by the degree of economic development in a particular economy. This occurs because more developed economies import proportionately fewer goods and services which reduces leakages to other economies. For example, in analyses conducted by BREA of the economic impact of the cruise industry in the United States, the indirect employment impacts were 30 percent higher than the direct impacts, resulting in an implicit employment multiplier of 2.3. In each of the destinations analyzed for this study, the indirect impacts were always smaller than the direct impacts. This is due to the relatively high proportion of imported goods and services in these economies. As a consequence, the implicit employment and wage multipliers for each destination were less than 2.0.

Table 16 – Total Economic Impact of Cruise Tourism by Destination, 2008/2009 Cruise Year

Destinations	Total Cruise Tourism Expenditures ($US Millions)	Total Employment	Total Employee Wage Income ($US Millions)
Acapulco	$ 21.4	636	$ 3.5
Antigua & Barbuda	$ 48.3	1,315	$ 11.9
Aruba	$ 54.1	1,330	$ 21.9
Bahamas①	$ 246.1	6,219	$ 100.4
Barbados②	$ 53.6	1,665	$ 17.2
Belize	$ 58.6	1,781	$ 17.7
Cabo San Lucas	$ 95.3	2,745	$ 16.7
Cayman Islands	$ 174.4	3,731	$ 69.5
Cartagena②	$ 24.6	629	$ 3.6
Costa Rica	$ 26.3	719	$ 3.9
Cozumel	$ 255.3	7,089	$ 52.8
Curacao	$ 39.3	748	$ 13.0
Dominica	$ 14.2	405	$ 3.0
Dominican Republic②	$ 23.5	788	$ 3.1
Ensenada	$ 46.4	1,279	$ 8.4
Grenada	$ 21.7	581	$ 3.9
Guatemala	$ 8.7	275	$ 1.2
Honduras	$ 28.3	632	$ 2.9
Huatulco	$ 10.1	347	$ 1.7
Jamaica②	$ 101.5	3,865	$ 22.6
Nicaragua	$ 2.7	141	$ 0.4
Puerto Rico②	$ 182.3	4,398	$ 63.2
St. Kitts and Nevis	$ 44.0	756	$ 5.9
St. Lucia	$ 45.7	1,203	$ 9.3
St. Maarten	$ 230.3	5,531	$ 106.3
St. Vincent and the Grenadines	$ 6.8	159	$ 1.5
Trinidad and Tobago	$ 2.9	143	$ 1.6
Turks and Caicos	$ 25.1	473	$ 7.7
U. S. Virgin Islands	$ 384.4	6,688	$ 146.6
All Destinations	**$ 2,275.9**	**56,271**	**$ 723.0**

① Only includes crew visits at Nassau and Freeport.

② Includes crew aboard both port-of-call and homeport cruise ships.

As shown in **Table 16**, the $2.28 billion in direct cruise tourism expenditures generated total employment of 56,271 residents of the 29 destinations and $723 million in employee wages during the 2008/2009 cruise year.

The U.S. Virgin Islands, with the highest per passenger spending rate, had the highest economic contribution. The $384 million in cruise tourism expenditures generated an estimated 6,688 jobs paying $146.6 million in wage income during the 2008/2009 cruise year.

Cozumel led the Caribbean in the number of passenger visits. In Cozumel the $255 million in total cruise tourism expenditures generated 7,089 jobs and $52.8 million in wage income during the 2008/2009 cruise year.

The Bahamas had the third highest total employment contribution. The $246 million in cruise tourism spending in the Bahamas generated 6,219 total jobs during the 2008/2009 cruise year. With a relatively low wage structure, just over $16,100 in average annual wages per impacted worker, the wage impact was $100.4 million.

The $230 million in cruise tourism expenditures in St. Maarten generated total employment of 5,531 residents and wage income of $106.3 million. The average annual wage per impacted worker in St. Maarten was over $19,000, one of the highest among the 29 destinations.

The $174 million in cruise tourism spending in the Cayman Islands generated 3,731 total jobs during the 2008/2009 cruise year. With a relatively high wage structure, just over $18,600 in average annual wages per impacted worker, the wage impact was $69.5 million.

Puerto Rico benefited from $182 million in total cruise tourism expenditures which, in turn, generated 4,398 jobs and $63.2 million in wages during the 2008/2009 cruise year. The economic benefits in Puerto Rico were generated by both homeport and port-of-call cruise ships.

Jamaica, like Puerto Rico, benefitted from both homeport and port-of-call cruise ships. The $101 million in cruise industry expenditures generated 3,865 total jobs paying $22.6 million in wage income.

Comparison to 2006 Study

While the current study covers significantly more destinations than the 2006 study, 29 versus 19 destinations, and the survey period in the current study was significantly longer than in the 2006 study, 6 months versus 3 months, it is possible to draw some general observations about the two studies.

As shown in **Table 17**, due to the larger number of destinations analyzed in the current study, the total value of cruise tourism expenditures and their subsequent economic impacts are considerably higher than those reported in the earlier study. As shown in the table, we have estimated that direct cruise tourism expenditures totaled $2.28 billion during the 2008/2009 cruise year among the 29 participating destinations. This is a 28.8 percent increase from the $1.77 billion in direct cruise tourism expenditures estimated for the 19 participating destinations during the 2005/2006 cruise year. Similarly, the employment and income impacts are also higher for the current study. The employments impacts are 35.6 percent higher while the income impacts are 20.5 percent higher.

However, if the expenditures are normalized on a per passenger basis, per passenger spending across the 29 destinations of the current study are only slightly higher than those of the 2006 study. The $2.28 billion in total expenditures among the 29 destinations of the current study equates to $129.62 per onshore passenger visit; whereas, in the 2006 study, the $1.77 billion in total expenditures among the 19 destinations equated to $129.39 per onshore passenger visit. The marginal increase of only 0.2 percent is primarily the net result of the 0.8 percent decline in per passenger spending by passengers and the 19.7 percent increase in per crew expenditures.

Table 17 – Comparison of Cruise Tourism Expenditures – All Destinations

	2008/2009 Cruise Year	2005/2006 Cruise Year	Percent Difference
Number of Participating Destinations	29	19	--
Total Direct Cruise Tourism Spending (US $ Billions)	$2.28	$1.77	28.8%
Total Passenger Onshore Visits (Millions)	17.56	13.68	28.4%
Total Expenditures per Passenger (US $)	$129.62	$129.39	0.2%
Total Employment Impact	56,271	41,500	35.6%
Total Income Impacts (US $ Millions)	$723.0	$600.1	20.5%
Average per Passenger Expenditures	$97.26	$98.01	-0.8%
Average Per Crew Expenditures	$89.24	$74.56	19.7%

Second, looking at just the 16 destinations that are common to the two studies[23] the average total expenditure per passenger in the current study is even higher relative to those same destinations in the 2006 study (see **Table 18**). Total expenditures on a per passenger basis were 3.6 percent higher during the 2008/2009 cruise year than during the 2005/2006 cruise year, $141.67 versus $136.79. While this difference is not very large it is the result of increased spending on a per passenger basis by passengers and crew which was partially offset by a decline in expenditures by cruise lines on a per passenger basis. On a per passenger basis and among the 16 common destinations, spending by passengers increased by 1.7 percent, spending by crew was up by 20 percent and spending by cruise lines declined by 2.8 percent.

Table 18 – Comparison of Cruise Tourism Expenditures – Common Destinations

	2008/2009 Cruise Year	2005/2006 Cruise Year	Percent Difference
Number of Participating Destinations	16	16	--
Total Direct Cruise Tourism Spending (US $ Billions)	$1.88	$1.45	29.7%
Total Passenger Onshore Visits (Millions)	13.27	10.60	25.2%
Total Expenditures per Passenger (US $)	$141.67	$136.79	3.6%
Total Employment Impact	44,069	38,355	14.9%
Total Income Impacts (US $ Millions)	$647.80	$552.2	17.3%
Average per Passenger Expenditures	$105.81	$104.06	1.7%
Average Per Crew Expenditures	$98.62	$82.12	20.1%

[23] These destinations are Antigua, Aruba, the Bahamas, Barbados, Belize, the Cayman Islands, Cartagena, Cozumel, Curacao, Dominica, Grenada, Puerto Rico, St. Kitts, St. Lucia, St. Maarten and the U.S.V.I.

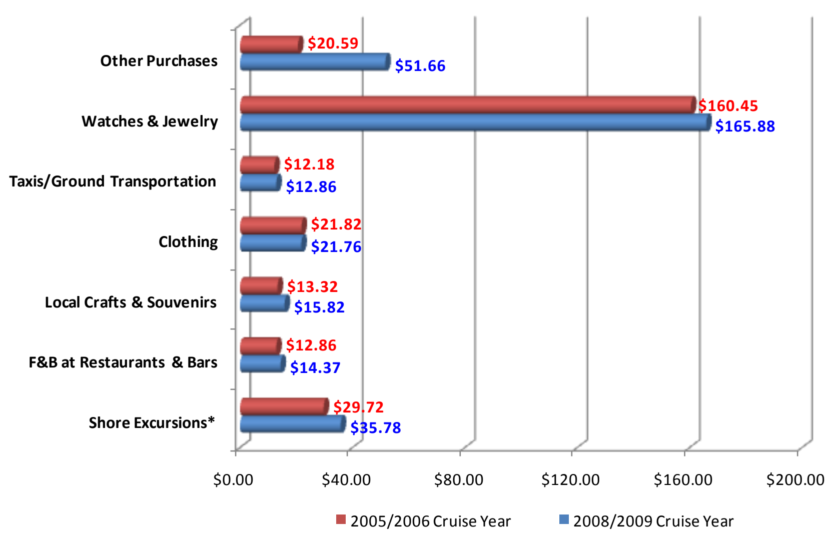
Third, since the difference in per passenger spending was higher among the sixteen common destinations, we can conclude that the additional 10 destinations reduced the per passenger spending impacts in the current study. Furthermore, since these destinations were concentrated in Central America and western Mexico, we can also conclude that spending in these regions tends to be lower than among the destinations of the basic Caribbean basin.

Fourth, the increase in passenger expenditures on a per passenger basis among the 16 destinations in both studies was the net result of an increase in per passenger spending in individual expenditure categories that was partially offset by a decline in the percentage of passengers making purchases in most of those categories. Thus, it appears that cruise passengers during the 2008/2009 cruise year were more selective in making purchases than during the 2005/2006 cruise year; but, when they did make a purchase they were willing to spend more.

Finally, crew spending increased substantially between the two periods. Among the sixteen common destinations, per crew expenditures averaged $82.12 during the 2005/2006 cruise year but increased by 20 percent to $98.62 during the 2008/2009 cruise year. This increase was the result of the combined impact of increased spending by crew in most categories, as well as an increase in the percentage of crew making onshore purchases.

In conclusion, the increase in the economic impacts during the 2008/2009 cruise year relative to the 2005/2006 cruise year are primarily due to i) the larger representation of destinations in the current study, ii) a slight marginal decrease in per passenger expenditures iii) a decline in expenditures by cruise lines on a per passenger basis; and iv) a substantial increase in crew expenditures in aggregate and on a per crew basis.

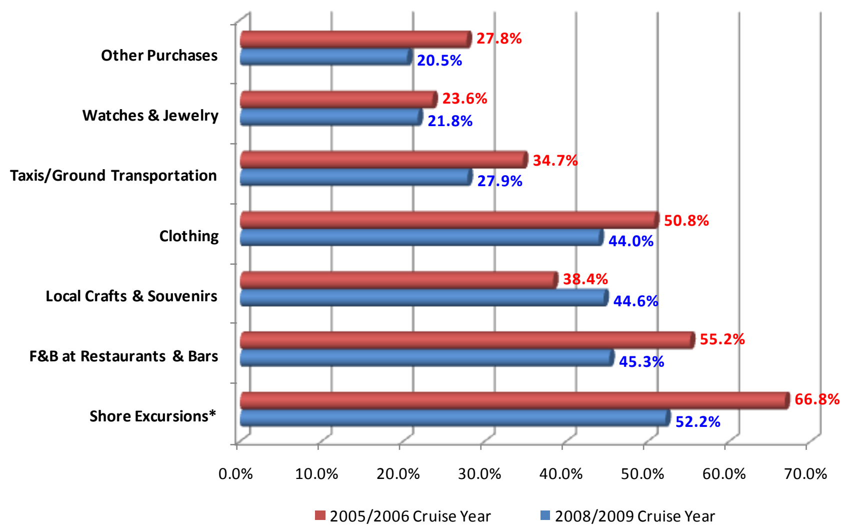
Figure 1 – Average Passenger Expenditures by Category



Because passenger expenditures account for 75 percent of total direct cruise tourism expenditures we have provided a more detailed analysis of the change in passenger spending between the current and 2006 studies. The increase in average expenditure by category is shown in **Figure 1**. For ease of illustration we have not shown the five smallest categories which account for 6% of passenger expenditures. As shown in the figure, the average value of passenger purchases was higher in the 2008/2009 cruise year for all major categories except clothing which was essentially unchanged. The highest percentage increases were for other purchases (150%), shore excursions (20%), local crafts (19%) and food and beverages (12%). Thus, on average, cruise passengers did spend more during the 2008/2009 cruise year when they did make a purchase, whether it was a shore excursion, the purchase of a meal in a restaurant or other purchases.

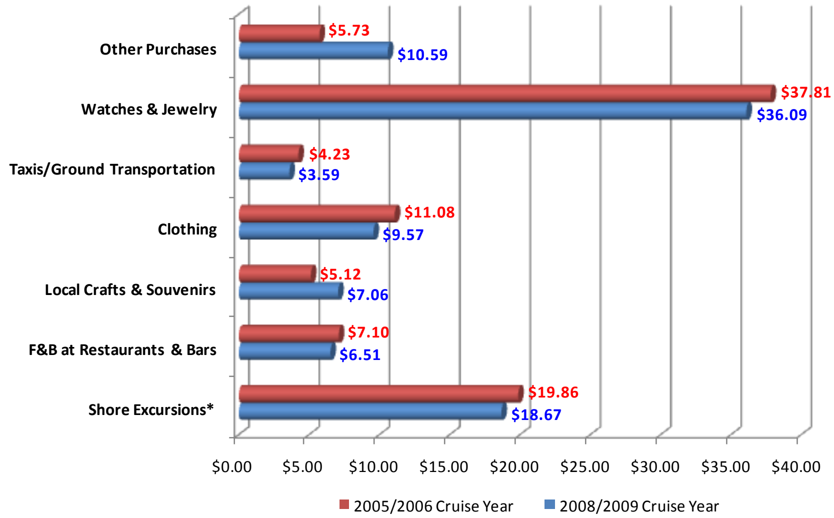
However, as stated above this increase in the average expenditure was offset by a smaller percentage of passengers making onshore purchases. As shown in **Figure 2** a smaller percentage of passengers made an onshore purchase during the 2008/2009 cruise year in all major categories except local crafts and souvenirs. For example, during the 2005/2006 cruise year, 66.8% of passengers reported purchasing a shore excursion. This percentage declined to 52.2% during the 2008/2009 cruise year. Smaller declines between 6 and 10 percentage points were recorded for food and beverages, clothing and other purchases. Thus, it appears that cruise passengers were more selective in making purchases during the most recent period; but, when they did make a purchase they were willing to spend more.

Figure 2 – Average Percentage of Passengers Making Purchases



Thus, when the average per passenger expenditures were weighted by the share of onshore purchasers, the weighted expenditure for some categories increased and fell for others (see **Figure 3**). The weighted average expenditure fell for watches and jewelry, ground transportation, clothing, food and beverages and shore excursions as the decline in the percentage of passengers making these purchases more than offset the increase in the average expenditure. The weighted average expenditure rose for local crafts and souvenirs and other purchases as the increase in the average spend more than offset the decline in the percentage of passengers making such purchases.

Figure 3 – Average Weighted Expenditure by Category



In conclusion, then, the marginal decline in the weighted average passenger expenditures among the full set of destinations during the 2008/2009 cruise year, which occurred in most categories, was partially offset by larger increases in a smaller number of categories. As a result, the weighted average expenditure of Caribbean cruise passengers declined slightly to $97.26 during the 2008/2009 cruise year from $98.01 during the 2005/2006 cruise year.

Table 19 – Passenger and Crew Expenditures – Average per Visit – 2009 and 2006 Cruise Tourism Studies

Destinations	2009 Study		2006 Study		Ratio: 2009/2006	
	Average Spend per Visit (Pax)	Average Spend per Visit (Crew)	Average Spend per Visit (Pax)	Average Spend per Visit (Crew)	Average Spend per Visit (Pax)	Average Spend per Visit (Crew)
Antigua	$72.06	$54.16	$84.00	$52.47	-14.2%	3.2%
Aruba	$87.41	$69.34	$113.26	$78.45	-22.8%	-11.6%
Bahamas	$83.93	$77.95	$60.54	$19.96	38.6%	290.5%
Barbados①	$69.10	$54.26	$111.82	$76.18	-38.2%	-28.8%
Belize	$87.96	$66.24	$87.77	$18.23	0.2%	263.4%
Cayman Islands	$96.78	$108.81	$82.73	$45.92	17.0%	137.0%
Cartagena①	$90.02	$65.64	$114.73	$43.64	-21.5%	50.4%
Cozumel	$104.58	$63.48	$91.64	$48.77	14.1%	30.2%
Curacao	$81.21	$116.88	$53.34	$39.17	52.3%	198.4%
Dominica	$45.87	$56.41	$51.20	$74.80	-10.4%	-24.6%
Grenada	$49.01	$40.30	$53.82	$26.07	-8.9%	54.6%
Puerto Rico (San Juan)①	$100.55	$138.63	$96.94	$91.13	3.7%	52.1%
St. Kitts	$99.41	$142.14	$57.40	$20.61	73.2%	589.7%
St. Lucia	$68.53	$37.66	$82.62	$31.01	-17.1%	21.4%
St. Maarten	$147.98	$149.45	$145.15	$159.55	1.9%	-6.3%
U.S.V.I. (St. Thomas)	$193.22	$152.58	$176.69	$143.83	9.4%	6.1%

① Includes Intransit and Homeport Passengers

On a destination basis, there was considerable variability in the change in estimated passenger and crew expenditure from the 2006 study. As shown in **Table 19**, the change in per passenger expenditures ranged from a high of 73% in St. Kitts to a low of -38% in Barbados. Among the sixteen destinations common to both studies, ten (10) showed an increase in per passenger expenditures and six (6) showed a decrease. A discussion of the primary causes of these changes is provided in Volume II where the impacts for each destination are reported. The change in per crew expenditures is more uniformly positive with twelve (12) destinations showing an increase and only four (4) showing a decline. In most cases the percentage of crew making onshore purchases increased from 2006. In those destinations in which the change was negative, crew tended to spend less when they made onshore purchases.

Table 20 – Passenger and Crew Expenditures – Total Spend During Cruise Year – 2009 and 2006 Cruise Tourism Studies – Millions US $

Destinations	2009 Study		2006 Study		Ratio: 2009/2006	
	Total Spend per Visit (Pax)	Total Spend per Visit (Crew)	Total Spend per Visit (Pax)	Total Spend per Visit (Crew)	Total Spend per Visit (Pax)	Total Spend per Visit (Crew)
Antigua	$38.30	$5.50	$32.90	$4.10	16.4%	34.1%
Aruba	$42.60	$6.50	$54.20	$7.00	-21.4%	-7.1%
Bahamas	$169.50	$28.00	$96.00	$5.60	76.6%	400.0%
Barbados①	$42.00	$6.40	$45.30	$6.30	-7.3%	1.6%
Belize	$45.70	$4.50	$53.60	$1.30	-14.7%	246.2%
Cayman Islands	$126.40	$21.80	$138.30	$12.00	-8.6%	81.7%
Cartagena①	$19.00	$2.10	$3.70	$0.20	413.5%	950.0%
Cozumel	$205.00	$25.60	$157.10	$17.40	30.5%	47.1%
Curacao	$28.00	$6.80	$13.50	$1.60	107.4%	325.0%
Dominica	$10.60	$2.10	$9.70	$2.60	9.3%	-19.2%
Grenada	$13.40	$1.90	$13.20	$1.30	1.5%	46.2%
Puerto Rico (San Juan)①	$118.80	$29.20	$115.00	$18.60	3.3%	57.0%
St. Kitts	$33.20	$7.80	$5.40	$0.40	514.8%	1850.0%
St. Lucia	$36.50	$4.30	$28.60	$2.40	27.6%	79.2%
St. Maarten	$170.50	$48.70	$189.30	$46.20	-9.9%	5.4%
U.S.V.I. (St. Thomas)	$304.30	$51.30	$288.30	$50.60	5.5%	1.4%

① Includes Intransit and Homeport Passengers

Table 20 shows estimated total expenditures for the 2008/2009 and 2005/2006 cruise years for those sixteen destinations common to both studies. As indicated in the table there are only five (5) destinations that experienced a decline in total passenger expenditures and only two (2) that experienced a decline in total crew expenditures. In Aruba and Barbados, the decline in total passenger expenditures was primarily the result of a decline in per passenger expenditures that was only partially offset by an increase in passenger visits. In Belize, the Cayman Islands and St. Maarten the decline was the result of a decrease in total passenger visits during the 2008/2009 cruise year. With respect to the decline in total crew expenditures in Aruba and Dominica, this was primarily due to the decline in the average spend per crew member.

APPENDIX B – DATA AND RANKING TABLES

This appendix contains data and ranking tables that include data on expenditures, economic impacts, satisfaction and other data derived from the passenger surveys for all destinations and regional aggregates. The regional definitions are as follows:

Eastern Caribbean: Antigua, the Bahamas, Dominica, the Dominican Republic, Puerto Rico, St. Kitts and Nevis, St. Maarten, the Turks and Caicos and the U.S. Virgin Islands.

Southern Caribbean: Aruba, Barbados, Cartagena, Costa Rica, Curacao, Grenada, St. Lucia, St. Vincent and the Grenadines, and Trinidad and Tobago.

Western Caribbean: Belize, the Cayman Islands, Cozumel, Guatemala, Honduras, Jamaica and Nicaragua.

Mexico West: Acapulco, Cabo San Lucas, Ensenada and Huatulco.

Table B-1 - Total Economic Contribution of Cruise Tourism by Destination, 2008/2009 Cruise Year

Destinations	Total Cruise Tourism Expenditures ($US Millions)	Rank	Total Employment	Rank	Total Employee Wage Income ($US Millions)	Rank
U. S. Virgin Islands	$384.4	1	6,688	2	$146.6	1
Cozumel	$255.3	2	7,089	1	$52.8	6
Bahamas	$246.1	3	6,219	3	$100.4	3
St. Maarten	$230.3	4	5,531	4	$106.3	2
Puerto Rico	$182.3	5	4,398	5	$63.2	5
Cayman Islands	$174.4	6	3,731	7	$69.5	4
Jamaica	$101.5	7	3,865	6	$22.6	7
Cabo San Lucas	$95.3	8	2,745	8	$16.7	11
Belize	$58.6	9	1,781	9	$17.7	9
Aruba	$54.1	10	1,330	11	$21.9	8
Barbados	$53.6	11	1,665	10	$17.2	10
Antigua & Barbuda	$48.3	12	1,315	12	$11.9	13
Ensenada	$46.4	13	1,279	13	$8.4	15
St. Lucia	$45.7	14	1,203	14	$9.3	14
St. Kitts and Nevis	$44.0	15	756	16	$5.9	17
Curacao	$39.3	16	748	17	$13.0	12
Honduras	$28.3	17	632	20	$2.9	24
Costa Rica	$26.3	18	719	18	$3.9	18
Turks and Caicos	$25.1	19	473	23	$7.7	16
Cartagena	$24.6	20	629	21	$3.6	20
Dominican Republic	$23.5	21	788	15	$3.1	22
Grenada	$21.7	22	581	22	$3.9	19
Acapulco	$21.4	23	636	19	$3.5	21
Dominica	$14.2	24	405	24	$3.0	23
Huatulco	$10.1	25	347	25	$1.7	25
Guatemala	$8.7	26	275	26	$1.2	28
St. Vincent and the Grenadines	$6.8	27	159	27	$1.5	27
Trinidad and Tobago	$2.9	28	143	28	$1.6	26
Nicaragua	$2.7	29	141	29	$0.4	29
All Destinations	**$2,275.9**		**56,271**		**$723.0**	
Eastern Caribbean	$1,198.2	1	26,573	1	$448.1	1
Western Caribbean	$629.5	2	17,514	2	$167.1	2
Southern Caribbean	$275.0	3	7,177	3	$75.9	3
Mexico West	$173.2	4	5,007	4	$30.3	4

Table B-2 - Passengers Onshore Visits and Expenditures by Destination, 2008/2009 Cruise Year

Destinations	Passenger Onshore Visits (Thousands)	Rank	Average Expenditure per Passenger ($ US)	Rank	Total Passenger Expenditures ($US Millions)	Rank
U. S. Virgin Islands	1,575	3	$193.22	1	$304.3	1
Cozumel	1,960	2	$104.58	3	$205.0	2
St. Maarten	1,152	6	$147.98	2	$170.5	3
Bahamas	2,019	1	$83.93	12	$169.5	4
Cayman Islands	1,306	4	$96.78	6	$126.4	5
Puerto Rico	1,182	5	$100.55	4	$118.8	6
Jamaica	883	8	$92.72	7	$81.8	7
Cabo San Lucas	968	7	$79.87	14	$77.3	8
Belize	519	13	$87.96	9	$45.7	9
Aruba	487	14	$87.41	11	$42.6	10
Barbados	608	9	$69.10	17	$42.0	11
Antigua & Barbuda	532	11	$72.06	15	$38.3	12
St. Lucia	532	12	$68.53	18	$36.5	13
St. Kitts and Nevis	334	17	$99.41	5	$33.2	14
Ensenada	533	10	$57.73	22	$30.8	15
Curacao	344	16	$81.21	13	$28.0	16
Honduras	329	18	$70.39	16	$23.2	17
Cartagena	211	23	$90.03	8	$19.0	18
Turks and Caicos	277	19	$67.22	20	$18.6	19
Costa Rica	267	21	$67.28	19	$18.0	20
Dominican Republic②	411	15	$43.42	27	$17.9	21
Acapulco	166	24	$87.65	10	$14.5	22
Grenada	273	20	$49.01	24	$13.4	23
Dominica	232	22	$45.87	26	$10.6	24
Guatemala	115	27	$63.47	21	$7.3	25
Huatulco	126	25	$49.05	23	$6.2	26
St. Vincent and the Grenadines	125	26	$33.50	29	$4.2	27
Nicaragua	52	28	$35.63	28	$1.9	28
Trinidad and Tobago	39	29	$46.27	25	$1.8	29
All Destinations	**17,558**		**$97.26**		**$1,707.3**	
Eastern Caribbean	7,128	1	$119.13	1	$849.1	1
Western Caribbean	5,867	2	$87.51	2	$513.4	2
Southern Caribbean	2,846	3	$71.15	4	$202.5	3
Mexico West	1,717	4	$82.89	3	$142.3	4

Table B-3 - Crew Visits and Expenditures by Destination, 2008/2009 Cruise Year

Destinations	Crew Onshore Visits (Thousands)	Rank	Average Expenditure per Crew ($ US)	Rank	Total Crew Expenditures ($US Millions)	Rank
U. S. Virgin Islands	336.1	3	$152.58	1	$51.3	1
St. Maarten	326.0	4	$149.45	2	$48.7	2
Puerto Rico	210.9	5	$138.63	4	$29.2	3
Bahamas	359.6	2	$77.95	7	$28.0	4
Cozumel	403.7	1	$63.48	14	$25.6	5
Cayman Islands	200.0	6	$108.81	6	$21.8	6
St. Kitts and Nevis	54.5	18	$142.14	3	$7.8	7
Jamaica	150.0	7	$51.32	22	$7.7	8
Curacao	58.5	16	$116.88	5	$6.8	9
Cabo San Lucas	120.8	8	$54.25	19	$6.6	10
Aruba	93.9	12	$69.34	9	$6.5	11
Barbados	117.9	9	$54.26	18	$6.4	12
Ensenada	89.2	13	$65.12	13	$5.8	13
Antigua & Barbuda	101.4	11	$54.16	20	$5.5	14
Belize	68.5	14	$66.24	11	$4.5	15
St. Lucia	113.5	10	$37.66	25	$4.3	16
Turks and Caicos	57.7	17	$61.00	15	$3.5	17
Acapulco	41.4	21	$69.80	8	$2.9	18
Dominican Republic	59.4	15	$47.59	23	$2.8	19
Costa Rica	47.1	19	$51.97	21	$2.4	20
Honduras	36.8	23	$58.66	16	$2.2	21
Dominica	37.3	22	$56.41	17	$2.1	23
Cartagena	32.4	24	$65.64	12	$2.1	22
Grenada	46.3	20	$40.30	24	$1.9	24
Huatulco	20.0	25	$37.02	26	$0.7	25
Guatemala	15.7	27	$31.80	27	$0.5	27
Trinidad and Tobago	7.0	29	$66.95	10	$0.5	26
St. Vincent and the Grenadines	19.9	26	$17.61	11	$0.3	29
Nicaragua	9.6	28	$29.96	28	$0.3	28
All Destinations	**3,235.1**		**$89.24**		**$288.7**	
Eastern Caribbean	1,599	1	$94.43	1	$151.0	1
Western Caribbean	751	2	$118.86	2	$89.3	2
Southern Caribbean	589	3	$54.35	4	$32.0	3
Mexico West	296	4	$55.41	3	$16.4	4

Table B-4 - Total Expenditures by Cruise Lines by Destination, 2008/2009 Cruise Year

Destinations	Estimated Expenditures ($US Millions)	Rank
Bahamas	$48.5	1
Puerto Rico	$34.2	2
U. S. Virgin Islands	$28.6	3
Cayman Islands	$26.1	4
Cozumel	$24.6	5
Jamaica	$11.9	6
Cabo San Lucas	$11.3	7
St. Maarten	$11.0	8
Ensenada	$9.8	9
Belize	$8.4	10
Grenada	$6.4	11
Costa Rica	$5.9	12
Barbados	$5.2	13
Aruba	$5.0	14
St. Lucia	$4.9	15
Antigua & Barbuda	$4.5	16
Curacao	$4.5	17
Acapulco	$4.0	18
Cartagena	$3.5	19
Huatulco	$3.1	20
St. Kitts and Nevis	$3.0	21
Turks and Caicos	$3.0	22
Honduras	$2.9	23
Dominican Republic	$2.8	24
St. Vincent and the Grenadines	$2.3	25
Dominica	$1.5	26
Guatemala	$0.9	27
Trinidad and Tobago	$0.6	28
Nicaragua	$0.5	29
All Destinations	**$279.9**	
Eastern Caribbean	$137.1	1
Western Caribbean	$75.3	2
Southern Caribbean	$38.3	3
Mexico West	$28.2	4

Table B-5 – Is this your first visit to "destination"?

			Number of Previous Visits					
Destinations	**First Visit**	**Rank**	**Unspecified**	**1**	**2**	**3**	**4**	**5+**
Nicaragua	95.9%	1	0.3%	2.6%	1.0%	0.1%	0.0%	0.1%
Huatulco	90.3%	2	0.7%	6.4%	1.4%	0.4%	0.3%	0.5%
Honduras	86.8%	3	0.5%	7.4%	2.5%	1.6%	0.7%	0.5%
St. Kitts and Nevis	86.6%	4	0.8%	8.8%	1.8%	1.3%	0.4%	0.3%
Turks and Caicos	86.5%	5	1.4%	8.2%	2.4%	0.8%	0.3%	0.4%
Guatemala	86.0%	6	1.1%	9.1%	2.0%	1.0%	0.1%	0.7%
St. Vincent and the Grenadines	85.9%	7	0.9%	10.8%	1.1%	0.6%	0.2%	0.5%
Trinidad and Tobago	81.9%	8	1.4%	11.0%	2.9%	1.2%	0.9%	0.7%
Belize	80.6%	9	1.3%	11.4%	3.3%	1.7%	0.7%	1.0%
Cartagena	79.4%	10	1.9%	12.9%	2.9%	1.6%	0.4%	0.9%
Dominican Republic	78.9%	11	2.8%	11.8%	3.9%	1.4%	1.1%	0.1%
Grenada	76.6%	12	1.6%	13.0%	5.2%	1.9%	1.1%	0.6%
Costa Rica	75.4%	13	1.5%	13.7%	4.4%	2.4%	1.5%	1.1%
Dominica	74.9%	14	2.0%	12.8%	5.6%	2.3%	1.3%	1.1%
St. Lucia	72.2%	15	1.3%	13.6%	6.6%	3.2%	1.2%	1.9%
Antigua & Barbuda	72.0%	16	3.2%	12.6%	5.6%	2.6%	1.5%	2.5%
Curacao	71.8%	17	1.7%	13.4%	6.6%	3.2%	1.4%	1.9%
Acapulco	64.6%	18	3.1%	15.1%	7.7%	3.6%	2.4%	3.5%
Aruba	63.4%	19	3.5%	16.6%	7.5%	4.1%	1.8%	3.1%
Cayman Islands	63.1%	20	2.1%	15.1%	7.8%	5.0%	2.8%	4.1%
Jamaica	61.8%	21	2.7%	16.7%	7.3%	4.8%	2.5%	4.2%
Cabo San Lucas	61.6%	22	3.5%	14.4%	7.4%	4.2%	2.5%	6.4%
Barbados	59.5%	23	2.7%	16.5%	9.3%	5.3%	2.5%	4.2%
St. Maarten	55.1%	24	3.3%	15.9%	9.2%	6.4%	3.7%	6.4%
Ensenada	54.7%	25	4.9%	14.3%	8.5%	5.8%	2.8%	9.0%
Puerto Rico	53.8%	26	4.8%	14.6%	10.6%	5.6%	3.2%	7.4%
Cozumel	52.5%	27	3.4%	15.6%	10.7%	6.3%	4.0%	7.5%
U. S. Virgin Islands	44.1%	28	4.8%	16.0%	10.2%	6.5%	3.8%	14.6%
Bahamas	43.7%	29	4.1%	18.0%	10.5%	7.4%	5.8%	10.5%
All Destinations	**70.7%**		**2.3%**	**12.8%**	**5.8%**	**3.2%**	**1.8%**	**3.4%**
Southern Caribbean	73.6%	1	1.9%	13.6%	5.4%	2.7%	1.3%	1.5%
Western Caribbean	73.1%	2	1.8%	11.8%	5.4%	3.2%	1.7%	3.0%
Eastern Caribbean	70.2%	3	2.6%	12.6%	6.0%	3.3%	2.0%	3.3%
Mexico West	63.0%	4	3.1%	13.7%	7.7%	4.3%	2.7%	5.5%

Table B-6 – How many hours did you spend ashore during your cruise call in "destination" today?

Destinations	Mean Hours	Rank	1-2	3-4	5-6	7+
Costa Rica	5.2	1	13.1%	20.3%	40.3%	26.3%
Cozumel	5.0	2	9.3%	28.1%	39.2%	23.4%
St. Maarten	4.8	3	6.1%	35.3%	43.2%	15.4%
Guatemala	4.6	4	21.3%	30.1%	27.6%	21.0%
Bahamas	4.6	5	15.3%	36.1%	31.1%	17.5%
Acapulco	4.6	6	12.0%	37.6%	34.6%	15.8%
U. S. Virgin Islands	4.6	7	11.5%	37.2%	38.6%	12.7%
Belize	4.5	8	18.3%	30.5%	32.9%	18.3%
St. Lucia	4.5	9	14.5%	36.4%	33.2%	15.9%
Jamaica	4.5	10	13.2%	34.3%	41.0%	11.5%
Nicaragua	4.4	11	21.0%	34.7%	23.6%	20.7%
Barbados	4.4	12	13.0%	41.3%	34.3%	11.4%
St. Kitts and Nevis	4.4	13	12.9%	39.9%	39.5%	7.7%
Curacao	4.3	14	12.6%	44.8%	32.4%	10.2%
Cayman Islands	4.3	15	11.1%	43.5%	37.2%	8.2%
Honduras	4.3	16	11.9%	37.7%	43.4%	7.0%
Aruba	4.2	17	15.5%	46.9%	28.8%	8.8%
Ensenada	4.2	18	12.9%	39.8%	40.0%	7.3%
Antigua & Barbuda	4.1	19	19.9%	38.6%	32.6%	8.9%
Cabo San Lucas	4.1	20	16.0%	46.7%	30.1%	7.2%
Puerto Rico	3.9	21	19.1%	44.3%	23.8%	12.8%
Dominica	3.9	22	22.2%	39.5%	31.9%	6.4%
Cartagena	3.9	23	12.0%	57.9%	27.1%	3.0%
Grenada	3.8	24	21.4%	46.6%	28.2%	3.8%
Trinidad and Tobago	3.6	25	26.2%	44.3%	22.1%	7.4%
Dominican Republic	3.6	26	27.3%	42.4%	26.8%	3.5%
Huatulco	3.6	27	20.2%	57.8%	20.0%	2.0%
Turks and Caicos	3.5	28	23.3%	53.1%	22.3%	1.3%
St. Vincent and the Grenadines	3.4	29	35.5%	37.7%	19.9%	6.9%
All Destinations	**4.3**		**16.3%**	**39.3%**	**32.3%**	**12.1%**
Western Caribbean	4.6	1	15.4%	33.3%	34.0%	17.3%
Mexico West	4.4	2	13.3%	40.0%	33.3%	13.4%
Southern Caribbean	4.2	3	17.3%	41.7%	30.3%	10.7%
Eastern Caribbean	4.1	4	17.6%	41.4%	32.1%	8.9%

Table B-7 – How satisfied were you with your overall visit to "destination"?

Destinations	Mean Score	Rank	Extremely Satisfied	Very Satisfied	Somewhat Satisfied	Not Too Satisfied	Not At All Satisfied	Satisfied	Not Satisfied
Cozumel	8.1	1	51.6%	29.4%	12.3%	3.6%	3.1%	93.3%	6.7%
St. Maarten	8.0	2	50.7%	30.6%	12.1%	4.0%	2.6%	93.4%	6.6%
Ensenada	8.0	3	42.1%	30.8%	15.3%	5.8%	6.0%	88.2%	11.8%
U. S. Virgin Islands	7.9	4	46.4%	32.4%	14.0%	3.9%	3.3%	92.8%	7.2%
St. Kitts and Nevis	7.8	5	49.8%	27.6%	12.4%	5.3%	4.9%	89.8%	10.2%
Bahamas	7.7	6	44.4%	31.0%	16.1%	5.1%	3.4%	91.5%	8.5%
Honduras	7.6	7	49.9%	25.0%	12.8%	3.8%	8.5%	87.7%	12.3%
St. Lucia	7.5	8	43.8%	28.1%	14.9%	5.5%	7.7%	86.8%	13.2%
Huatulco	7.3	9	48.4%	29.8%	12.6%	5.4%	3.8%	90.8%	9.2%
Guatemala	7.3	10	48.8%	26.3%	13.2%	5.4%	6.3%	88.3%	11.7%
Antigua & Barbuda	7.3	11	36.9%	30.4%	17.6%	6.9%	8.2%	84.9%	15.1%
Cabo San Lucas	7.2	12	39.1%	35.9%	15.7%	5.9%	3.4%	90.7%	9.3%
Cayman Islands	7.2	13	39.1%	31.0%	18.1%	7.1%	4.7%	88.2%	11.8%
Aruba	7.2	14	35.2%	33.1%	19.2%	7.9%	4.6%	87.5%	12.5%
Acapulco	7.2	15	39.1%	29.7%	16.1%	7.2%	7.9%	84.9%	15.1%
Curacao	7.1	16	43.1%	33.2%	14.5%	5.7%	3.5%	90.8%	9.2%
Grenada	7.1	17	38.6%	29.4%	15.5%	8.9%	7.6%	83.5%	16.5%
Dominica	7.1	18	35.3%	27.3%	15.7%	8.7%	13.0%	78.3%	21.7%
Costa Rica	7.0	19	45.2%	30.2%	11.3%	6.2%	7.1%	86.7%	13.3%
Barbados	7.0	20	39.6%	29.2%	15.9%	8.2%	7.1%	84.7%	15.3%
Turks and Caicos	6.9	21	35.6%	26.4%	19.1%	9.9%	9.0%	81.1%	18.9%
Puerto Rico	6.8	22	30.7%	29.1%	21.4%	9.4%	9.4%	81.2%	18.8%
Jamaica	6.8	23	33.8%	28.9%	15.5%	8.9%	12.9%	78.2%	21.8%
Cartagena	6.7	24	31.7%	28.3%	19.0%	10.0%	11.0%	79.0%	21.0%
St. Vincent and the Grenadines	6.7	25	42.2%	19.5%	11.6%	7.4%	19.3%	73.3%	26.7%
Belize	6.6	26	37.3%	27.3%	16.3%	9.0%	10.1%	80.9%	19.1%
Nicaragua	6.5	27	27.2%	30.2%	20.0%	11.3%	11.3%	77.4%	22.6%
Trinidad and Tobago	6.5	28	33.0%	25.1%	17.0%	9.5%	15.4%	75.1%	24.9%
Dominican Republic	5.5	29	19.1%	24.4%	20.8%	13.1%	22.6%	64.3%	35.7%
All Destinations	**7.3**		**40.3%**	**29.2%**	**15.6%**	**7.2%**	**7.7%**	**85.1%**	**14.9%**
Mexico West	7.7	1	45.0%	31.0%	14.1%	5.4%	4.5%	90.1%	9.9%
Western Caribbean	7.3	2	41.2%	28.6%	15.4%	7.1%	7.7%	85.2%	14.8%
Eastern Caribbean	7.2	3	38.9%	28.3%	16.4%	7.6%	8.8%	83.6%	16.4%
Southern Caribbean	7.2	4	39.0%	29.0%	15.6%	7.8%	8.6%	83.6%	16.4%

Table B-8 – How did your visit to "destination" meet your expectations?

Destinations	Mean Score	Rank	Greatly Exceeded Expectations	Exceeded Expectations	Met Expectations	Fell Short of Expectations	Fell Far Short of Expectations	Met or Exceeded Expectations	Did Not Meet Expectations
Cozumel	7.6	1	43.2%	31.9%	15.1%	5.1%	4.7%	90.2%	9.8%
Huatulco	7.5	2	39.7%	33.4%	15.8%	5.6%	5.5%	88.9%	11.1%
St. Maarten	7.5	3	38.8%	36.1%	13.8%	6.2%	5.1%	88.7%	11.3%
Curacao	7.4	4	36.2%	35.1%	18.9%	4.6%	5.2%	90.2%	9.8%
U. S. Virgin Islands	7.4	5	36.5%	36.7%	16.7%	5.0%	5.1%	89.9%	10.1%
St. Kitts and Nevis	7.4	6	40.1%	32.8%	14.1%	6.2%	6.8%	87.0%	13.0%
Honduras	7.4	7	45.3%	25.1%	14.1%	6.0%	9.5%	84.5%	15.5%
Bahamas	7.3	8	38.1%	31.2%	18.9%	6.1%	5.7%	88.2%	11.8%
Cabo San Lucas	7.2	9	34.2%	34.5%	18.8%	6.5%	6.0%	87.5%	12.5%
Ensenada	7.2	10	36.7%	31.4%	18.7%	6.7%	6.5%	86.8%	13.2%
Guatemala	7.2	11	38.5%	29.8%	16.7%	6.0%	9.0%	85.0%	15.0%
St. Lucia	7.1	12	35.7%	31.5%	16.4%	7.5%	8.9%	83.6%	16.4%
Costa Rica	7.0	13	34.5%	31.3%	18.3%	7.1%	8.8%	84.1%	15.9%
Acapulco	6.9	14	32.9%	30.9%	19.4%	7.8%	9.0%	83.2%	16.8%
Cayman Islands	6.9	15	31.3%	31.6%	19.6%	9.1%	8.4%	82.5%	17.5%
Aruba	6.8	16	27.9%	32.3%	22.2%	10.1%	7.5%	82.4%	17.6%
Antigua & Barbuda	6.7	17	28.9%	31.9%	20.4%	8.9%	9.9%	81.2%	18.8%
Grenada	6.7	18	30.9%	30.3%	19.3%	8.8%	10.7%	80.5%	19.5%
Barbados	6.7	19	31.0%	30.0%	18.3%	8.7%	12.0%	79.3%	20.7%
Belize	6.6	20	30.4%	29.2%	17.7%	9.6%	13.1%	77.3%	22.7%
Dominica	6.5	21	29.0%	29.4%	18.3%	8.8%	14.5%	76.7%	23.3%
Jamaica	6.4	22	28.6%	28.9%	18.9%	9.4%	14.2%	76.4%	23.6%
Puerto Rico	6.4	23	25.4%	29.5%	21.2%	12.0%	11.9%	76.1%	23.9%
Turks and Caicos	6.3	24	27.8%	26.2%	20.7%	9.6%	15.7%	74.7%	25.3%
St. Vincent and the Grenadines	6.3	25	32.8%	25.2%	13.2%	9.2%	19.6%	71.2%	28.8%
Nicaragua	6.2	26	22.3%	30.8%	22.7%	10.8%	13.4%	75.8%	24.2%
Cartagena	6.2	27	25.8%	28.4%	19.8%	11.4%	14.6%	74.0%	26.0%
Trinidad and Tobago	6.0	28	23.9%	26.5%	20.3%	10.8%	18.5%	70.7%	29.3%
Dominican Republic	5.2	29	14.7%	24.1%	22.2%	14.6%	24.4%	61.0%	39.0%
All Destinations	**6.9**		**32.7%**	**30.8%**	**18.3%**	**8.1%**	**10.1%**	**81.8%**	**18.2%**
Mexico West	7.3	1	38.0%	32.4%	17.3%	6.2%	6.1%	87.7%	12.3%
Western Caribbean	6.9	2	33.9%	30.2%	18.0%	7.9%	10.0%	82.1%	17.9%
Southern Caribbean	6.7	3	30.7%	30.4%	19.0%	8.6%	11.3%	80.1%	19.9%
Eastern Caribbean	6.7	4	31.1%	30.4%	18.3%	8.7%	11.5%	79.8%	20.2%

Table B-9 – How likely are you to return to "destination" for a land-based or resort vacation within the next three years?

Destinations	Mean Score	Rank	Extremely Likely	Very Likely	Somewhat Likely	Not Too Likely	Not At All Likely	Likely	Not Likely
Cozumel	5.7	1	26.6%	19.7%	18.1%	9.4%	26.2%	64.4%	35.6%
Bahamas	5.6	2	25.6%	18.3%	19.0%	11.6%	25.5%	62.9%	37.1%
U. S. Virgin Islands	5.4	3	23.6%	20.5%	17.6%	7.8%	30.5%	61.7%	38.3%
Cabo San Lucas	5.4	4	22.9%	20.7%	16.4%	11.7%	28.3%	60.0%	40.0%
Honduras	5.2	5	24.3%	18.3%	14.9%	7.7%	34.8%	57.5%	42.5%
St. Maarten	5.1	6	21.9%	18.0%	16.6%	11.6%	31.9%	56.5%	43.5%
St. Kitts and Nevis	5.0	7	20.4%	19.9%	15.2%	9.6%	34.9%	55.5%	44.5%
Ensenada	4.9	8	20.1%	14.9%	17.7%	11.0%	36.3%	52.7%	47.3%
Cayman Islands	4.7	9	17.3%	16.8%	17.2%	13.4%	35.3%	51.3%	48.7%
St. Lucia	4.6	10	16.7%	17.6%	16.4%	10.8%	38.5%	50.7%	49.3%
Huatulco	4.6	11	15.4%	18.9%	16.0%	9.6%	40.1%	50.3%	49.7%
Costa Rica	4.4	12	13.9%	17.0%	17.1%	11.9%	40.1%	48.0%	52.0%
Barbados	4.4	13	14.6%	15.8%	16.3%	12.4%	40.9%	46.7%	53.3%
Jamaica	4.2	14	14.9%	13.4%	15.0%	11.3%	45.4%	43.3%	56.7%
Guatemala	4.1	15	12.7%	14.5%	17.3%	10.6%	44.9%	44.5%	55.5%
Aruba	4.1	16	13.5%	14.8%	15.8%	11.3%	44.6%	44.1%	55.9%
Turks and Caicos	4.1	17	14.2%	13.7%	15.3%	10.3%	46.5%	43.2%	56.8%
Puerto Rico	4.1	18	12.4%	10.8%	19.5%	15.4%	41.9%	42.7%	57.3%
Antigua & Barbuda	4.1	19	12.8%	13.7%	15.7%	13.4%	44.4%	42.2%	57.8%
Curacao	4.0	20	12.1%	15.8%	15.1%	9.4%	47.6%	43.0%	57.0%
Acapulco	3.8	21	10.3%	13.8%	16.3%	11.4%	48.2%	40.4%	59.6%
Grenada	3.8	22	9.8%	14.2%	15.5%	13.6%	46.9%	39.5%	60.5%
Belize	3.8	23	10.8%	13.3%	15.0%	12.4%	48.5%	39.1%	60.9%
St. Vincent and the Grenadines	3.7	24	11.8%	15.0%	11.6%	8.2%	53.4%	38.4%	61.6%
Dominica	3.3	25	9.5%	10.0%	12.7%	11.0%	56.8%	32.2%	67.8%
Trinidad and Tobago	3.2	26	6.4%	10.9%	13.0%	12.1%	57.6%	30.3%	69.7%
Dominican Republic	3.1	27	6.9%	8.4%	14.5%	13.1%	57.1%	29.8%	70.2%
Cartagena	3.1	28	7.2%	8.8%	12.5%	11.5%	60.0%	28.5%	71.5%
Nicaragua	2.7	29	4.6%	6.7%	11.8%	11.3%	65.6%	23.1%	76.9%
All Destinations	**4.3**		**15.0%**	**15.0%**	**15.8%**	**11.3%**	**42.9%**	**45.8%**	**54.2%**
Mexico West	5.0	1	20.2%	18.1%	17.0%	10.5%	34.2%	55.3%	44.7%
Western Caribbean	4.3	2	15.5%	14.7%	15.9%	11.2%	42.7%	46.1%	53.9%
Eastern Caribbean	4.3	3	15.5%	14.2%	15.7%	11.7%	42.9%	45.4%	54.6%
Southern Caribbean	3.9	4	11.6%	14.4%	15.1%	11.6%	47.3%	41.1%	58.9%

Table B-10 – How satisfied were you with your initial shoreside welcome?

Destinations	Mean Score	Rank	Extremely Satisfied	Very Satisfied	Somewhat Satisfied	Not Too Satisfied	Not At All Satisfied	Satisfied	Not Satisfied
Guatemala	8.2	1	57.1%	24.6%	12.3%	3.1%	2.9%	94.0%	6.0%
Honduras	8.2	2	54.5%	29.3%	10.1%	3.1%	3.0%	93.9%	6.1%
Cozumel	8.0	3	50.8%	28.1%	14.9%	3.1%	3.1%	93.8%	6.2%
Huatulco	7.9	4	49.2%	28.7%	14.2%	3.8%	4.1%	92.1%	7.9%
Ensenada	7.9	5	49.9%	25.5%	16.0%	3.8%	4.8%	91.4%	8.6%
Bahamas	7.8	6	48.6%	25.4%	15.1%	5.9%	5.0%	89.1%	10.9%
St. Maarten	7.7	7	45.4%	28.5%	16.9%	5.1%	4.1%	90.8%	9.2%
Cabo San Lucas	7.6	8	40.7%	32.6%	16.9%	5.9%	3.9%	90.2%	9.8%
U. S. Virgin Islands	7.6	9	44.4%	28.3%	17.5%	4.7%	5.1%	90.2%	9.8%
St. Kitts and Nevis	7.6	10	44.2%	28.4%	17.2%	5.6%	4.6%	89.8%	10.2%
Cartagena□	7.6	11	46.1%	27.8%	14.4%	5.1%	6.6%	88.3%	11.7%
Turks and Caicos	7.6	12	46.6%	24.4%	16.8%	5.8%	6.4%	87.8%	12.2%
Curacao	7.5	13	42.7%	27.2%	20.3%	4.0%	5.8%	90.2%	9.8%
Grenada	7.4	14	39.7%	29.5%	18.8%	5.5%	6.5%	88.0%	12.0%
Costa Rica	7.4	15	43.2%	25.7%	16.3%	7.3%	7.5%	85.2%	14.8%
Nicaragua	7.3	16	37.9%	30.2%	19.2%	5.8%	6.9%	87.3%	12.7%
Belize	7.3	17	39.4%	27.1%	19.5%	6.8%	7.2%	86.0%	14.0%
Trinidad and Tobago	7.3	18	40.6%	28.2%	17.1%	6.4%	7.7%	85.9%	14.1%
St. Vincent and the Grenadines	7.3	19	39.6%	30.4%	14.5%	6.1%	9.4%	84.5%	15.5%
Cayman Islands	7.2	20	37.5%	27.3%	20.4%	8.0%	6.8%	85.2%	14.8%
Antigua & Barbuda	7.2	21	39.2%	27.4%	18.3%	7.2%	7.9%	84.9%	15.1%
St. Lucia	7.2	22	37.6%	27.3%	19.9%	7.9%	7.3%	84.8%	15.2%
Acapulco	7.2	23	38.7%	28.0%	16.7%	7.4%	9.2%	83.4%	16.6%
Barbados	7.1	24	38.1%	26.8%	19.0%	7.2%	8.9%	83.9%	16.1%
Aruba	7.0	25	34.7%	27.4%	21.7%	8.5%	7.7%	83.8%	16.2%
Jamaica	7.0	26	35.8%	26.9%	19.6%	9.1%	8.6%	82.3%	17.7%
Puerto Rico	6.9	27	35.2%	25.6%	21.6%	8.8%	8.8%	82.4%	17.6%
Dominica	6.9	28	33.3%	27.0%	21.8%	8.4%	9.5%	82.1%	17.9%
Dominican Republic	6.7	29	32.1%	26.2%	20.1%	10.4%	11.2%	78.4%	21.6%
All Destinations	**7.5**		**42.5%**	**27.6%**	**17.5%**	**6.1%**	**6.3%**	**87.6%**	**12.4%**
Mexico West	7.7	1	46.0%	28.9%	15.7%	4.6%	4.8%	90.6%	9.4%
Western Caribbean	7.6	2	44.6%	27.3%	17.0%	5.6%	5.5%	88.9%	11.1%
Southern Caribbean	7.3	3	40.4%	27.7%	18.1%	6.5%	7.3%	86.2%	13.8%
Eastern Caribbean	7.3	4	40.8%	26.7%	18.4%	7.1%	7.0%	85.9%	14.1%

Table B-11 – How satisfied were you with your purchased tour?

Destinations	Mean Score	Rank	Extremely Satisfied	Very Satisfied	Somewhat Satisfied	Not Too Satisfied	Not At All Satisfied	Satisfied	Not Satisfied
St. Vincent and the Grenadines	8.8	1	67.0%	25.4%	4.3%	1.7%	1.6%	96.7%	3.3%
Cozumel	8.5	2	65.4%	20.3%	7.1%	2.8%	4.4%	92.8%	7.2%
Honduras	8.4	3	65.5%	17.7%	9.5%	3.4%	3.9%	92.7%	7.3%
Costa Rica	8.4	4	65.8%	18.7%	7.6%	4.2%	3.7%	92.1%	7.9%
Dominica	8.3	5	61.1%	24.2%	7.4%	3.0%	4.3%	92.7%	7.3%
Ensenada	8.3	6	61.3%	22.0%	9.4%	2.2%	5.1%	92.7%	7.3%
Guatemala	8.3	7	61.7%	22.4%	8.5%	3.1%	4.3%	92.6%	7.4%
Belize	8.3	8	61.7%	21.8%	8.0%	3.9%	4.6%	91.5%	8.5%
Acapulco	8.2	9	58.1%	25.3%	7.8%	4.2%	4.6%	91.2%	8.8%
Barbados	8.2	10	58.2%	24.6%	8.4%	4.0%	4.8%	91.2%	8.8%
Cabo San Lucas	8.2	11	59.3%	24.1%	7.2%	4.3%	5.1%	90.6%	9.4%
Bahamas	8.1	12	59.1%	20.0%	12.0%	3.1%	5.8%	91.1%	8.9%
U. S. Virgin Islands	8.1	13	53.8%	27.4%	9.8%	3.6%	5.4%	91.0%	9.0%
Jamaica	8.1	14	56.0%	24.8%	9.4%	4.1%	5.7%	90.2%	9.8%
St. Maarten	8.1	15	57.4%	24.4%	8.2%	3.6%	6.4%	90.0%	10.0%
St. Lucia	8.1	16	57.1%	23.1%	9.1%	4.7%	6.0%	89.3%	10.7%
St. Kitts and Nevis	8.1	17	57.3%	21.9%	9.8%	5.6%	5.4%	89.0%	11.0%
Curacao	8.0	18	54.5%	25.5%	13.0%	2.5%	4.5%	93.0%	7.0%
Aruba	8.0	19	51.0%	30.6%	9.3%	4.0%	5.1%	90.9%	9.1%
Antigua & Barbuda	7.9	20	57.3%	22.8%	8.6%	3.3%	8.0%	88.7%	11.3%
Grenada	7.9	21	54.1%	25.2%	9.2%	4.5%	7.0%	88.5%	11.5%
Trinidad and Tobago	7.7	22	51.0%	24.9%	11.6%	5.4%	7.1%	87.5%	12.5%
Huatulco	7.7	23	51.1%	25.9%	10.0%	5.7%	7.3%	87.0%	13.0%
Turks and Caicos	7.7	24	55.2%	17.8%	12.9%	5.7%	8.4%	85.9%	14.1%
Puerto Rico	7.6	25	49.9%	23.4%	11.1%	6.4%	9.2%	84.4%	15.6%
Cayman Islands	7.6	26	50.8%	22.5%	10.5%	7.5%	8.7%	83.8%	16.2%
Nicaragua	7.2	27	40.7%	27.1%	15.5%	8.2%	8.5%	83.3%	16.7%
Cartagena	7.2	28	42.9%	24.7%	14.8%	7.9%	9.7%	82.4%	17.6%
Dominican Republic	6.9	29	37.4%	25.6%	17.6%	7.5%	11.9%	80.6%	19.4%
All Destinations	**8.0**		**56.4%**	**23.5%**	**9.7%**	**4.5%**	**5.9%**	**89.6%**	**10.4%**
Mexico West	8.2	1	59.9%	23.3%	8.0%	3.7%	5.1%	91.2%	8.8%
Western Caribbean	8.1	2	57.5%	22.7%	9.5%	4.6%	5.7%	89.7%	10.3%
Southern Caribbean	8.0	3	55.3%	24.2%	10.0%	4.6%	5.9%	89.5%	10.5%
Eastern Caribbean	7.9	4	55.8%	22.8%	10.1%	4.5%	6.8%	88.7%	11.3%

Table B-12 – How satisfied were you with historic sites/museums that you visited?

Destinations	Mean Score	Rank	Extremely Satisfied	Very Satisfied	Somewhat Satisfied	Not Too Satisfied	Not At All Satisfied	Satisfied	Not Satisfied
Cozumel	7.8	1	54.2%	21.8%	11.7%	3.9%	8.4%	87.7%	12.3%
Guatemala	7.8	2	54.3%	23.5%	9.7%	4.7%	7.8%	87.5%	12.5%
Puerto Rico	7.5	3	47.3%	24.4%	15.1%	7.4%	5.8%	86.8%	13.2%
Belize	7.5	4	49.2%	22.7%	11.9%	7.0%	9.2%	83.8%	16.2%
Cartagena	7.4	5	41.7%	29.7%	16.0%	7.0%	5.6%	87.4%	12.6%
Bahamas	7.4	6	48.3%	18.9%	17.9%	6.8%	8.1%	85.1%	14.9%
Curacao	7.3	7	37.4%	33.1%	17.1%	5.3%	7.1%	87.6%	12.4%
Barbados	7.3	8	41.8%	28.6%	16.1%	5.8%	7.7%	86.5%	13.5%
St. Lucia	7.3	9	40.7%	29.8%	14.6%	5.0%	9.9%	85.1%	14.9%
Ensenada	7.3	10	41.7%	27.8%	14.6%	7.1%	8.8%	84.1%	15.9%
Antigua & Barbuda	7.2	11	39.4%	28.6%	17.2%	5.6%	9.2%	85.2%	14.8%
U. S. Virgin Islands	7.2	12	39.9%	28.7%	15.3%	4.8%	11.3%	83.9%	16.1%
St. Kitts and Nevis	7.2	13	42.8%	26.7%	13.0%	7.4%	10.1%	82.5%	17.5%
Acapulco	7.2	14	41.4%	28.7%	12.2%	5.9%	11.8%	82.3%	17.7%
Honduras	7.1	15	42.0%	26.7%	13.0%	3.8%	14.5%	81.7%	18.3%
St. Vincent and the Grenadines	7.0	16	38.3%	27.0%	17.4%	4.7%	12.6%	82.7%	17.3%
Jamaica	7.0	17	42.4%	24.0%	11.2%	5.5%	16.9%	77.6%	22.4%
St. Maarten	6.9	18	35.3%	26.0%	21.1%	6.3%	11.3%	82.4%	17.6%
Aruba	6.9	19	33.4%	29.9%	17.3%	8.3%	11.1%	80.6%	19.4%
Grenada	6.8	20	29.4%	33.5%	20.1%	6.2%	10.8%	83.0%	17.0%
Cabo San Lucas	6.7	21	41.3%	19.2%	14.9%	7.6%	17.0%	75.4%	24.6%
Trinidad and Tobago	6.6	22	33.5%	25.5%	17.7%	10.4%	12.9%	76.7%	23.3%
Costa Rica	6.6	23	40.0%	19.5%	14.6%	6.7%	19.2%	74.1%	25.9%
Dominica	6.5	24	28.1%	29.0%	19.3%	9.0%	14.6%	76.4%	23.6%
Cayman Islands	6.5	25	33.1%	26.1%	15.3%	9.1%	16.4%	74.5%	25.5%
Huatulco	6.5	26	33.6%	24.7%	15.8%	8.0%	17.9%	74.1%	25.9%
Nicaragua	6.2	27	23.9%	28.3%	19.6%	14.2%	14.0%	71.8%	28.2%
Turks and Caicos	5.7	28	27.0%	18.3%	17.8%	14.1%	22.8%	63.1%	36.9%
Dominican Republic	5.0	29	19.8%	19.5%	12.1%	14.3%	34.3%	51.4%	48.6%
All Destinations	**7.0**		**39.6%**	**26.0%**	**15.3%**	**7.4%**	**11.7%**	**80.9%**	**19.1%**
Mexico West	7.3	1	45.1%	24.3%	13.2%	5.8%	11.6%	82.6%	17.4%
Western Caribbean	7.2	2	43.5%	24.4%	13.2%	7.4%	11.5%	81.1%	18.9%
Southern Caribbean	7.0	3	37.1%	28.9%	16.9%	6.9%	10.2%	82.9%	17.1%
Eastern Caribbean	6.8	4	36.9%	24.7%	16.8%	8.5%	13.1%	78.4%	21.6%

Table B-13 – How satisfied were you with the variety of things to see and do in "destination"?

Destinations	Mean Score	Rank	Extremely Satisfied	Very Satisfied	Somewhat Satisfied	Not Too Satisfied	Not At All Satisfied	Satisfied	Not Satisfied
Cozumel	7.6	1	42.7%	30.7%	15.0%	6.7%	4.9%	88.4%	11.6%
U. S. Virgin Islands	7.4	2	36.8%	34.0%	17.2%	7.0%	5.0%	88.0%	12.0%
St. Maarten	7.3	3	36.2%	31.4%	20.6%	8.5%	3.3%	88.2%	11.8%
Bahamas	7.2	4	37.6%	27.0%	20.6%	8.2%	6.6%	85.2%	14.8%
Acapulco	7.1	5	37.5%	28.8%	18.3%	8.6%	6.8%	84.6%	15.4%
Curacao	7.0	6	29.9%	31.3%	24.6%	10.0%	4.2%	85.8%	14.2%
St. Lucia	7.0	7	34.7%	27.4%	20.9%	7.9%	9.1%	83.0%	17.0%
Cabo San Lucas	6.9	8	31.6%	30.0%	21.2%	11.0%	6.2%	82.8%	17.2%
Barbados	6.9	9	32.7%	28.3%	21.3%	9.2%	8.5%	82.3%	17.7%
St. Kitts and Nevis	6.9	10	31.8%	31.9%	17.0%	11.1%	8.2%	80.7%	19.3%
Costa Rica	6.9	11	34.6%	29.5%	15.3%	9.2%	11.4%	79.4%	20.6%
Aruba	6.7	12	26.8%	30.2%	23.6%	11.3%	8.1%	80.6%	19.4%
Cartagena	6.7	13	29.6%	28.9%	21.7%	10.5%	9.3%	80.2%	19.8%
Cayman Islands	6.7	14	30.1%	27.8%	22.3%	12.1%	7.7%	80.2%	19.8%
Ensenada	6.6	15	28.6%	27.2%	21.4%	13.7%	9.1%	77.2%	22.8%
Honduras	6.6	16	31.0%	26.2%	19.4%	11.2%	12.2%	76.6%	23.4%
Antigua & Barbuda	6.5	17	26.7%	27.9%	25.1%	11.3%	9.0%	79.7%	20.3%
Guatemala	6.5	18	28.9%	26.2%	21.7%	11.4%	11.8%	76.8%	23.2%
Jamaica	6.5	19	29.9%	26.1%	20.4%	11.2%	12.4%	76.4%	23.6%
Huatulco	6.4	20	21.8%	30.3%	26.2%	12.5%	9.2%	78.3%	21.7%
Grenada	6.4	21	23.8%	31.4%	22.2%	13.1%	9.5%	77.4%	22.6%
Puerto Rico	6.4	22	26.6%	26.0%	23.7%	13.5%	10.2%	76.3%	23.7%
Belize	6.1	23	24.8%	24.1%	21.2%	13.6%	16.3%	70.1%	29.9%
Dominica	5.9	24	23.2%	23.5%	22.5%	13.3%	17.5%	69.2%	30.8%
Trinidad and Tobago	5.9	25	23.0%	23.9%	21.6%	12.3%	19.2%	68.5%	31.5%
St. Vincent and the Grenadines	5.9	26	24.6%	24.6%	17.0%	13.3%	20.5%	66.2%	33.8%
Turks and Caicos	5.3	27	15.7%	19.2%	25.4%	18.8%	20.9%	60.3%	39.7%
Nicaragua	5.1	28	12.0%	21.2%	25.6%	19.9%	21.3%	58.8%	41.2%
Dominican Republic	4.5	29	11.8%	15.4%	19.2%	20.4%	33.2%	46.4%	53.6%
All Destinations	**6.5**		**28.9%**	**27.4%**	**21.0%**	**11.6%**	**11.1%**	**77.3%**	**22.7%**
Mexico West	7.1	1	34.6%	29.7%	19.4%	9.6%	6.7%	83.7%	16.3%
Southern Caribbean	6.6	2	29.0%	28.8%	21.2%	10.5%	10.5%	79.0%	21.0%
Western Caribbean	6.5	3	29.2%	26.3%	20.6%	12.0%	11.9%	76.1%	23.9%
Eastern Caribbean	6.3	4	26.3%	25.4%	21.9%	13.0%	13.4%	73.6%	26.4%

Table B-14 – How satisfied were you with the friendliness of the residents of "destination"?

Destinations	Mean Score	Rank	Extremely Satisfied	Very Satisfied	Somewhat Satisfied	Not Too Satisfied	Not At All Satisfied	Satisfied	Not Satisfied
Guatemala	8.6	1	65.4%	21.2%	8.9%	2.6%	1.9%	95.5%	4.5%
Cozumel	8.3	2	55.9%	27.0%	11.8%	3.2%	2.1%	94.7%	5.3%
St. Kitts and Nevis	8.3	3	58.4%	24.3%	10.0%	4.9%	2.4%	92.7%	7.3%
Costa Rica	8.2	4	58.3%	24.7%	8.7%	4.8%	3.5%	91.7%	8.3%
Honduras	8.2	5	58.4%	23.9%	8.6%	5.4%	3.7%	90.9%	9.1%
Huatulco	8.1	6	53.7%	28.0%	12.0%	4.1%	2.2%	93.7%	6.3%
Aruba	8.0	7	48.0%	30.2%	16.0%	3.4%	2.4%	94.2%	5.8%
U. S. Virgin Islands	8.0	8	49.9%	31.0%	12.4%	4.3%	2.4%	93.3%	6.7%
St. Maarten	8.0	9	50.8%	29.2%	13.2%	3.9%	2.9%	93.2%	6.8%
Bahamas	8.0	10	51.5%	27.4%	13.3%	4.7%	3.1%	92.2%	7.8%
Cayman Islands	7.9	11	49.9%	27.6%	14.7%	4.8%	3.0%	92.2%	7.8%
Ensenada	7.9	12	50.4%	26.2%	14.4%	5.8%	3.2%	91.0%	9.0%
Curacao	7.9	13	52.1%	25.4%	13.4%	5.3%	3.8%	90.9%	9.1%
St. Lucia	7.8	14	50.1%	25.3%	13.0%	6.0%	5.6%	88.4%	11.6%
Trinidad and Tobago	7.7	15	48.5%	25.0%	14.8%	4.9%	6.8%	88.3%	11.7%
Turks and Caicos	7.7	16	47.7%	26.7%	13.8%	6.6%	5.2%	88.2%	11.8%
Belize	7.7	17	49.0%	25.3%	13.0%	6.5%	6.2%	87.3%	12.7%
Barbados	7.7	18	51.7%	23.4%	11.7%	7.2%	6.0%	86.8%	13.2%
Grenada	7.6	19	47.4%	26.2%	13.4%	6.1%	6.9%	87.0%	13.0%
Dominica	7.6	20	47.2%	25.8%	12.6%	6.8%	7.6%	85.6%	14.4%
Cabo San Lucas	7.5	21	39.0%	33.8%	16.9%	5.5%	4.8%	89.7%	10.3%
Nicaragua	7.5	22	41.2%	29.4%	17.3%	6.8%	5.3%	87.9%	12.1%
Acapulco	7.5	23	42.7%	29.6%	15.1%	5.6%	7.0%	87.4%	12.6%
Antigua & Barbuda	7.5	24	45.1%	25.1%	16.7%	6.6%	6.5%	86.9%	13.1%
St. Vincent and the Grenadines	7.5	25	51.5%	20.9%	10.3%	6.4%	10.9%	82.7%	17.3%
Puerto Rico	7.3	26	39.7%	27.5%	18.0%	8.5%	6.3%	85.2%	14.8%
Cartagena	7.2	27	40.6%	27.9%	14.3%	8.2%	9.0%	82.8%	17.2%
Jamaica	6.9	28	38.8%	24.8%	14.8%	9.4%	12.2%	78.4%	21.6%
Dominican Republic	6.4	29	28.6%	25.4%	19.5%	12.2%	14.3%	73.5%	26.5%
All Destinations	**7.8**		**49.2%**	**26.6%**	**13.4%**	**5.7%**	**5.1%**	**89.2%**	**10.8%**
Mexico West	7.9	1	49.2%	29.0%	13.7%	4.4%	3.7%	91.9%	8.1%
Western Caribbean	7.9	2	51.5%	25.7%	12.9%	5.2%	4.7%	90.1%	9.9%
Southern Caribbean	7.7	3	49.8%	25.7%	12.9%	5.8%	5.8%	88.4%	11.6%
Eastern Caribbean	7.6	4	47.2%	26.6%	14.1%	6.3%	5.8%	87.9%	12.1%

Table B-15 – How satisfied were you with your overall shopping experience in "destination"?

Destinations	Mean Score	Rank	Extremely Satisfied	Very Satisfied	Somewhat Satisfied	Not Too Satisfied	Not At All Satisfied	Satisfied	Not Satisfied
St. Maarten	7.6	1	41.3%	32.6%	16.8%	5.7%	3.6%	90.7%	9.3%
St. Kitts and Nevis	7.6	2	42.8%	29.9%	17.4%	5.9%	4.0%	90.1%	9.9%
U. S. Virgin Islands	7.5	3	39.8%	32.6%	16.9%	6.4%	4.3%	89.3%	10.7%
Cozumel	7.5	4	41.2%	31.0%	16.5%	6.0%	5.3%	88.7%	11.3%
Bahamas	7.3	5	37.0%	29.7%	21.1%	7.0%	5.2%	87.8%	12.2%
Guatemala	7.3	6	38.2%	30.3%	17.9%	6.9%	6.7%	86.4%	13.6%
Ensenada	7.3	7	38.8%	29.3%	17.5%	8.7%	5.7%	85.6%	14.4%
Huatulco	7.1	8	32.6%	32.0%	21.4%	7.6%	6.4%	86.0%	14.0%
Curacao	7.1	9	35.0%	31.4%	19.2%	7.8%	6.6%	85.6%	14.4%
Cayman Islands	7.1	10	33.6%	31.3%	20.3%	8.0%	6.8%	85.2%	14.8%
Aruba	6.8	11	30.2%	30.5%	21.4%	8.9%	9.0%	82.1%	17.9%
Cabo San Lucas	6.7	12	27.3%	34.1%	20.3%	10.7%	7.6%	81.7%	18.3%
Honduras	6.7	13	30.1%	30.4%	18.3%	9.3%	11.9%	78.8%	21.2%
Puerto Rico	6.5	14	27.4%	26.7%	24.4%	12.3%	9.2%	78.5%	21.5%
Antigua & Barbuda	6.5	15	26.9%	28.1%	22.7%	12.1%	10.2%	77.7%	22.3%
Grenada	6.5	16	26.5%	31.1%	20.0%	11.8%	10.6%	77.6%	22.4%
Turks and Caicos	6.5	17	29.3%	26.4%	20.5%	12.2%	11.6%	76.2%	23.8%
Acapulco	6.4	18	27.1%	30.0%	19.1%	10.1%	13.7%	76.2%	23.8%
Costa Rica	6.4	19	30.2%	25.1%	20.6%	10.6%	13.5%	75.9%	24.1%
Barbados	6.4	20	27.1%	28.2%	20.0%	11.5%	13.2%	75.3%	24.7%
St. Lucia	6.3	21	27.6%	25.6%	20.7%	12.3%	13.8%	73.9%	26.1%
Belize	6.2	22	25.1%	26.1%	22.4%	11.9%	14.5%	73.6%	26.4%
Jamaica	5.9	23	25.2%	22.9%	20.3%	12.2%	19.4%	68.4%	31.6%
Cartagena	5.7	24	19.5%	26.1%	19.7%	14.2%	20.5%	65.3%	34.7%
Nicaragua	5.6	25	17.0%	25.1%	24.7%	12.7%	20.5%	66.8%	33.2%
Dominica	5.5	26	19.6%	22.2%	21.0%	13.0%	24.2%	62.8%	37.2%
Trinidad and Tobago	5.1	27	20.5%	17.2%	19.3%	13.3%	29.7%	57.0%	43.0%
St. Vincent and the Grenadines	5.0	28	15.9%	22.7%	19.9%	9.4%	32.1%	58.5%	41.5%
Dominican Republic	4.5	29	12.0%	17.5%	19.1%	15.4%	36.0%	48.6%	51.4%
All Destinations	**6.6**		**30.5%**	**28.4%**	**19.8%**	**9.7%**	**11.6%**	**78.7%**	**21.3%**
Mexico West	7.1	1	34.3%	31.4%	18.6%	8.2%	7.5%	84.3%	15.7%
Western Caribbean	6.7	2	31.8%	28.4%	19.6%	9.2%	11.0%	79.8%	20.2%
Eastern Caribbean	6.6	3	30.9%	27.2%	20.0%	9.9%	12.0%	78.1%	21.9%
Southern Caribbean	6.3	4	26.7%	27.0%	20.2%	11.1%	15.0%	73.9%	26.1%

Table B-16 – How satisfied were you with the courtesy of store employees in "destination"?

Destinations	Mean Score	Rank	Extremely Satisfied	Very Satisfied	Somewhat Satisfied	Not Too Satisfied	Not At All Satisfied	Satisfied	Not Satisfied
Guatemala	8.3	1	59.8%	23.8%	10.5%	3.5%	2.4%	94.1%	5.9%
Huatulco	8.2	2	54.4%	28.2%	11.9%	3.5%	2.0%	94.5%	5.5%
St. Kitts and Nevis	8.2	3	55.3%	26.5%	12.3%	3.4%	2.5%	94.1%	5.9%
Cozumel	8.2	4	55.9%	27.0%	10.1%	4.2%	2.8%	93.0%	7.0%
Costa Rica	8.2	5	59.0%	22.3%	9.5%	5.7%	3.5%	90.8%	9.2%
St. Maarten	8.1	6	52.8%	28.8%	12.3%	3.9%	2.2%	93.9%	6.1%
U. S. Virgin Islands	8.1	7	52.1%	30.4%	11.4%	3.6%	2.5%	93.9%	6.1%
Bahamas	8.1	8	53.5%	26.3%	13.4%	3.9%	2.9%	93.2%	6.8%
Honduras	8.0	9	52.8%	26.0%	13.0%	4.7%	3.5%	91.8%	8.2%
Ensenada	8.0	10	53.6%	25.6%	12.4%	5.7%	2.7%	91.6%	8.4%
Cayman Islands	7.9	11	49.4%	27.3%	15.0%	5.2%	3.1%	91.7%	8.3%
Curacao	7.9	12	51.1%	28.0%	11.7%	5.3%	3.9%	90.8%	9.2%
Aruba	7.8	13	46.9%	29.5%	15.4%	5.2%	3.0%	91.8%	8.2%
Belize	7.8	14	48.9%	26.1%	14.4%	5.7%	4.9%	89.4%	10.6%
Cabo San Lucas	7.7	15	45.4%	31.1%	14.2%	5.5%	3.8%	90.7%	9.3%
Nicaragua	7.7	16	47.8%	26.5%	14.6%	5.6%	5.5%	88.9%	11.1%
Turks and Caicos	7.7	17	48.9%	26.0%	13.7%	6.6%	4.8%	88.6%	11.4%
Cartagena	7.7	18	48.0%	28.5%	11.9%	5.0%	6.6%	88.4%	11.6%
Grenada	7.6	19	44.2%	28.8%	15.9%	5.0%	6.1%	88.9%	11.1%
Puerto Rico	7.6	20	44.8%	29.0%	14.9%	6.1%	5.2%	88.7%	11.3%
Acapulco	7.6	21	45.6%	28.1%	14.6%	5.5%	6.2%	88.3%	11.7%
St. Lucia	7.6	22	46.4%	25.9%	15.9%	5.3%	6.5%	88.2%	11.8%
Antigua & Barbuda	7.5	23	44.3%	28.7%	13.9%	7.2%	5.9%	86.9%	13.1%
Barbados	7.5	24	46.2%	27.2%	13.0%	7.1%	6.5%	86.4%	13.6%
Trinidad and Tobago	7.4	25	46.9%	24.5%	13.4%	6.1%	9.1%	84.8%	15.2%
Dominica	7.4	26	43.2%	27.7%	13.6%	7.0%	8.5%	84.5%	15.5%
Jamaica	7.3	27	42.6%	25.6%	14.8%	7.6%	9.4%	83.0%	17.0%
St. Vincent and the Grenadines	7.3	28	48.7%	21.0%	12.4%	6.6%	11.3%	82.1%	17.9%
Dominican Republic	6.6	29	34.6%	23.7%	17.8%	10.3%	13.6%	76.1%	23.9%
All Destinations	**7.8**		**49.7%**	**26.9%**	**13.2%**	**5.4%**	**4.8%**	**89.8%**	**10.2%**
Mexico West	8.0	1	51.3%	28.0%	12.4%	4.8%	3.5%	91.7%	8.3%
Western Caribbean	7.9	2	51.7%	26.0%	12.8%	5.2%	4.3%	90.5%	9.5%
Eastern Caribbean	7.7	3	48.1%	27.2%	13.7%	5.7%	5.3%	89.0%	11.0%
Southern Caribbean	7.7	4	48.6%	26.6%	13.3%	5.7%	5.8%	88.5%	11.5%

Table B-17 – How satisfied were you with the variety of shops in "destination"?

Destinations	Mean Score	Rank	Extremely Satisfied	Very Satisfied	Somewhat Satisfied	Not Too Satisfied	Not At All Satisfied	Satisfied	Not Satisfied
Cozumel	7.6	1	43.6%	27.6%	17.0%	6.9%	4.9%	88.2%	11.8%
St. Maarten	7.4	2	39.6%	29.1%	18.8%	8.5%	4.0%	87.5%	12.5%
St. Kitts and Nevis	7.3	3	38.3%	28.7%	19.1%	8.4%	5.5%	86.1%	13.9%
Bahamas	7.2	4	37.3%	26.8%	21.9%	7.5%	6.5%	86.0%	14.0%
Curacao	7.2	5	36.5%	30.0%	19.4%	8.1%	6.0%	85.9%	14.1%
U. S. Virgin Islands	7.2	6	37.9%	28.5%	19.3%	6.9%	7.4%	85.7%	14.3%
Ensenada	7.2	7	41.1%	23.7%	18.4%	10.3%	6.5%	83.2%	16.8%
Cayman Islands	7.0	8	34.2%	28.1%	19.5%	10.7%	7.5%	81.8%	18.2%
Aruba	6.9	9	33.6%	26.1%	22.4%	9.0%	8.9%	82.1%	17.9%
Guatemala	6.9	10	32.9%	28.0%	19.7%	11.1%	8.3%	80.6%	19.4%
Cabo San Lucas	6.8	11	29.6%	31.2%	21.2%	11.9%	6.1%	82.0%	18.0%
Antigua & Barbuda	6.6	12	26.9%	30.4%	21.3%	12.1%	9.3%	78.6%	21.4%
Puerto Rico	6.6	13	29.7%	27.3%	20.7%	12.3%	10.0%	77.7%	22.3%
Acapulco	6.6	14	30.6%	27.6%	18.9%	11.2%	11.7%	77.1%	22.9%
Barbados	6.5	15	27.5%	29.1%	20.6%	12.0%	10.8%	77.2%	22.8%
Grenada	6.4	16	23.7%	30.3%	22.9%	12.8%	10.3%	76.9%	23.1%
St. Lucia	6.3	17	25.2%	26.8%	23.8%	12.0%	12.2%	75.8%	24.2%
Turks and Caicos	6.2	18	23.9%	24.7%	24.2%	15.0%	12.2%	72.8%	27.2%
Jamaica	6.1	19	24.9%	23.6%	21.9%	13.8%	15.8%	70.4%	29.6%
Huatulco	6.0	20	27.0%	31.8%	24.2%	10.1%	6.9%	83.0%	17.0%
Honduras	5.9	21	21.7%	24.9%	22.8%	13.5%	17.1%	69.4%	30.6%
Belize	5.9	22	20.5%	24.0%	24.8%	15.5%	15.2%	69.3%	30.7%
Costa Rica	5.9	23	21.4%	24.0%	23.2%	15.0%	16.4%	68.6%	31.4%
Cartagena	5.9	24	20.8%	26.2%	21.5%	15.4%	16.1%	68.5%	31.5%
Trinidad and Tobago	4.8	25	14.2%	17.9%	21.2%	15.7%	31.0%	53.3%	46.7%
Nicaragua	4.8	26	12.2%	16.5%	23.5%	21.3%	26.5%	52.2%	47.8%
St. Vincent and the Grenadines	4.7	27	11.5%	19.8%	23.3%	13.1%	32.3%	54.6%	45.4%
Dominica	4.7	28	12.0%	16.9%	23.0%	19.3%	28.8%	51.9%	48.1%
Dominican Republic	4.0	29	7.3%	13.6%	19.8%	19.8%	39.5%	40.7%	59.3%
All Destinations	**6.5**		**28.6%**	**26.1%**	**21.0%**	**12.2%**	**12.1%**	**75.7%**	**24.3%**
Mexico West	7.1	1	35.6%	28.5%	19.5%	9.6%	6.8%	83.6%	16.4%
Western Caribbean	6.5	2	29.9%	25.3%	20.6%	12.3%	11.9%	75.8%	24.2%
Eastern Caribbean	6.3	3	27.8%	25.0%	21.2%	12.6%	13.4%	74.0%	26.0%
Southern Caribbean	6.2	4	24.7%	26.3%	22.0%	12.6%	14.4%	73.0%	27.0%

Table B-18 – How satisfied were you with overall prices in "destination"?

Destinations	Mean Score	Rank	Extremely Satisfied	Very Satisfied	Somewhat Satisfied	Not Too Satisfied	Not At All Satisfied	Satisfied	Not Satisfied
Guatemala	7.4	1	36.9%	34.0%	18.6%	5.6%	4.9%	89.5%	10.5%
St. Maarten	7.3	2	35.9%	33.5%	19.7%	6.8%	4.1%	89.1%	10.9%
U. S. Virgin Islands	7.1	3	29.3%	37.1%	22.4%	6.2%	5.0%	88.8%	11.2%
St. Kitts and Nevis	7.1	4	31.7%	32.4%	22.3%	9.0%	4.6%	86.4%	13.6%
Cozumel	7.1	5	32.8%	31.8%	20.5%	8.9%	6.0%	85.1%	14.9%
Ensenada	7.1	6	36.0%	28.6%	20.0%	10.1%	5.3%	84.6%	15.4%
Costa Rica	6.9	7	29.2%	32.5%	22.2%	8.7%	7.4%	83.9%	16.1%
Huatulco	6.8	8	26.5%	32.5%	23.8%	10.5%	6.7%	82.8%	17.2%
Curacao	6.8	9	29.2%	30.4%	23.2%	9.0%	8.2%	82.8%	17.2%
Honduras	6.8	10	31.6%	27.2%	23.9%	8.2%	9.1%	82.7%	17.3%
Bahamas	6.8	11	28.8%	29.4%	24.1%	11.4%	6.3%	82.3%	17.7%
Nicaragua	6.7	12	28.5%	29.9%	23.1%	9.2%	9.3%	81.5%	18.5%
Puerto Rico	6.6	13	25.4%	32.1%	23.0%	10.2%	9.3%	80.5%	19.5%
Aruba	6.6	14	27.1%	30.1%	21.6%	12.4%	8.8%	78.8%	21.2%
Cabo San Lucas	6.3	15	19.8%	32.7%	24.5%	13.0%	10.0%	77.0%	23.0%
Acapulco	6.3	16	20.8%	32.1%	24.0%	10.3%	12.8%	76.9%	23.1%
Grenada	6.2	17	20.2%	31.0%	26.2%	11.7%	10.9%	77.4%	22.6%
Belize	6.2	18	20.8%	30.4%	24.8%	12.0%	12.0%	76.0%	24.0%
Antigua & Barbuda	6.2	19	20.1%	32.6%	20.6%	14.9%	11.8%	73.3%	26.7%
Cartagena	6.1	20	20.9%	27.9%	25.7%	12.7%	12.8%	74.5%	25.5%
Cayman Islands	6.1	21	21.6%	27.0%	23.4%	16.2%	11.8%	72.0%	28.0%
Dominica	6.0	22	21.1%	25.3%	26.6%	11.2%	15.8%	73.0%	27.0%
St. Lucia	6.0	23	20.0%	27.6%	25.3%	12.7%	14.4%	72.9%	27.1%
Barbados	6.0	24	19.7%	27.4%	25.6%	13.7%	13.6%	72.7%	27.3%
Jamaica	6.0	25	21.2%	26.8%	24.3%	14.3%	13.4%	72.3%	27.7%
Turks and Caicos	5.8	26	19.4%	24.3%	25.7%	15.1%	15.5%	69.4%	30.6%
Trinidad and Tobago	5.7	27	19.8%	24.7%	23.2%	13.0%	19.3%	67.7%	32.3%
St. Vincent and the Grenadines	5.3	28	17.5%	22.4%	22.0%	13.8%	24.3%	61.9%	38.1%
Dominican Republic	5.1	29	12.8%	22.1%	25.4%	16.7%	23.0%	60.3%	39.7%
All Destinations	**6.5**		**25.7%**	**30.0%**	**23.1%**	**11.1%**	**10.1%**	**78.8%**	**21.2%**
Mexico West	6.7	1	27.4%	31.8%	22.4%	10.3%	8.1%	81.6%	18.4%
Western Caribbean	6.7	2	28.1%	30.2%	22.1%	10.6%	9.0%	80.4%	19.6%
Eastern Caribbean	6.4	3	25.3%	28.9%	23.4%	11.6%	10.8%	77.6%	22.4%
Southern Caribbean	6.3	4	23.0%	29.0%	24.2%	11.7%	12.1%	76.2%	23.8%

Table B-19 – How satisfied were you with taxis and/or local transportation in "destination"?

Destinations	Mean Score	Rank	Extremely Satisfied	Very Satisfied	Somewhat Satisfied	Not Too Satisfied	Not At All Satisfied	Satisfied	Not Satisfied
St. Maarten	8.1	1	55.7%	27.2%	8.7%	2.8%	5.6%	91.6%	8.4%
Cozumel	8.1	2	55.4%	26.1%	10.1%	3.1%	5.3%	91.6%	8.4%
Ensenada	8.0	3	54.3%	26.2%	9.9%	3.5%	6.1%	90.4%	9.6%
St. Kitts and Nevis	7.8	4	53.9%	24.6%	9.5%	4.1%	7.9%	88.0%	12.0%
U. S. Virgin Islands	7.7	5	47.5%	29.2%	13.0%	4.5%	5.8%	89.7%	10.3%
Bahamas	7.7	6	49.5%	22.6%	14.7%	6.5%	6.7%	86.8%	13.2%
Honduras	7.6	7	51.8%	24.3%	6.9%	5.9%	11.1%	83.0%	17.0%
Antigua & Barbuda	7.3	8	45.7%	26.2%	11.2%	4.8%	12.1%	83.1%	16.9%
Huatulco	7.3	9	47.8%	25.0%	10.2%	4.2%	12.8%	83.0%	17.0%
Guatemala	7.3	10	48.4%	22.4%	10.4%	4.5%	14.3%	81.2%	18.8%
Cabo San Lucas	7.2	11	41.8%	26.9%	15.6%	5.3%	10.4%	84.3%	15.7%
Acapulco	7.2	12	44.0%	24.8%	13.5%	4.6%	13.1%	82.3%	17.7%
Aruba	7.2	13	46.2%	25.9%	10.0%	3.5%	14.4%	82.1%	17.9%
St. Lucia	7.2	14	42.2%	25.4%	13.7%	6.9%	11.8%	81.3%	18.7%
Cayman Islands	7.2	15	42.2%	27.1%	11.9%	7.2%	11.6%	81.2%	18.8%
Curacao	7.1	16	42.9%	25.8%	14.6%	2.7%	14.0%	83.3%	16.7%
Grenada	7.1	17	40.9%	27.2%	14.3%	5.9%	11.7%	82.4%	17.6%
Dominica	7.1	18	42.5%	26.1%	11.7%	6.2%	13.5%	80.3%	19.7%
Trinidad and Tobago	7.1	19	48.0%	20.6%	10.5%	4.9%	16.0%	79.1%	20.9%
Barbados	7.0	20	40.5%	25.5%	14.0%	7.1%	12.9%	80.0%	20.0%
Puerto Rico	7.0	21	44.2%	16.9%	18.9%	6.0%	14.0%	80.0%	20.0%
Costa Rica	7.0	22	46.2%	23.6%	7.0%	5.0%	18.2%	76.8%	23.2%
Jamaica	6.9	23	42.1%	22.6%	12.2%	6.8%	16.3%	76.9%	23.1%
Nicaragua	6.8	24	36.7%	28.5%	12.9%	5.3%	16.6%	78.1%	21.9%
Cartagena	6.7	25	38.8%	24.3%	13.5%	7.1%	16.3%	76.6%	23.4%
St. Vincent and the Grenadines	6.7	26	42.2%	21.7%	9.4%	8.9%	17.8%	73.3%	26.7%
Belize	6.6	27	36.7%	24.8%	14.0%	6.5%	18.0%	75.5%	24.5%
Turks and Caicos	6.5	28	41.3%	18.5%	11.6%	7.3%	21.3%	71.4%	28.6%
Dominican Republic	5.5	29	20.0%	23.2%	20.0%	11.3%	25.5%	63.2%	36.8%
All Destinations	**7.3**		**45.3%**	**25.1%**	**12.1%**	**5.3%**	**12.2%**	**82.5%**	**17.5%**
Mexico West	7.7	1	50.2%	25.9%	11.5%	4.0%	8.4%	87.6%	12.4%
Western Caribbean	7.3	2	46.2%	25.2%	11.3%	5.2%	12.1%	82.7%	17.3%
Eastern Caribbean	7.3	3	45.5%	24.3%	12.5%	5.5%	12.2%	82.3%	17.7%
Southern Caribbean	7.1	4	43.0%	24.7%	12.3%	5.8%	14.2%	80.0%	20.0%

Table B-20 – How well informed were you of the activities available in "destination"?

Destinations	Mean Score	Rank	Extremely Informed	Very Informed	Somewhat Informed	Not Too Informed	Not At All Informed	Informed	Not Informed
Cozumel	8.1	1	54.6%	27.0%	10.5%	4.0%	3.9%	92.1%	7.9%
U. S. Virgin Islands	8.0	2	48.9%	30.5%	12.9%	4.1%	3.6%	92.3%	7.7%
Ensenada	8.0	3	53.1%	24.9%	14.0%	4.7%	3.3%	92.0%	8.0%
Curacao	7.9	4	47.3%	30.6%	14.5%	3.3%	4.3%	92.4%	7.6%
Aruba	7.9	5	49.7%	29.5%	12.9%	3.3%	4.6%	92.1%	7.9%
Cabo San Lucas	7.9	6	47.9%	30.0%	14.0%	4.8%	3.3%	91.9%	8.1%
Cayman Islands	7.9	7	49.5%	29.9%	11.9%	4.7%	4.0%	91.3%	8.7%
Acapulco	7.8	8	46.1%	31.1%	14.2%	4.3%	4.3%	91.4%	8.6%
Costa Rica	7.8	9	46.8%	29.2%	14.9%	5.3%	3.8%	90.9%	9.1%
St. Maarten	7.8	10	46.6%	30.1%	13.9%	4.4%	5.0%	90.6%	9.4%
Bahamas	7.8	11	48.6%	27.3%	13.7%	5.3%	5.1%	89.6%	10.4%
St. Kitts and Nevis	7.7	12	43.3%	31.8%	15.9%	4.8%	4.2%	91.0%	9.0%
Jamaica	7.7	13	46.0%	29.8%	14.0%	6.2%	4.0%	89.8%	10.2%
Belize	7.7	14	45.9%	29.7%	13.8%	5.6%	5.0%	89.4%	10.6%
St. Lucia	7.6	15	42.4%	31.1%	16.5%	5.5%	4.5%	90.0%	10.0%
Guatemala	7.6	16	44.4%	29.1%	16.1%	5.5%	4.9%	89.6%	10.4%
Barbados	7.6	17	43.4%	29.0%	16.9%	5.8%	4.9%	89.3%	10.7%
Honduras	7.6	18	42.7%	31.3%	14.4%	5.9%	5.7%	88.4%	11.6%
Huatulco	7.5	19	39.3%	32.8%	16.9%	5.4%	5.6%	89.0%	11.0%
St. Vincent and the Grenadines	7.5	20	38.1%	35.7%	14.7%	5.4%	6.1%	88.5%	11.5%
Puerto Rico	7.4	21	41.0%	27.3%	19.5%	5.7%	6.5%	87.8%	12.2%
Grenada	7.4	22	37.3%	33.3%	17.0%	6.9%	5.5%	87.6%	12.4%
Dominica	7.4	23	39.4%	30.1%	18.0%	7.3%	5.2%	87.5%	12.5%
Antigua & Barbuda	7.4	24	42.1%	29.0%	16.0%	5.9%	7.0%	87.1%	12.9%
Trinidad and Tobago	7.1	25	33.9%	33.2%	17.8%	7.3%	7.8%	84.9%	15.1%
Nicaragua	7.1	26	35.5%	30.2%	18.8%	8.6%	6.9%	84.5%	15.5%
Cartagena	7.1	27	35.4%	31.7%	17.0%	9.0%	6.9%	84.1%	15.9%
Turks and Caicos	7.0	28	36.0%	27.7%	17.6%	7.9%	10.8%	81.3%	18.7%
Dominican Republic	6.4	29	26.9%	26.7%	20.5%	12.8%	13.1%	74.1%	25.9%
All Destinations	**7.6**		**43.8%**	**29.9%**	**15.3%**	**5.7%**	**5.3%**	**89.0%**	**11.0%**
Mexico West	7.9	1	49.0%	29.2%	13.4%	4.4%	4.0%	91.6%	8.4%
Western Caribbean	7.7	2	46.4%	29.2%	14.0%	5.6%	4.8%	89.6%	10.4%
Southern Caribbean	7.5	3	41.6%	31.3%	15.9%	5.8%	5.4%	88.8%	11.2%
Eastern Caribbean	7.4	4	40.7%	29.0%	16.8%	6.6%	6.9%	86.5%	13.5%

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DESTINATIONS OF THE CARIBBEAN (Including Central and South America)

Antigua and Barbuda

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.[1] The surveys were undertaken during the six-month period beginning in November 2008 and ending in April 2009. The survey schedule was designed so that surveys were conducted by FCCA member cruise lines that called at each destination and that the distribution of passenger and crew surveys would reflect the distribution of passenger and crew arrivals by cruise line at each destination. On any given cruise itinerary, passenger and crew surveys were placed in all passenger cabins and crew quarters following a single destination call. The surveys were completed by the passengers and crew in the privacy of their quarters and returned to a designated office on the cruise ship. Thus, passengers and crew were only surveyed once during a cruise itinerary and for a single destination. On a subsequent itinerary, passengers were surveyed following a call at a different destination.

The passenger and crew surveys were designed to collect data for onshore spending and visit satisfaction by both passengers and crew. While the crew survey was slightly shorter than the passenger survey, both surveys were designed to collect the following information:

- hours spent ashore;
- expenditures by category, including shore tours, food & beverages, clothing, etc.;
- visit satisfaction, including shore tour, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation; and
- demographic characteristics, including country of residence, age group, income, etc.

Combining the expenditure data collected from the passenger and crew surveys with data on expenditures by cruise lines for port fees and services, payments to local tour operators for passenger shore excursions purchased onboard the cruise ships, and other provisions purchased locally by the cruise lines, estimates of total cruise tourism expenditures were developed for each participating destination.

Given the direct spending estimates, the economic contribution of these expenditures, as measured by employment and wage income were then estimated for each destination. This process began with the collection of economic data for each destination from a combination of local, regional and international sources. Utilizing all of these data a set of economic impact models were developed for each destination to estimate the direct and total employment and wage impacts. A more detailed description of these models is provided in the **Data and Methods** section of Volume I.

[1] Surveys were conducted on the ships of the following cruise lines: Azamara Cruises, Carnival Cruise Lines, Celebrity Cruises, Disney Cruise Line, Holland America Line, MSC Cruises (USA), Inc., Norwegian Cruise Line, Princess Cruises, P&O Cruises and Royal Caribbean International.

Cruise Tourism Expenditures

Cruise tourism expenditures in destination ports are composed of a broad range of spending including:

- onshore expenditures by passengers which are concentrated in shore excursions and retail purchases of clothing and jewelry and purchases of food and beverages;
- onshore expenditures by crew which are concentrated in purchases of food and beverages in restaurants and retail purchases of jewelry and clothing;
- expenditures by cruise lines for port services, such as dockage fees and linesmen, utilities, such as water and power and navigation services; and
- purchases of supplies, such as food and other supplies, by the cruise lines from local businesses.

According to data obtained from the FCCA and the CTO, 626,000 cruise passengers arrived aboard cruise ships during the 2008/2009 cruise year.[2] Of these, an estimated 532,100 passengers (85 percent) disembarked and visited Antigua. Utilizing additional data provided by the visiting cruise lines, we have estimated that 253,620 crew were aboard the cruise ships and that 40 percent, or 101,448 crew, disembarked and visited the island. These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **$48.3** million ($US) in cruise tourism expenditures in Antigua during the 2008/2009 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Table 1 – Estimated Passenger Spending ($US) in Antigua, 2008/2009 Cruise Year[3]

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	$ 63.10	49%	$ 30.60
Local Crafts & Souvenirs	$ 25.60	43%	$ 11.04
Clothing	$ 45.60	38%	$ 17.36
F&B at Restaurants & Bars	$ 20.90	33%	$ 6.84
Other Purchases	$ 83.54	20%	$ 16.64
Taxis/Ground Transportation	$ 38.60	20%	$ 7.58
Watches & Jewelry	$ 370.30	12%	$ 44.96
Perfumes & Cosmetics	$ 85.80	7%	$ 6.18
Retail Purchases of Liquor	$ 26.40	6%	$ 1.56
Entertainment/Night Clubs	$ 50.20	2%	$ 1.04
Telephone & Internet	$ 6.90	2%	$ 0.16
Electronics	$ 23.00	1%	$ 0.16
Total Spend per Cruise Party			**$ 144.12**
Average Size of a Cruise Party			2.0
Total Spend per Cruise Passenger			**$ 72.06**
Cruise Passenger Visits			532,100
Total Cruise Passenger Expenditures			**$ 38,344,304**

[2] The 2008/2009 cruise year includes the twelve months beginning in May, 2008 and ending in April, 2009.

[3] The average shore excursion expenditure is a weighted average of the onshore and Internet purchases and the portion of the onboard purchases paid to local tour operators.

Per passenger spending estimates were derived from the 1,012 surveys completed by passengers that went ashore during the survey period. As shown in **Table 1,** each passenger cruise party spent an average of $144.12. The average spend per cruise party is the sum of the weighted spending in each of the twelve categories. For example, 43 percent of the survey respondents reported spending an average of $25.60 at for local crafts and souvenirs. Spread over the 1,012 cruise parties that visited Antigua, this represented an average of $11.04 per party. On a per passenger basis, the average total expenditure was $72.06. This represents the sum of per party expenditures, $114.12, divided by the average size of a cruise party in Antigua, 2.0 passengers.

For the entire 2008/2009 cruise year, the estimated 532,100 cruise passengers who visited Antigua spent a total of **$38.3 million** ($US) in Antigua.

Per crew spending estimates were derived from the 597 surveys completed by crew members during the survey period. As shown in **Table 2,** each crew member spent an average of $54.16 in Antigua. The average spend per crew member is the sum of the weighted spending in each of the twelve categories. For example, 79 percent of the survey respondents reported spending an average of $27.20 for food and beverages. Spread over the 597 crew members that visited Antigua, this represents an average of $21.34 per crew member.

For the entire 2008/2009 cruise year, the estimated 101,448 crew who visited Antigua spent an estimated total of **$5.5 million** ($US).

Table 2 – Estimated Crew Spending ($US) in Antigua, 2008/2009 Cruise Year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	$ 27.20	79%	$ 21.34
Taxis/Ground Transportation	$ 16.10	18%	$ 2.91
Clothing	$ 38.10	15%	$ 5.86
Perfumes & Cosmetics	$ 49.40	10%	$ 5.13
Local Crafts & Souvenirs	$ 16.50	10%	$ 1.65
Other Purchases	$ 44.90	8%	$ 3.63
Telephone & Internet	$ 12.10	6%	$ 0.70
Entertainment/Night Clubs/Casinos	$ 124.20	5%	$ 5.73
Retail Purchases of Liquor	$ 17.50	3%	$ 0.54
Watches & Jewelry	$ 252.20	2%	$ 5.82
Electronics	$ 31.30	2%	$ 0.48
Onshore Purchase of Tours	$ 26.70	1%	$ 0.37
Total Spend per Crew			**$ 54.16**
Cruise Passenger Visits			101,448
Total Cruise Passenger Expenditures			**$ 5,494,424**

Cruise lines made payments to local businesses for a variety of goods and services. Net payments to local vendors for shore excursions have been included with passenger expenditures. However, cruise lines made other local expenditures, including payments for port fees and taxes, navigation services, utilities and other supplies. Based upon data provided by the FCCA member cruise lines, we estimated that all cruise lines spent **$4.5 million** ($US) in

Antigua during the 2008/2009 cruise year. Nearly all of these expenditures were payments for port fees and taxes and navigation services.

Economic Contribution of Cruise Tourism Expenditures

As noted in the **Data and Methods** section of the full report, a set of economic impact models were developed for each destination to produce estimates of the economic contribution of cruise tourism. Data for these models were collected from a broad range of local, regional and international sources. The impact models were designed to reflect the economic structure of each destination, including the industrial composition of Gross Domestic Product (GDP), the wage share of GDP by industry and average employee wages by industry.

Table 3 – Total Economic Contribution of Cruise Tourism in Antigua, 2008/2009 Cruise Year

	Employment	Wage Income ($US Millions)
Direct Economic Contribution	813	$ 7.3
Total Economic Contribution	1,315	$ 11.9

As shown in **Table 3**, the $48.3 million in total cruise tourism expenditures in Antigua generated direct employment of 813 residents of Antigua paying $7.3 million in annual wages. Adding the indirect contribution that results from the spending of those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures generated a total employment contribution of 1,315 jobs and $11.9 million in wage income in Antigua during the 2008/2009 cruise year.

Figure 1 – Total Employment Impacts by Sector - Antigua

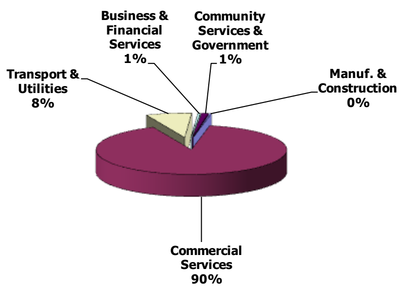
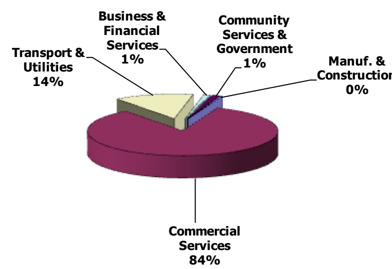


Figure 2 – Total Wage Impacts by Sector Antigua



As shown in **Figures 1 and 2**, the total employment and wage impacts of cruise tourism are concentrated in the commercial and transport sectors which account for 98 percent of the total impacts. This is not surprising since the direct impacts account for nearly 60 percent of the total employment impacts and that virtually all of the cruise tourism expenditures are made with businesses in these sectors. Because of the relatively higher wages in the transport sector compared to the other sectors of the economy, the transport sector accounts for 14 percent of the wage impacts but only 8 percent of the employment impacts. The remainder of the total employment and wage impacts was generated by the indirect spending in the other sectors of the economy.[4]

Comparison to 2006 Study

Total passenger and crew visits increased by nearly 35 percent from 470,300 visits during the 2005/2006 cruise year to 633,500 during the 2008/2009 cruise year. Total direct cruise tourism expenditures increased at a much slower rate, 18 percent, over the three year period, increasing from $41 million to $48.3 million. As indicated in **Table 4**, all three components of cruise tourism expenditures, passengers, crew and cruise lines, experienced an increase in spending. However, the increase in passenger expenditures was the net result of a decline in the average expenditure per passenger which was more than offset by the increase in total passenger visits. The decline in per passenger expenditures was due to a decline in the percentage of passengers making onshore purchases and the average value of those purchases. For example, for the two largest expenditure categories, jewelry and shore excursions, the percentage of passengers making such purchases fell from 14% to 12% in the case of jewelry and from 72% to 49% for shore excursions. This was also matched by a decline in the average value of purchases in these categories, for jewelry the average value of an actual purchase fell from $426 to $370 while the average effective value of a shore excursion fell from $65 to $63.

Table 4 – Comparison of Cruise Tourism Impacts, Current Study versus 2006 Study

	Current Study	2006 Study
Total Onshore Visits (Thousands)	**633.5**	**470.3**
Passengers	532.1	391.4
Crew	101.4	78.9
Total Direct Expenditures ($US Millions)	**$ 48.3**	**$ 41.0**
Passengers	$ 38.3	$ 32.9
Crew	$ 5.5	$ 4.1
Cruise Lines	$ 4.5	$ 4.0
Average Per Passenger Expenditure	**$72.06**	**$ 84.00**
Average Per Crew Expenditure	**$54.16**	**$ 52.47**
Total Employment Impact	**1,315**	**1,215**
Total Wage Impact ($US Millions)	**$ 11.9**	**$ 10.4**

As a result of the increase in direct cruise tourism expenditures from the 2005/2006 cruise year, the economic impacts increased as well. The total employment impact increased by 8 percent over the three-year period while the wage impact increased by 14 percent. The higher growth in wages is due to increased labor productivity and average wages over the intervening period.

[4] The industry sectors include the following activities:
Manufacturing & Construction: residential and nonresidential construction and all manufacturing
Commercial Services: wholesale and retail trade, lodging and eating and drinking establishments
Transportation & Utilities: tour operators, port services, telecommunications and water and power utilities
Business & Financial Services: banking, insurance, legal, accounting, leasing and other business services
Community Services & Government: education, health and social services and government agencies

Passenger Surveys

A total of 1,059 passenger surveys were completed and returned for tabulation. **Table 5** shows the major attributes of passenger visits to Antigua as derived from the passenger surveys.

- Of the 1,059 cruise parties that completed the surveys 72% stated that this had been their first visit to Antigua.
- Ninety-six percent (96%) of the cruise parties that completed the surveys disembarked their cruise ship to visit Antigua.
- Of the cruise parties that went ashore, 52% made at least one purchase while ashore. The typical cruise party consisted of two passengers and spent an average of 4.1 hours ashore.
- The responding cruise parties reported spending an average of $114 while ashore (excludes shore excursions).
- Forty-eight percent (48%) of the passengers that went ashore purchased a shore excursion. Sixty-nine percent (69%) of passengers who purchased a tour did so through their cruise line, 27.5% purchased their tour onshore and nearly 4 percent purchased their tour through their travel agent.
- The typical cruise party that purchased a shore excursion spent $105 for their tour.

Table 5 - Major Attributes of Passenger Surveys - Antigua

	Number	Percent
Total Respondents	1,059	
Number Making First Visit	762	72.0%
Number Ashore	1,012	95.6%
Number Making Onshore Purchases:	521	51.5%
Average Hours Ashore	4.1	
Average Size of Expenditure Party (Persons)	2.0	
Average Onshore Expenditure per Party	$114	
Purchased a Shore Excursion (Tour)	491	48.5%
Purchased Onshore Tour from:		
Cruise Line	339	69.0%
Onshore from Tour Operator	135	27.5%
Travel Agent	17	3.5%
Average Cost of Shore Excursion per Party	$105	
Toured On Own/Did not Tour	521	

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Table 6**. A 10-point scale was used with 10 being the highest score, i.e., extremely satisfied, and 1 being the lowest score, i.e., not at all satisfied.

Table 6 – Passenger Visit Satisfaction* - Antigua

Visit Attributes	Mean Score
Overall Visit	7.2
Visit Met Expectations	6.7
Likelihood of a Return Visit	4.1
Informed of Tours and Activities	7.4
Initial Shoreside Welcome	7.2
Guided Tour	7.9
Historic Sites/Museums	7.2
Variety of Things to See and Do	6.5
Friendliness of Residents	7.5
Overall Shopping Experience	6.5
Courtesy of Employees	7.5
Variety of Shops	6.2
Overall Prices	6.5
Taxis/Local Transportation	7.3

* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows: Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3; Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Cruise passengers were very satisfied with their overall visit to Antigua with a mean score of 7.2. However, the visit did not score as high in terms of meeting expectations. The mean score for "Visit Met Expectations" was lower at 6.7.
- Passengers felt very informed about tours and onshore activities in Antigua with a mean score of 7.4.
- "Guided Tours" (or Shore Excursions) received the highest score of all visit attributes with a mean score of 7.9. Thus, cruise passengers were very satisfied with their shore excursions.
- Passenger interactions with residents and store employees were very positive with "friendliness of residents" and "courtesy of employees" each having a mean score of 7.5.
- Categories with slightly lower scores but still above 7.0 (Very Satisfied) were: initial shoreside welcome, historic sites and local transportation.
- Categories with average scores between 5.0 and 7.0 (Somewhat Satisfied) were given for variety of things to see and do and the overall shopping experience, including the variety of shops and overall prices. Thus, while passengers thought shop employees were very courteous, the overall score for their shopping experience was brought down by lower perceptions on the variety of shops (6.2) and overall prices (6.5).
- Cruise passengers stated that they were not too likely to return to Antigua for a land-based vacation.

Passenger Demographics

Residents of the United States and Canada accounted for 92 percent of the responding passengers. The average age of the respondents was 55 years with 35 percent of the respondents being 65 years of age or older. Antigua passengers had an average household income of $98,000 with 37 percent having over $100,000 in household income.

Figure 3 – Passenger Age Cohorts Antigua

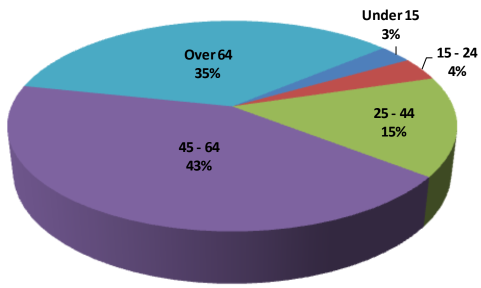
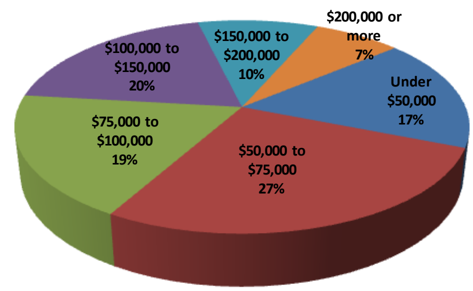


Figure 4 – Passenger Household Income Antigua



Aruba

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.[5] The surveys were undertaken during the six-month period beginning in November 2008 and ending in April 2009. The survey schedule was designed so that surveys were conducted by FCCA member cruise lines that called at each destination and that the distribution of passenger and crew surveys would reflect the distribution of passenger and crew arrivals by cruise line at each destination. On any given cruise itinerary, passenger and crew surveys were placed in all passenger cabins and crew quarters following a single destination call. The surveys were completed by the passengers and crew in the privacy of their quarters and returned to a designated office on the cruise ship. Thus, passengers and crew were only surveyed once during a cruise itinerary and for a single destination. On a subsequent itinerary, passengers were surveyed following a call at a different destination.

The passenger and crew surveys were designed to collect data for onshore spending and visit satisfaction by both passengers and crew. While the crew survey was slightly shorter than the passenger survey, both surveys were designed to collect the following information:

- hours spent ashore;
- expenditures by category, including shore tours, food & beverages, clothing, etc.;
- visit satisfaction, including shore tour, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation; and
- demographic characteristics, including country of residence, age group, income, etc.

Combining the expenditure data collected from the passenger and crew surveys with data on expenditures by cruise lines for port fees and services, payments to local tour operators for passenger shore excursions purchased onboard the cruise ships, and other provisions purchased locally by the cruise lines, estimates of total cruise tourism expenditures were developed for each participating destination.

Given the direct spending estimates, the economic contribution of these expenditures, as measured by employment and wage income were then estimated for each destination. This process began with the collection of economic data for each destination from a combination of local, regional and international sources. Utilizing all of these data a set of economic impact models were developed for each destination to estimate the direct and total employment and wage impacts. A more detailed description of these models is provided in the **Data and Methods** section of Volume I.

[5] Surveys were conducted on the ships of the following cruise lines: Azamara Cruises, Carnival Cruise Lines, Celebrity Cruises, Disney Cruise Line, Holland America Line, MSC Cruises (USA), Inc., Norwegian Cruise Line, Princess Cruises, P&O Cruises and Royal Caribbean International.

Cruise Tourism Expenditures

Cruise tourism expenditures in destination ports are composed of a broad range of spending including:

- onshore expenditures by passengers which tend to be concentrated in shore excursions and retail purchases of clothing, jewelry and local crafts and souvenirs;
- onshore expenditures by crew which are generally concentrated in purchases of food and beverages, local transportation and retail purchases of clothing and electronics;
- expenditures by cruise lines for port services, such as dockage fees and linesmen, utilities, such as water and power and navigation services; and
- purchases of supplies, such as food and other stores, by the cruise lines from local businesses.

According to data provided by the Aruba Ports Authority, 573,100 cruise passengers arrived aboard cruise ships during the 2008/2009 cruise year.[6] Of these, an estimated 487,100 passengers (85 percent) disembarked and visited Aruba. The Aruba Ports Authority also reported that 234,600 crew arrived on visiting cruise ships. Utilizing data provided by the visiting cruise lines, we have estimated that 40 percent, or 93,851 crew, disembarked and visited Aruba. These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **$54.1 million** ($US) in cruise tourism expenditures in Aruba during the 2008/2009 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Table 7 – Estimated Passenger Spending ($US) in Aruba, 2008/2009 Cruise Year[7]

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	$ 64.20	55%	$ 35.42
Clothing	$ 44.50	45%	$ 19.91
Local Crafts & Souvenirs	$ 25.50	38%	$ 9.83
F&B at Restaurants & Bars	$ 27.70	33%	$ 9.18
Other Purchases	$ 87.02	20%	$ 17.12
Taxis/Ground Transportation	$ 31.00	18%	$ 5.52
Watches & Jewelry	$ 510.90	15%	$ 75.62
Perfumes & Cosmetics	$ 39.30	10%	$ 3.74
Retail Purchases of Liquor	$ 22.30	4%	$ 0.82
Telephone & Internet	$ 14.70	4%	$ 0.61
Entertainment/Night Clubs	$ 89.90	3%	$ 2.88
Electronics	$ 174.70	2%	$ 2.90
Total Spend per Cruise Party			$ 183.55
Average Size of a Cruise Party			2.1
Total Spend per Cruise Passenger			$ 87.41
Cruise Passenger Visits			487,100
Total Cruise Passenger Expenditures			$ 42,575,972

[6] The 2008/2009 cruise year includes the twelve months beginning in May, 2008 and ending in April, 2009.

[7] The average shore excursion expenditure is a weighted average of the onshore and Internet purchases and the portion of the onboard purchases paid to local tour operators.

Per passenger spending estimates were derived from the 1,297 surveys completed by passengers that went ashore during the survey period. As shown in **Table 7,** each passenger cruise party spent an average of $183.55. The average spend per cruise party is the sum of the weighted spending in each of the twelve categories. For example, 33 percent of the survey respondents reported spending an average of $27.70 at local restaurants and/or bars. Spread over the 1,297 cruise parties that visited Aruba, this represents an average of $9.18 per party. On a per passenger basis, the average total expenditure was $87.41. This represents the sum of per party expenditures, $183.55, divided by the average size of a cruise party in Aruba, 2.1 passengers.

For the entire 2008/2009 cruise year, the estimated 487,100 cruise passengers who visited Aruba spent a total of **$42.6 million** ($US).

Per crew spending estimates were derived from the 524 surveys completed by crew members during the survey period. As shown in **Table 8,** each crew member spent an average of $69.34 in Aruba. The average spend per crew member is the sum of the weighted spending in each of the twelve categories. For example, 75 percent of the survey respondents reported spending an average of $28.50 for food and beverages. Spread over the 524 crew members that visited Aruba, this represents an average of $21.28 per crew member.

For the entire 2008/2009 cruise year, the estimated 93,851 crew who visited Aruba spent an estimated total of **$6.5 million** ($US).

Table 8 – Estimated Crew Spending ($US) in Aruba, 2008/2009 Cruise Year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	$ 28.50	75%	$ 21.28
Taxis/Ground Transportation	$ 8.40	24%	$ 2.01
Clothing	$ 38.40	15%	$ 5.84
Telephone & Internet	$ 10.30	14%	$ 1.46
Entertainment/Night Clubs	$ 96.90	12%	$ 11.46
Other Purchases	$ 34.60	12%	$ 3.97
Local Crafts & Souvenirs	$ 18.10	11%	$ 1.90
Perfumes & Cosmetics	$ 54.70	7%	$ 3.88
Watches & Jewelry	$ 238.70	6%	$ 15.32
Shore Excursions	$ 21.50	4%	$ 0.80
Electronics	$ 36.60	3%	$ 0.99
Retail Purchases of Liquor	$ 14.00	3%	$ 0.43
Total Spend per Crew			**$ 69.34**
Cruise Passenger Visits			93,851
Total Cruise Passenger Expenditures			**$ 6,507,628**

Cruise lines made payments to local businesses for a variety of goods and services. Net payments to local vendors for shore excursions have been included with passenger expenditures. However, cruise lines made other local expenditures, including payments for port fees and taxes, navigation services, utilities and other supplies. Based upon data provided by the FCCA member cruise lines, we estimated that all cruise lines spent $**5.0 million** ($US) in

Aruba during the 2008/2009 cruise year. Approximately 80 percent of these expenditures were payments for port fees and navigation services while the remaining 20 percent consisted of payments for ship supplies.

Economic Contribution of Cruise Tourism Expenditures

As noted in the **Data and Methods** section of the full report, a set of economic impact models were developed for each destination to produce estimates of the economic contribution of cruise tourism. Data for these models were collected from a broad range of local, regional and international sources. The impact models were designed to reflect the economic structure of each destination, including the industrial composition of Gross Domestic Product (GDP), the wage share of GDP by industry and average employee wages by industry.

Table 9 – Total Economic Contribution of Cruise Tourism in Aruba, 2008/2009 Cruise Year

	Employment	Wage Income ($US Millions)
Direct Economic Contribution	735	$12.0
Total Economic Contribution	1,330	$21.9

As shown in **Table 9**, the $54.1 million in total cruise tourism expenditures generated direct employment of 735 residents of Aruba paying $12.0 million in annual wages. Adding the indirect contribution that results from the spending of those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures generated a total employment contribution of 1,330 jobs and $21.9 million in wage income in Aruba during the 2008/2009 cruise year.

Figure 5 – Total Employment Impacts by Sector - Aruba

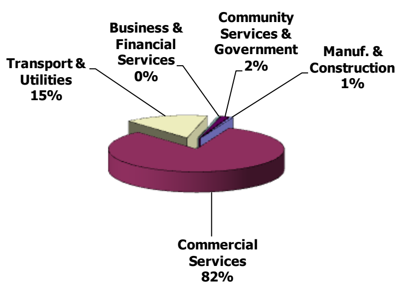
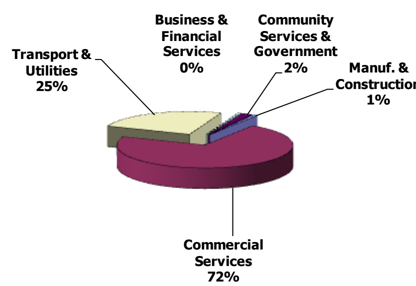


Figure 6 – Total Wage Impacts by Sector Aruba



As shown in **Figures 5 and 6**, the total employment and wage impacts of cruise tourism are concentrated in the commercial and transport sectors which account for about 97 percent of the employment and wage impacts.[8] This is not surprising since the direct impacts account for 55

[8] The industry sectors include the following activities:
Manufacturing & Construction: residential and nonresidential construction and all manufacturing
Commercial Services: wholesale and retail trade, lodging and eating and drinking establishments

percent of the total employment impacts and that virtually all of the cruise tourism expenditures are made with businesses in these sectors. Because of the relatively higher wages in the transport sector compared to the other sectors of the economy, the transport sector accounts for 25 percent of the wage impacts but only 15 percent of the employment impacts. The remainder of the total employment and wage impacts was generated by the indirect spending in the other sectors of the economy.

Comparison to 2006 Study

Total passenger and crew visits increased by only 2.2 percent from 568,200 visits during the 2005/2006 cruise year to 581,000 during the 2008/2009 cruise year. However, total direct cruise tourism expenditures actually declined by 18 percent, over the three year period, falling from an estimated $66.2 million to $54.1 million. As indicated in **Table 10**, cruise tourism expenditures by passengers and crew declined while spending by the cruise lines remained unchanged.

Table 10 – Comparison of Cruise Tourism Impacts, Current Study versus 2006 Study

	Current Study	2006 Study
Total Onshore Visits (Thousands)	**581.0**	**568.2**
Passengers	587.1	478.6
Crew	93.9	89.6
Total Direct Expenditures ($US Millions)	**$ 54.1**	**$ 66.2**
Passengers	$ 42.6	$ 54.2
Crew	$ 6.5	$ 7.0
Cruise Lines	$ 5.0	$ 5.0
Average Per Passenger Expenditure	**$87.41**	**$ 113.26**
Average Per Crew Expenditure	**$69.34**	**$ 78.45**
Total Employment Impact	**1,330**	**1,710**
Total Wage Impact ($US Millions)	**$ 21.9**	**$ 24.6**

The decline in average expenditures by passengers was the result of a smaller percentage of passengers making onshore expenditures while also spending less when making a purchase. For example during the 2005/2006 cruise year an estimated 70 percent of cruise passengers purchased shore excursions. During the 2008/2009 cruise year this percentage dropped to 55 percent. At the same time this decline in the percentage of passengers purchasing shore excursions was augmented by a decline in the average effective price of a shore excursion from $69 in 2005/2006 to $63 in 2008/2009.

In the case of crew expenditures most of the decline in the average expenditure was due to lower expenditures by those crew that made onshore purchases. At the same time the percentage of crew making purchases in a category increased. As an example, the percentage of crew making onshore purchases of

Transportation & Utilities: tour operators, port services, telecommunications and water and power utilities
Business & Financial Services: banking, insurance, legal, accounting, leasing and other business services
Community Services & Government: education, health and social services and government agencies

food and beverage actually increased from 53% in the 2005/2006 cruise year to 78 percent in the 2008/2009 cruise year. However the actual expenditure by those crew that purchased food and beverages fell from $37.50 to $27.20. The net effect of these two effects across all categories was to lower the average expenditure pre crew.

As a result of the decrease in direct cruise tourism expenditures from the 2005/2006 cruise year, the economic impacts declined as well. The total employment impact fell by 22 percent over the three-year period while the wage impact increased by 11 percent. The smaller decline in wages is due to increased labor productivity and average wages over the intervening period.

Passenger Surveys

A total of 1,380 passenger surveys were completed and returned for tabulation. **Table 11** shows the major attributes of passenger visits in Aruba as derived from the passenger surveys.

- Of the 1,380 cruise parties that completed the surveys 63% stated that this had been their first visit to Aruba.
- Ninety-four percent (94%) of the cruise parties that completed the surveys disembarked their cruise ship to visit Aruba.
- Of the cruise parties that went ashore, 74% made at least one purchase while ashore. The typical cruise party consisted of 2.1 passengers and spent an average of 4.2 hours ashore.

Table 11 - Major Attributes of Passenger Surveys - Aruba

	Number	Percent
Total Respondents	1,380	
Number Making First Visit	875	63.4%
Number Ashore	1,297	94.0%
Number Making Onshore Purchases:	966	74.5%
Average Hours Ashore	4.2	
Average Size of Expenditure Party (Persons)	2.1	
Average Onshore Expenditure per Party	$148	
Purchased a Shore Excursion (Tour)	716	55.2%
Purchased Onshore Tour from:		
Cruise Line	533	74.4%
Onshore from Tour Operator	136	18.9%
Travel Agent	48	6.7%
Average Cost of Shore Excursion per Party	$104	
Toured On Own/Did not Tour	581	

- The responding cruise parties reported spending an average of $148 while ashore (excludes shore excursions).
- Fifty-five percent (55%) of the passengers that went ashore purchased a shore excursion. Seventy-four percent (74%) of passengers who purchased a tour did so through their cruise line, 19% purchased their tour onshore and nearly 7 percent purchased their tour through their travel agent.

- The typical cruise party that purchased a shore excursion spent $104 for their tour.

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Table 12**. A 10-point scale was used with 10 being the highest score, i.e., extremely satisfied, and 1 being the lowest score, i.e., not at all satisfied.

Table 12 – Passenger Visit Satisfaction* - Aruba

Visit Attributes	Mean Score
Overall Visit	7.3
Visit Met Expectations	6.8
Likelihood of a Return Visit	4.1
Informed of Tours and Activities	7.9
Initial Shoreside Welcome	7.0
Guided Tour	8.0
Historic Sites/Museums	6.9
Variety of Things to See and Do	6.7
Friendliness of Residents	8.0
Overall Shopping Experience	6.8
Courtesy of Employees	7.8
Variety of Shops	6.9
Overall Prices	6.6
Taxis/Local Transportation	7.2

* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows: Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3; Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Cruise passengers were very satisfied with their overall visit to Aruba with a mean score of 7.3. However, the visit did not score as high in terms of meeting expectations. The mean score for "Visit Met Expectations" was lower at 6.8.
- Passengers felt very informed about tours and onshore activities in Aruba with a mean score of 7.9.
- "Guided Tours" (or Shore Excursions) received the highest score of all visit attributes with a mean score of 8.0. Thus, cruise passengers were very satisfied with their shore excursions.
- Passenger interactions with residents and store employees were very positive with "friendliness of residents" receiving a mean score of 8.0 and "courtesy of employees" having a mean score of 7.8.
- Categories with slightly lower scores but still above 7.0 (Very Satisfied) were: initial shoreside welcome and local transportation.

- Categories with average scores between 5.0 and 7.0 (Somewhat Satisfied) were given for historic sites, variety of things to see and do and the overall shopping experience, including the variety of shops and overall prices. Thus, while passengers thought shop employees were very courteous, the overall score for their shopping experience was brought down by lower perceptions on the variety of shops (6.9) and overall prices (6.6).
- Cruise passengers stated that they were not too likely to return to Aruba for a land-based vacation.

Passenger Demographics

Residents of the United States and the Canada accounted for 93 percent of the responding passengers. The average age of the respondents was 59 years with 45 percent of the respondents being 65 years of age or older. Aruba passengers had an average household income of $104,500 with 41 percent having over $100,000 in household income.

Figure 7 – Passenger Age Aruba

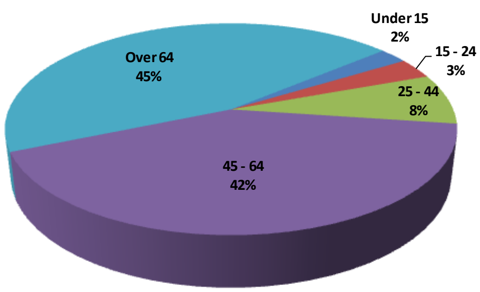
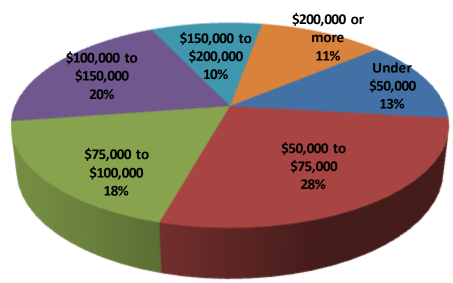


Figure 8 – Passenger Household Income Aruba



The Bahamas

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.[9] The surveys were undertaken during the six-month period beginning in November 2008 and ending in April 2009. The survey schedule was designed so that surveys were conducted by FCCA member cruise lines that called at each destination and that the distribution of passenger and crew surveys would reflect the distribution of passenger and crew arrivals by cruise line at each destination. On any given cruise itinerary, passenger and crew surveys were placed in all passenger cabins and crew quarters following a single destination call. The surveys were completed by the passengers and crew in the privacy of their quarters and returned to a designated office on the cruise ship. Thus, passengers and crew were only surveyed once during a cruise itinerary and for a single destination. On a subsequent itinerary, passengers were surveyed following a call at a different destination.

The passenger and crew surveys were designed to collect data for onshore spending and visit satisfaction by both passengers and crew. While the crew survey was slightly shorter than the passenger survey, both surveys were designed to collect the following information:

- hours spent ashore;
- expenditures by category, including shore tours, food & beverages, clothing, etc.;
- visit satisfaction, including shore tour, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation; and
- demographic characteristics, including country of residence, age group, income, etc.

Combining the expenditure data collected from the passenger and crew surveys with data on expenditures by cruise lines for port fees and services, payments to local tour operators for passenger shore excursions purchased onboard the cruise ships, and other provisions purchased locally by the cruise lines, estimates of total cruise tourism expenditures were developed for each participating destination.

Given the direct spending estimates, the economic contribution of these expenditures, as measured by employment and wage income were then estimated for each destination. This process began with the collection of economic data for each destination from a combination of local, regional and international sources. Utilizing all of these data a set of economic impact models were developed for each destination to estimate the direct and total employment and wage impacts. A more detailed description of these models is provided in the **Data and Methods** section of Volume I.

[9] Surveys were conducted on the ships of the following cruise lines: Azamara Cruises, Carnival Cruise Lines, Celebrity Cruises, Disney Cruise Line, Holland America Line, MSC Cruises (USA), Inc., Norwegian Cruise Line, Princess Cruises, P&O Cruises and Royal Caribbean International.

Cruise Tourism Expenditures

Cruise tourism expenditures in destination ports are composed of a broad range of spending including:

- onshore expenditures by passengers which tend to be concentrated in shore excursions and retail purchases of clothing, jewelry and local crafts and souvenirs;
- onshore expenditures by crew which are generally concentrated in purchases of food and beverages, local transportation and retail purchases of clothing and electronics;
- expenditures by cruise lines for port services, such as dockage fees and linesmen, utilities, such as water and power and navigation services; and
- purchases of supplies, such as food and other stores, by the cruise lines from local businesses.

According to data provided by the Ministry of Tourism, an estimated 2.5 million cruise passengers arrived aboard cruise ships at Nassau and Freeport[10] during the 2008/2009 cruise year.[11] Of these, an estimated 2.0 million passengers (80 percent) disembarked and visited the Bahamas. Utilizing additional data provided by the visiting cruise lines, we have estimated that one million crew were aboard the cruise ships and that 35 percent, or 360,000 crew, disembarked and visited the island. These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **$246.1 million** ($US) in cruise tourism expenditures in the Bahamas during the 2008/2009 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Per passenger spending estimates were derived from the 1,040 surveys completed by passengers that went ashore during the survey period. As shown in **Table 13,** each passenger cruise party spent an average of $193.04. The average spend per cruise party is the sum of the weighted spending in each of the twelve categories. For example, 38 percent of the survey respondents reported spending an average of $36.60 at local restaurants and/or bars. Spread over the 1,040 cruise parties that visited the Bahamas, this represents an average of $13.73 per party. On a per passenger basis, the average total expenditure was $83.93. This represents the sum of per party expenditures, $193.04, divided by the average size of a cruise party in the Bahamas, 2.3 passengers.

For the entire 2008/2009 cruise year, the estimated 2.0 million cruise passengers who visited The Bahamas spent a total of **$169.5 million** ($US).

[10] Since this analysis is focused on the economic impact of onshore spending by the cruise sector, we have excluded passenger and crew arrivals and visits at the various private cays in The Bahamas. Including these visits, the CTO has estimated that there were 2.9 million total passenger arrivals in The Bahamas during the 2008 calendar year.

[11] The 2008/2009 cruise year includes the twelve months beginning in May, 2008 and ending in April, 2009.

Table 13 – Estimated Passenger Spending ($US) in The Bahamas, 2008/2009 Cruise Year[12]

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Clothing	$ 46.10	50%	$ 22.84
Local Crafts & Souvenirs	$ 39.30	49%	$ 19.18
Shore Excursions	$ 85.79	46%	$ 39.64
F&B at Restaurants & Bars	$ 36.60	38%	$ 13.73
Taxis/Ground Transportation	$ 26.20	28%	$ 7.31
Watches & Jewelry	$ 236.80	21%	$ 49.52
Other Purchases	$ 171.80	16%	$ 28.08
Retail Purchases of Liquor	$ 32.50	11%	$ 3.47
Entertainment/Night Clubs	$ 94.40	7%	$ 6.35
Perfumes & Cosmetics	$ 46.60	4%	$ 2.02
Telephone & Internet	$ 10.30	1%	$ 0.16
Electronics	$ 153.80	1%	$ 0.74
Total Spend per Cruise Party			$ 193.04
Average Size of a Cruise Party			2.3
Total Spend per Cruise Passenger			$ 83.93
Cruise Passenger Visits			2,019,355
Total Cruise Passenger Expenditures			$ 169,490,573

Per crew spending estimates were derived from the 645 surveys completed by crew members during the survey period. As shown in **Table 14,** each crew member spent an average of $77.95 in the Bahamas. The average spend per crew member is the sum of the weighted spending in each of the twelve categories. For example, 66 percent of the survey respondents reported spending an average of $35.80 for food and beverages. Spread over the 645 crew members that visited the Bahamas, this represents an average of $23.47 per crew member. For the entire 2008/2009 cruise year, the estimated 359,551 crew who visited the Bahamas spent an estimated total of **$28.0 million** ($US).

Table 14 – Estimated Crew Spending ($US) in The Bahamas, 2008/2009 Cruise Year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	$ 35.80	66%	$ 23.47
Taxis/Ground Transportation	$ 12.60	23%	$ 2.95
Clothing	$ 36.00	17%	$ 6.26
Entertainment/Night Clubs	$191.10	14%	$ 27.48
Telephone & Internet	$ 14.40	10%	$ 1.49
Shore Excursions	$ 50.90	6%	$ 3.26
Local Crafts & Souvenirs	$ 16.40	6%	$ 1.04
Other Purchases	$ 75.60	5%	$ 4.05
Watches & Jewelry	$167.50	4%	$ 6.72
Perfumes & Cosmetics	$ 28.00	2%	$ 0.66
Retail Purchases of Liquor	$ 19.20	2%	$ 0.32
Electronics	$ 25.00	1%	$ 0.25
Total Spend per Crew			$ 77.95
Cruise Passenger Visits			359,551
Total Cruise Passenger Expenditures			$ 28,026,985

[12] The average shore excursion expenditure is a weighted average of the onshore and Internet purchases and the portion of the onboard purchases paid to local tour operators.

Cruise lines made payments to local businesses for a variety of goods and services. Net payments to local vendors for shore excursions have been included with passenger expenditures. However, cruise lines made other local expenditures, including payments for port fees and taxes, navigation services, utilities and other supplies. Based upon data provided by the FCCA member cruise lines, we estimated that all cruise lines spent **$48.5 million** ($US) in The Bahamas during the 2008/2009 cruise year. Nearly all of these expenditures were payments for port fees and taxes and navigation services.

Economic Contribution of Cruise Tourism Expenditures

As noted in the **Data and Methods** section of the full report, a set of economic impact models were developed for each destination to produce estimates of the economic contribution of cruise tourism. Data for these models were collected from a broad range of local, regional and international sources. The impact models were designed to reflect the economic structure of each destination, including the industrial composition of Gross Domestic Product (GDP), the wage share of GDP by industry and average employee wages by industry.

Table 15 – Total Economic Contribution of Cruise Tourism in The Bahamas, 2008/2009 Cruise Year

	Employment	Wage Income ($US Millions)
Direct Economic Contribution	3,692	$ 60.3
Total Economic Contribution	6,219	$100.4

As shown in **Table 15**, the $246.1 million in total cruise tourism expenditures generated direct employment of 3,692 residents of the Bahamas paying $60.3 million in annual wages. Adding the indirect contribution that results from the spending of those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures generated a total employment contribution of 6,219 jobs and $100.4 million in wage income in the Bahamas during the 2008/2009 cruise year.

Figure 9 – Total Employment Impacts by Sector - The Bahamas

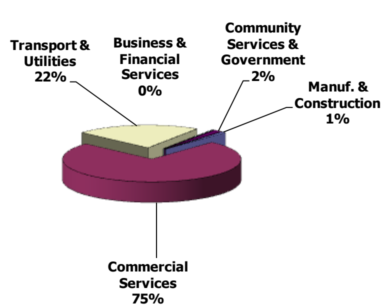
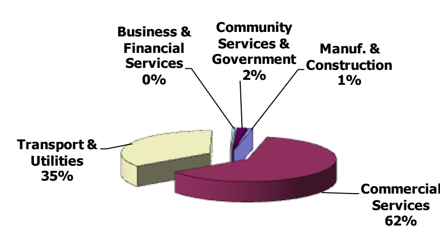


Figure 10 – Total Wage Impacts by Sector The Bahamas



As shown in **Figures 9 and 10**, the total employment and wage impacts of cruise tourism are concentrated in the commercial and transport sectors which account for about 97 percent of the employment and wage impacts.[13] This is not surprising since the direct impacts account for nearly 60 percent of the total employment impacts and that virtually all of the cruise tourism expenditures are made with businesses in these sectors. Because of the relatively higher wages in the transport sector compared to the other sectors of the economy, the transport sector accounts for 35 percent of the wage impacts but only 22 percent of the employment impacts. The remainder of the total employment and wage impacts was generated by the indirect spending in the other sectors of the economy.

Comparison to 2006 Study

Total estimated passenger and crew visits increased by nearly 28 percent from 1.87 million visits during the 2005/2006 cruise year to 2.38 million during the 2008/2009 cruise year. Total direct expenditures in the Bahamas increased even more dramatically growing by 70 percent from $114 million in the 2005/2006 cruise year to $246 million in the 2008/2009 cruise year. As indicated in **Table 16**, cruise tourism expenditures increased among all groups, passengers, crew and cruise lines.

Table 16 – Comparison of Cruise Tourism Impacts, Current Study versus 2006 Study

	Current Study	2006 Study
Total Onshore Visits (Thousands)	**2,379.0**	**1,865.2**
Passengers	2,019.4	1,585.5
Crew	359.6	279.8
Total Direct Expenditures ($US Millions)	**$ 246.1**	**$ 144.4**
Passengers	$ 169.5	$ 96.0
Crew	$ 28.0	$ 5.6
Cruise Lines	$ 48.5	$ 42.8
Average Per Passenger Expenditure	**$83.93**	**$ 60.54**
Average Per Crew Expenditure	**$77.95**	**$ 19.96**
Total Employment Impact	**6,219**	**3,965**
Total Wage Impact ($US Millions)	**$ 100.4**	**$ 60.9**

The growth in passenger and crew expenditures was not only driven by the 70 percent increase in onshore visits but also by the 39 percent increase in average passenger expenditures and the tripling in the reported average crew expenditures. These are certainly significant increases and were among the largest estimated among those destinations that participated in both studies. The growth in per passenger expenditures varied across categories, but, in general, the increase was mostly the result of an increase in the average

[13] The industry sectors include the following activities:
Manufacturing & Construction: residential and nonresidential construction and all manufacturing
Commercial Services: wholesale and retail trade, lodging and eating and drinking establishments
Transportation & Utilities: tour operators, port services, telecommunications and water and power utilities
Business & Financial Services: banking, insurance, legal, accounting, leasing and other business services
Community Services & Government: education, health and social services and government agencies

purchase in each category by those making such purchases. The percentage making purchases rose in some categories, such as local crafts and food and beverages and fell in others, such as clothing and shore excursions.

In the case of visiting crew, the sharp increase in per crew spending is primarily due to an impressive increase in the percentage of crew reporting purchases in each category. As an example, in the 2006 study 16 percent of crew reported making an average purchase of $32.30 for food and beverages. This increased to 66 percent reporting an average expenditure of $35.80 at restaurants and bars in the current study. Similar, but smaller, increases in the percentage of crew making purchases were reported in most categories.

As a result of the 70 percent increase in direct cruise tourism expenditures from the 2005/2006 cruise year, the economic impacts increased as well. The total employment impact rose by 57 percent over the three-year period while the wage impact increased by 65 percent. The higher growth in wages is due to increased labor productivity and average wages over the intervening period.

Passenger Surveys

A total of 1,102 passenger surveys were completed and returned for tabulation. **Table 11** shows the major attributes of passenger visits in the Bahamas as derived from the passenger surveys.

Table 17 - Major Attributes of Passenger Surveys - The Bahamas

	Number	Percent
Total Respondents	1,102	
Number Making First Visit	481	43.7%
Number Ashore	1,040	94.4%
Number Making Onshore Purchases:	560	53.8%
Average Hours Ashore	4.6	
Average Size of Expenditure Party (Persons)	2.3	
Average Onshore Expenditure per Party	$153	
Purchased a Shore Excursion (Tour)	480	46.2%
Purchased Onshore Tour from:		
Cruise Line	328	68.3%
Onshore from Tour Operator	130	27.1%
Travel Agent	22	4.6%
Average Cost of Shore Excursion per Party	$120	
Toured On Own/Did not Tour	560	

- Of the 1,102 cruise parties that completed the surveys 44% stated that this had been their first visit to the Bahamas.
- Ninety-four percent (94%) of the cruise parties that completed the surveys disembarked their cruise ship to visit the Bahamas.

- Of the cruise parties that went ashore, 54% made at least one purchase while ashore. The typical cruise party consisted of 2.3 passengers and spent an average of 4.6 hours ashore.

- The responding cruise parties reported spending an average of $153 while ashore (excludes shore excursions).

- Forty-six percent (46%) of the passengers that went ashore purchased a shore excursion. Sixty-eight percent (68%) of passengers who purchased a tour did so through their cruise line, 27% purchased their tour onshore and nearly 5 percent purchased their tour through their travel agent.

- The typical cruise party that purchased a shore excursion spent $120 for their tour.

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Table 17**. A 10-point scale was used with 10 being the highest score, i.e., extremely satisfied, and 1 being the lowest score, i.e., not at all satisfied.

Table 18 – Passenger Visit Satisfaction* - The Bahamas

Visit Attributes	Mean Score
Overall Visit	7.7
Visit Met Expectations	7.3
Likelihood of a Return Visit	5.6
Informed of Tours and Activities	7.8
Initial Shoreside Welcome	7.8
Guided Tour	8.1
Historic Sites/Museums	7.4
Variety of Things to See and Do	7.2
Friendliness of Residents	8.0
Overall Shopping Experience	7.3
Courtesy of Employees	8.1
Variety of Shops	7.2
Overall Prices	6.8
Taxis/Local Transportation	7.7

* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows: Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3; Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Cruise passengers were very satisfied with their overall visit to the Bahamas with a mean score of 7.7. However, the visit did not score as high in terms of meeting expectations. The mean score for "Visit Met Expectations" was lower at 7.3.

- Passengers felt very informed about tours and onshore activities in the Bahamas with a mean score of 7.8.

- "Guided Tours" (or Shore Excursions) received the highest score of all visit attributes with a mean score of 8.1. Thus, cruise passengers were very satisfied with their shore excursions.
- Passenger interactions with residents and store employees were very positive with "friendliness of residents" receiving a mean score of 8.0 and "courtesy of employees" having a mean score of 8.1.
- Categories with slightly lower scores but still above 7.0 (Very Satisfied) were: initial shoreside welcome, historic sites, variety of things to see and do and local transportation.
- The overall shopping experience, including the variety of shops and overall prices, received a mean score of 7.3. Thus, while passengers thought shop employees were very courteous, the overall score for their shopping experience was brought down by lower perceptions on the variety of shops (7.2) and overall prices (6.8). Still, passengers were very satisfied with their shopping experience.
- Cruise passengers stated that they were somewhat likely to return to the Bahamas for a land-based vacation.

Passenger Demographics

Residents of the United States and the Canada accounted for 97 percent of the responding passengers. Cruise passengers visiting the Bahamas tend to be younger and less affluent than the average Caribbean cruise passenger. The average age of the respondents was 48 years with only 23 percent of the respondents being 65 years of age or older. The Bahamas passengers had an average household income of $84,400 with only 24 percent having over $100,000 in household income.

Figure 11 – Passenger Age
The Bahamas

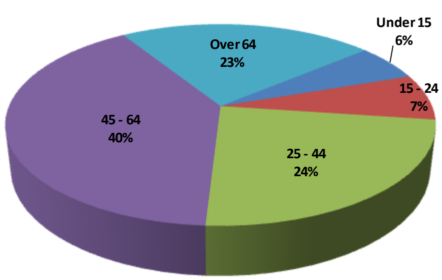
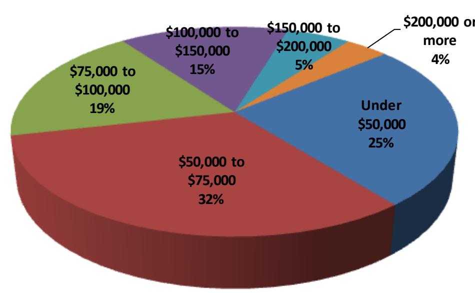


Figure 12 – Passenger Household Income
The Bahamas



Barbados

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.[14] The surveys were undertaken during the six-month period beginning in November 2008 and ending in April 2009. The survey schedule was designed so that surveys were conducted by FCCA member cruise lines that called at each destination and that the distribution of passenger and crew surveys would reflect the distribution of passenger and crew arrivals by cruise line at each destination. On any given cruise itinerary, passenger and crew surveys were placed in all passenger cabins and crew quarters following a single destination call. The surveys were completed by the passengers and crew in the privacy of their quarters and returned to a designated office on the cruise ship. Thus, passengers and crew were only surveyed once during a cruise itinerary and for a single destination. On a subsequent itinerary, passengers were surveyed following a call at a different destination.

The passenger and crew surveys were designed to collect data for onshore spending and visit satisfaction by both passengers and crew. While the crew survey was slightly shorter than the passenger survey, both surveys were designed to collect the following information:

- hours spent ashore;
- expenditures by category, including shore tours, food & beverages, clothing, etc.;
- visit satisfaction, including shore tour, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation; and
- demographic characteristics, including country of residence, age group, income, etc.

Combining the expenditure data collected from the passenger and crew surveys with data on expenditures by cruise lines for port fees and services, payments to local tour operators for passenger shore excursions purchased onboard the cruise ships, and other provisions purchased locally by the cruise lines, estimates of total cruise tourism expenditures were developed for each participating destination.

Given the direct spending estimates, the economic contribution of these expenditures, as measured by employment and wage income were then estimated for each destination. This process began with the collection of economic data for each destination from a combination of local, regional and international sources. Utilizing all of these data a set of economic impact models were developed for each destination to estimate the direct and total employment and wage impacts. A more detailed description of these models is provided in the **Data and Methods** section of Volume I.

[14] Surveys were conducted on the ships of the following cruise lines: Azamara Cruises, Carnival Cruise Lines, Celebrity Cruises, Disney Cruise Line, Holland America Line, MSC Cruises (USA), Inc., Norwegian Cruise Line, Princess Cruises, P&O Cruises and Royal Caribbean International.

Cruise Tourism Expenditures

Cruise tourism expenditures in destination ports are composed of a broad range of spending including:

- onshore expenditures by passengers which tend to be concentrated in shore excursions and retail purchases of clothing, jewelry and local crafts and souvenirs;
- onshore expenditures by crew which are generally concentrated in purchases of food and beverages, local transportation and retail purchases of clothing and electronics;
- expenditures by cruise lines for port services, such as dockage fees and linesmen, utilities, such as water and power and navigation services; and
- purchases of supplies, such as food and other stores, by the cruise lines from local businesses.

According to data provided by the Barbados Port Inc., a total of 718,418 cruise passengers arrived in Barbados during the 2008/2009 cruise year.[15] These included 551,405 intransit passengers and 167,013 passengers embarking on their cruises in Barbados. Of the intransit passengers, an estimated 441,124 passengers (80 percent) disembarked and visited Barbados. Utilizing additional data provided by the visiting cruise lines, we have estimated that 294,792 crew were aboard the cruise ships that sailed to and from Barbados and that 40 percent, or 117,917 crew, disembarked and visited the island. These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **$53.6 million** ($US) in cruise tourism expenditures in Barbados during the 2008/2009 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Passenger expenditures were estimated separately for intransit and homeport passengers. Per passenger spending estimates for intransit passengers were derived from the 1,396 surveys completed by passengers that went ashore during the survey period. As shown in **Table 19,** each passenger cruise party spent an average of $135.88 in Barbados. The average spend per cruise party is the sum of the weighted spending in each of the twelve categories. For example, 33 percent of the survey respondents reported spending an average of $23.40 at local restaurants and/or bars. Spread over the 1,396 cruise parties that visited Barbados, this represents an average of $7.80 per party. On a per passenger basis, the average total expenditure was $67.94. This represents the sum of per party expenditures, $135.88, divided by the average size of a cruise party in Barbados, 2.0 passengers. For the entire 2008/2009 cruise year, the estimated 441,124 intransit cruise passengers who visited Barbados spent a total of **$30.0 million** ($US) on the island.

[15] The 2008/2009 cruise year includes the twelve months beginning in May, 2008 and ending in April, 2009.

Table 19 – Estimated Intransit Passenger Spending ($US) in Barbados, 2008/2009 Cruise Year[16]

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	$ 64.02	58%	$ 37.00
Local Crafts & Souvenirs	$ 26.70	45%	$ 12.10
Taxis/Ground Transportation	$ 23.90	36%	$ 8.56
Clothing	$ 44.90	34%	$ 15.38
F&B at Restaurants & Bars	$ 23.40	33%	$ 7.80
Other Purchases	$ 56.54	25%	$ 14.16
Retail Purchases of Liquor	$ 27.40	13%	$ 3.64
Watches & Jewelry	$ 330.30	10%	$ 33.70
Telephone & Internet	$ 8.10	5%	$ 0.44
Perfumes & Cosmetics	$ 57.70	4%	$ 2.42
Entertainment/Night Clubs	$ 51.00	1%	$ 0.44
Electronics	$ 49.00	1%	$ 0.24
Total Spend per Cruise Party			**$ 135.88**
Average Size of a Cruise Party			2.0
Total Spend per Cruise Passenger			**$ 67.94**
Cruise Passenger Visits			441,124
Total Cruise Passenger Expenditures			**$ 29,970,410**

As noted above another 167,013 cruise passengers arrived in Barbados to begin their cruise in the southern Caribbean. These embarking passengers were also surveyed using a slightly different survey instrument. The response rate for passengers embarking on their cruise in Barbados, the Dominican Republic and Jamaica was very low. Following discussions with the staff of the homeport cruise ships, we concluded that because the vast majority of the passengers embarking on cruises in these islands arrive on the day of the cruise's departure and leave on the day of its return, only a few passengers on any survey date responded to the survey. As a consequence we aggregated the survey responses for these three homeport islands. Therefore, the following estimates of spending by homeport passengers are based upon the responses of passengers at the three islands.

Per passenger spending estimates for homeport passengers were derived from the 359 surveys completed by passengers that embarked on their cruises from Barbados, the Dominican Republic and Jamaica during the survey period. As shown in **Table 20,** each passenger cruise party spent an average of $144.30 in Barbados. The calculation of this figure is identical to that calculated for intransit passengers as discussed above. On a per passenger basis, the average total expenditure was $72.15. This figure is relatively low for homeport passengers and reflects the relatively low percentage of homeport passengers purchasing lodging and food and beverages. Those that did make purchases in these categories did spend at a representative level for homeport passengers but just fewer did so (see results for Puerto Rico). For the entire 2008/2009 cruise year, the estimated 167,013 homeport cruise passengers who visited Barbados spent a total of **$12.0 million** ($US) on the island.

[16] The average shore excursion expenditure is a weighted average of the onshore and Internet purchases and the portion of the onboard purchases paid to local tour operators.

Table 20 – Estimated Homeport Passenger Spending ($US) in Barbados, 2008/2009 Cruise Year[17]

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	$ 274.24	20%	$ 54.30
F&B at Restaurants & Bars	$ 47.24	16%	$ 7.50
Lodging	$ 220.26	15%	$ 33.70
Taxis/Ground Transportation	$ 36.06	12%	$ 4.52
Retail Purchases of Liquor	$ 33.34	8%	$ 2.60
Local Crafts & Souvenirs	$ 32.68	8%	$ 2.64
Other Purchases	$ 431.86	7%	$ 32.48
Clothing	$ 42.70	5%	$ 2.26
Watches & Jewelry	$ 137.62	2%	$ 2.30
Perfumes & Cosmetics	$ 65.82	2%	$ 1.10
Entertainment/Night Clubs	$ 57.44	1%	$ 0.80
Telephone & Internet	$ 11.97	1%	$ 0.10
Total Spend per Cruise Party			**$ 144.30**
Average Size of a Cruise Party			2.0
Total Spend per Cruise Passenger			**$ 72.15**
Cruise Passenger Visits			167,013
Total Cruise Passenger Expenditures			**$ 12,049,988**

Per crew spending estimates were derived from the 1,366 surveys completed by crew members during the survey period. As shown in **Table 21,** each crew member spent an average of $54.26 in Barbados. The average spend per crew member is the sum of the weighted spending in each of the twelve categories. For example, 52 percent of the survey respondents reported spending an average of $27.90 for food and beverages. Spread over all crew members that visited Barbados, this represents an average of $14.55 per crew member. For the entire 2008/2009 cruise year, the estimated 117,917 crew who visited Barbados spent an estimated total of **$6.4 million** ($US).

Table 21 – Estimated Crew Spending ($US) in Barbados, 2008/2009 Cruise Year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
Taxis/Ground Transportation	$ 21.30	57%	$ 12.13
F&B at Restaurants & Bars	$ 27.90	52%	$ 14.55
Watches & Jewelry	$ 43.00	18%	$ 7.82
Local Crafts & Souvenirs	$ 21.10	16%	$ 3.29
Perfumes & Cosmetics	$ 35.70	13%	$ 4.50
Clothing	$ 33.30	11%	$ 3.71
Other Purchases	$ 19.20	8%	$ 1.50
Entertainment/Night Clubs	$ 36.30	6%	$ 2.29
Retail Purchases of Liquor	$ 22.30	5%	$ 1.03
Electronics	$ 22.50	4%	$ 0.88
Telephone & Internet	$ 19.20	4%	$ 0.71
Shore Excursions	$ 68.50	3%	$ 1.85
Total Spend per Crew			**$ 54.26**
Cruise Passenger Visits			117,917
Total Cruise Passenger Expenditures			**$ 6,398,1762**

[17] The average shore excursion expenditure is a weighted average of the onshore and Internet purchases and the portion of the onboard purchases paid to local tour operators.

Cruise lines made payments to local businesses for a variety of goods and services. Net payments to local vendors for shore excursions have been included with passenger expenditures. However, cruise lines made other local expenditures, including payments for port fees and taxes, navigation services, utilities and other supplies. Based upon data provided by the FCCA member cruise lines, we estimated that all cruise lines spent **$5.2 million** ($US) in Barbados during the 2008/2009 cruise year. Approximately 85 percent of these expenditures were payments for port fees and navigation services while the remaining 15 percent consisted of payments for ship supplies.

Economic Contribution of Cruise Tourism Expenditures

As noted in the **Data and Methods** section of the full report, a set of economic impact models were developed for each destination to produce estimates of the economic contribution of cruise tourism. Data for these models were collected from a broad range of local, regional and international sources. The impact models were designed to reflect the economic structure of each destination, including the industrial composition of Gross Domestic Product (GDP), the wage share of GDP by industry and average employee wages by industry.

Table 22 – Total Economic Contribution of Cruise Tourism in Barbados, 2008/2009 Cruise Year

	Employment	Wage Income ($US Millions)
Direct Economic Contribution	875	$9.5
Total Economic Contribution	1,665	$17.2

As shown in **Table 22**, the $53.6 million in total cruise tourism expenditures generated direct employment of 875 residents of Barbados paying $9.5 million in annual wages. Adding the indirect contribution that results from the spending of those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures generated a total employment contribution of 1,665 jobs and $17.2 million in wage income in Barbados during the 2008/2009 cruise year.

Figure 13 – Total Employment Impacts by Sector - Barbados

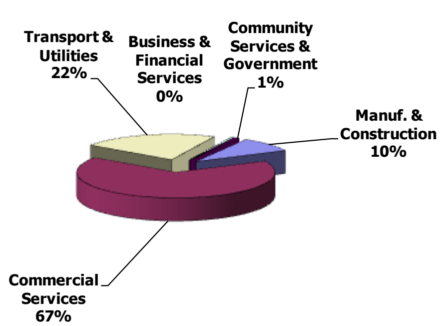
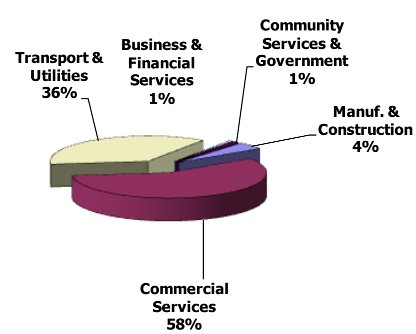


Figure 14 – Total Wage Impacts by Sector Barbados



As shown in **Figures 13 and 14**, the total employment and wage impacts of cruise tourism are concentrated in the commercial and transport sectors which account for about 90 percent of the employment and wage impacts.[18] This is not surprising since the direct impacts account for more than half of the total employment impacts and that virtually all of the cruise tourism expenditures are made with businesses in these sectors. Because of the relatively higher wages in the transport sector compared to the other sectors of the economy, the transport sector accounts for 36 percent of the wage impacts but only 22 percent of the employment impacts. The remainder of the total employment and wage impacts was generated by the indirect spending in the other sectors of the economy.

Comparison to 2006 Study

Total passenger and crew visits increased by 49 percent from 488,100 visits during the 2005/2006 cruise year to 726,000 during the 2008/2009 cruise year. However, total direct cruise tourism expenditures actually declined by 6.5 percent, over the three year period, falling from an estimated $57.3 million to $53.6 million.[19] As indicated in **Table 23**, cruise tourism expenditures by passengers and cruise lines declined while spending by the crew increased marginally.

Table 23 – Comparison of Cruise Tourism Impacts, Current Study versus 2006 Study

	Current Study	2006 Study
Total Onshore Visits (Thousands)	**726.0**	**488.1**
Passengers	608.1	405.3
Crew	117.9	82.8
Total Direct Expenditures ($US Millions)	**$ 53.6**	**$ 57.3**
Passengers	$ 42.0	$ 45.3
Crew	$ 6.4	$ 6.3
Cruise Lines	$ 5.2	$ 5.7
Average Per Passenger Expenditure①	**$69.10**	**$ 111.82**
Average Per Crew Expenditure	**$54.26**	**$ 76.18**
Total Employment Impact	**1,665**	**1,635**
Total Wage Impact ($US Millions)	**$ 17.2**	**$ 16.8**

① Includes both intransit and homeport passengers.

The decline in average expenditures by passengers was primarily the result of a sharp decline in the weighted average expenditure for clothing and jewelry. In both cases the average expenditure declined by more than 50 percent as both the average value of such purchases and the percentage of passengers

[18] The industry sectors include the following activities:
Manufacturing & Construction: residential and nonresidential construction and all manufacturing
Commercial Services: wholesale and retail trade, lodging and eating and drinking establishments
Transportation & Utilities: tour operators, port services, telecommunications and water and power utilities
Business & Financial Services: banking, insurance, legal, accounting, leasing and other business services
Community Services & Government: education, health and social services and government agencies

[19] While the passenger counts for the 2005/2006 cruise year do include homeport passengers, the spending figures for the 2005/2006 cruise year do not include data specific to homeport passengers.

making purchases of these commodities declined. While total crew expenditures increased the average expenditure of a crew member declined by nearly 30 percent. This decline was principally the result of crew members spending less for most goods.

Despite the decrease in direct cruise tourism expenditures from the 2005/2006 cruise year, the economic impacts remained relatively flat. The total employment impact was virtually unchanged, an increase of 1.8 percent, over the three-year period while the wage impact increased by 2.4 percent. The slightly higher growth in wages is due to increased labor productivity and average wages over the intervening period.

Passenger Surveys

A total of 1,516 intransit passenger surveys were completed and returned for tabulation. **Table 24** shows the major attributes of passenger visits in Barbados as derived from the passenger surveys.

Table 24 - Major Attributes of Intransit Passenger Surveys - Barbados

	Number	Percent
Total Respondents	1,516	
Number Making First Visit	902	59.5%
Number Ashore	1,396	92.1%
Number Making Onshore Purchases:	1,078	77.2%
Average Hours Ashore	4.4	
Average Size of Expenditure Party (Persons)	2.0	
Average Onshore Expenditure per Party	$99	
Purchased a Shore Excursion (Tour)	807	57.8%
Purchased Onshore Tour from:		
Cruise Line	659	81.7%
Onshore from Tour Operator	118	14.6%
Travel Agent	30	3.7%
Average Cost of Shore Excursion per Party	$112	
Toured On Own/Did not Tour	589	

- Of the 1,516 cruise parties that completed the surveys 60% stated that this had been their first visit to Barbados.
- Ninety-two percent (92%) of the cruise parties that completed the surveys disembarked their cruise ship to visit Barbados.
- Of the cruise parties that went ashore, 77% made at least one purchase while ashore. The typical cruise party consisted of 2.0 passengers and spent an average of 4.4 hours ashore.
- The responding cruise parties reported spending an average of $99 while ashore (excludes shore excursions).
- Fifty-eight percent (58%) of the passengers that went ashore purchased a shore excursion. Eighty-two percent (82%) of passengers who purchased a tour did so through their cruise line, just over 14% purchased their tour onshore and nearly 4 percent purchased their tour through their travel agent.

- The typical cruise party that purchased a shore excursion spent $112 for their tour.

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Table 25**. A 10-point scale was used with 10 being the highest score, i.e., extremely satisfied, and 1 being the lowest score, i.e., not at all satisfied.

Table 25 – Passenger Visit Satisfaction* - Barbados

Visit Attributes	Mean Score
Overall Visit	7.2
Visit Met Expectations	6.7
Likelihood of a Return Visit	4.4
Informed of Tours and Activities	7.6
Initial Shoreside Welcome	7.1
Guided Tour	8.2
Historic Sites/Museums	7.3
Variety of Things to See and Do	6.9
Friendliness of Residents	7.7
Overall Shopping Experience	6.4
Courtesy of Employees	7.5
Variety of Shops	6.5
Overall Prices	6.0
Taxis/Local Transportation	7.0

* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows:
Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3;
Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Cruise passengers were very satisfied with their overall visit to Barbados with a mean score of 7.2. However, the visit did not score as high in terms of meeting expectations. The mean score for “Visit Met Expectations” was lower at 6.7.
- Passengers felt very informed about tours and onshore activities in Barbados with a mean score of 7.6.
- “Guided Tours” (or Shore Excursions) received the highest score of all visit attributes with a mean score of 8.2. Thus, cruise passengers were very satisfied with their shore excursions.
- Passenger interactions with residents and store employees were very positive with “friendliness of residents” receiving a mean score of 7.7 and “courtesy of employees” having a mean score of 7.5.
- Categories with slightly lower scores but still above 7.0 (Very Satisfied) were: initial shoreside welcome, historic sites and local transportation.

- Categories with average scores between 5.0 and 7.0 (Somewhat Satisfied) were given for variety of things to see and do and the overall shopping experience, including the variety of shops and overall prices. Thus, while passengers thought shop employees were very courteous, the overall score for their shopping experience was brought down by lower perceptions on the variety of shops (6.5) and overall prices (6.0).
- Cruise passengers stated that they were not too likely to return to Barbados for a land-based vacation.

Passenger Demographics

Residents of the United States and the Canada accounted for 88 percent of the responding passengers. The average age of the respondents was 56 years with 35 percent of the respondents being 65 years of age or older. Barbados passengers had an average household income of $103,500 with 41 percent having over $100,000 in household income.

Figure 15 – Passenger Age Barbados

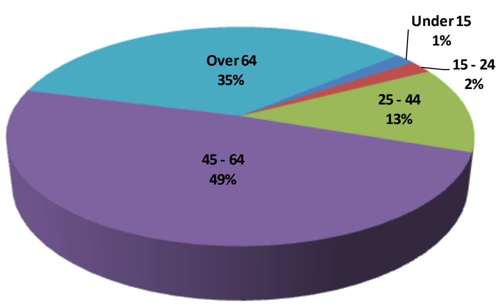
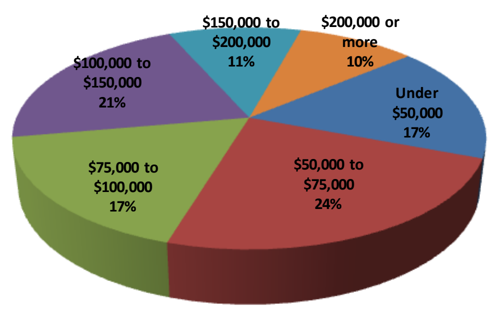


Figure 16 – Passenger Household Income Barbados



Belize

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.[20] The surveys were undertaken during the six-month period beginning in November 2008 and ending in April 2009. The survey schedule was designed so that surveys were conducted by FCCA member cruise lines that called at each destination and that the distribution of passenger and crew surveys would reflect the distribution of passenger and crew arrivals by cruise line at each destination. On any given cruise itinerary, passenger and crew surveys were placed in all passenger cabins and crew quarters following a single destination call. The surveys were completed by the passengers and crew in the privacy of their quarters and returned to a designated office on the cruise ship. Thus, passengers and crew were only surveyed once during a cruise itinerary and for a single destination. On a subsequent itinerary, passengers were surveyed following a call at a different destination.

The passenger and crew surveys were designed to collect data for onshore spending and visit satisfaction by both passengers and crew. While the crew survey was slightly shorter than the passenger survey, both surveys were designed to collect the following information:

- hours spent ashore;
- expenditures by category, including shore tours, food & beverages, clothing, etc.;
- visit satisfaction, including shore tour, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation; and
- demographic characteristics, including country of residence, age group, income, etc.

Combining the expenditure data collected from the passenger and crew surveys with data on expenditures by cruise lines for port fees and services, payments to local tour operators for passenger shore excursions purchased onboard the cruise ships, and other provisions purchased locally by the cruise lines, estimates of total cruise tourism expenditures were developed for each participating destination.

Given the direct spending estimates, the economic contribution of these expenditures, as measured by employment and wage income were then estimated for each destination. This process began with the collection of economic data for each destination from a combination of local, regional and international sources. Utilizing all of these data a set of economic impact models were developed for each destination to estimate the direct and total employment and wage impacts. A more detailed description of these models is provided in the **Data and Methods** section of Volume I.

[20] Surveys were conducted on the ships of the following cruise lines: Azamara Cruises, Carnival Cruise Lines, Celebrity Cruises, Disney Cruise Line, Holland America Line, MSC Cruises (USA), Inc., Norwegian Cruise Line, Princess Cruises, P&O Cruises and Royal Caribbean International.

Cruise Tourism Expenditures

Cruise tourism expenditures in destination ports are composed of a broad range of spending including:

- onshore expenditures by passengers which tend to be concentrated in shore excursions and retail purchases of clothing, jewelry and local crafts and souvenirs;
- onshore expenditures by crew which are generally concentrated in purchases of food and beverages, local transportation and retail purchases of clothing and electronics;
- expenditures by cruise lines for port services, such as dockage fees and linesmen, utilities, such as water and power and navigation services; and
- purchases of supplies, such as food and other stores, by the cruise lines from local businesses.

According to data provided by the Belize Tourist Board, 611,008 cruise passengers arrived aboard cruise ships during the 2008/2009 cruise year.[21] Of these, an estimated 519,357 passengers (85 percent) disembarked and visited Belize. Utilizing additional data provided by the visiting cruise lines, we have estimated that 253,714 crew were aboard the cruise ships and that 27 percent, or 68,503 crew, disembarked and visited Belize. These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **$58.6 million** ($US) in cruise tourism expenditures in Belize during the 2008/2009 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Table 26 – Estimated Passenger Spending ($US) in Belize, 2008/2009 Cruise Year[22]

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	$ 86.36	70%	$ 60.02
Local Crafts & Souvenirs	$ 32.40	53%	$ 17.29
Clothing	$ 37.10	44%	$ 16.32
F&B at Restaurants & Bars	$ 34.20	43%	$ 14.67
Other Purchases	$ 109.87	22%	$ 23.69
Watches & Jewelry	$ 389.80	14%	$ 55.09
Retail Purchases of Liquor	$ 25.70	7%	$ 1.83
Taxis/Ground Transportation	$ 34.10	5%	$ 1.83
Perfumes & Cosmetics	$ 78.30	3%	$ 2.02
Telephone & Internet	$ 22.50	1%	$ 0.31
Entertainment/Night Clubs	$ 54.00	1%	$ 0.35
Electronics	$ 28.60	0%	$ 0.09
Total Spend per Cruise Party			**$ 193.51**
Average Size of a Cruise Party			2.2
Total Spend per Cruise Passenger			**$ 87.96**
Cruise Passenger Visits			519,357
Total Cruise Passenger Expenditures			**$ 45,682,906**

[21] The 2008/2009 cruise year includes the twelve months beginning in May, 2008 and ending in April, 2009.

[22] The average shore excursion expenditure is a weighted average of the onshore and Internet purchases and the portion of the onboard purchases paid to local tour operators.

Per passenger spending estimates were derived from the 1,965 surveys completed by passengers that went ashore during the survey period. As shown in **Table 26,** each passenger cruise party spent an average of $193.51 in Belize. The average spend per cruise party is the sum of the weighted spending in each of the twelve categories. For example, 43 percent of the survey respondents reported spending an average of $34.20 at local restaurants and/or bars. Spread over the 1,965 cruise parties that visited Belize, this represents an average of $14.67 per party. On a per passenger basis, the average total expenditure was $87.96. This represents the sum of per party expenditures, $193.51, divided by the average size of a cruise party in Belize, 2.2 passengers.

For the entire 2008/2009 cruise year, the estimated 519,357 cruise passengers who visited Belize spent a total of $**45.7 million** ($US).

Per crew spending estimates were derived from the 541 surveys completed by crew members during the survey period. As shown in **Table 27,** each crew member spent an average of $66.24 in Belize. The average spend per crew member is the sum of the weighted spending in each of the twelve categories. For example, 77 percent of the survey respondents reported spending an average of $26.20 for food and beverages. Spread over all the crew members that visited Belize, this represents an average of $20.25 per crew member.

Table 27 – Estimated Crew Spending ($US) in Belize, 2008/2009 Cruise Year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	$ 26.20	77%	$ 20.25
Clothing	$ 26.50	23%	$ 6.02
Taxis/Ground Transportation	$ 11.40	17%	$ 1.90
Other Purchases	$ 18.40	14%	$ 2.51
Local Crafts & Souvenirs	$ 22.80	12%	$ 2.76
Entertainment/Night Clubs	$ 204.60	11%	$ 21.70
Watches & Jewelry	$ 62.50	8%	$ 4.73
Telephone & Internet	$ 22.50	8%	$ 1.70
Perfumes & Cosmetics	$ 30.40	6%	$ 1.84
Shore Excursions	$ 26.70	4%	$ 0.96
Electronics	$ 60.70	2%	$ 1.38
Retail Purchases of Liquor	$ 32.50	2%	$ 0.49
Total Spend per Crew			**$ 66.24**
Cruise Passenger Visits			68,503
Total Cruise Passenger Expenditures			**$ 4,537,624**

For the entire 2008/2009 cruise year, the estimated 68,503 crew who visited Belize spent an estimated total of **$4.5 million** ($US).

Cruise lines made payments to local businesses for a variety of goods and services. Net payments to local vendors for shore excursions have been included with passenger expenditures. However, cruise lines made other local expenditures, including payments for port fees and taxes, navigation services, utilities and other supplies. Based upon data provided by the FCCA member cruise lines, we estimated that all cruise lines spent **$8.4 million** ($US) in

Belize during the 2008/2009 cruise year. Essentially all of these expenditures were payments for port fees and taxes and navigation services.

Economic Contribution of Cruise Tourism Expenditures

As noted in the **Data and Methods** section of the full report, a set of economic impact models were developed for each destination to produce estimates of the economic contribution of cruise tourism. Data for these models were collected from a broad range of local, regional and international sources. The impact models were designed to reflect the economic structure of each destination, including the industrial composition of Gross Domestic Product (GDP), the wage share of GDP by industry and average employee wages by industry.

Table 28 – Total Economic Contribution of Cruise Tourism in Belize, 2008/2009 Cruise Year

	Employment	Wage Income ($US Millions)
Direct Economic Contribution	1,182	$11.7
Total Economic Contribution	1,781	$17.7

As shown in **Table 28**, the $58.6 million in total cruise tourism expenditures generated direct employment of 1,182 residents of Belize paying $11.7 million in annual wages. Adding the indirect contribution that results from the spending of those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures generated a total employment contribution of 1,781 jobs and $17.7 million in wage income in Belize during the 2008/2009 cruise year.

Figure 17 – Total Employment Impacts by Sector - Belize

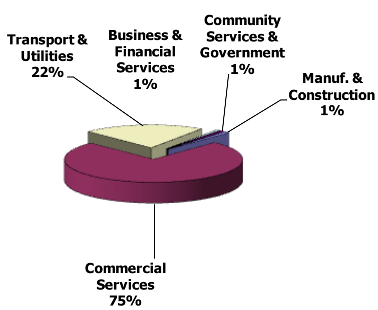
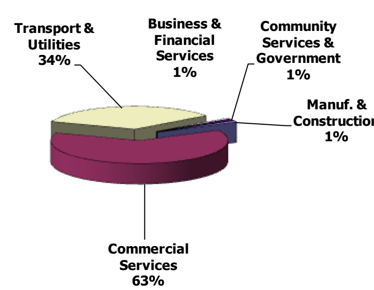


Figure 18 – Total Wage Impacts by Sector Belize



As shown in **Figures 17 and 18**, the total employment and wage impacts of cruise tourism are concentrated in the commercial and transport sectors which account for about 97 percent of the employment and wage impacts.[23] This is not surprising since the direct impacts account for 66

[23] The industry sectors include the following activities:
Manufacturing & Construction: residential and nonresidential construction and all manufacturing
Commercial Services: wholesale and retail trade, lodging and eating and drinking establishments
Transportation & Utilities: tour operators, port services, telecommunications and water and power utilities
Business & Financial Services: banking, insurance, legal, accounting, leasing and other business services
Community Services & Government: education, health and social services and government agencies

percent of the total employment impacts and that virtually all of the cruise tourism expenditures are made with businesses in these sectors. Because of the relatively higher wages in the transport sector compared to the other sectors of the economy, the transport sector accounts for 34 percent of the wage impacts but only 22 percent of the employment impacts. The remainder of the total employment and wage impacts was generated by the indirect spending in the other sectors of the economy.

Comparison to 2006 Study

Total passenger and crew visits declined by 14 percent from 682,500 visits during the 2005/2006 cruise year to 587,900 during the 2008/2009 cruise year. However, total direct cruise tourism expenditures actually declined by 8.7 percent, over the three year period, falling from an estimated $64.2 million to $58.6 million. As indicated in **Table 29**, cruise tourism expenditures by passengers and cruise lines declined while spending by the crew increased significantly.

Table 29 – Comparison of Cruise Tourism Impacts, Current Study versus 2006 Study

	Current Study	2006 Study
Total Onshore Visits (Thousands)	**587.9**	**682.5**
Passengers	519.4	610.4
Crew	68.5	72.1
Total Direct Expenditures ($US Millions)	**$ 58.6**	**$ 64.2**
Passengers	$ 45.7	$ 53.6
Crew	$ 4.5	$ 1.3
Cruise Lines	$ 8.4	$ 9.3
Average Per Passenger Expenditure①	**$87.96**	**$ 87.77**
Average Per Crew Expenditure	**$66.24**	**$ 18.23**
Total Employment Impact	**1,781**	**1,885**
Total Wage Impact ($US Millions)	**$ 17.7**	**$ 19.9**

① Includes both intransit and homeport passengers.

The decline in passenger expenditures was driven by the 15 percent decline in passenger visits. As indicated in the table the average per passenger expenditure remained virtually unchanged from the prior study. While the weighted average remained unchanged, it was the net result of an increase in the typical expenditure in most categories that was offset by a decline in the percentage of passengers making purchases.

The 246 percent increase in total crew expenditures was the result of the 260 percent increase in the average crew expenditure. The increase in the average crew expenditure was the net result of a general decline in the average value of a purchase made by a crew member which was more than offset by the dramatic increase in crew making purchases once ashore. For example in the prior study only 24 percent of crew reported purchasing food and beverages onshore while in the current study this rose to 77 percent.

Given the decrease in direct cruise tourism expenditures from the 2005/2006 cruise year, the economic impacts also declined. The total employment impact fell by nearly 6 percent over the three-year period while the wage impact declined by 11 percent.

Passenger Surveys

A total of 2,110 passenger surveys were completed and returned for tabulation. **Table 30** shows the major attributes of passenger visits in Belize as derived from the passenger surveys.

Table 30 - Major Attributes of Intransit Passenger Surveys - Belize

	Number	Percent
Total Respondents	2,110	
Number Making First Visit	1,700	80.6%
Number Ashore	1,965	93.1%
Number Making Onshore Purchases:	1,507	76.7%
Average Hours Ashore	4.5	
Average Size of Expenditure Party (Persons)	2.2	
Average Onshore Expenditure per Party	$134	
Purchased a Shore Excursion (Tour)	1,365	69.5%
Purchased Onshore Tour from:		
Cruise Line	1,084	79.4%
Onshore from Tour Operator	215	15.8%
Travel Agent	66	4.8%
Average Cost of Shore Excursion per Party	$141	
Toured On Own/Did not Tour	600	

- Of the 2,110 cruise parties that completed the surveys 81% stated that this had been their first visit to Belize.
- Ninety-three percent (93%) of the cruise parties that completed the surveys disembarked their cruise ship to visit Belize.
- Of the cruise parties that went ashore, 77% made at least one purchase while ashore. The typical cruise party consisted of 2.2 passengers and spent an average of 4.5 hours ashore.
- The responding cruise parties reported spending an average of $134 while ashore (excludes shore excursions).
- Sixty-nine percent (69%) of the passengers that went ashore purchased a shore excursion. Seventy-nine percent (79%) of passengers who purchased a tour did so through their cruise line, 16% purchased their tour onshore and nearly 5 percent purchased their tour through their travel agent.
- The typical cruise party that purchased a shore excursion spent $141 for their tour.

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Table 31**. A 10-point scale was used with 10 being the highest score, i.e., extremely satisfied, and 1 being the lowest score, i.e., not at all satisfied.

Table 31 – Passenger Visit Satisfaction* - Belize

Visit Attributes	Mean Score
Overall Visit	7.0
Visit Met Expectations	6.6
Likelihood of a Return Visit	3.8
Informed of Tours and Activities	7.7
Initial Shoreside Welcome	7.3
Guided Tour	8.3
Historic Sites/Museums	7.5
Variety of Things to See and Do	6.1
Friendliness of Residents	7.7
Overall Shopping Experience	6.2
Courtesy of Employees	7.8
Variety of Shops	5.9
Overall Prices	6.2
Taxis/Local Transportation	6.6

* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows: Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3; Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Cruise passengers were very satisfied with their overall visit to Belize with a mean score of 7.0. However, the visit did not score as high in terms of meeting expectations. The mean score for "Visit Met Expectations" was lower at 6.6.
- Passengers felt very informed about tours and onshore activities in Belize with a mean score of 7.7.
- "Guided Tours" (or Shore Excursions) received the highest score of all visit attributes with a mean score of 8.3. Thus, cruise passengers were very satisfied with their shore excursions.
- Passenger interactions with residents and store employees were very positive with "friendliness of residents" receiving a mean score of 7.7 and "courtesy of employees" having a mean score of 7.8.
- Categories with slightly lower scores but still above 7.0 (Very Satisfied) were: initial shoreside welcome and historic sites.
- Categories with average scores between 5.0 and 7.0 (Somewhat Satisfied) were given for variety of things to see and do, local transportation and the overall shopping experience, including the variety of shops and overall prices. Thus, while

passengers thought shop employees were very courteous, the overall score for their shopping experience was brought down by lower perceptions on the variety of shops (5.9) and overall prices (6.2).

- Cruise passengers stated that they were not too likely to return to Belize for a land-based vacation.

Passenger Demographics

Residents of the United States and the Canada accounted for 96 percent of the responding passengers. The average age of the respondents was 53 years with 32 percent of the respondents being 65 years of age or older. Belize passengers had an average household income of $95,800 with 34 percent having over $100,000 in household income.

Figure 19 – Passenger Age Belize

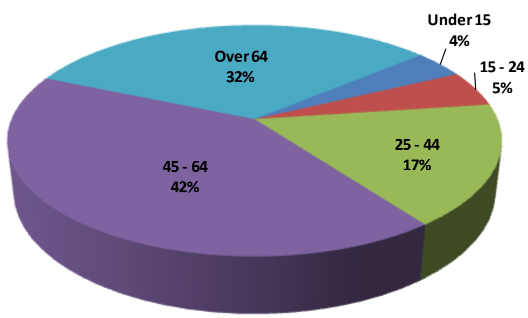
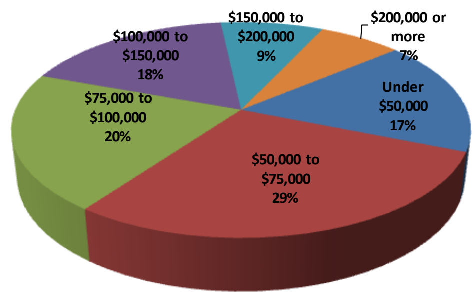


Figure 20 – Passenger Household Income Belize



Cayman Islands

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.[24] The surveys were undertaken during the six-month period beginning in November 2008 and ending in April 2009. The survey schedule was designed so that surveys were conducted by FCCA member cruise lines that called at each destination and that the distribution of passenger and crew surveys would reflect the distribution of passenger and crew arrivals by cruise line at each destination. On any given cruise itinerary, passenger and crew surveys were placed in all passenger cabins and crew quarters following a single destination call. The surveys were completed by the passengers and crew in the privacy of their quarters and returned to a designated office on the cruise ship. Thus, passengers and crew were only surveyed once during a cruise itinerary and for a single destination. On a subsequent itinerary, passengers were surveyed following a call at a different destination.

The passenger and crew surveys were designed to collect data for onshore spending and visit satisfaction by both passengers and crew. While the crew survey was slightly shorter than the passenger survey, both surveys were designed to collect the following information:

- hours spent ashore;
- expenditures by category, including shore tours, food & beverages, clothing, etc.;
- visit satisfaction, including shore tour, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation; and
- demographic characteristics, including country of residence, age group, income, etc.

Combining the expenditure data collected from the passenger and crew surveys with data on expenditures by cruise lines for port fees and services, payments to local tour operators for passenger shore excursions purchased onboard the cruise ships, and other provisions purchased locally by the cruise lines, estimates of total cruise tourism expenditures were developed for each participating destination.

Given the direct spending estimates, the economic contribution of these expenditures, as measured by employment and wage income were then estimated for each destination. This process began with the collection of economic data for each destination from a combination of local, regional and international sources. Utilizing all of these data a set of economic impact models were developed for each destination to estimate the direct and total employment and wage impacts. A more detailed description of these models is provided in the **Data and Methods** section of Volume I.

[24] Surveys were conducted on the ships of the following cruise lines: Azamara Cruises, Carnival Cruise Lines, Celebrity Cruises, Disney Cruise Line, Holland America Line, MSC Cruises (USA), Inc., Norwegian Cruise Line, Princess Cruises, P&O Cruises and Royal Caribbean International.

Cruise Tourism Expenditures

Cruise tourism expenditures in destination ports are composed of a broad range of spending including:

- onshore expenditures by passengers which tend to be concentrated in shore excursions and retail purchases of clothing, jewelry and local crafts and souvenirs;
- onshore expenditures by crew which are generally concentrated in purchases of food and beverages, local transportation and retail purchases of clothing and electronics;
- expenditures by cruise lines for port services, such as dockage fees and linesmen, utilities, such as water and power and navigation services; and
- purchases of supplies, such as food and other stores, by the cruise lines from local businesses.

According to data provided by the Department of Tourism, 1.45 million cruise passengers arrived aboard cruise ships during the 2008/2009 cruise year.[25] Of these, an estimated 1.31 million passengers (90 percent) disembarked and visited the Cayman Islands. Utilizing additional data provided by the visiting cruise lines, we have estimated that 571,291 crew were aboard the cruise ships and that 35 percent, or 199,952 crew, disembarked and visited the island. These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **$174.4 million** ($US) in cruise tourism expenditures in the Cayman Islands during the 2008/2009 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Table 32 – Estimated Passenger Spending ($US) in the Cayman Islands, 2008/2009 Cruise Year[26]

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	$ 64.54	59%	$ 38.34
F&B at Restaurants & Bars	$ 37.70	55%	$ 20.61
Clothing	$ 53.70	42%	$ 22.49
Local Crafts & Souvenirs	$ 33.00	41%	$ 13.41
Taxis/Ground Transportation	$ 26.10	26%	$ 6.67
Other Purchases	$ 83.76	22%	$ 18.42
Watches & Jewelry	$ 434.60	21%	$ 89.63
Retail Purchases of Liquor	$ 51.50	12%	$ 6.07
Perfumes & Cosmetics	$ 81.90	6%	$ 5.13
Telephone & Internet	$ 16.60	2%	$ 0.30
Entertainment/Night Clubs	$ 113.60	1%	$ 1.22
Electronics	$ 76.10	0%	$ 0.30
Total Spend per Cruise Party			$ 222.59
Average Size of a Cruise Party			2.3
Total Spend per Cruise Passenger			$ 96.78
Cruise Passenger Visits			1,305.694
Total Cruise Passenger Expenditures			$ 126,361,835

[25] The 2008/2009 cruise year includes the twelve months beginning in May, 2008 and ending in April, 2009.
[26] The average shore excursion expenditure is a weighted average of the onshore and Internet purchases and the portion of the onboard purchases paid to local tour operators.

Per passenger spending estimates were derived from the 1,972 surveys completed by passengers that went ashore during the survey period. As shown in **Table 32,** each passenger cruise party spent an average of $222.59 in the Cayman Islands. The average spend per cruise party is the sum of the weighted spending in each of the twelve categories. For example, 55 percent of the survey respondents reported spending an average of $37.70 at local restaurants and/or bars. Spread over the 1,972 cruise parties that visited the Cayman Islands, this represents an average of $20.61 per party. On a per passenger basis, the average total expenditure was $96.78. This represents the sum of per party expenditures, $222.59, divided by the average size of a cruise party in the Cayman Islands, 2.3 passengers.

For the entire 2008/2009 cruise year, the estimated 1.31 million cruise passengers who visited the Cayman Islands spent a total of **$126.4 million** ($US) on the island.

Per crew spending estimates were derived from the 697 surveys completed by crew members during the survey period. As shown in **Table 33,** each crew member spent an average of $108.81 in the Cayman Islands. The average spend per crew member is the sum of the weighted spending in each of the twelve categories. For example, 74 percent of the survey respondents reported spending an average of $33.20 for food and beverages. Spread over all the crew members that visited the Cayman Islands, this represents an average of $24.69 per crew member.

For the entire 2008/2009 cruise year, the estimated 199,952 crew who visited the Cayman Islands spent an estimated total of **$21.8 million** ($US).

Table 33 – Estimated Crew Spending ($US) in the Cayman Islands, 2008/2009 Cruise Year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	$ 33.20	74%	$ 24.69
Taxis/Ground Transportation	$ 14.10	33%	$ 4.62
Clothing	$ 44.60	18%	$ 8.25
Local Crafts & Souvenirs	$ 36.60	23%	$ 8.46
Perfumes & Cosmetics	$ 73.10	14%	$ 10.14
Watches & Jewelry	$ 213.00	13%	$ 28.64
Other Purchases	$ 34.90	13%	$ 4.69
Shore Excursions	$ 33.20	10%	$ 3.22
Telephone & Internet	$ 16.00	8%	$ 1.34
Retail Purchases of Liquor	$ 49.70	6%	$ 2.71
Electronics	$ 233.00	3%	$ 6.86
Entertainment/Night Clubs	$ 205.80	2%	$ 5.19
Total Spend per Crew			$ 108.81
Cruise Passenger Visits			199,952
Total Cruise Passenger Expenditures			$ 21,756,761

Cruise lines made payments to local businesses for a variety of goods and services. Net payments to local vendors for shore excursions have been included with passenger expenditures. However, cruise lines made other local expenditures, including payments for port fees and taxes, navigation services, utilities and other supplies. Based upon data provided by

the FCCA member cruise lines, we estimated that all cruise lines spent **$26.1 million** ($US) in the Cayman Islands during the 2008/2009 cruise year. Essentially all of these expenditures were payments for port fees and taxes and navigation services.

Economic Contribution of Cruise Tourism Expenditures

As noted in the **Data and Methods** section of the full report, a set of economic impact models were developed for each destination to produce estimates of the economic contribution of cruise tourism. Data for these models were collected from a broad range of local, regional and international sources. The impact models were designed to reflect the economic structure of each destination, including the industrial composition of Gross Domestic Product (GDP), the wage share of GDP by industry and average employee wages by industry.

Table 34 – Total Economic Contribution of Cruise Tourism in the Cayman Islands 2008/2009 Cruise Year

	Employment	Wage Income ($US Millions)
Direct Economic Contribution	2,073	$38.7
Total Economic Contribution	3,731	$69.5

As shown in **Table 39**, the $174.4 million in total cruise tourism expenditures generated direct employment of 2,073 residents of the Cayman Islands paying $38.7 million in annual wages. Adding the indirect contribution that results from the spending of those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures generated a total employment contribution of 3,731 jobs and $69.5 million in wage income in the Cayman Islands during the 2008/2009 cruise year.

Figure 21 – Total Employment Impacts by Sector - The Cayman Islands

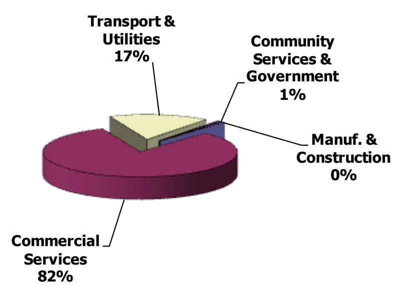
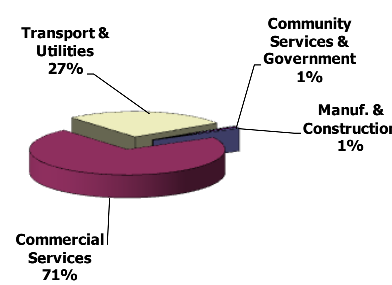


Figure 22 – Total Wage Impacts by Sector The Cayman Islands



As shown in **Figures 21 and 22**, the total employment and wage impacts of cruise tourism are concentrated in the commercial and transport sectors which account for about 98 percent of the employment and wage impacts.[27] This is not surprising since the direct impacts account for 55 percent of the total employment impacts and that virtually all of the cruise tourism expenditures are made with businesses in these sectors. Because of the relatively higher wages in the transport sector compared to the other sectors of the economy, the transport sector accounts for 27 percent of the wage impacts but only 17 percent of the employment impacts. The remainder of the total employment and wage impacts was generated by the indirect spending in the other sectors of the economy.

Comparison to 2006 Study

Total passenger and crew visits declined by 22 percent from 1.96 million visits during the 2005/2006 cruise year to 1.51 million during the 2008/2009 cruise year. However, total direct cruise tourism expenditures declined by a much smaller degree, 3 percent, over the three year period, falling from an estimated $179.7 million to $174.4 million. As indicated in **Table 35**, cruise tourism expenditures by passengers and cruise lines declined while spending by the crew increased significantly.

Table 35 – Comparison of Cruise Tourism Impacts, Current Study versus 2006 Study

	Current Study	2006 Study
Total Onshore Visits (Thousands)	**1,505.7**	**1,933.1**
Passengers	1,305.7	1,671.5
Crew	200.0	261.6
Total Direct Expenditures ($US Millions)	**$ 174.4**	**$ 179.7**
Passengers	$ 126.4	$ 138.3
Crew	$ 21.8	$ 12.0
Cruise Lines	$ 26.1	$ 29.4
Average Per Passenger Expenditure①	**$ 96.78**	**$ 82.73**
Average Per Crew Expenditure	**$108.81**	**$ 45.92**
Total Employment Impact	**3,731**	**3,705**
Total Wage Impact ($US Millions)	**$ 69.5**	**$ 66.0**

① Includes both intransit and homeport passengers.

The decline in passenger expenditures was driven by the 22 percent decline in passenger visits. As indicated in the table the average per passenger expenditure actually increased by 17 percent from the prior study. This increase was primarily driven by increased spending in three categories, food and beverages, jewelry

[27] The industry sectors include the following activities:
Manufacturing & Construction: residential and nonresidential construction and all manufacturing
Commercial Services: wholesale and retail trade, lodging and eating and drinking establishments
Transportation & Utilities: tour operators, port services, telecommunications and water and power utilities
Business & Financial Services: banking, insurance, legal, accounting, leasing and other business services
Community Services & Government: education, health and social services and government agencies

and local crafts. In each of these categories the typical passenger spent more and a higher percentage of passengers purchased these goods during the 2008/2009 cruise year.

The near doubling in total crew expenditures was the result of the 136 percent increase in the average crew expenditure. The increase in the average crew expenditure was the result of a general increase in the average value of a purchase made by a crew member and by the dramatic increase in crew making purchases once ashore. For example in the prior study only 35 percent of crew reported purchasing food and beverages onshore while in the current study this rose to 74 percent.

Despite the small decrease in direct cruise tourism expenditures from the 2005/2006 cruise year, the economic impacts increased marginally. The total employment impact remained virtually unchanged over the three-year period while the wage impact increased by 5 percent. The slightly higher growth in wages is due to increased labor productivity and average wages over the intervening period.

Passenger Surveys

A total of 2,170 passenger surveys were completed and returned for tabulation. **Table 36** shows the major attributes of passenger visits in the Cayman Islands as derived from the passenger surveys.

Table 36 - Major Attributes of Passenger Surveys - The Cayman Islands

	Number	Percent
Total Respondents	2,170	
Number Making First Visit	1,370	63.1%
Number Ashore	1,972	90.9%
Number Making Onshore Purchases:	1,755	89.0%
Average Hours Ashore	4.3	
Average Size of Expenditure Party (Persons)	2.3	
Average Onshore Expenditure per Party	$184	
Purchased a Shore Excursion (Tour)	1,172	59.4%
Purchased Onshore Tour from:		
Cruise Line	926	79.0%
Onshore from Tour Operator	191	16.3%
Travel Agent	55	4.7%
Average Cost of Shore Excursion per Party	$114	
Toured On Own/Did not Tour	800	

- Of the 2,170 cruise parties that completed the surveys 63% stated that this had been their first visit to The Cayman Islands.
- Ninety-one percent (91%) of the cruise parties that completed the surveys disembarked their cruise ship to visit the Cayman Islands.
- Of the cruise parties that went ashore, 89% made at least one purchase while ashore. The typical cruise party consisted of 2.3 passengers and spent an average of 4.3 hours ashore.

- The responding cruise parties reported spending an average of $184 while ashore (excludes shore excursions).
- Fifty-nine percent (59%) of the passengers that went ashore purchased a shore excursion. Seventy-nine percent (79%) of passengers who purchased a tour did so through their cruise line, 16% purchased their tour onshore and nearly 5 percent purchased their tour through their travel agent.
- The typical cruise party that purchased a shore excursion spent $114 for their tour.

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Table 37**. A 10-point scale was used with 10 being the highest score, i.e., extremely satisfied, and 1 being the lowest score, i.e., not at all satisfied.

Table 37 – Passenger Visit Satisfaction* - The Cayman Islands

Visit Attributes	Mean Score
Overall Visit	7.4
Visit Met Expectations	6.9
Likelihood of a Return Visit	4.7
Informed of Tours and Activities	7.9
Initial Shoreside Welcome	7.2
Guided Tour	7.6
Historic Sites/Museums	6.5
Variety of Things to See and Do	6.7
Friendliness of Residents	7.9
Overall Shopping Experience	7.1
Courtesy of Employees	7.9
Variety of Shops	7.0
Overall Prices	6.1
Taxis/Local Transportation	7.2

* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows:
Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3;
Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Cruise passengers were very satisfied with their overall visit to the Cayman Islands with a mean score of 7.4. However, the visit did not score as high in terms of meeting expectations. The mean score for “Visit Met Expectations” was lower at 6.9.
- Passengers felt very informed about tours and onshore activities in the Cayman Islands with a mean score of 7.9.
- “Guided Tours” (or Shore Excursions) received an average score of 7.6. While cruise passengers were very satisfied with their shore excursions, this score is relatively low with most destinations scoring 8.0 or better.

- Passenger interactions with residents and store employees were very positive with "friendliness of residents" and "courtesy of employees" each receiving a mean score of 7.9.
- Categories with slightly lower scores but still above 7.0 (Very Satisfied) were: initial shoreside welcome, overall shopping experience, variety of shops and local transportation.
- Categories with average scores between 5.0 and 7.0 (Somewhat Satisfied) were given for historic sites, variety of things to see and do and overall prices.
- Cruise passengers stated that they were not too likely to return to the Cayman Islands for a land-based vacation.

Passenger Demographics

Residents of the United States and the Canada accounted for 96 percent of the responding passengers. The average age of the respondents was 50 years with 24 percent of the respondents being 65 years of age or older. The Cayman Islands passengers had an average household income of $100,000 with 38 percent having over $100,000 in household income.

Figure 23 – Passenger Age
The Cayman Islands

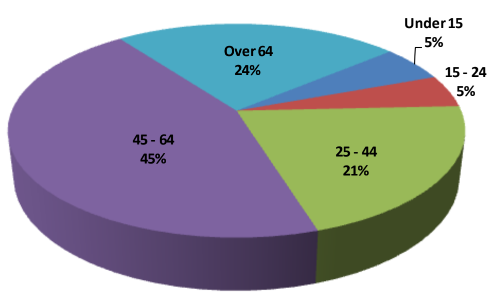
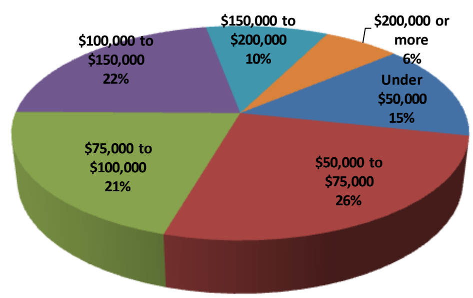


Figure 24 – Passenger Household Income
The Cayman Islands



Cartagena

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.[28] The surveys were undertaken during the six-month period beginning in November 2008 and ending in April 2009. The survey schedule was designed so that surveys were conducted by FCCA member cruise lines that called at each destination and that the distribution of passenger and crew surveys would reflect the distribution of passenger and crew arrivals by cruise line at each destination. On any given cruise itinerary, passenger and crew surveys were placed in all passenger cabins and crew quarters following a single destination call. The surveys were completed by the passengers and crew in the privacy of their quarters and returned to a designated office on the cruise ship. Thus, passengers and crew were only surveyed once during a cruise itinerary and for a single destination. On a subsequent itinerary, passengers were surveyed following a call at a different destination.

The passenger and crew surveys were designed to collect data for onshore spending and visit satisfaction by both passengers and crew. While the crew survey was slightly shorter than the passenger survey, both surveys were designed to collect the following information:

- hours spent ashore;
- expenditures by category, including shore tours, food & beverages, clothing, etc.;
- visit satisfaction, including shore tour, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation; and
- demographic characteristics, including country of residence, age group, income, etc.

Combining the expenditure data collected from the passenger and crew surveys with data on expenditures by cruise lines for port fees and services, payments to local tour operators for passenger shore excursions purchased onboard the cruise ships, and other provisions purchased locally by the cruise lines, estimates of total cruise tourism expenditures were developed for each participating destination.

Given the direct spending estimates, the economic contribution of these expenditures, as measured by employment and wage income were then estimated for each destination. This process began with the collection of economic data for each destination from a combination of local, regional and international sources. Utilizing all of these data a set of economic impact models were developed for each destination to estimate the direct and total employment and wage impacts. A more detailed description of these models is provided in the **Data and Methods** section of Volume I.

[28] Surveys were conducted on the ships of the following cruise lines: Azamara Cruises, Carnival Cruise Lines, Celebrity Cruises, Disney Cruise Line, Holland America Line, MSC Cruises (USA), Inc., Norwegian Cruise Line, Princess Cruises, P&O Cruises and Royal Caribbean International.

Cruise Tourism Expenditures

Cruise tourism expenditures in destination ports are composed of a broad range of spending including:

- onshore expenditures by passengers which tend to be concentrated in shore excursions and retail purchases of clothing, jewelry and local crafts and souvenirs;
- onshore expenditures by crew which are generally concentrated in purchases of food and beverages, local transportation and retail purchases of clothing and electronics;
- expenditures by cruise lines for port services, such as dockage fees and linesmen, utilities, such as water and power and navigation services; and
- purchases of supplies, such as food and other stores, by the cruise lines from local businesses.

According to data provided by the Sociedad Portuaria Regional de Cartagena, 246,951 cruise passengers arrived aboard cruise ships during the 2008/2009 cruise year.[29] These included 242,144 intransit passengers and 4,807 passengers embarking on their cruises in Cartagena. Of the intransit passengers, an estimated 205,822 passengers (85 percent) disembarked and visited Cartagena. Utilizing additional data provided by the visiting cruise lines, we have estimated that 107,877 crew were aboard the cruise ships and that 30 percent, or 32,363 crew, disembarked and visited Cartagena. These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **$24.6** million ($US) in cruise tourism expenditures in Cartagena during the 2008/2009 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Passenger expenditures were estimated separately for intransit and homeport passengers. Per passenger spending estimates for intransit passengers were derived from the 1,213 surveys completed by passengers that went ashore during the survey period. As shown in **Table 38,** each passenger cruise party spent an average of $180.89 in Cartagena. The average spend per cruise party is the sum of the weighted spending in each of the twelve categories. For example, 20 percent of the survey respondents reported spending an average of $18.80 at local restaurants and/or bars. Spread over the 1,213 cruise parties that visited Cartagena, this represents an average of $3.76 per party. On a per passenger basis, the average total expenditure was $90.44. This represents the sum of per party expenditures, $180.89, divided by the average size of a cruise party in Cartagena, 2.0 passengers.

For the entire 2008/2009 cruise year, the estimated 205,822 intransit cruise passengers who visited Cartagena spent a total of **$18.6 million** ($US) on the island.

[29] The 2008/2009 cruise year includes the twelve months beginning in May, 2008 and ending in April, 2009.

Table 38 – Estimated Intransit Passenger Spending ($US) in Cartagena, 2008/2009 Cruise Year[30]

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	$ 58.42	72%	$ 41.83
Local Crafts & Souvenirs	$ 26.20	57%	$ 14.82
Clothing	$ 25.30	35%	$ 8.78
Watches & Jewelry	$ 310.40	29%	$ 89.92
Other Purchases	$ 45.87	27%	$ 12.18
Taxis/Ground Transportation	$ 39.30	21%	$ 8.14
F&B at Restaurants & Bars	$ 18.80	20%	$ 3.76
Retail Purchases of Liquor	$ 19.50	4%	$ 0.78
Telephone & Internet	$ 11.30	2%	$ 0.20
Perfumes & Cosmetics	$ 43.80	1%	$ 0.30
Entertainment/Night Clubs	$ 15.80	1%	$ 0.10
Electronics	$ 22.00	0%	$ 0.08
Total Spend per Cruise Party			$ 180.89
Average Size of a Cruise Party			2.0
Total Spend per Cruise Passenger			$ 90.44
Cruise Passenger Visits			205,822
Total Cruise Passenger Expenditures			$ 18,615,180

As noted above, another 2,807 cruise passengers arrived in Cartagena to begin their cruise. While passengers embarking on their cruise in Cartagena were not surveyed, survey data derived from homeport surveys conducted in Barbados, the Dominican Republic and Jamaica were utilized to estimate spending by Cartagena homeport passengers. Per passenger spending estimates for homeport passengers were derived from the 359 surveys completed by passengers that embarked on their cruises from the three islands during the survey period. As shown in **Table 39,** each passenger cruise party spent an average of $144.30 in Cartagena. On a per passenger basis, the average total expenditure was $72.15. This figure is relatively low for homeport passengers and reflects the relatively low percentage of homeport passengers purchasing lodging and food and beverages. Those that did make purchases in these categories did spend at a representative level for homeport passengers but just fewer did so (see results for Puerto Rico). For the entire 2008/2009 cruise year, the estimated 4,807 homeport cruise passengers who visited Cartagena spent a total of **$346,825** ($US) in Cartagena.

[30] The average shore excursion expenditure is a weighted average of the onshore and Internet purchases and the portion of the onboard purchases paid to local tour operators.

Table 39 – Estimated Homeport Passenger Spending ($US) in Cartagena, 2008/2009 Cruise Year[31]

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	$ 274.24	20%	$ 54.30
F&B at Restaurants & Bars	$ 47.24	16%	$ 7.50
Lodging	$ 220.26	15%	$ 33.70
Taxis/Ground Transportation	$ 36.06	12%	$ 4.52
Retail Purchases of Liquor	$ 33.34	8%	$ 2.60
Local Crafts & Souvenirs	$ 32.68	8%	$ 2.64
Other Purchases	$ 431.86	7%	$ 32.48
Clothing	$ 42.70	5%	$ 2.26
Watches & Jewelry	$ 137.62	2%	$ 2.30
Perfumes & Cosmetics	$ 65.82	2%	$ 1.10
Entertainment/Night Clubs	$ 57.44	1%	$ 0.80
Telephone & Internet	$ 11.97	1%	$ 0.10
Total Spend per Cruise Party			$ 144.30
Average Size of a Cruise Party			2.0
Total Spend per Cruise Passenger			$ 72.15
Cruise Passenger Visits			4,807
Total Cruise Passenger Expenditures			$ 346,825

Per crew spending estimates were derived from the 396 surveys completed by crew members during the survey period. As shown in **Table 40,** each crew member spent an average of $65.64 in Cartagena. The average spend per crew member is the sum of the weighted spending in each of the twelve categories. For example, 68 percent of the survey respondents reported spending an average of $26.40 for food and beverages. Spread over all crew members that visited Cartagena, this represents an average of $17.89 per crew member. For the entire 2008/2009 cruise year, the estimated 31,733 crew who visited Cartagena spent an estimated total of **$2.1 million** ($US).

Table 40 – Estimated Crew Spending ($US) in Cartagena, 2008/2009 Cruise Year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	$ 26.40	68%	$ 17.89
Taxis/Ground Transportation	$ 16.40	65%	$ 10.66
Local Crafts & Souvenirs	$ 26.20	38%	$ 9.88
Other Purchases	$ 22.70	22%	$ 6.21
Clothing	$ 33.00	16%	$ 5.40
Watches & Jewelry	$ 80.30	9%	$ 7.46
Retail Purchases of Liquor	$ 37.70	6%	$ 2.27
Perfumes & Cosmetics	$ 35.90	6%	$ 1.96
Telephone & Internet	$ 7.70	5%	$ 0.38
Entertainment/Night Clubs	$ 71.70	3%	$ 2.35
Shore Excursions	$ 15.00	3%	$ 0.41
Electronics	$ 70.00	1%	$ 0.77
Total Spend per Crew			$ 65.64
Cruise Passenger Visits			31,733
Total Cruise Passenger Expenditures			$ 2,082,961

[31] The average shore excursion expenditure is a weighted average of the onshore and Internet purchases and the portion of the onboard purchases paid to local tour operators.

Cruise lines made payments to local businesses for a variety of goods and services. Net payments to local vendors for shore excursions have been included with passenger expenditures. However, cruise lines made other local expenditures, including payments for port fees and taxes, navigation services, utilities and other supplies. Based upon data provided by the FCCA member cruise lines, we estimated that all cruise lines spent **$3.5 million** ($US) in Cartagena during the 2008/2009 cruise year. Nearly all of these expenditures were payments for port fees and taxes and navigation services.

Economic Contribution of Cruise Tourism Expenditures

As noted in the **Data and Methods** section of the full report, a set of economic impact models were developed for each destination to produce estimates of the economic contribution of cruise tourism. Data for these models were collected from a broad range of local, regional and international sources. The impact models were designed to reflect the economic structure of each destination, including the industrial composition of Gross Domestic Product (GDP), the wage share of GDP by industry and average employee wages by industry.

Table 41 – Total Economic Contribution of Cruise Tourism in Cartagena, 2008/2009 Cruise Year

	Employment	Wage Income ($US Millions)
Direct Economic Contribution	406	$2.4
Total Economic Contribution	629	$3.6

As shown in **Table 41**, the $24.6 million in total cruise tourism expenditures in Cartagena generated direct employment of 406 residents of Cartagena paying $2.4 million in annual wages. Adding the indirect contribution that results from the spending of those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures generated a total employment contribution of 629 jobs and $3.6 million in wage income in Cartagena during the 2008/2009 cruise year.

Figure 25 – Total Employment Impacts by Sector - Cartagena

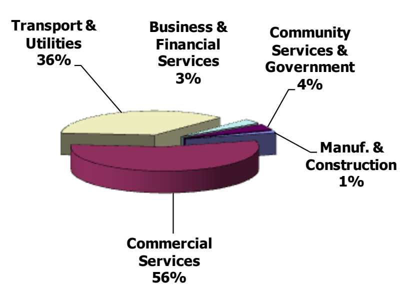
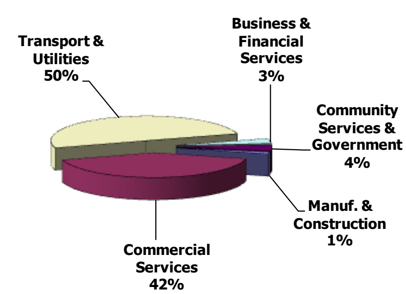


Figure 26 – Total Wage Impacts by Sector Cartagena



As shown in **Figures 25 and 26**, the total employment and wage impacts of cruise tourism are concentrated in the commercial and transport sectors which account for about 92 percent of the total impacts. This is not surprising since the direct impacts account for nearly 65 percent of the total employment impacts and that virtually all of the cruise tourism expenditures are made with businesses in these sectors. Because of the relatively higher wages in the transport sector compared to the other sectors of the economy, the transport sector accounts for 50 percent of the wage impacts but only 36 percent of the employment impacts. The remainder of the total employment and wage impacts was generated by the indirect spending in the other sectors of the economy.[32]

Comparison to 2006 Study

Total passenger and crew visits increased by nearly 550 percent from 37,600 visits during the 2005/2006 cruise year to 243,000 during the 2008/2009 cruise year. Total direct cruise tourism expenditures increased at a similar rate over the three year period, increasing from $4.5 million to $24.6 million. As indicated in **Table 42**, all three components of cruise tourism expenditures, passengers, crew and cruise lines, experienced an increase in spending.

Table 42 – Comparison of Cruise Tourism Impacts, Current Study versus 2006 Study

	Current Study	2006 Study
Total Onshore Visits (Thousands)	**243.0**	**37.6**
Passengers	210.6	32.4
Crew	32.4	5.2
Total Direct Expenditures ($US Millions)	**$ 24.6**	**$ 4.5**
Passengers	$ 19.0	$ 3.7
Crew	$ 2.1	$ 0.2
Cruise Lines	$ 3.5	$ 0.6
Average Per Passenger Expenditure①	**$90.03**	**$ 114.73**
Average Per Crew Expenditure	**$65.64**	**$ 43.64**
Total Employment Impact	**629**	**140**
Total Wage Impact ($US Millions)	**$ 3.6**	**$ 0.8**

① Includes both intransit and homeport passengers.

The increase in passenger expenditures was the net result of a decline in the average expenditure per passenger which was more than offset by the increase in total passenger visits. The decline in per passenger expenditures was the net result of a decline in the percentage of passengers making onshore purchases and an increase in the average value of those purchases. For example, passengers that

[32] The industry sectors include the following activities:
Manufacturing & Construction: residential and nonresidential construction and all manufacturing
Commercial Services: wholesale and retail trade, lodging and eating and drinking establishments
Transportation & Utilities: tour operators, port services, telecommunications and water and power utilities
Business & Financial Services: banking, insurance, legal, accounting, leasing and other business services
Community Services & Government: education, health and social services and government agencies

purchased a shore excursion spent an average of $58.42 during the 2008/2009 cruise year compared to $54.53 during the 2005/2006 cruise year. At the same time a smaller percentage of passengers purchased tours in the current study, 72 percent versus 92 percent in the 2006 study.

In the case of crew expenditures, both the average spend, as well as the number of crew visits increased. In the prior study crew expenditures were estimated using an average for all Caribbean destinations. Consequently, it is not possible to draw any conclusions about changes in the spending behavior of crew visiting Cartagena.

As a result of the increase in direct cruise tourism expenditures from the 2005/2006 cruise year, the economic impacts increased as well. The total employment and wage impacts increased by 350 percent over the three-year period.

Passenger Surveys

A total of 1,305 passenger surveys were completed and returned for tabulation. **Table 43** shows the major attributes of passenger visits in Cartagena as derived from the passenger surveys.

Table 43 - Major Attributes of Intransit Passenger Surveys - Cartagena

	Number	Percent
Total Respondents	1,305	
Number Making First Visit	1,036	79.4%
Number Ashore	1,213	93.0%
Number Making Onshore Purchases:	870	71.7%
Average Hours Ashore	3.9	
Average Size of Expenditure Party (Persons)	2.0	
Average Onshore Expenditure per Party	$139	
Purchased a Shore Excursion (Tour)	869	71.6%
Purchased Onshore Tour from:		
Cruise Line	701	80.7%
Onshore from Tour Operator	120	13.8%
Travel Agent	48	5.5%
Average Cost of Shore Excursion per Party	$109	
Toured On Own/Did not Tour	344	

- Of the 1,305 cruise parties that completed the surveys 79% stated that this had been their first visit to Cartagena.
- Ninety-three percent (93%) of the cruise parties that completed the surveys disembarked their cruise ship to visit Cartagena.
- Of the cruise parties that went ashore, 72% made at least one purchase while ashore. The typical cruise party consisted of 2.0 passengers and spent an average of 3.9 hours ashore.
- The responding cruise parties reported spending an average of $139 while ashore (excludes shore excursions).

- Seventy-two percent (72%) of the passengers that went ashore purchased a shore excursion. Eighty-one percent (81%) of passengers who purchased a tour did so through their cruise line, 14% purchased their tour onshore and 5 percent purchased their tour through their travel agent.
- The typical cruise party that purchased a shore excursion spent $109 for their tour.

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Table 44**. A 10-point scale was used with 10 being the highest score, i.e., extremely satisfied, and 1 being the lowest score, i.e., not at all satisfied.

Table 44 – Passenger Visit Satisfaction* - Cartagena

Visit Attributes	Mean Score
Overall Visit	6.7
Visit Met Expectations	6.2
Likelihood of a Return Visit	3.1
Informed of Tours and Activities	7.1
Initial Shoreside Welcome	7.6
Guided Tour	7.2
Historic Sites/Museums	7.4
Variety of Things to See and Do	6.7
Friendliness of Residents	7.2
Overall Shopping Experience	5.7
Courtesy of Employees	7.7
Variety of Shops	5.9
Overall Prices	6.1
Taxis/Local Transportation	6.7

* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows: Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3; Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Cruise passengers were only somewhat satisfied with their overall visit to Cartagena with a mean score of 6.7. This was among the lowest scores among the 29 destinations. Nor did their visit score well in terms of meeting expectations. The mean score for "Visit Met Expectations" was lower at 6.2.
- Passengers felt very informed about tours and onshore activities in Cartagena with a mean score of 7.1.
- "Guided Tours" (or Shore Excursions) received an average score of 7.2. While cruise passengers were very satisfied with their shore excursions, this score is relatively low with most destinations scoring 8.0 or better.

- Passenger interactions with residents and store employees were very positive with “friendliness of residents” receiving a mean score of 7.2 and “courtesy of employees” having a mean score of 7.7.
- Categories with slightly lower scores but still above 7.0 (Very Satisfied) were: initial shoreside welcome and historic sites.
- Categories with average scores between 5.0 and 7.0 (Somewhat Satisfied) were given for variety of things to see and do, local transportation and the overall shopping experience, including the variety of shops and overall prices. Thus, while passengers thought shop employees were very courteous, the overall score for their shopping experience was brought down by lower perceptions on the variety of shops (5.9) and overall prices (6.1).
- Cruise passengers stated that they were not too likely to return to Cartagena for a land-based vacation.

Passenger Demographics

Residents of the United States and the Canada accounted for 93 percent of the responding passengers. The average age of the respondents was 62 years with 53 percent of the respondents being 65 years of age or older. Cartagena passengers had an average household income of $101,600 with 38 percent having over $100,000 in household income.

Figure 27 – Passenger Age Cartagena

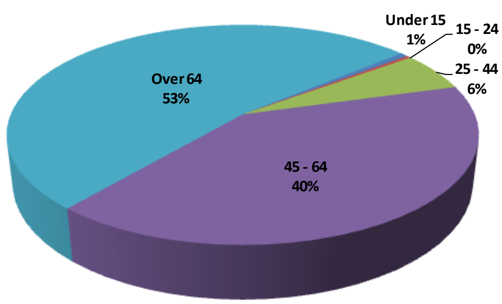
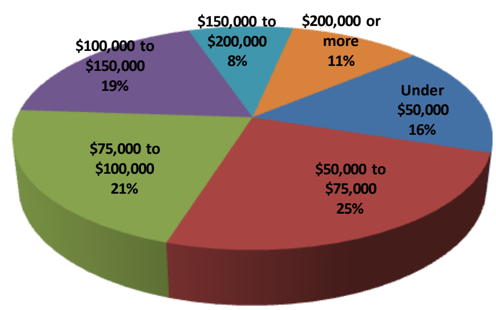


Figure 28 – Passenger Household Income Cartagena



Costa Rica

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.[33] The surveys were undertaken during the six-month period beginning in November 2008 and ending in April 2009. The survey schedule was designed so that surveys were conducted by FCCA member cruise lines that called at each destination and that the distribution of passenger and crew surveys would reflect the distribution of passenger and crew arrivals by cruise line at each destination. On any given cruise itinerary, passenger and crew surveys were placed in all passenger cabins and crew quarters following a single destination call. The surveys were completed by the passengers and crew in the privacy of their quarters and returned to a designated office on the cruise ship. Thus, passengers and crew were only surveyed once during a cruise itinerary and for a single destination. On a subsequent itinerary, passengers were surveyed following a call at a different destination.

The passenger and crew surveys were designed to collect data for onshore spending and visit satisfaction by both passengers and crew. While the crew survey was slightly shorter than the passenger survey, both surveys were designed to collect the following information:

- hours spent ashore;
- expenditures by category, including shore tours, food & beverages, clothing, etc.;
- visit satisfaction, including shore tour, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation; and
- demographic characteristics, including country of residence, age group, income, etc.

Combining the expenditure data collected from the passenger and crew surveys with data on expenditures by cruise lines for port fees and services, payments to local tour operators for passenger shore excursions purchased onboard the cruise ships, and other provisions purchased locally by the cruise lines, estimates of total cruise tourism expenditures were developed for each participating destination.

Given the direct spending estimates, the economic contribution of these expenditures, as measured by employment and wage income were then estimated for each destination. This process began with the collection of economic data for each destination from a combination of local, regional and international sources. Utilizing all of these data a set of economic impact models were developed for each destination to estimate the direct and total employment and wage impacts. A more detailed description of these models is provided in the **Data and Methods** section of Volume I.

[33] Surveys were conducted on the ships of the following cruise lines: Azamara Cruises, Carnival Cruise Lines, Celebrity Cruises, Disney Cruise Line, Holland America Line, MSC Cruises (USA), Inc., Norwegian Cruise Line, Princess Cruises, P&O Cruises and Royal Caribbean International.

Cruise Tourism Expenditures

Cruise tourism expenditures in destination ports are composed of a broad range of spending including:

- onshore expenditures by passengers which tend to be concentrated in shore excursions and retail purchases of clothing, jewelry and local crafts and souvenirs;
- onshore expenditures by crew which are generally concentrated in purchases of food and beverages, local transportation and retail purchases of clothing and electronics;
- expenditures by cruise lines for port services, such as dockage fees and linesmen, utilities, such as water and power and navigation services; and
- purchases of supplies, such as food and other stores, by the cruise lines from local businesses.

According to data obtained from the FCCA and the CTO, 314,000 cruise passengers arrived aboard cruise ships during the 2008/2009 cruise year.[34] Of these, an estimated 266,900 passengers (85 percent) disembarked and visited Costa Rica. Utilizing additional data provided by the visiting cruise lines, we have estimated that 134,558 crew were aboard the cruise ships and that 35 percent, or 47,095 crew, disembarked and visited Costa Rica. These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **$26.3 million** ($US) in cruise tourism expenditures in Costa Rica during the 2008/2009 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Table 45 – Estimated Passenger Spending ($US) in Costa Rica, 2008/2009 Cruise Year[35]

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	$ 90.35	80%	$ 72.10
Local Crafts & Souvenirs	$ 37.40	66%	$ 24.88
Clothing	$ 27.40	35%	$ 9.70
Other Purchases	$ 52.95	29%	$ 15.46
F&B at Restaurants & Bars	$ 14.40	20%	$ 2.90
Watches & Jewelry	$ 91.00	6%	$ 5.30
Taxis/Ground Transportation	$ 46.30	5%	$ 2.46
Retail Purchases of Liquor	$ 14.90	5%	$ 0.72
Telephone & Internet	$ 9.80	3%	$ 0.32
Perfumes & Cosmetics	$ 36.30	1%	$ 0.34
Entertainment/Night Clubs	$ 61.30	1%	$ 0.32
Electronics	$ 24.70	0%	$ 0.06
Total Spend per Cruise Party			$ 134.56
Average Size of a Cruise Party			2.0
Total Spend per Cruise Passenger			$ 67.28
Cruise Passenger Visits			266,900
Total Cruise Passenger Expenditures			$ 17,956,718

[34] The 2008/2009 cruise year includes the twelve months beginning in May, 2008 and ending in April, 2009.
[35] The average shore excursion expenditure is a weighted average of the onshore and Internet purchases and the portion of the onboard purchases paid to local tour operators.

Per passenger spending estimates were derived from the 1,536 surveys completed by passengers that went ashore during the survey period. As shown in **Table 45,** each passenger cruise party spent an average of $134.56 in Costa Rica. The average spend per cruise party is the sum of the weighted spending in each of the twelve categories. For example, 20 percent of the survey respondents reported spending an average of $14.40 at local restaurants and/or bars. Spread over the 1,536 cruise parties that visited Costa Rica, this represents an average of $2.90 per party. On a per passenger basis, the average total expenditure was $67.28. This represents the sum of per party expenditures, $134.56, divided by the average size of a cruise party in Costa Rica, 2.0 passengers.

For the entire 2008/2009 cruise year, the estimated 266,900 cruise passengers who visited Costa Rica spent a total of **$18.0 million** ($US).

Per crew spending estimates were derived from the 471 surveys completed by crew members during the survey period. As shown in **Table 46,** each crew member spent an average of $51.97 in Costa Rica. The average spend per crew member is the sum of the weighted spending in each of the twelve categories. For example, 66 percent of the survey respondents reported spending an average of $26.50 for food and beverages. Spread over all the crew members that visited Costa Rica, this represents an average of $17.58 per crew member.

For the entire 2008/2009 cruise year, the estimated 47,095 crew who visited Costa Rica spent an estimated total of **$2.4 million** ($US).

Table 46 – Estimated Crew Spending ($US) in Costa Rica, 2008/2009 Cruise Year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	$ 26.50	66%	$ 17.58
Local Crafts & Souvenirs	$ 21.10	26%	$ 5.38
Taxis/Ground Transportation	$ 31.60	23%	$ 7.26
Other Purchases	$ 23.30	22%	$ 5.11
Clothing	$ 29.00	13%	$ 3.85
Telephone & Internet	$ 8.50	10%	$ 0.87
Watches & Jewelry	$ 80.80	5%	$ 3.71
Retail Purchases of Liquor	$ 43.20	5%	$ 2.20
Perfumes & Cosmetics	$ 48.40	4%	$ 1.73
Shore Excursions	$ 23.60	4%	$ 0.99
Entertainment/Night Clubs	$ 59.60	4%	$ 2.13
Electronics	$ 56.80	2%	$ 1.16
Total Spend per Crew			$ 51.97
Cruise Passenger Visits			47,095
Total Cruise Passenger Expenditures			$ 2,447,543

Cruise lines made payments to local businesses for a variety of goods and services. Net payments to local vendors for shore excursions have been included with passenger expenditures. However, cruise lines made other local expenditures, including payments for port fees and taxes, navigation services, utilities and other supplies. Based upon data provided by the FCCA member cruise lines, we estimated that all cruise lines spent **$5.9 million** ($US) in

Costa Rica during the 2008/2009 cruise year. Approximately 40 percent of these payments went for port fees, taxes and navigation services with the remaining 60 percent going toward the purchase of ship's stores.

Economic Contribution of Cruise Tourism Expenditures

As noted in the **Data and Methods** section of the full report, a set of economic impact models were developed for each destination to produce estimates of the economic contribution of cruise tourism. Data for these models were collected from a broad range of local, regional and international sources. The impact models were designed to reflect the economic structure of each destination, including the industrial composition of Gross Domestic Product (GDP), the wage share of GDP by industry and average employee wages by industry.

Table 47 – Total Economic Contribution of Cruise Tourism in Costa Rica 2008/2009 Cruise Year

	Employment	Wage Income ($US Millions)
Direct Economic Contribution	493	$ 2.7
Total Economic Contribution	719	$ 3.9

As shown in **Table 47**, the $26.3 million in total cruise tourism expenditures generated direct employment of 493 residents of Costa Rica paying $2.7 million in annual wages. Adding the indirect contribution that results from the spending of those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures generated a total employment contribution of 719 jobs and $3.9 million in wage income in Costa Rica during the 2008/2009 cruise year.

Figure 29 – Total Employment Impacts by Sector - Costa Rica

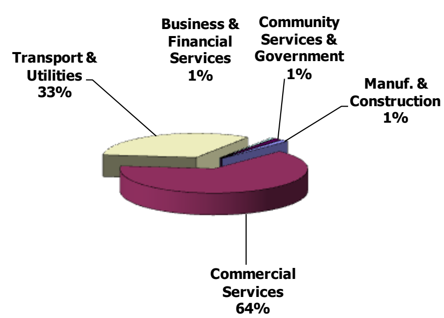
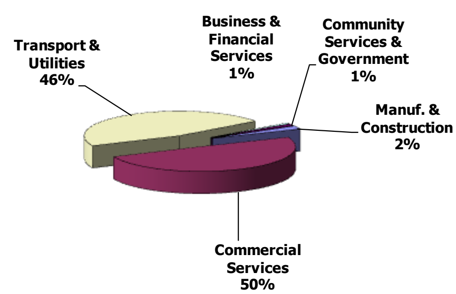


Figure 30 – Total Wage Impacts by Sector Costa Rica



As shown in **Figures 29 and 30**, the total employment and wage impacts of cruise tourism are concentrated in the commercial and transport sectors which account for about 96 percent of the employment and wage impacts.[36] This is not surprising since the direct impacts account for about 70 percent of the total employment impacts and that virtually all of the cruise tourism expenditures are made with businesses in these sectors. Because of the relatively higher wages in the transport sector compared to the other sectors of the economy, the transport sector accounts for 46 percent of the wage impacts but only 33 percent of the employment impacts. The remainder of the total employment and wage impacts was generated by the indirect spending in the other sectors of the economy.

Passenger Surveys

A total of 1,623 passenger surveys were completed and returned for tabulation. **Table 48** shows the major attributes of passenger visits in Costa Rica as derived from the passenger surveys.

Table 48 - Major Attributes of Intransit Passenger Surveys - Costa Rica

	Number	Percent
Total Respondents	1,623	
Number Making First Visit	1,224	75.4%
Number Ashore	1,536	94.6%
Number Making Onshore Purchases:	1,168	76.0%
Average Hours Ashore	5.2	
Average Size of Expenditure Party (Persons)	2.0	
Average Onshore Expenditure per Party	$62	
Purchased a Shore Excursion (Tour)	1,225	79.8%
Purchased Onshore Tour from:		
Cruise Line	1,020	83.3%
Onshore from Tour Operator	142	11.6%
Travel Agent	63	5.1%
Average Cost of Shore Excursion per Party	$150	
Toured On Own/Did not Tour	311	

- Of the 1,623 cruise parties that completed the surveys 75% stated that this had been their first visit to Costa Rica.
- Ninety-five percent (95%) of the cruise parties that completed the surveys disembarked their cruise ship to visit Costa Rica.
- Of the cruise parties that went ashore, 76% made at least one purchase while ashore. The typical cruise party consisted of 2.0 passengers and spent an average of 5.2 hours ashore.

[36] The industry sectors include the following activities:
Manufacturing & Construction: residential and nonresidential construction and all manufacturing
Commercial Services: wholesale and retail trade, lodging and eating and drinking establishments
Transportation & Utilities: tour operators, port services, telecommunications and water and power utilities
Business & Financial Services: banking, insurance, legal, accounting, leasing and other business services
Community Services & Government: education, health and social services and government agencies

- The responding cruise parties reported spending an average of $62 while ashore (excludes shore excursions).
- Eighty percent (80%) of the passengers that went ashore purchased a shore excursion. Eighty-three percent (83%) of passengers who purchased a tour did so through their cruise line, 12% purchased their tour onshore and 5 percent purchased their tour through their travel agent.
- The typical cruise party that purchased a shore excursion spent $150 for their tour.

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Table 49**. A 10-point scale was used with 10 being the highest score, i.e., extremely satisfied, and 1 being the lowest score, i.e., not at all satisfied.

Table 49 – Passenger Visit Satisfaction* - Costa Rica

Visit Attributes	Mean Score
Overall Visit	7.6
Visit Met Expectations	7.0
Likelihood of a Return Visit	4.4
Informed of Tours and Activities	7.8
Initial Shoreside Welcome	7.4
Guided Tour	8.4
Historic Sites/Museums	6.6
Variety of Things to See and Do	6.9
Friendliness of Residents	8.2
Overall Shopping Experience	6.4
Courtesy of Employees	8.2
Variety of Shops	5.9
Overall Prices	6.9
Taxis/Local Transportation	7.0

* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows: Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3; Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Cruise passengers were very satisfied with their overall visit to Costa Rica with a mean score of 7.6. However, the visit did not score as high in terms of meeting expectations. The mean score for "Visit Met Expectations" was lower at 7.0.
- Passengers felt very informed about tours and onshore activities in Costa Rica with a mean score of 7.8.
- "Guided Tours" (or Shore Excursions) received the highest score of all visit attributes with a mean score of 8.4. Thus, cruise passengers were very satisfied with their shore excursions.

- Passenger interactions with residents and store employees were very positive with "friendliness of residents" and "courtesy of employees" each receiving a mean score of 8.2.
- Categories with slightly lower scores but still above 7.0 (Very Satisfied) were: initial shoreside welcome and local transportation.
- Categories with average scores between 5.0 and 7.0 (Somewhat Satisfied) were given for historic sites, variety of things to see and do and the overall shopping experience, including the variety of shops and overall prices. Thus, while passengers thought shop employees were very courteous, the overall score for their shopping experience was brought down by lower perceptions on the variety of shops (5.9) and overall prices (6.9).
- Cruise passengers stated that they were not too likely to return to Costa Rica for a land-based vacation.

Passenger Demographics

Residents of the United States and the Canada accounted for 93 percent of the responding passengers. The average age of the respondents was 62 years with 51 percent of the respondents being 65 years of age or older. Costa Rica passengers had an average household income of $100,100 with 38 percent having over $100,000 in household income.

Figure 31 – Passenger Age Costa Rica

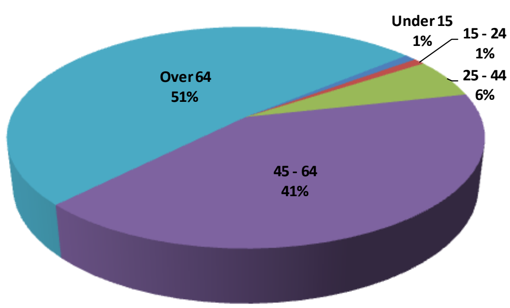
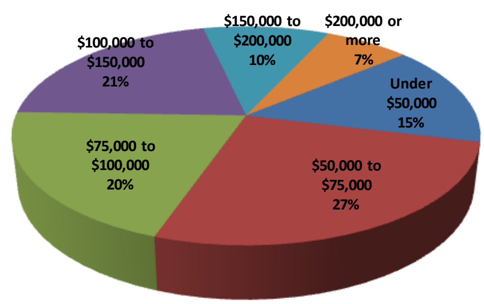


Figure 32 – Passenger Household Income Costa Rica



Cozumel

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.[37] The surveys were undertaken during the six-month period beginning in November 2008 and ending in April 2009. The survey schedule was designed so that surveys were conducted by FCCA member cruise lines that called at each destination and that the distribution of passenger and crew surveys would reflect the distribution of passenger and crew arrivals by cruise line at each destination. On any given cruise itinerary, passenger and crew surveys were placed in all passenger cabins and crew quarters following a single destination call. The surveys were completed by the passengers and crew in the privacy of their quarters and returned to a designated office on the cruise ship. Thus, passengers and crew were only surveyed once during a cruise itinerary and for a single destination. On a subsequent itinerary, passengers were surveyed following a call at a different destination.

The passenger and crew surveys were designed to collect data for onshore spending and visit satisfaction by both passengers and crew. While the crew survey was slightly shorter than the passenger survey, both surveys were designed to collect the following information:

- hours spent ashore;
- expenditures by category, including shore tours, food & beverages, clothing, etc.;
- visit satisfaction, including shore tour, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation; and
- demographic characteristics, including country of residence, age group, income, etc.

Combining the expenditure data collected from the passenger and crew surveys with data on expenditures by cruise lines for port fees and services, payments to local tour operators for passenger shore excursions purchased onboard the cruise ships, and other provisions purchased locally by the cruise lines, estimates of total cruise tourism expenditures were developed for each participating destination.

Given the direct spending estimates, the economic contribution of these expenditures, as measured by employment and wage income were then estimated for each destination. This process began with the collection of economic data for each destination from a combination of local, regional and international sources. Utilizing all of these data a set of economic impact models were developed for each destination to estimate the direct and total employment and wage impacts. A more detailed description of these models is provided in the **Data and Methods** section of Volume I.

[37] Surveys were conducted on the ships of the following cruise lines: Azamara Cruises, Carnival Cruise Lines, Celebrity Cruises, Disney Cruise Line, Holland America Line, MSC Cruises (USA), Inc., Norwegian Cruise Line, Princess Cruises, P&O Cruises and Royal Caribbean International.

Cruise Tourism Expenditures

Cruise tourism expenditures in destination ports are composed of a broad range of spending including:

- onshore expenditures by passengers which tend to be concentrated in shore excursions and retail purchases of clothing, jewelry and local crafts and souvenirs;
- onshore expenditures by crew which are generally concentrated in purchases of food and beverages, local transportation and retail purchases of clothing and electronics;
- expenditures by cruise lines for port services, such as dockage fees and linesmen, utilities, such as water and power and navigation services; and
- purchases of supplies, such as food and other stores, by the cruise lines from local businesses.

According to data obtained from the CTO and FCCA, 2.45 million cruise passengers arrived aboard cruise ships during the 2008/2009 cruise year.[38] Of these, an estimated 1.96 million passengers (80 percent) disembarked and visited Cozumel. Utilizing additional data provided by the visiting cruise lines, we have estimated that just over one million crew were aboard the cruise ships and that 40 percent, or 403,708 crew, disembarked and visited Cozumel. These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **$255.3 million** ($US) in cruise tourism expenditures in Cozumel during the 2008/2009 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Table 50 – Estimated Passenger Spending ($US) in Cozumel, 2008/2009 Cruise Year[39]

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
F&B at Restaurants & Bars	$ 32.90	57%	$ 18.81
Clothing	$ 49.10	54%	$ 26.73
Shore Excursions	$ 94.14	51%	$ 47.73
Local Crafts & Souvenirs	$ 40.50	49%	$ 20.01
Taxis/Ground Transportation	$ 27.90	40%	$ 11.13
Watches & Jewelry	$ 243.30	32%	$ 78.34
Other Purchases	$ 134.51	21%	$ 27.97
Retail Purchases of Liquor	$ 39.80	14%	$ 5.64
Perfumes & Cosmetics	$ 66.70	3%	$ 2.23
Entertainment/Night Clubs	$ 104.40	2%	$ 1.66
Telephone & Internet	$ 15.60	2%	$ 0.23
Electronics	$ 33.70	0%	$ 0.07
Total Spend per Cruise Party			$ 240.55
Average Size of a Cruise Party			2.3
Total Spend per Cruise Passenger			$ 104.58
Cruise Passenger Visits			1,960,000
Total Cruise Passenger Expenditures			$ 204,980,992

[38] The 2008/2009 cruise year includes the twelve months beginning in May, 2008 and ending in April, 2009.
[39] The average shore excursion expenditure is a weighted average of the onshore and Internet purchases and the portion of the onboard purchases paid to local tour operators.

Per passenger spending estimates were derived from the 2,719 surveys completed by passengers that went ashore during the survey period. As shown in **Table 50,** each passenger cruise party spent an average of $240.55 in Cozumel. The average spend per cruise party is the sum of the weighted spending in each of the twelve categories. For example, 57 percent of the survey respondents reported spending an average of $32.90 at local restaurants and/or bars. Spread over the 2,719 cruise parties that visited Cozumel, this represents an average of $18.81 per party. On a per passenger basis, the average total expenditure was $104.58. This represents the sum of per party expenditures, $240.55, divided by the average size of a cruise party in Cozumel, 2.3 passengers.

For the entire 2008/2009 cruise year, the estimated 1.96 million cruise passengers who visited Cozumel spent a total of **$205 million** ($US).

Per crew spending estimates were derived from the 1,022 surveys completed by crew members during the survey period. As shown in **Table 51,** each crew member spent an average of $63.48 in Cozumel. The average spend per crew member is the sum of the weighted spending in each of the twelve categories. For example, 81 percent of the survey respondents reported spending an average of $31.60 for food and beverages. Spread over all the crew members that visited Cozumel, this represents an average of $25.69 per crew member.

For the entire 2008/2009 cruise year, the estimated 356,390 crew who visited Cozumel spent an estimated total of **$25.6 million** ($US).

Table 51 – Estimated Crew Spending ($US) in Cozumel, 2008/2009 Cruise Year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	$ 31.60	81%	$ 25.69
Taxis/Ground Transportation	$ 12.20	39%	$ 4.77
Clothing	$ 26.80	21%	$ 5.54
Other Purchases	$ 37.20	19%	$ 7.14
Telephone & Internet	$ 10.00	18%	$ 1.75
Local Crafts & Souvenirs	$ 22.00	13%	$ 2.94
Perfumes & Cosmetics	$ 42.90	9%	$ 3.72
Shore Excursions	$ 34.40	8%	$ 2.71
Watches & Jewelry	$ 158.40	5%	$ 7.25
Retail Purchases of Liquor	$ 25.00	3%	$ 0.65
Entertainment/Night Clubs	$ 36.00	3%	$ 1.16
Electronics	$ 33.00	1%	$ 0.16
Total Spend per Crew			**$ 63.48**
Cruise Passenger Visits			403,708
Total Cruise Passenger Expenditures			**$ 25,627,358**

Cruise lines made payments to local businesses for a variety of goods and services. Net payments to local vendors for shore excursions have been included with passenger expenditures. However, cruise lines made other local expenditures, including payments for port fees and taxes, navigation services, utilities and other supplies. Based upon data provided by the FCCA member cruise lines, we estimated that all cruise lines spent **$24.6 million** ($US) in

Cozumel during the 2008/2009 cruise year. Essentially all of these expenditures were payments for port fees and taxes and navigation services.

Economic Contribution of Cruise Tourism Expenditures

As noted in the **Data and Methods** section of the full report, a set of economic impact models were developed for each destination to produce estimates of the economic contribution of cruise tourism. Data for these models were collected from a broad range of local, regional and international sources. The impact models were designed to reflect the economic structure of each destination, including the industrial composition of Gross Domestic Product (GDP), the wage share of GDP by industry and average employee wages by industry.

Table 52 – Total Economic Contribution of Cruise Tourism in Cozumel 2008/2009 Cruise Year

	Employment	Wage Income ($US Millions)
Direct Economic Contribution	4,344	$31.9
Total Economic Contribution	7,089	$52.8

As shown in **Table 52**, the $255.3 million in total cruise tourism expenditures generated direct employment of 4,344 residents of Cozumel paying $31.9 million in annual wages. Adding the indirect contribution that results from the spending of those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures generated a total employment contribution of 7,089 jobs and $52.8 million in wage income in Cozumel during the 2008/2009 cruise year.

Figure 33 – Total Employment Impacts by Sector - Cozumel

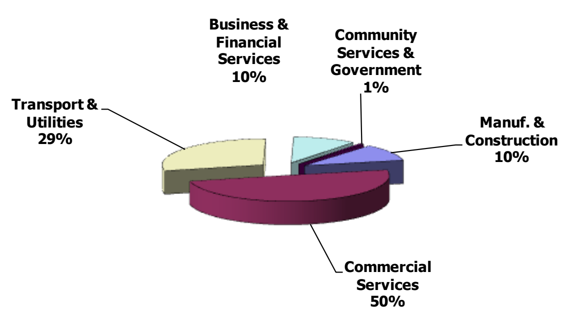
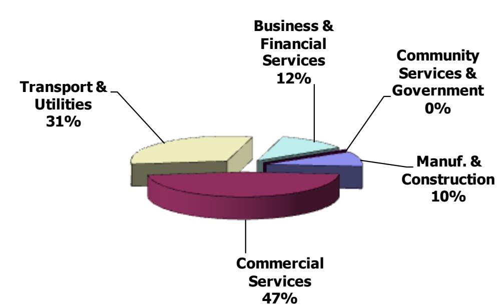


Figure 34 – Total Wage Impacts by Sector Cozumel



As shown in **Figures 33 and 34**, the total employment and wage impacts of cruise tourism are concentrated in the commercial and transport sectors which account for about 84 percent of the employment and wage impacts.[40] This is not surprising since the direct impacts account for about 60 percent of the total employment impacts and that virtually all of the cruise tourism expenditures are made with businesses in these sectors.

Comparison to 2006 Study

Total passenger and crew visits increased by 14 percent from 2.07 million visits during the 2005/2006 cruise year to 2.36 million during the 2008/2009 cruise year. Total direct cruise tourism expenditures increased at a slightly higher rate, 19 percent, over the three year period, increasing from $213.9 million to $255.3 million. As indicated in **Table 53**, expenditures by passengers and crew increased while expenditures by cruise lines declined.

Table 53 – Comparison of Cruise Tourism Impacts, Current Study versus 2006 Study

	Current Study	2006 Study
Total Onshore Visits (Thousands)	**2,363.7**	**2,070.2**
Passengers	1,960.0	1,713.9
Crew	403.7	356.4
Total Direct Expenditures ($US Millions)	**$ 255.3**	**$ 213.9**
Passengers	$ 205.0	$ 157.1
Crew	$ 25.6	$ 17.4
Cruise Lines	$ 24.6	$ 39.5
Average Per Passenger Expenditure	**$104.58**	**$ 91.64**
Average Per Crew Expenditure	**$ 63.48**	**$ 48.77**
Total Employment Impact	**7,089**	**5,945**
Total Wage Impact ($US Millions)	**$ 52.8**	**$ 40.8**

The 30 percent increase in passenger expenditures was the result of the 14 percent increase in passenger visits and the average expenditure per passenger. The increase in per passenger expenditures was primarily driven by increases in the average expenditures for jewelry, local crafts and other purchases. In many of the other categories, passengers spent more when they made purchases but a smaller percentage reported making purchases during the 2008/2009 cruise year.

In the case of crew expenditures, again, both the average spend, as well as the number of crew visits increased. The average crew expenditure increased by 30 percent primarily as a result of an increase in the percentage of crew making onshore purchases.

[40] The industry sectors include the following activities:
Manufacturing & Construction: residential and nonresidential construction and all manufacturing
Commercial Services: wholesale and retail trade, lodging and eating and drinking establishments
Transportation & Utilities: tour operators, port services, telecommunications and water and power utilities
Business & Financial Services: banking, insurance, legal, accounting, leasing and other business services
Community Services & Government: education, health and social services and government agencies

As a result of the increase in direct cruise tourism expenditures from the 2005/2006 cruise year, the economic impacts increased as well. The total employment impact increased by 19 percent over the three-year period while the wage impact increased by 29 percent. The higher growth in wages is due to increased labor productivity and average wages over the intervening period.

Passenger Surveys

A total of 2,918 passenger surveys were completed and returned for tabulation. **Table 54** shows the major attributes of passenger visits in Cozumel as derived from the passenger surveys.

Table 54 - Major Attributes of Intransit Passenger Surveys - Cozumel

	Number	Percent
Total Respondents	2,918	
Number Making First Visit	1,532	52.5%
Number Ashore	2,719	93.2%
Number Making Onshore Purchases:	2,525	92.9%
Average Hours Ashore	5.0	
Average Size of Expenditure Party (Persons)	2.3	
Average Onshore Expenditure per Party	$193	
Purchased a Shore Excursion (Tour)	1,378	50.7%
Purchased Onshore Tour from:		
Cruise Line	1,130	82.0%
Onshore from Tour Operator	159	11.5%
Travel Agent	89	6.5%
Average Cost of Shore Excursion per Party	$149	
Toured On Own/Did not Tour	1,341	

- Of the 2,918 cruise parties that completed the surveys 52% stated that this had been their first visit to Cozumel.
- Ninety-three percent (93%) of the cruise parties that completed the surveys disembarked their cruise ship to visit Cozumel.
- Of the cruise parties that went ashore, 93% made at least one purchase while ashore. The typical cruise party consisted of 2.3 passengers and spent an average of 5.0 hours ashore.
- The responding cruise parties reported spending an average of $193 while ashore (excludes shore excursions).
- Fifty-one percent (51%) of the passengers that went ashore purchased a shore excursion. Eighty-two percent (82%) of passengers who purchased a tour did so through their cruise line, 12% purchased their tour onshore and 6 percent purchased their tour through their travel agent.
- The typical cruise party that purchased a shore excursion spent $149 for their tour.

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Table 55**. A 10-point scale was used with 10 being the highest score, i.e., extremely satisfied, and 1 being the lowest score, i.e., not at all satisfied. Overall, Cozumel received among the highest satisfaction scores among the 29 participating destinations.

Table 55 – Passenger Visit Satisfaction* - Cozumel

Visit Attributes	Mean Score
Overall Visit	8.0
Visit Met Expectations	7.6
Likelihood of a Return Visit	5.7
Informed of Tours and Activities	8.1
Initial Shoreside Welcome	8.0
Guided Tour	8.5
Historic Sites/Museums	7.8
Variety of Things to See and Do	7.6
Friendliness of Residents	8.3
Overall Shopping Experience	7.5
Courtesy of Employees	8.2
Variety of Shops	7.6
Overall Prices	7.1
Taxis/Local Transportation	8.1

* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows: Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3; Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Cruise passengers were very satisfied with their overall visit to Cozumel with a mean score of 8.0. However, the visit did not score as high in terms of meeting expectations. The mean score for "Visit Met Expectations" was lower at 7.6.
- Passengers felt very informed about tours and onshore activities in Cozumel with a mean score of 8.1.
- "Guided Tours" (or Shore Excursions) received the highest score of all visit attributes with a mean score of 8.5. Thus, cruise passengers were very satisfied with their shore excursions.
- Passenger interactions with residents and store employees were very positive with "friendliness of residents" receiving a mean score of 8.3 and "courtesy of employees" having a mean score of 8.2.
- Categories with slightly lower scores but still above 7.0 (Very Satisfied) were: initial shoreside welcome, historic sites, variety of things to see and do and local transportation.

- Passengers were also very satisfied with their shopping experience which received a mean score of 7.5. It was already noted that passengers were very satisfied with shop employees but they were also very satisfied the variety of shops (7.6) and overall prices (7.1).
- Cruise passengers stated that they were somewhat likely to return to Cozumel for a land-based vacation.

Passenger Demographics

Residents of the United States and the Canada accounted for 96 percent of the responding passengers. Cruise passengers visiting Cozumel tend to be younger and less affluent than the average Caribbean cruise passenger. The average age of the respondents was 50 years with only 24 percent of the respondents being 65 years of age or older. Cozumel passengers had an average household income of $93,400 with 33 percent having over $100,000 in household income.

Figure 35 – Passenger Age Cozumel

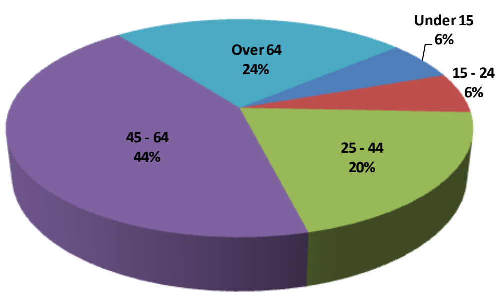
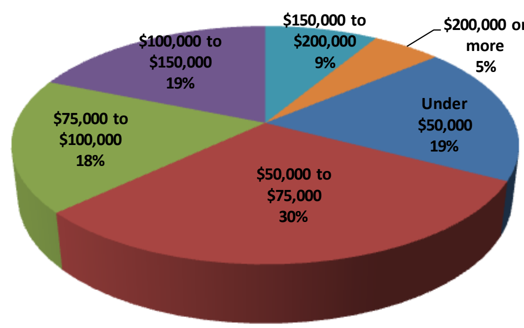


Figure 36 – Passenger Household Income Cozumel



Curacao

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.[41] The surveys were undertaken during the six-month period beginning in November 2008 and ending in April 2009. The survey schedule was designed so that surveys were conducted by FCCA member cruise lines that called at each destination and that the distribution of passenger and crew surveys would reflect the distribution of passenger and crew arrivals by cruise line at each destination. On any given cruise itinerary, passenger and crew surveys were placed in all passenger cabins and crew quarters following a single destination call. The surveys were completed by the passengers and crew in the privacy of their quarters and returned to a designated office on the cruise ship. Thus, passengers and crew were only surveyed once during a cruise itinerary and for a single destination. On a subsequent itinerary, passengers were surveyed following a call at a different destination.

The passenger and crew surveys were designed to collect data for onshore spending and visit satisfaction by both passengers and crew. While the crew survey was slightly shorter than the passenger survey, both surveys were designed to collect the following information:

- hours spent ashore;
- expenditures by category, including shore tours, food & beverages, clothing, etc.;
- visit satisfaction, including shore tour, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation; and
- demographic characteristics, including country of residence, age group, income, etc.

Combining the expenditure data collected from the passenger and crew surveys with data on expenditures by cruise lines for port fees and services, payments to local tour operators for passenger shore excursions purchased onboard the cruise ships, and other provisions purchased locally by the cruise lines, estimates of total cruise tourism expenditures were developed for each participating destination.

Given the direct spending estimates, the economic contribution of these expenditures, as measured by employment and wage income were then estimated for each destination. This process began with the collection of economic data for each destination from a combination of local, regional and international sources. Utilizing all of these data a set of economic impact models were developed for each destination to estimate the direct and total employment and wage impacts. A more detailed description of these models is provided in the **Data and Methods** section of Volume I.

[41] Surveys were conducted on the ships of the following cruise lines: Azamara Cruises, Carnival Cruise Lines, Celebrity Cruises, Disney Cruise Line, Holland America Line, MSC Cruises (USA), Inc., Norwegian Cruise Line, Princess Cruises, P&O Cruises and Royal Caribbean International.

Cruise Tourism Expenditures

Cruise tourism expenditures in destination ports are composed of a broad range of spending including:

- onshore expenditures by passengers which tend to be concentrated in shore excursions and retail purchases of clothing, jewelry and local crafts and souvenirs;
- onshore expenditures by crew which are generally concentrated in purchases of food and beverages, local transportation and retail purchases of clothing and electronics;
- expenditures by cruise lines for port services, such as dockage fees and linesmen, utilities, such as water and power and navigation services; and
- purchases of supplies, such as food and other stores, by the cruise lines from local businesses.

According to data obtained from the Curacao Ports Authority, 405,219 cruise passengers arrived aboard cruise ships during the 2008/2009 cruise year.[42] Of these, an estimated 344,436 passengers (85 percent) disembarked and visited Curacao. Utilizing additional data provided by the visiting cruise lines, we have estimated that 167,021 crew were aboard the cruise ships and that 35 percent, or 58,457 crew, disembarked and visited Curacao. These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **$39.3 million** ($US) in cruise tourism expenditures in Curacao during the 2008/2009 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Table 56 – Estimated Passenger Spending ($US) in Curacao, 2008/2009 Cruise Year[43]

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	$ 58.72	56%	$ 32.88
Clothing	$ 47.10	40%	$ 18.88
Local Crafts & Souvenirs	$ 27.30	39%	$ 10.68
F&B at Restaurants & Bars	$ 19.20	38%	$ 7.34
Other Purchases	$ 79.01	23%	$ 18.52
Watches & Jewelry	$ 358.50	16%	$ 59.24
Retail Purchases of Liquor	$ 36.00	16%	$ 4.26
Taxis/Ground Transportation	$ 33.10	12%	$ 3.98
Perfumes & Cosmetics	$ 54.30	6%	$ 3.34
Entertainment/Night Clubs	$ 40.90	3%	$ 1.26
Telephone & Internet	$ 7.00	3%	$ 0.20
Electronics	$ 127.40	1%	$ 1.84
Total Spend per Cruise Party			**$ 162.42**
Average Size of a Cruise Party			2.0
Total Spend per Cruise Passenger			**$ 81.21**
Cruise Passenger Visits			344,436
Total Cruise Passenger Expenditures			**$ 27,972,356**

[42] The 2008/2009 cruise year includes the twelve months beginning in May, 2008 and ending in April, 2009.
[43] The average shore excursion expenditure is a weighted average of the onshore and Internet purchases and the portion of the onboard purchases paid to local tour operators.

Per passenger spending estimates were derived from the 1,315 surveys completed by passengers that went ashore during the survey period. As shown in **Table 56,** each passenger cruise party spent an average of $162.42 in Curacao. The average spend per cruise party is the sum of the weighted spending in each of the twelve categories. For example, 38 percent of the survey respondents reported spending an average of $19.20 at local restaurants and/or bars. Spread over the 1,315 cruise parties that visited Curacao, this represents an average of $7.34 per party. On a per passenger basis, the average total expenditure was $81.21. This represents the sum of per party expenditures, $162.42, divided by the average size of a cruise party in Curacao, 2.0 passengers.

For the entire 2008/2009 cruise year, the estimated 344,436 cruise passengers who visited Curacao spent a total of **$28 million** ($US).

Per crew spending estimates were derived from the 367 surveys completed by crew members during the survey period. As shown in **Table 57,** each crew member spent an average of $116.88 in Curacao. The average spend per crew member is the sum of the weighted spending in each of the twelve categories. For example, 63 percent of the survey respondents reported spending an average of $34.50 for food and beverages. Spread over all the crew members that visited Curacao, this represents an average of $21.84 per crew member.

For the entire 2008/2009 cruise year, the estimated 58,457 crew who visited Curacao spent an estimated total of **$6.8 million** ($US).

Table 57 – Estimated Crew Spending ($US) in Curacao, 2008/2009 Cruise Year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	$ 34.50	63%	$ 21.84
Clothing	$ 45.50	25%	$ 11.58
Other Purchases	$ 28.70	21%	$ 6.11
Taxis/Ground Transportation	$ 20.60	19%	$ 3.90
Entertainment/Night Clubs	$ 158.00	14%	$ 21.50
Local Crafts & Souvenirs	$ 19.10	9%	$ 1.70
Perfumes & Cosmetics	$ 42.60	9%	$ 3.78
Watches & Jewelry	$ 458.10	8%	$ 35.24
Telephone & Internet	$ 9.50	6%	$ 0.56
Electronics	$ 190.80	4%	$ 6.77
Shore Excursions	$ 70.70	4%	$ 3.04
Retail Purchases of Liquor	$ 36.30	2%	$ 0.86
Total Spend per Crew			**$ 116.88**
Cruise Passenger Visits			58,457
Total Cruise Passenger Expenditures			**$ 6,832,495**

Cruise lines made payments to local businesses for a variety of goods and services. Net payments to local vendors for shore excursions have been included with passenger expenditures. However, cruise lines made other local expenditures, including payments for port fees and taxes, navigation services, utilities and other supplies. Based upon data provided by the FCCA member cruise lines, we estimated that all cruise lines spent **$4.5 million** ($US) in

Curacao during the 2008/2009 cruise year. Approximately 75 percent of these expenditures were payments for port fees and navigation services while the remaining 25 percent consisted of payments for ship supplies.

Economic Contribution of Cruise Tourism Expenditures

As noted in the **Data and Methods** section of the full report, a set of economic impact models were developed for each destination to produce estimates of the economic contribution of cruise tourism. Data for these models were collected from a broad range of local, regional and international sources. The impact models were designed to reflect the economic structure of each destination, including the industrial composition of Gross Domestic Product (GDP), the wage share of GDP by industry and average employee wages by industry.

Table 58 – Total Economic Contribution of Cruise Tourism in Curacao 2008/2009 Cruise Year

	Employment	Wage Income ($US Millions)
Direct Economic Contribution	432	$ 7.5
Total Economic Contribution	748	$13.0

As shown in **Table 58**, the $39.3 million in total cruise tourism expenditures generated direct employment of 432 residents of Curacao paying $7.5 million in annual wages. Adding the indirect contribution that results from the spending of those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures generated a total employment contribution of 748 jobs and $13.0 million in wage income in Curacao during the 2008/2009 cruise year.

Figure 37 – Total Employment Impacts by Sector - Curacao

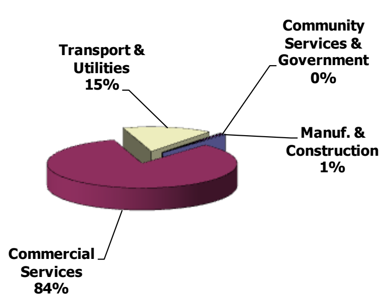
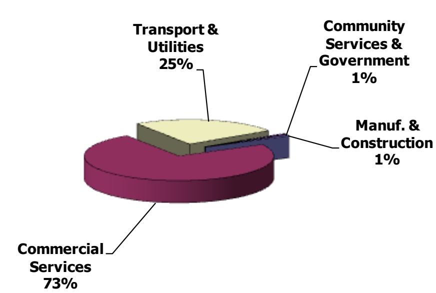


Figure 38 – Total Wage Impacts by Sector Curacao



As shown in **Figures 37 and 38**, the total employment and wage impacts of cruise tourism are concentrated in the commercial and transport sectors which account for about 98 percent of the employment and wage impacts.[44] This is not surprising since the direct impacts account for about 60 percent of the total employment impacts and that virtually all of the cruise tourism expenditures are made with businesses in these sectors. Because of the relatively higher wages in the transport sector compared to the other sectors of the economy, the transport sector accounts for 25 percent of the wage impacts but only 15 percent of the employment impacts. The remainder of the total employment and wage impacts was generated by the indirect spending in the other sectors of the economy.

Comparison to 2006 Study

Total passenger and crew visits increased by 36 percent from 295,900 visits during the 2005/2006 cruise year to 402,900 during the 2008/2009 cruise year. However, total direct cruise tourism expenditures more than doubled over the three year period, increasing from $18 million to $39.3 million. As indicated in **Table 59**, all three components of cruise tourism expenditures, passengers, crew and cruise lines, experienced an increase in spending.

Table 59 – Comparison of Cruise Tourism Impacts, Current Study versus 2006 Study

	Current Study	2006 Study
Total Onshore Visits (Thousands)	**402.9**	**295.9**
Passengers	344.4	253.8
Crew	58.5	42.1
Total Direct Expenditures ($US Millions)	**$ 39.3**	**$ 18.0**
Passengers	$ 28.0	$ 13.5
Crew	$ 6.8	$ 1.6
Cruise Lines	$ 4.5	$ 2.9
Average Per Passenger Expenditure	**$ 81.21**	**$ 53.34**
Average Per Crew Expenditure	**$116.88**	**$ 39.17**
Total Employment Impact	**748**	**420**
Total Wage Impact ($US Millions)	**$ 13.0**	**$ 7.5**

The increase in passenger expenditures was the result of the 36 percent increase in passenger visits and the 52 percent increase in the average expenditure per passenger. The increase in the average expenditure per passenger was the net result of an increase in the average value of purchases in most categories which was partially offset by a lower percentage of passengers making onshore purchases. For example the average expenditure for a shore excursion rose from $37 in the 2005/2006 cruise year to $59 in the 2008/2009

[44] The industry sectors include the following activities:
Manufacturing & Construction: residential and nonresidential construction and all manufacturing
Commercial Services: wholesale and retail trade, lodging and eating and drinking establishments
Transportation & Utilities: tour operators, port services, telecommunications and water and power utilities
Business & Financial Services: banking, insurance, legal, accounting, leasing and other business services
Community Services & Government: education, health and social services and government agencies

cruise year. At the same time the percentage of passengers purchasing shore excursions fell from 61 percent to 56 percent.

The average crew expenditure almost tripled over the three-year period. This increase was the combined impact of higher value purchases and a higher percentage of crew making onshore purchases.

The total employment impact increased by nearly 80 percent over the three-year period while the wage impact increased by 70 percent.

Passenger Surveys

A total of 1,366 passenger surveys were completed and returned for tabulation. **Table 60** shows the major attributes of passenger visits in Curacao as derived from the passenger surveys.

- Of the 1,366 cruise parties that completed the surveys 72% stated that this had been their first visit to Curacao.
- Ninety-six percent (96%) of the cruise parties that completed the surveys disembarked their cruise ship to visit Curacao.
- Of the cruise parties that went ashore, 79% made at least one purchase while ashore. The typical cruise party consisted of 2.0 passengers and spent an average of 4.3 hours ashore.

Table 60 - Major Attributes of Passenger Surveys - Curacao

	Number	Percent
Total Respondents	1,366	
Number Making First Visit	980	71.8%
Number Ashore	1,315	96.3%
Number Making Onshore Purchases:	1,041	79.2%
Average Hours Ashore	4.3	
Average Size of Expenditure Party (Persons)	2.0	
Average Onshore Expenditure per Party	$130	
Purchased a Shore Excursion (Tour)	737	56.0%
Purchased Onshore Tour from:		
Cruise Line	547	74.2%
Onshore from Tour Operator	158	21.4%
Travel Agent	32	4.3%
Average Cost of Shore Excursion per Party	$101	
Toured On Own/Did not Tour	578	

- The responding cruise parties reported spending an average of $130 while ashore (excludes shore excursions).
- Fifty-six percent (56%) of the passengers that went ashore purchased a shore excursion. Seventy-four percent (74%) of passengers who purchased a tour did so through their cruise line, 21% purchased their tour onshore and 4 percent purchased their tour through their travel agent.

- The typical cruise party that purchased a shore excursion spent $101 for their tour.

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Table 61**. A 10-point scale was used with 10 being the highest score, i.e., extremely satisfied, and 1 being the lowest score, i.e., not at all satisfied.

Table 61 – Passenger Visit Satisfaction* - Curacao

Visit Attributes	Mean Score
Overall Visit	7.7
Visit Met Expectations	7.4
Likelihood of a Return Visit	4.0
Informed of Tours and Activities	7.9
Initial Shoreside Welcome	7.5
Guided Tour	8.0
Historic Sites/Museums	7.3
Variety of Things to See and Do	7.0
Friendliness of Residents	7.9
Overall Shopping Experience	7.1
Courtesy of Employees	7.9
Variety of Shops	7.2
Overall Prices	6.8
Taxis/Local Transportation	7.1

* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows: Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3; Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Cruise passengers were very satisfied with their overall visit to Curacao with a mean score of 7.7. However, the visit did not score as high in terms of meeting expectations. The mean score for "Visit Met Expectations" was lower at 7.4.
- Passengers felt very informed about tours and onshore activities in Curacao with a mean score of 7.9.
- "Guided Tours" (or Shore Excursions) received the highest score of all visit attributes with a mean score of 8.0. Thus, cruise passengers were very satisfied with their shore excursions.
- Passenger interactions with residents and store employees were very positive with "friendliness of residents" and "courtesy of employees" each receiving a mean score of 7.9.
- Categories with slightly lower scores but still above 7.0 (Very Satisfied) were: initial shoreside welcome, historic sites, variety of things to see and do and local transportation.

- Passengers were also very satisfied with their shopping experience which received a mean score of 7.1. It was already noted that passengers were very satisfied with shop employees but they were also very satisfied the variety of shops (7.2) but only somewhat satisfied with overall prices (6.8).
- Cruise passengers stated that they were not too likely to return to Curacao for a land-based vacation.

Passenger Demographics

Residents of the United States and the Canada accounted for 97 percent of the responding passengers. The average age of the respondents was 61 years with 52 percent of the respondents being 65 years of age or older. Curacao passengers had an average household income of $104,600 with 41 percent having over $100,000 in household income.

Figure 39 – Passenger Age Curacao

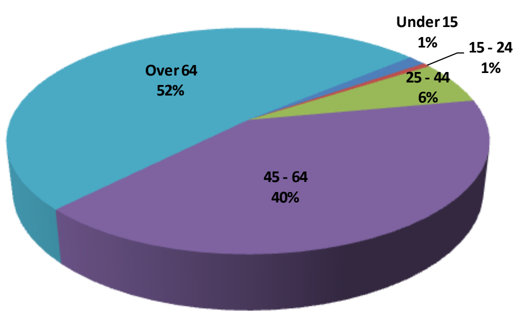
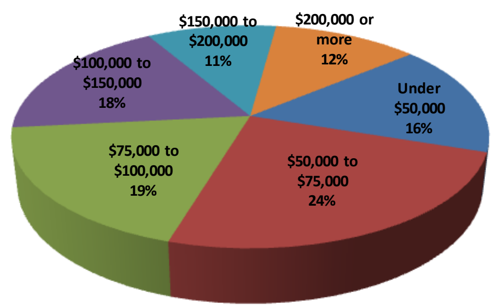


Figure 40 – Passenger Household Income Curacao



Dominica

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.[45] The surveys were undertaken during the six-month period beginning in November 2008 and ending in April 2009. The survey schedule was designed so that surveys were conducted by FCCA member cruise lines that called at each destination and that the distribution of passenger and crew surveys would reflect the distribution of passenger and crew arrivals by cruise line at each destination. On any given cruise itinerary, passenger and crew surveys were placed in all passenger cabins and crew quarters following a single destination call. The surveys were completed by the passengers and crew in the privacy of their quarters and returned to a designated office on the cruise ship. Thus, passengers and crew were only surveyed once during a cruise itinerary and for a single destination. On a subsequent itinerary, passengers were surveyed following a call at a different destination.

The passenger and crew surveys were designed to collect data for onshore spending and visit satisfaction by both passengers and crew. While the crew survey was slightly shorter than the passenger survey, both surveys were designed to collect the following information:

- hours spent ashore;
- expenditures by category, including shore tours, food & beverages, clothing, etc.;
- visit satisfaction, including shore tour, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation; and
- demographic characteristics, including country of residence, age group, income, etc.

Combining the expenditure data collected from the passenger and crew surveys with data on expenditures by cruise lines for port fees and services, payments to local tour operators for passenger shore excursions purchased onboard the cruise ships, and other provisions purchased locally by the cruise lines, estimates of total cruise tourism expenditures were developed for each participating destination.

Given the direct spending estimates, the economic contribution of these expenditures, as measured by employment and wage income were then estimated for each destination. This process began with the collection of economic data for each destination from a combination of local, regional and international sources. Utilizing all of these data a set of economic impact models were developed for each destination to estimate the direct and total employment and wage impacts. A more detailed description of these models is provided in the **Data and Methods** section of Volume I.

[45] Surveys were conducted on the ships of the following cruise lines: Azamara Cruises, Carnival Cruise Lines, Celebrity Cruises, Disney Cruise Line, Holland America Line, MSC Cruises (USA), Inc., Norwegian Cruise Line, Princess Cruises, P&O Cruises and Royal Caribbean International.

Cruise Tourism Expenditures

Cruise tourism expenditures in destination ports are composed of a broad range of spending including:

- onshore expenditures by passengers which tend to be concentrated in shore excursions and retail purchases of clothing, jewelry and local crafts and souvenirs;
- onshore expenditures by crew which are generally concentrated in purchases of food and beverages, local transportation and retail purchases of clothing and electronics;
- expenditures by cruise lines for port services, such as dockage fees and linesmen, utilities, such as water and power and navigation services; and
- purchases of supplies, such as food and other stores, by the cruise lines from local businesses.

According to data obtained from the Dominica Air and Sea Ports Authority, 272,633 cruise passengers arrived aboard cruise ships during the 2008/2009 cruise year.[46] Of these, an estimated 231,738 passengers (85 percent) disembarked and visited Dominica. Utilizing additional data provided by the visiting cruise lines, we have estimated that 106,613 crew were aboard the cruise ships and that 35 percent, or 37,315 crew, disembarked and visited Dominica. These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **$14.2 million** ($US) in cruise tourism expenditures in Dominica during the 2008/2009 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Table 62 – Estimated Passenger Spending ($US) in Dominica, 2008/2009 Cruise Year[47]

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	$ 66.27	67%	$ 44.47
Local Crafts & Souvenirs	$ 19.60	58%	$ 11.32
F&B at Restaurants & Bars	$ 11.40	30%	$ 3.48
Clothing	$ 23.30	26%	$ 6.06
Other Purchases	$ 78.36	17%	$ 13.60
Taxis/Ground Transportation	$ 31.50	13%	$ 4.18
Retail Purchases of Liquor	$ 20.80	8%	$ 1.70
Watches & Jewelry	$ 104.60	6%	$ 6.22
Perfumes & Cosmetics	$ 20.60	3%	$ 0.56
Telephone & Internet	$ 4.30	2%	$ 0.08
Electronics	$ 9.00	0%	$ 0.02
Entertainment/Night Clubs	$ 10.00	0%	$ 0.04
Total Spend per Cruise Party			**$ 91.73**
Average Size of a Cruise Party			2.0
Total Spend per Cruise Passenger			**$ 45.87**
Cruise Passenger Visits			231,738
Total Cruise Passenger Expenditures			**$ 10,628,696**

[46] The 2008/2009 cruise year includes the twelve months beginning in May, 2008 and ending in April, 2009.

[47] The average shore excursion expenditure is a weighted average of the onshore and Internet purchases and the portion of the onboard purchases paid to local tour operators.

Per passenger spending estimates were derived from the 1,820 surveys completed by passengers that went ashore during the survey period. As shown in **Table 62,** each passenger cruise party spent an average of $91.73 in Dominica. The average spend per cruise party is the sum of the weighted spending in each of the twelve categories. For example, 30 percent of the survey respondents reported spending an average of $11.40 at local restaurants and/or bars. Spread over the 1,820 cruise parties that visited Dominica, this represents an average of $3.48 per party. On a per passenger basis, the average total expenditure was $45.87. This represents the sum of per party expenditures, $91.73, divided by the average size of a cruise party in Dominica, 2.0 passengers.

For the entire 2008/2009 cruise year, the estimated 231,738 cruise passengers who visited Dominica spent a total of **$10.6 million** ($US).

Per crew spending estimates were derived from the 712 surveys completed by crew members during the survey period. As shown in **Table 63,** each crew member spent an average of $56.41 in Dominica. The average spend per crew member is the sum of the weighted spending in each of the twelve categories. For example, 67 percent of the survey respondents reported spending an average of $20.50 for food and beverages. Spread over all the crew members that visited Dominica, this represents an average of $13.79 per crew member.

For the entire 2008/2009 cruise year, the estimated 37,315 crew who visited Dominica spent an estimated total of **$2.1 million** ($US).

Table 63 – Estimated Crew Spending ($US) in Dominica, 2008/2009 Cruise Year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	$ 20.50	67%	$ 13.79
Taxis/Ground Transportation	$ 16.90	27%	$ 4.55
Local Crafts & Souvenirs	$ 19.40	20%	$ 3.86
Other Purchases	$ 60.50	12%	$ 7.43
Clothing	$ 41.90	12%	$ 4.90
Telephone & Internet	$ 13.10	11%	$ 1.38
Perfumes & Cosmetics	$ 53.90	7%	$ 3.78
Watches & Jewelry	$ 239.00	3%	$ 6.99
Electronics	$ 222.00	3%	$ 6.49
Shore Excursions	$ 17.50	3%	$ 0.60
Retail Purchases of Liquor	$ 46.50	2%	$ 1.09
Entertainment/Night Clubs	$ 66.30	2%	$ 1.55
Total Spend per Crew			$ 56.41
Cruise Passenger Visits			37,315
Total Cruise Passenger Expenditures			$ 2,104,914

Cruise lines made payments to local businesses for a variety of goods and services. Net payments to local vendors for shore excursions have been included with passenger expenditures. However, cruise lines made other local expenditures, including payments for port fees and taxes, navigation services, utilities and other supplies. Based upon data provided by the FCCA member cruise lines, we estimated that all cruise lines spent **$1.5 million** ($US) in

Dominica during the 2008/2009 cruise year. Essentially all of these expenditures were payments for port fees and taxes and navigation services.

Economic Contribution of Cruise Tourism Expenditures

As noted in the **Data and Methods** section of the full report, a set of economic impact models were developed for each destination to produce estimates of the economic contribution of cruise tourism. Data for these models were collected from a broad range of local, regional and international sources. The impact models were designed to reflect the economic structure of each destination, including the industrial composition of Gross Domestic Product (GDP), the wage share of GDP by industry and average employee wages by industry.

Table 64 – Total Economic Contribution of Cruise Tourism in Dominica 2008/2009 Cruise Year

	Employment	Wage Income ($US Millions)
Direct Economic Contribution	263	$2.0
Total Economic Contribution	405	$3.0

As shown in **Table 64**, the $14.2 million in total cruise tourism expenditures generated direct employment of 263 residents of Dominica paying $2.0 million in annual wages. Adding the indirect contribution that results from the spending of those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures generated a total employment contribution of 405 jobs and $3.0 million in wage income in Dominica during the 2008/2009 cruise year.

Figure 41 – Total Employment Impacts by Sector - Dominica

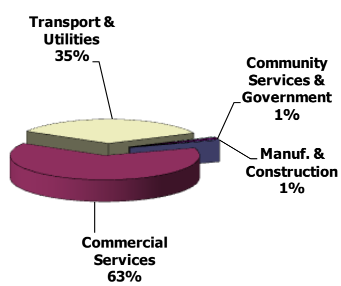
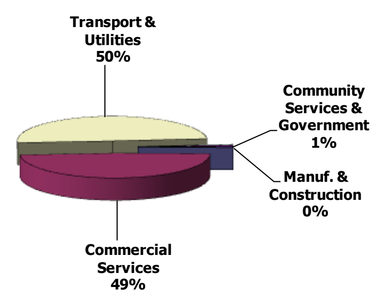


Figure 42 – Total Wage Impacts by Sector Dominica



As shown in **Figures 41 and 42**, the total employment and wage impacts of cruise tourism are concentrated in the commercial and transport sectors which account for about 98 percent of the employment and wage impacts.[48] This is not surprising since the direct impacts account for about 65 percent of the total employment impacts and that virtually all of the cruise tourism expenditures are made with businesses in these sectors. Because of the relatively higher wages in the transport sector compared to the other sectors of the economy, the transport sector accounts for 50 percent of the wage impacts but only 35 percent of the employment impacts. The remainder of the total employment and wage impacts was generated by the indirect spending in the other sectors of the economy.

Comparison to 2006 Study

Total passenger and crew visits increased by 19 percent from 225,400 visits during the 2005/2006 cruise year to 269,100 during the 2008/2009 cruise year. However, total direct cruise tourism expenditures only increased by 3 percent over the three year period, increasing from $13.8 million to $14.2 million. As indicated in **Table 65**, passenger expenditures increased, spending by crew declined and expenditures by cruise lines remained unchanged.

Table 65 – Comparison of Cruise Tourism Impacts, Current Study versus 2006 Study

	Current Study	2006 Study
Total Onshore Visits (Thousands)	**269.1**	**225.4**
Passengers	231.8	190.0
Crew	37.3	35.4
Total Direct Expenditures ($US Millions)	**$ 14.2**	**$ 13.8**
Passengers	$ 10.6	$ 9.7
Crew	$ 2.1	$ 2.6
Cruise Lines	$ 1.5	$ 1.5
Average Per Passenger Expenditure	**$ 45.87**	**$ 51.20**
Average Per Crew Expenditure	**$ 56.41**	**$ 74.80**
Total Employment Impact	**405**	**390**
Total Wage Impact ($US Millions)	**$ 3.0**	**$ 3.0**

The increase in passenger expenditures was the net result of the 22 percent increase in passenger visits and a 10 percent decline in the average expenditure per passenger. The decline in the average expenditure per passenger was the net result of a general stability in the value of purchases made in most categories but a lower percentage of passengers making onshore purchases. For example the average expenditure for

[48] The industry sectors include the following activities:
Manufacturing & Construction: residential and nonresidential construction and all manufacturing
Commercial Services: wholesale and retail trade, lodging and eating and drinking establishments
Transportation & Utilities: tour operators, port services, telecommunications and water and power utilities
Business & Financial Services: banking, insurance, legal, accounting, leasing and other business services
Community Services & Government: education, health and social services and government agencies

jewelry remained near $105 per cruise party in both the 2005/2006 cruise year and the 2008/2009 cruise year. At the same time the percentage of passengers purchasing jewelry fell from 10 percent to 6 percent.

The average crew expenditure declined by 25 percent over the three-year period while crew onshore visits only increased by 5 percent. As a consequence total crew expenditures fell by 20 percent. The decline in average crew expenditures was primarily due to a drop in crew purchases of clothing and jewelry.

As a result of the 3 percent increase in total expenditures, the total employment impact increased at a similar rate while the wage income impact remained unchanged.

Passenger Surveys

A total of 1,969 passenger surveys were completed and returned for tabulation. **Table 66** shows the major attributes of passenger visits in Dominica as derived from the passenger surveys.

- Of the 1,969 cruise parties that completed the surveys 75% stated that this had been their first visit to Dominica.
- Ninety-two percent (92%) of the cruise parties that completed the surveys disembarked their cruise ship to visit Dominica.
- Of the cruise parties that went ashore, 66% made at least one purchase while ashore. The typical cruise party consisted of 2.0 passengers and spent an average of 3.9 hours ashore.

Table 66 - Major Attributes of Passenger Surveys - Dominica

	Number	Percent
Total Respondents	1,969	
Number Making First Visit	1,475	74.9%
Number Ashore	1,820	92.4%
Number Making Onshore Purchases:	1,210	66.5%
Average Hours Ashore	3.9	
Average Size of Expenditure Party (Persons)	2.0	
Average Onshore Expenditure per Party	$47	
Purchased a Shore Excursion (Tour)	1,221	67.1%
Purchased Onshore Tour from:		
Cruise Line	848	69.5%
Onshore from Tour Operator	315	25.8%
Travel Agent	58	4.8%
Average Cost of Shore Excursion per Party	$107	
Toured On Own/Did not Tour	599	

- The responding cruise parties reported spending an average of $47 while ashore (excludes shore excursions).
- Sixty-seven percent (67%) of the passengers that went ashore purchased a shore excursion. Seventy percent (70%) of passengers who purchased a tour did so

through their cruise line, 25% purchased their tour onshore and 5 percent purchased their tour through their travel agent.

- The typical cruise party that purchased a shore excursion spent $107 for their tour.

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Table 67**. A 10-point scale was used with 10 being the highest score, i.e., extremely satisfied, and 1 being the lowest score, i.e., not at all satisfied.

Table 67 – Passenger Visit Satisfaction* - Dominica

Visit Attributes	Mean Score
Overall Visit	6.8
Visit Met Expectations	6.5
Likelihood of a Return Visit	3.3
Informed of Tours and Activities	7.4
Initial Shoreside Welcome	6.9
Guided Tour	8.3
Historic Sites/Museums	6.5
Variety of Things to See and Do	5.9
Friendliness of Residents	7.6
Overall Shopping Experience	5.5
Courtesy of Employees	7.4
Variety of Shops	4.7
Overall Prices	6.0
Taxis/Local Transportation	7.1

* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows: Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3; Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Cruise passengers were only somewhat satisfied with their overall visit to Dominica with a mean score of 6.8. The visit scored even lower in terms of meeting expectations. The mean score for "Visit Met Expectations" was lower at 6.5.
- Passengers felt very informed about tours and onshore activities in Dominica with a mean score of 7.4.
- "Guided Tours" (or Shore Excursions) received the highest score of all visit attributes with a mean score of 8.3. Thus, cruise passengers were very satisfied with their shore excursions which were clearly the highlight of their visit.
- Passenger interactions with residents and store employees were very positive with "friendliness of residents" receiving a mean score of 7.6 and "courtesy of employees" having a mean score of 7.4.
- Local transportation also received a mean score of 7.1 (Very Satisfied).

- Categories with average scores between 5.0 and 7.0 (Somewhat Satisfied) were given for initial shoreside welcome, historic sites, variety of things to see and do and the overall shopping experience, including the variety of shops and overall prices. Thus, while passengers thought shop employees were very courteous, the overall score for their shopping experience was brought down by lower perceptions on the variety of shops (4.7) and overall prices (6.0).
- Cruise passengers stated that they were not too likely to return to Dominica for a land-based vacation.

Passenger Demographics

Residents of the United States and the Canada accounted for 90 percent of the responding passengers. The average age of the respondents was 59 years with 41 percent of the respondents being 65 years of age or older. Dominica passengers had an average household income of $100,300 with 38 percent having over $100,000 in household income.

Figure 43 – Passenger Age Dominica

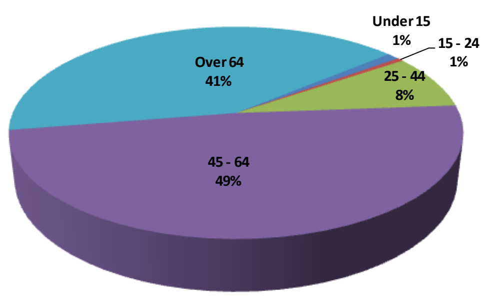
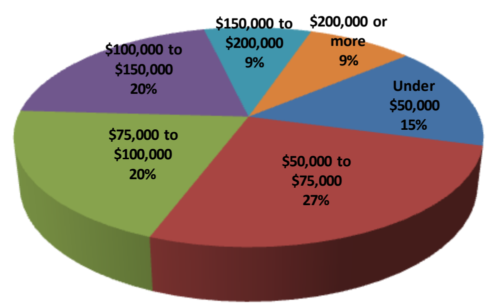


Figure 44 – Passenger Household Income Dominica



Dominican Republic

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.[49] The surveys were undertaken during the six-month period beginning in November 2008 and ending in April 2009. The survey schedule was designed so that surveys were conducted by FCCA member cruise lines that called at each destination and that the distribution of passenger and crew surveys would reflect the distribution of passenger and crew arrivals by cruise line at each destination. On any given cruise itinerary, passenger and crew surveys were placed in all passenger cabins and crew quarters following a single destination call. The surveys were completed by the passengers and crew in the privacy of their quarters and returned to a designated office on the cruise ship. Thus, passengers and crew were only surveyed once during a cruise itinerary and for a single destination. On a subsequent itinerary, passengers were surveyed following a call at a different destination.

The passenger and crew surveys were designed to collect data for onshore spending and visit satisfaction by both passengers and crew. While the crew survey was slightly shorter than the passenger survey, both surveys were designed to collect the following information:

- hours spent ashore;
- expenditures by category, including shore tours, food & beverages, clothing, etc.;
- visit satisfaction, including shore tour, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation; and
- demographic characteristics, including country of residence, age group, income, etc.

Combining the expenditure data collected from the passenger and crew surveys with data on expenditures by cruise lines for port fees and services, payments to local tour operators for passenger shore excursions purchased onboard the cruise ships, and other provisions purchased locally by the cruise lines, estimates of total cruise tourism expenditures were developed for each participating destination.

Given the direct spending estimates, the economic contribution of these expenditures, as measured by employment and wage income were then estimated for each destination. This process began with the collection of economic data for each destination from a combination of local, regional and international sources. Utilizing all of these data a set of economic impact models were developed for each destination to estimate the direct and total employment and wage impacts. A more detailed description of these models is provided in the **Data and Methods** section of Volume I.

[49] Surveys were conducted on the ships of the following cruise lines: Azamara Cruises, Carnival Cruise Lines, Celebrity Cruises, Disney Cruise Line, Holland America Line, MSC Cruises (USA), Inc., Norwegian Cruise Line, Princess Cruises, P&O Cruises and Royal Caribbean International.

Cruise Tourism Expenditures

Cruise tourism expenditures in destination ports are composed of a broad range of spending including:

- onshore expenditures by passengers which tend to be concentrated in shore excursions and retail purchases of clothing, jewelry and local crafts and souvenirs;
- onshore expenditures by crew which are generally concentrated in purchases of food and beverages, local transportation and retail purchases of clothing and electronics;
- expenditures by cruise lines for port services, such as dockage fees and linesmen, utilities, such as water and power and navigation services; and
- purchases of supplies, such as food and other stores, by the cruise lines from local businesses.

According to data provided by the CTO and the FCCA, a total of 475,200 cruise passengers arrived in the Dominican Republic during the 2008/2009 cruise year.[50] These included 425,200 intransit passengers and 50,000 passengers embarking on their cruises in the Dominican Republic. Of the intransit passengers, an estimated 361,420 passengers (85 percent) disembarked and visited the Dominican Republic. Utilizing additional data provided by the visiting cruise lines, we have estimated that 198,000 crew were aboard the cruise ships that sailed to and from the Dominican Republic and that 30 percent, or 59,400 crew, disembarked and visited the island. These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **$23.5 million** ($US) in cruise tourism expenditures in the Dominican Republic during the 2008/2009 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Passenger expenditures were estimated separately for intransit and homeport passengers. Per passenger spending estimates for intransit passengers were derived from the 922 surveys completed by passengers that went ashore during the survey period. As shown in **Table 68,** each passenger cruise party spent an average of $86.80 in the Dominican Republic. The average spend per cruise party is the sum of the weighted spending in each of the eleven categories. For example, 57 percent of the survey respondents reported spending an average of $16.50 at local restaurants and/or bars. Spread over the 922 cruise parties that visited the Dominican Republic, this represents an average of $9.46 per party. On a per passenger basis, the average total expenditure was $39.45. This represents the sum of per party expenditures, $86.80, divided by the average size of a cruise party in the Dominican Republic, 2.2 passengers. For the entire 2008/2009 cruise year, the estimated 361,420 intransit cruise passengers who visited the Dominican Republic spent a total of **$14.3 million** ($US) in the country.

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[50] The 2008/2009 cruise year includes the twelve months beginning in May, 2008 and ending in April, 2009.

Table 68 – Estimated Intransit Passenger Spending ($US) in the Dominican Republic, 2008/2009 Cruise Year[51]

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
F&B at Restaurants & Bars	$ 16.50	57%	$ 9.46
Shore Excursions	$ 70.92	49%	$ 34.61
Local Crafts & Souvenirs	$ 24.00	46%	$ 11.00
Taxis/Ground Transportation	$ 34.20	29%	$ 9.97
Other Purchases	$ 54.64	23%	$ 12.43
Clothing	$ 19.80	14%	$ 2.84
Watches & Jewelry	$ 43.60	12%	$ 5.39
Retail Purchases of Liquor	$ 15.80	5%	$ 0.84
Telephone & Internet	$ 2.60	1%	$ 0.02
Perfumes & Cosmetics	$ 23.50	1%	$ 0.13
Electronics	$ 26.70	1%	$ 0.11
Total Spend per Cruise Party			**$ 86.80**
Average Size of a Cruise Party			2.2
Total Spend per Cruise Passenger			**$ 39.45**
Cruise Passenger Visits			361,420
Total Cruise Passenger Expenditures			**$ 14,258,171**

As noted above another 50,000 cruise passengers arrived in the Dominican Republic to begin their Caribbean cruise. These embarking passengers were also surveyed using a slightly different survey instrument. The response rate for passengers embarking on their cruise in the Dominican Republic, Barbados and Jamaica was very low. Following discussions with the staff of the homeport cruise ships, we concluded that because the vast majority of the passengers embarking on cruises in these islands arrive on the day of the cruise's departure and leave on the day of its return, only a few passengers on any survey date responded to the survey. As a consequence we aggregated the survey responses for these three homeports. Therefore, the following estimates of spending by homeport passengers is based upon the responses of passengers at the three homeports.

Per passenger spending estimates for homeport passengers were derived from the 359 surveys completed by passengers that embarked on their cruises from Barbados, the Dominican Republic and Jamaica during the survey period. As shown in **Table 69,** each passenger cruise party spent an average of $144.30 in the Dominican Republic. The calculation of this figure is identical to that calculated for intransit passengers as discussed above. On a per passenger basis, the average total expenditure was $72.15. This figure is relatively low for homeport passengers and reflects the relatively low percentage of homeport passengers purchasing lodging and food and beverages. Those that did make purchases in these categories did spend at a representative level for homeport passengers but just fewer did so (see results for Puerto Rico). For the entire 2008/2009 cruise year, the estimated 50,000 homeport cruise passengers who visited the Dominican Republic spent a total of **$3.6 million** ($US) on the island.

[51] The average shore excursion expenditure is a weighted average of the onshore and Internet purchases and the portion of the onboard purchases paid to local tour operators.

Table 69 – Estimated Homeport Passenger Spending ($US) in the Dominican Republic, 2008/2009 Cruise Year[52]

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	$ 274.24	20%	$ 54.30
F&B at Restaurants & Bars	$ 47.24	16%	$ 7.50
Lodging	$ 220.26	15%	$ 33.70
Taxis/Ground Transportation	$ 36.06	12%	$ 4.52
Retail Purchases of Liquor	$ 33.34	8%	$ 2.60
Local Crafts & Souvenirs	$ 32.68	8%	$ 2.64
Other Purchases	$ 431.86	7%	$ 32.48
Clothing	$ 42.70	5%	$ 2.26
Watches & Jewelry	$ 137.62	2%	$ 2.30
Perfumes & Cosmetics	$ 65.82	2%	$ 1.10
Entertainment/Night Clubs	$ 57.44	1%	$ 0.80
Telephone & Internet	$ 11.97	1%	$ 0.10
Total Spend per Cruise Party			**$ 144.30**
Average Size of a Cruise Party			2.0
Total Spend per Cruise Passenger			**$ 72.15**
Cruise Passenger Visits			50,000
Total Cruise Passenger Expenditures			**$ 3,607,500**

Per crew spending estimates were derived from the 874 surveys completed by crew members during the survey period. As shown in **Table 70,** each crew member spent an average of $47.59 in the Dominican Republic. The average spend per crew member is the sum of the weighted spending in each of the twelve categories. For example, 64 percent of the survey respondents reported spending an average of $21.00 for food and beverages. Spread over all crew members that visited the Dominican Republic, this represents an average of $13.47 per crew member. For the entire 2008/2009 cruise year, the estimated 59,400 crew who visited the Dominican Republic spent an estimated total of **$2.8 million** ($US).

Cruise lines made payments to local businesses for a variety of goods and services. Net payments to local vendors for shore excursions have been included with passenger expenditures. However, cruise lines made other local expenditures, including payments for port fees and taxes, navigation services, utilities and other supplies. Based upon data provided by the FCCA member cruise lines, we estimated that all cruise lines spent **$2.8 million** ($US) in the Dominican Republic during the 2008/2009 cruise year. Approximately 90 percent of these expenditures were payments for port fees and navigation services while the remaining 10 percent consisted of payments for ship supplies.

[52] The average shore excursion expenditure is a weighted average of the onshore and Internet purchases and the portion of the onboard purchases paid to local tour operators.

Table 70 – Estimated Crew Spending ($US) in the Dominican Republic, 2008/2009 Cruise Year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	$ 21.00	64%	$ 13.47
Taxis/Ground Transportation	$ 16.40	45%	$ 7.37
Local Crafts & Souvenirs	$ 15.70	22%	$ 3.49
Clothing	$ 35.60	14%	$ 5.03
Telephone & Internet	$ 16.60	14%	$ 2.35
Other Purchases	$ 46.40	13%	$ 5.86
Watches & Jewelry	$ 57.70	7%	$ 3.79
Perfumes & Cosmetics	$ 30.40	4%	$ 1.38
Entertainment/Night Clubs	$ 91.70	3%	$ 2.78
Retail Purchases of Liquor	$ 30.00	2%	$ 0.61
Electronics	$ 66.70	2%	$ 1.01
Shore Excursions	$ 26.70	2%	$ 0.45
Total Spend per Crew			$ 47.59
Cruise Passenger Visits			59,400
Total Cruise Passenger Expenditures			$ 2,826,851

Economic Contribution of Cruise Tourism Expenditures

As noted in the **Data and Methods** section of the full report, a set of economic impact models were developed for each destination to produce estimates of the economic contribution of cruise tourism. Data for these models were collected from a broad range of local, regional and international sources. The impact models were designed to reflect the economic structure of each destination, including the industrial composition of Gross Domestic Product (GDP), the wage share of GDP by industry and average employee wages by industry.

Table 71 – Total Economic Contribution of Cruise Tourism in the Dominican Republic, 2008/2009 Cruise Year

	Employment	Wage Income ($US Millions)
Direct Economic Contribution	508	$2.0
Total Economic Contribution	788	$3.1

As shown in **Table 71**, the $23.5 million in total cruise tourism expenditures generated direct employment of 508 residents of the Dominican Republic paying $2.0 million in annual wages. Adding the indirect contribution that results from the spending of those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures generated a total employment contribution of 788 jobs and $3.1 million in wage income in the Dominican Republic during the 2008/2009 cruise year.

Figure 45 – Total Employment Impacts by Sector - The Dominican Republic

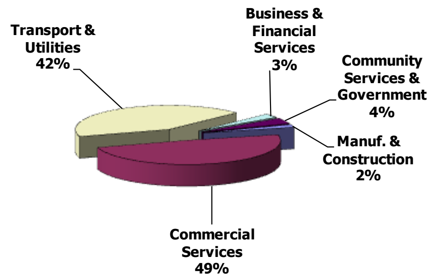
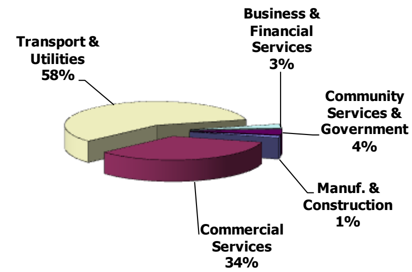


Figure 46 – Total Wage Impacts by Sector The Dominican Republic



As shown in **Figures 45 and 46**, the total employment and wage impacts of cruise tourism are concentrated in the commercial and transport sectors which account for about 90 percent of the employment and wage impacts.[53] This is not surprising since the direct impacts account for 65 percent of the total employment impacts and that virtually all of the cruise tourism expenditures are made with businesses in these sectors. Because of the relatively higher wages in the transport sector compared to the other sectors of the economy, the transport sector accounts for 58 percent of the wage impacts but only 42 percent of the employment impacts. The remainder of the total employment and wage impacts was generated by the indirect spending in the other sectors of the economy.

Passenger Surveys

A total of 1,023 intransit passenger surveys were completed and returned for tabulation. **Table 72** shows the major attributes of passenger visits in the Dominican Republic as derived from the passenger surveys.

- Of the 1,023 cruise parties that completed the surveys 79% stated that this had been their first visit to the Dominican Republic.
- Ninety percent (90%) of the cruise parties that completed the surveys disembarked their cruise ship to visit the Dominican Republic.
- Of the cruise parties that went ashore, 71% made at least one purchase while ashore. The typical cruise party consisted of 2.2 passengers and spent an average of 3.6 hours ashore.
- The responding cruise parties reported spending an average of $52 while ashore (excludes shore excursions).

[53] The industry sectors include the following activities:
Manufacturing & Construction: residential and nonresidential construction and all manufacturing
Commercial Services: wholesale and retail trade, lodging and eating and drinking establishments
Transportation & Utilities: tour operators, port services, telecommunications and water and power utilities
Business & Financial Services: banking, insurance, legal, accounting, leasing and other business services
Community Services & Government: education, health and social services and government agencies

- Forty-nine percent (49%) of the passengers that went ashore purchased a shore excursion. Seventy-two percent (72%) of passengers who purchased a tour did so through their cruise line, just over 24% purchased their tour onshore and nearly 4 percent purchased their tour through their travel agent.
- The typical cruise party that purchased a shore excursion spent $115 for their tour.

Table 72 - Major Attributes of Intransit Passenger Surveys - Dominican Republic

	Number	Percent
Total Respondents	1,023	
Number Making First Visit	807	78.9%
Number Ashore	922	90.1%
Number Making Onshore Purchases:	655	71.0%
Average Hours Ashore	3.6	
Average Size of Expenditure Party (Persons)	2.2	
Average Onshore Expenditure per Party	$52	
Purchased a Shore Excursion (Tour)	450	48.8%
Purchased Onshore Tour from:		
Cruise Line	326	72.4%
Onshore from Tour Operator	107	23.8%
Travel Agent	17	3.8%
Average Cost of Shore Excursion per Party	$115	
Toured On Own/Did not Tour	472	

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Table 73**. A 10-point scale was used with 10 being the highest score, i.e., extremely satisfied, and 1 being the lowest score, i.e., not at all satisfied. Passengers visiting the Dominican Republic gave low scores for satisfaction with their visit with no category receiving a score of 7.0 or higher.

Among other key conclusions concerning visit satisfaction were the following:

- Cruise passengers were only somewhat satisfied with their overall visit to the Dominican Republic with a mean score of 5.6. Nor did the visit score as high in terms of meeting expectations. The mean score for "Visit Met Expectations" was lower at 5.2.
- Passengers felt only somewhat informed about tours and onshore activities in the Dominican Republic with a mean score of 6.4.
- "Guided Tours" (or Shore Excursions) received the highest score of all visit attributes with a mean score of 6.9. Still, cruise passengers were only somewhat satisfied with their shore excursions.
- Passengers were only somewhat satisfied with their interactions with residents and store employees with "friendliness of residents" receiving a mean score of 6.4 and "courtesy of employees" having a mean score of 6.6.
- Categories with slightly lower scores but still above 5.0 (Somewhat Satisfied) were: initial shoreside welcome, historic sites and local transportation.

- Categories with average scores between 3.0 and 5.0 (Not To Satisfied) were given for variety of things to see and do and the overall shopping experience, including the variety of shops and overall prices. Thus, while passengers thought shop employees were somewhat courteous, the overall score for their shopping experience was considered to be not too satisfactory due to even lower scores for the variety of shops (4.0) and overall prices (5.1).
- Cruise passengers stated that they were not too likely to return to the Dominican Republic for a land-based vacation.

Table 73 – Passenger Visit Satisfaction* - Dominican Republic

Visit Attributes	Mean Score
Overall Visit	5.6
Visit Met Expectations	5.2
Likelihood of a Return Visit	3.1
Informed of Tours and Activities	6.4
Initial Shoreside Welcome	6.7
Guided Tour	6.9
Historic Sites/Museums	5.0
Variety of Things to See and Do	4.5
Friendliness of Residents	6.4
Overall Shopping Experience	4.5
Courtesy of Employees	6.6
Variety of Shops	4.0
Overall Prices	5.1
Taxis/Local Transportation	5.5

* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows: Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3; Not At All Satisfied: 2-1.

Passenger Demographics

Residents of the United States and the Canada accounted for 46 percent of the responding passengers. The average age of the respondents was 54 years with 29 percent of the respondents being 65 years of age or older. The Dominican Republic passengers had an average household income of $93,400 with 35 percent having over $100,000 in household income.

Figure 47 – Passenger Age
The Dominican Republic

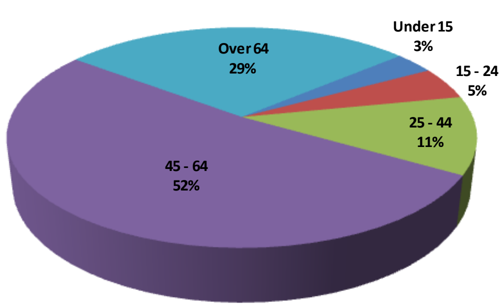
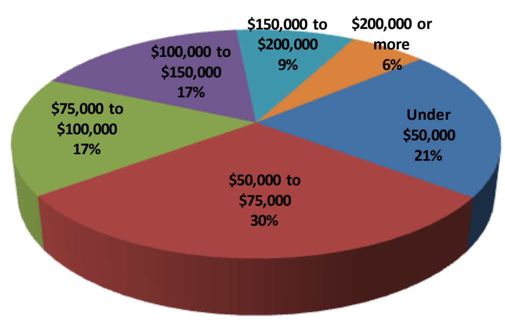


Figure 48 – Passenger Household Income
The Dominican Republic



Grenada

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.[54] The surveys were undertaken during the six-month period beginning in November 2008 and ending in April 2009. The survey schedule was designed so that surveys were conducted by FCCA member cruise lines that called at each destination and that the distribution of passenger and crew surveys would reflect the distribution of passenger and crew arrivals by cruise line at each destination. On any given cruise itinerary, passenger and crew surveys were placed in all passenger cabins and crew quarters following a single destination call. The surveys were completed by the passengers and crew in the privacy of their quarters and returned to a designated office on the cruise ship. Thus, passengers and crew were only surveyed once during a cruise itinerary and for a single destination. On a subsequent itinerary, passengers were surveyed following a call at a different destination.

The passenger and crew surveys were designed to collect data for onshore spending and visit satisfaction by both passengers and crew. While the crew survey was slightly shorter than the passenger survey, both surveys were designed to collect the following information:

- hours spent ashore;
- expenditures by category, including shore tours, food & beverages, clothing, etc.;
- visit satisfaction, including shore tour, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation; and
- demographic characteristics, including country of residence, age group, income, etc.

Combining the expenditure data collected from the passenger and crew surveys with data on expenditures by cruise lines for port fees and services, payments to local tour operators for passenger shore excursions purchased onboard the cruise ships, and other provisions purchased locally by the cruise lines, estimates of total cruise tourism expenditures were developed for each participating destination.

Given the direct spending estimates, the economic contribution of these expenditures, as measured by employment and wage income were then estimated for each destination. This process began with the collection of economic data for each destination from a combination of local, regional and international sources. Utilizing all of these data a set of economic impact models were developed for each destination to estimate the direct and total employment and wage impacts. A more detailed description of these models is provided in the **Data and Methods** section of Volume I.

[54] Surveys were conducted on the ships of the following cruise lines: Azamara Cruises, Carnival Cruise Lines, Celebrity Cruises, Disney Cruise Line, Holland America Line, MSC Cruises (USA), Inc., Norwegian Cruise Line, Princess Cruises, P&O Cruises and Royal Caribbean International.

Cruise Tourism Expenditures

Cruise tourism expenditures in destination ports are composed of a broad range of spending including:

- onshore expenditures by passengers which tend to be concentrated in shore excursions and retail purchases of clothing, jewelry and local crafts and souvenirs;
- onshore expenditures by crew which are generally concentrated in purchases of food and beverages, local transportation and retail purchases of clothing and electronics;
- expenditures by cruise lines for port services, such as dockage fees and linesmen, utilities, such as water and power and navigation services; and
- purchases of supplies, such as food and other stores, by the cruise lines from local businesses.

According to data provided by the Grenada Board of Tourism, 320,804 cruise passengers arrived aboard cruise ships during the 2008/2009 cruise year.[55] Of these, an estimated 272,683 passengers (85 percent) disembarked and visited Grenada. Utilizing additional data provided by the visiting cruise lines, we have estimated that 132,223 crew were aboard the cruise ships and that 35 percent, or 46,278 crew, disembarked and visited Grenada. These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **$21.7** million ($US) in cruise tourism expenditures in Grenada during the 2008/2009 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Table 74 – Estimated Passenger Spending ($US) in Grenada, 2008/2009 Cruise Year[56]

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Local Crafts & Souvenirs	$ 26.70	61%	$ 16.21
Shore Excursions	$ 58.95	56%	$ 33.25
Other Purchases	$ 49.52	32%	$ 15.75
F&B at Restaurants & Bars	$ 16.70	27%	$ 4.52
Clothing	$ 30.50	18%	$ 5.54
Taxis/Ground Transportation	$ 35.60	18%	$ 6.57
Retail Purchases of Liquor	$ 20.60	11%	$ 2.21
Watches & Jewelry	$ 207.40	8%	$ 17.54
Perfumes & Cosmetics	$ 39.20	3%	$ 1.01
Telephone & Internet	$ 5.70	2%	$ 0.11
Entertainment/Night Clubs	$ 57.00	0%	$ 0.21
Electronics	$ 10.00	0%	$ 0.02
Total Spend per Cruise Party			$ 102.94
Average Size of a Cruise Party			2.1
Total Spend per Cruise Passenger			$ 49.01
Cruise Passenger Visits			272,683
Total Cruise Passenger Expenditures			$ 13,364,677

[55] The 2008/2009 cruise year includes the twelve months beginning in May, 2008 and ending in April, 2009.
[56] The average shore excursion expenditure is a weighted average of the onshore and Internet purchases and the portion of the onboard purchases paid to local tour operators.

Per passenger spending estimates were derived from the 1,643 surveys completed by passengers that went ashore during the survey period. As shown in **Table 74,** each passenger cruise party spent an average of $102.94 in Grenada. The average spend per cruise party is the sum of the weighted spending in each of the twelve categories. For example, 27 percent of the survey respondents reported spending an average of $16.70 for food and beverages. Spread over the 1,643 cruise parties that visited Grenada, this represents an average of $4.52 per party. On a per passenger basis, the average total expenditure was $49.01. This represents the sum of per party expenditures, $102.94, divided by the average size of a cruise party in Grenada, 2.1 passengers.

For the entire 2008/2009 cruise year, the estimated 272,683 cruise passengers who visited Grenada spent a total of **$13.4 million** ($US) in Grenada.

Per crew spending estimates were derived from the 783 surveys completed by crew members during the survey period. As shown in **Table 75,** each crew member spent an average of $40.30 in Grenada. The average spend per crew member is the sum of the weighted spending in each of the twelve categories. For example, 62 percent of the survey respondents reported spending an average of $19.60 for food and beverages. Spread over all the crew members that visited Grenada, this represents an average of $12.08 per crew member.

For the entire 2008/2009 cruise year, the estimated 46,278 crew who visited Grenada spent an estimated total of **$1.9 million** ($US).

Table 75 – Estimated Crew Spending ($US) in Grenada, 2008/2009 Cruise Year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	$ 19.60	62%	$ 12.08
Taxis/Ground Transportation	$ 12.30	22%	$ 2.69
Clothing	$ 45.60	16%	$ 7.30
Local Crafts & Souvenirs	$ 13.60	11%	$ 1.52
Other Purchases	$ 44.70	11%	$ 4.99
Watches & Jewelry	$ 38.20	7%	$ 2.60
Telephone & Internet	$ 9.60	6%	$ 0.61
Perfumes & Cosmetics	$ 47.90	6%	$ 3.02
Shore Excursions	$ 10.00	5%	$ 0.46
Retail Purchases of Liquor	$ 14.80	4%	$ 0.57
Electronics	$ 173.80	2%	$ 4.22
Entertainment/Night Clubs	$ 16.70	2%	$ 0.24
Total Spend per Crew			$ 40.30
Cruise Passenger Visits			46,278
Total Cruise Passenger Expenditures			$ 1,865,005

Cruise lines made payments to local businesses for a variety of goods and services. Net payments to local vendors for shore excursions have been included with passenger expenditures. However, cruise lines made other local expenditures, including payments for port fees and taxes, navigation services, utilities and other supplies. Based upon data provided by the FCCA member cruise lines, we estimated that all cruise lines spent **$6.4 million** ($US) in

Grenada during the 2008/2009 cruise year. All of these expenditures were payments for port fees and taxes and navigation services.

Economic Contribution of Cruise Tourism Expenditures

As noted in the **Data and Methods** section of the full report, a set of economic impact models were developed for each destination to produce estimates of the economic contribution of cruise tourism. Data for these models were collected from a broad range of local, regional and international sources. The impact models were designed to reflect the economic structure of each destination, including the industrial composition of Gross Domestic Product (GDP), the wage share of GDP by industry and average employee wages by industry.

Table 76 – Total Economic Contribution of Cruise Tourism in Grenada, 2008/2009 Cruise Year

	Employment	Wage Income ($US Millions)
Direct Economic Contribution	364	$2.4
Total Economic Contribution	581	$3.9

As shown in **Table 76**, the $21.7 million in total cruise tourism expenditures in Grenada generated direct employment of 364 residents of Grenada paying $2.4 million in annual wages. Adding the indirect contribution that results from the spending of those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures generated a total employment contribution of 581 jobs and $3.9 million in wage income in Grenada during the 2008/2009 cruise year.

Figure 49 – Total Employment Impacts by Sector - Grenada

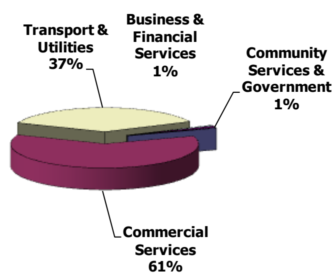
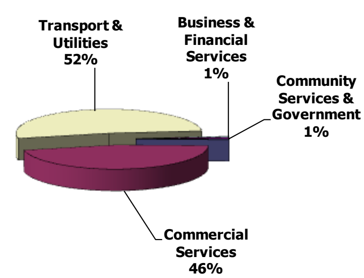


Figure 50 – Total Wage Impacts by Sector Grenada



As shown in **Figures 49 and 50**, the total employment and wage impacts of cruise tourism are concentrated in the commercial and transport sectors which account for about 98 percent of the total impacts. This is not surprising since the direct impacts account for nearly 65 percent of the total employment impacts and that virtually all of the cruise tourism expenditures are made with businesses in these sectors. Because of the relatively higher wages in the transport sector compared to the other sectors of the economy, the transport sector accounts for 52 percent of the wage impacts but only 37 percent of the employment impacts. The remainder of the total employment and wage impacts was generated by the indirect spending in the other sectors of the economy.[57]

Comparison to 2006 Study

Total passenger and crew visits increased by 9 percent from 292,200 visits during the 2005/2006 cruise year to 319,000 during the 2008/2009 cruise year. Total direct cruise tourism expenditures increased more rapidly over the three year period, increasing from $16.3 million to $21.7 million. As indicated in **Table 77**, all three components of cruise tourism expenditures, passengers, crew and cruise lines, experienced an increase in spending.

Table 77 – Comparison of Cruise Tourism Impacts, Current Study versus 2006 Study

	Current Study	2006 Study
Total Onshore Visits (Thousands)	**319.0**	**292.2**
Passengers	272.7	246.2
Crew	46.3	50.0
Total Direct Expenditures ($US Millions)	**$ 21.7**	**$ 16.3**
Passengers	$ 13.4	$ 13.2
Crew	$ 1.9	$ 1.3
Cruise Lines	$ 6.4	$ 1.8
Average Per Passenger Expenditure①	**$49.01**	**$53.82**
Average Per Crew Expenditure	**$40.30**	**$26.07**
Total Employment Impact	**581**	**485**
Total Wage Impact ($US Millions)	**$ 3.9**	**$ 3.1**

① Includes both intransit and homeport passengers.

The increase in passenger expenditures was the net result of a decline in the average expenditure per passenger which was more than offset by the increase in total passenger visits. While per passenger expenditures increased in some categories and fell in others, the overall decline in per passenger

[57] The industry sectors include the following activities:
Manufacturing & Construction: residential and nonresidential construction and all manufacturing
Commercial Services: wholesale and retail trade, lodging and eating and drinking establishments
Transportation & Utilities: tour operators, port services, telecommunications and water and power utilities
Business & Financial Services: banking, insurance, legal, accounting, leasing and other business services
Community Services & Government: education, health and social services and government agencies

expenditures was primarily the result of a decline in spending for shore excursions and jewelry. In both cases the average expenditure for cruise parties declined as did the percentage of cruise parties making such expenditures. For example, passengers that purchased a shore excursion spent an average of $58.95 during the 2008/2009 cruise year compared to $59.43 during the 2005/2006 cruise year. At the same time a smaller percentage of passengers purchased tours in the current study, 56 percent versus 75 percent in the 2006 study.

In the case of crew expenditures, the number of crew visits declined but this was offset by a larger percentage increase in spending per crew member. In the prior study crew expenditures were estimated using an average for all Caribbean destinations. Consequently, it is not possible to draw any conclusions about changes in the spending behavior of crew visiting Grenada.

As a result of the increase in direct cruise tourism expenditures from the 2005/2006 cruise year, the economic impacts increased as well. The total employment and wage impacts increased by just over 20 percent during the three-year period.

Passenger Surveys

A total of 1,774 passenger surveys were completed and returned for tabulation. **Table 78** shows the major attributes of passenger visits in Grenada as derived from the passenger surveys.

- Of the 1,774 cruise parties that completed the surveys 77% stated that this had been their first visit to Grenada.
- Ninety-three percent (93%) of the cruise parties that completed the surveys disembarked their cruise ship to visit Grenada.
- Of the cruise parties that went ashore, 85% made at least one purchase while ashore. The typical cruise party consisted of 2.1 passengers and spent an average of 3.8 hours ashore.
- The responding cruise parties reported spending an average of $70 while ashore (excludes shore excursions).
- Fifty-six percent (56%) of the passengers that went ashore purchased a shore excursion. Sixty-seven percent (67%) of passengers who purchased a tour did so through their cruise line, 29% purchased their tour onshore and 4 percent purchased their tour through their travel agent.
- The typical cruise party that purchased a shore excursion spent $88 for their tour.

Table 78 - Major Attributes of Passenger Surveys - Grenada

	Number	Percent
Total Respondents	1,774	
Number Making First Visit	1,358	76.6%
Number Ashore	1,643	92.6%
Number Making Onshore Purchases:	1,396	85.0%
Average Hours Ashore	3.8	
Average Size of Expenditure Party (Persons)	2.1	
Average Onshore Expenditure per Party	$70	
Purchased a Shore Excursion (Tour)	927	56.4%
Purchased Onshore Tour from:		
Cruise Line	622	67.1%
Onshore from Tour Operator	267	28.8%
Travel Agent	38	4.1%
Average Cost of Shore Excursion per Party	$88	
Toured On Own/Did not Tour	716	

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Table 79**. A 10-point scale was used with 10 being the highest score, i.e., extremely satisfied, and 1 being the lowest score, i.e., not at all satisfied.

Table 79 – Passenger Visit Satisfaction* - Grenada

Visit Attributes	Mean Score
Overall Visit	7.1
Visit Met Expectations	6.7
Likelihood of a Return Visit	3.8
Informed of Tours and Activities	7.4
Initial Shoreside Welcome	7.4
Guided Tour	7.9
Historic Sites/Museums	6.8
Variety of Things to See and Do	6.4
Friendliness of Residents	7.6
Overall Shopping Experience	6.5
Courtesy of Employees	7.6
Variety of Shops	6.4
Overall Prices	6.2
Taxis/Local Transportation	7.1

* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows: Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3; Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Cruise passengers were very satisfied with their overall visit to Grenada with a mean score of 7.1. However, the visit did not score as high in terms of meeting expectations. The mean score for "Visit Met Expectations" was lower at 6.7.
- Passengers felt very informed about tours and onshore activities in Grenada with a mean score of 7.4.
- "Guided Tours" (or Shore Excursions) received the highest score of all visit attributes with a mean score of 7.9. Thus, cruise passengers were very satisfied with their shore excursions.
- Passenger interactions with residents and store employees were very positive with "friendliness of residents" and "courtesy of employees" each receiving a mean score of 7.6.
- Categories with slightly lower scores but still above 7.0 (Very Satisfied) were: initial shoreside welcome and local transportation.
- Categories with average scores between 5.0 and 7.0 (Somewhat Satisfied) were given for historic sites, variety of things to see and do and the overall shopping experience, including the variety of shops and overall prices. Thus, while passengers thought shop employees were very courteous, the overall score for their shopping experience was brought down by lower perceptions on the variety of shops (6.4) and overall prices (6.2).
- Cruise passengers stated that they were not too likely to return to Grenada for a land-based vacation.

Passenger Demographics

Residents of the United States and the Canada accounted for 76 percent of the responding passengers. The average age of the respondents was 55 years with 31 percent of the respondents being 65 years of age or older. Grenada passengers had an average household income of $102,100 with 38 percent having over $100,000 in household income.

Figure 51 – Passenger Age Grenada

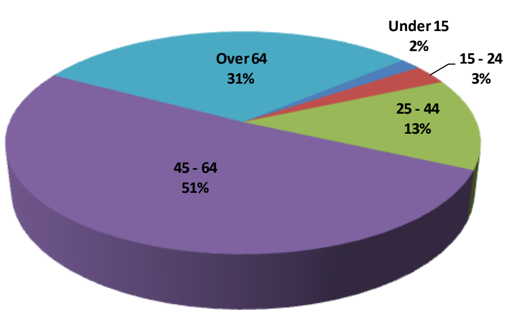
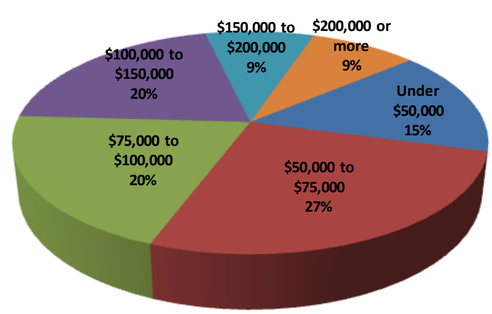


Figure 52 – Passenger Household Income Grenada



Guatemala

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.[58] The surveys were undertaken during the six-month period beginning in November 2008 and ending in April 2009. The survey schedule was designed so that surveys were conducted by FCCA member cruise lines that called at each destination and that the distribution of passenger and crew surveys would reflect the distribution of passenger and crew arrivals by cruise line at each destination. On any given cruise itinerary, passenger and crew surveys were placed in all passenger cabins and crew quarters following a single destination call. The surveys were completed by the passengers and crew in the privacy of their quarters and returned to a designated office on the cruise ship. Thus, passengers and crew were only surveyed once during a cruise itinerary and for a single destination. On a subsequent itinerary, passengers were surveyed following a call at a different destination.

The passenger and crew surveys were designed to collect data for onshore spending and visit satisfaction by both passengers and crew. While the crew survey was slightly shorter than the passenger survey, both surveys were designed to collect the following information:

- hours spent ashore;
- expenditures by category, including shore tours, food & beverages, clothing, etc.;
- visit satisfaction, including shore tour, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation; and
- demographic characteristics, including country of residence, age group, income, etc.

Combining the expenditure data collected from the passenger and crew surveys with data on expenditures by cruise lines for port fees and services, payments to local tour operators for passenger shore excursions purchased onboard the cruise ships, and other provisions purchased locally by the cruise lines, estimates of total cruise tourism expenditures were developed for each participating destination.

Given the direct spending estimates, the economic contribution of these expenditures, as measured by employment and wage income were then estimated for each destination. This process began with the collection of economic data for each destination from a combination of local, regional and international sources. Utilizing all of these data a set of economic impact models were developed for each destination to estimate the direct and total employment and wage impacts. A more detailed description of these models is provided in the **Data and Methods** section of Volume I.

[58] Surveys were conducted on the ships of the following cruise lines: Azamara Cruises, Carnival Cruise Lines, Celebrity Cruises, Disney Cruise Line, Holland America Line, MSC Cruises (USA), Inc., Norwegian Cruise Line, Princess Cruises, P&O Cruises and Royal Caribbean International.

Cruise Tourism Expenditures

Cruise tourism expenditures in destination ports are composed of a broad range of spending including:

- onshore expenditures by passengers which tend to be concentrated in shore excursions and retail purchases of clothing, jewelry and local crafts and souvenirs;
- onshore expenditures by crew which are generally concentrated in purchases of food and beverages, local transportation and retail purchases of clothing and electronics;
- expenditures by cruise lines for port services, such as dockage fees and linesmen, utilities, such as water and power and navigation services; and
- purchases of supplies, such as food and other stores, by the cruise lines from local businesses.

According to data obtained from the FCCA and the CTO, 135,500 cruise passengers arrived aboard cruise ships during the 2008/2009 cruise year.[59] Of these, an estimated 115,175 passengers (85 percent) disembarked and visited Guatemala. Utilizing additional data provided by the visiting cruise lines, we have estimated that 52,393 crew were aboard the cruise ships and that 30 percent, or 15,718 crew, disembarked and visited Guatemala. These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **$8.7 million** ($US) in cruise tourism expenditures in Guatemala during the 2008/2009 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Table 80 – Estimated Passenger Spending ($US) in Guatemala, 2008/2009 Cruise Year[60]

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	$ 80.63	71%	$ 57.49
Local Crafts & Souvenirs	$ 44.50	71%	$ 31.44
F&B at Restaurants & Bars	$ 13.30	38%	$ 5.02
Clothing	$ 28.10	35%	$ 9.85
Watches & Jewelry	$ 59.00	25%	$ 14.83
Other Purchases	$ 80.71	14%	$ 11.30
Taxis/Ground Transportation	$ 40.10	7%	$ 2.71
Retail Purchases of Liquor	$ 17.60	2%	$ 0.32
Telephone & Internet	$ 7.10	2%	$ 0.17
Perfumes & Cosmetics	$ 41.40	0%	$ 0.08
Entertainment/Night Clubs	$ 15.50	0%	$ 0.08
Electronics	$ 11.50	0%	$ 0.00
Total Spend per Cruise Party			$ 133.29
Average Size of a Cruise Party			2.1
Total Spend per Cruise Passenger			$ 63.47
Cruise Passenger Visits			115,175
Total Cruise Passenger Expenditures			$ 7,309,779

[59] The 2008/2009 cruise year includes the twelve months beginning in May, 2008 and ending in April, 2009.

[60] The average shore excursion expenditure is a weighted average of the onshore and Internet purchases and the portion of the onboard purchases paid to local tour operators.

Per passenger spending estimates were derived from the 2,654 surveys completed by passengers that went ashore during the survey period. As shown in **Table 80,** each passenger cruise party spent an average of $133.29 in Guatemala. The average spend per cruise party is the sum of the weighted spending in each of the twelve categories. For example, 38 percent of the survey respondents reported spending an average of $13.30 at local restaurants and/or bars. Spread over the 2,654 cruise parties that visited Guatemala, this represents an average of $5.02 per party. On a per passenger basis, the average total expenditure was $63.47. This represents the sum of per party expenditures, $133.29, divided by the average size of a cruise party in Guatemala, 2.1 passengers.

For the entire 2008/2009 cruise year, the estimated 115,175 cruise passengers who visited Guatemala spent a total of **$7.3 million** ($US).

Per crew spending estimates were derived from the 299 surveys completed by crew members during the survey period. As shown in **Table 81,** each crew member spent an average of $31.80 in Guatemala. The average spend per crew member is the sum of the weighted spending in each of the ten categories. For example, 53 percent of the survey respondents reported spending an average of $19.60 for food and beverages. Spread over all the crew members that visited Guatemala, this represents an average of $10.40 per crew member.

For the entire 2008/2009 cruise year, the estimated 15,718 crew who visited Guatemala spent an estimated total of **$0.5 million** ($US).

Table 81 – Estimated Crew Spending ($US) in Guatemala, 2008/2009 Cruise Year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	$ 19.60	53%	$ 10.40
Taxis/Ground Transportation	$ 19.20	31%	$ 6.01
Local Crafts & Souvenirs	$ 24.70	30%	$ 7.52
Clothing	$ 21.50	15%	$ 3.18
Other Purchases	$ 9.50	10%	$ 0.91
Telephone & Internet	$ 4.00	6%	$ 0.24
Shore Excursions	$ 15.00	4%	$ 0.66
Perfumes & Cosmetics	$ 15.30	3%	$ 0.40
Entertainment/Night Clubs	$135.00	2%	$ 2.35
Watches & Jewelry	$ 15.00	1%	$ 0.13
Total Spend per Crew			**$ 31.80**
Cruise Passenger Visits			15,718
Total Cruise Passenger Expenditures			**$ 499,829**

Cruise lines made payments to local businesses for a variety of goods and services. Net payments to local vendors for shore excursions have been included with passenger expenditures. However, cruise lines made other local expenditures, including payments for port fees and taxes, navigation services, utilities and other supplies. Based upon data provided by the FCCA member cruise lines, we estimated that all cruise lines spent **$0.9 million** ($US) in Guatemala during the 2008/2009 cruise year. All of these expenditures were payments for port fees and taxes and navigation services.

Economic Contribution of Cruise Tourism Expenditures

As noted in the **Data and Methods** section of the full report, a set of economic impact models were developed for each destination to produce estimates of the economic contribution of cruise tourism. Data for these models were collected from a broad range of local, regional and international sources. The impact models were designed to reflect the economic structure of each destination, including the industrial composition of Gross Domestic Product (GDP), the wage share of GDP by industry and average employee wages by industry.

Table 82 – Total Economic Contribution of Cruise Tourism in Guatemala 2008/2009 Cruise Year

	Employment	Wage Income ($US Millions)
Direct Economic Contribution	189	$ 0.8
Total Economic Contribution	275	$ 1.2

As shown in **Table 82**, the $8.7 million in total cruise tourism expenditures generated direct employment of 189 residents of Guatemala paying $0.8 million in annual wages. Adding the indirect contribution that results from the spending of those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures generated a total employment contribution of 275 jobs and $1.2 million in wage income in Guatemala during the 2008/2009 cruise year.

Figure 53 – Total Employment Impacts by Sector - Guatemala

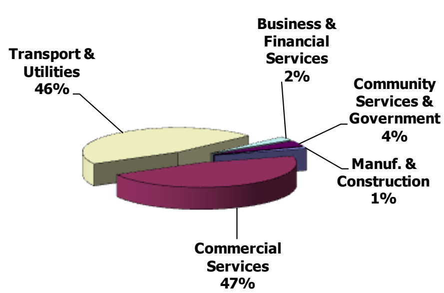
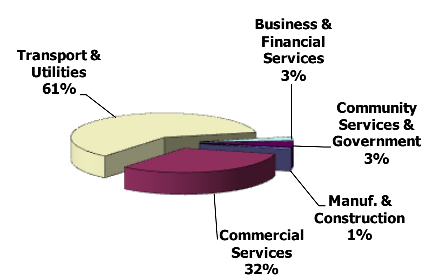


Figure 54 – Total Wage Impacts by Sector Guatemala



As shown in **Figures 53 and 54**, the total employment and wage impacts of cruise tourism are concentrated in the commercial and transport sectors which account for about 93 percent of the employment and wage impacts.[61] This is not surprising since the direct impacts account for about 70 percent of the total employment impacts and that virtually all of the cruise tourism expenditures are made with businesses in these sectors. Because of the relatively higher wages in the transport sector compared to the other sectors of the economy, the transport sector accounts for 61 percent of the wage impacts but only 46 percent of the employment impacts. The remainder of the total employment and wage impacts was generated by the indirect spending in the other sectors of the economy.

Passenger Surveys

A total of 2,764 passenger surveys were completed and returned for tabulation. **Table 83** shows the major attributes of passenger visits in Guatemala as derived from the passenger surveys.

Table 83 - Major Attributes of Intransit Passenger Surveys - Guatemala

	Number	Percent
Total Respondents	2,764	
Number Making First Visit	2,377	86.0%
Number Ashore	2,654	96.0%
Number Making Onshore Purchases:	2,293	86.4%
Average Hours Ashore	4.6	
Average Size of Expenditure Party (Persons)	2.1	
Average Onshore Expenditure per Party	$76	
Purchased a Shore Excursion (Tour)	1,893	71.3%
Purchased Onshore Tour from:		
Cruise Line	1,465	77.4%
Onshore from Tour Operator	363	19.2%
Travel Agent	65	3.4%
Average Cost of Shore Excursion per Party	$129	
Toured On Own/Did not Tour	761	

- Of the 2,764 cruise parties that completed the surveys 86% stated that this had been their first visit to Guatemala.
- Ninety-six percent (96%) of the cruise parties that completed the surveys disembarked their cruise ship to visit Guatemala.
- Of the cruise parties that went ashore, 86% made at least one purchase while ashore. The typical cruise party consisted of 2.1 passengers and spent an average of 4.6 hours ashore.

[61] The industry sectors include the following activities:
Manufacturing & Construction: residential and nonresidential construction and all manufacturing
Commercial Services: wholesale and retail trade, lodging and eating and drinking establishments
Transportation & Utilities: tour operators, port services, telecommunications and water and power utilities
Business & Financial Services: banking, insurance, legal, accounting, leasing and other business services
Community Services & Government: education, health and social services and government agencies

- The responding cruise parties reported spending an average of $76 while ashore (excludes shore excursions).
- Seventy-one percent (71%) of the passengers that went ashore purchased a shore excursion. Seventy-seven percent (77%) of passengers who purchased a tour did so through their cruise line, 19% purchased their tour onshore and 3 percent purchased their tour through their travel agent.
- The typical cruise party that purchased a shore excursion spent $129 for their tour.

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Table 84**. A 10-point scale was used with 10 being the highest score, i.e., extremely satisfied, and 1 being the lowest score, i.e., not at all satisfied.

Table 84 – Passenger Visit Satisfaction* - Guatemala

Visit Attributes	Mean Score
Overall Visit	7.7
Visit Met Expectations	7.2
Likelihood of a Return Visit	4.1
Informed of Tours and Activities	7.6
Initial Shoreside Welcome	8.2
Guided Tour	8.3
Historic Sites/Museums	7.8
Variety of Things to See and Do	6.5
Friendliness of Residents	8.6
Overall Shopping Experience	7.3
Courtesy of Employees	8.3
Variety of Shops	6.9
Overall Prices	7.4
Taxis/Local Transportation	7.3

* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows: Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3; Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Cruise passengers were very satisfied with their overall visit to Guatemala with a mean score of 7.7. However, the visit did not score as high in terms of meeting expectations. The mean score for "Visit Met Expectations" was lower at 7.2.
- Passengers felt very informed about tours and onshore activities in Guatemala with a mean score of 7.6.
- "Guided Tours" (or Shore Excursions) received the highest score of all visit attributes with a mean score of 8.3. Thus, cruise passengers were very satisfied with their shore excursions.

- Passenger interactions with residents and store employees were very positive with "friendliness of residents" receiving a mean score of 8.6 and "courtesy of employees" receiving a mean score of 8.3.
- Categories with slightly lower scores but still above 7.0 (Very Satisfied) were: initial shoreside welcome, historic sites and local transportation.
- Passengers were somewhat satisfied with the variety of things to see and do which received the lowest mean score of 6.5.
- Passengers were also very satisfied with their shopping experience which received a mean score of 7.3. It was already noted that passengers were very satisfied with shop employees but they were also very satisfied overall prices (7.4) but only somewhat satisfied with variety of shops (6.9).
- Cruise passengers stated that they were not too likely to return to Guatemala for a land-based vacation.

Passenger Demographics

Residents of the United States and the Canada accounted for 98 percent of the responding passengers. The average age of the respondents was 58 years with 45 percent of the respondents being 65 years of age or older. Guatemala passengers had an average household income of $96,500 with 34 percent having over $100,000 in household income.

Figure 55 – Passenger Age Guatemala

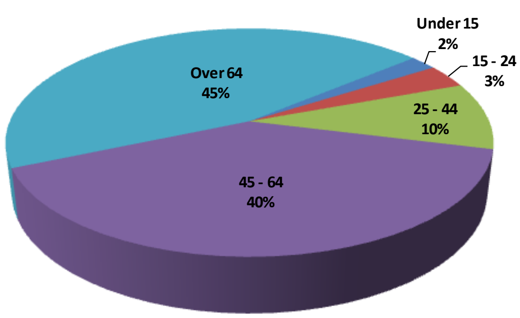
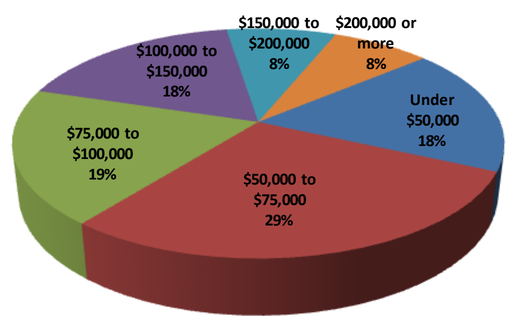


Figure 56 – Passenger Household Income Guatemala



Honduras

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.[62] The surveys were undertaken during the six-month period beginning in November 2008 and ending in April 2009. The survey schedule was designed so that surveys were conducted by FCCA member cruise lines that called at each destination and that the distribution of passenger and crew surveys would reflect the distribution of passenger and crew arrivals by cruise line at each destination. On any given cruise itinerary, passenger and crew surveys were placed in all passenger cabins and crew quarters following a single destination call. The surveys were completed by the passengers and crew in the privacy of their quarters and returned to a designated office on the cruise ship. Thus, passengers and crew were only surveyed once during a cruise itinerary and for a single destination. On a subsequent itinerary, passengers were surveyed following a call at a different destination.

The passenger and crew surveys were designed to collect data for onshore spending and visit satisfaction by both passengers and crew. While the crew survey was slightly shorter than the passenger survey, both surveys were designed to collect the following information:

- hours spent ashore;
- expenditures by category, including shore tours, food & beverages, clothing, etc.;
- visit satisfaction, including shore tour, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation; and
- demographic characteristics, including country of residence, age group, income, etc.

Combining the expenditure data collected from the passenger and crew surveys with data on expenditures by cruise lines for port fees and services, payments to local tour operators for passenger shore excursions purchased onboard the cruise ships, and other provisions purchased locally by the cruise lines, estimates of total cruise tourism expenditures were developed for each participating destination.

Given the direct spending estimates, the economic contribution of these expenditures, as measured by employment and wage income were then estimated for each destination. This process began with the collection of economic data for each destination from a combination of local, regional and international sources. Utilizing all of these data a set of economic impact models were developed for each destination to estimate the direct and total employment and wage impacts. A more detailed description of these models is provided in the **Data and Methods** section of Volume I.

[62] Surveys were conducted on the ships of the following cruise lines: Azamara Cruises, Carnival Cruise Lines, Celebrity Cruises, Disney Cruise Line, Holland America Line, MSC Cruises (USA), Inc., Norwegian Cruise Line, Princess Cruises, P&O Cruises and Royal Caribbean International.

Cruise Tourism Expenditures

Cruise tourism expenditures in destination ports are composed of a broad range of spending including:

- onshore expenditures by passengers which tend to be concentrated in shore excursions and retail purchases of clothing, jewelry and local crafts and souvenirs;
- onshore expenditures by crew which are generally concentrated in purchases of food and beverages, local transportation and retail purchases of clothing and electronics;
- expenditures by cruise lines for port services, such as dockage fees and linesmen, utilities, such as water and power and navigation services; and
- purchases of supplies, such as food and other stores, by the cruise lines from local businesses.

According to data obtained from the Port of Roatan, 387,418 cruise passengers arrived aboard cruise ships during the 2008/2009 cruise year.[63] Of these, an estimated 329,305 passengers (85 percent) disembarked and visited Honduras. Utilizing additional data provided by the visiting cruise lines, we have estimated that 147,356 crew were aboard the cruise ships and that 25 percent, or 36,839 crew, disembarked and visited Honduras. These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **$28.3 million** ($US) in cruise tourism expenditures in Honduras during the 2008/2009 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Table 85 – Estimated Passenger Spending ($US) in Honduras, 2008/2009 Cruise Year[64]

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	$ 69.91	67%	$ 46.91
Local Crafts & Souvenirs	$ 54.00	60%	$ 32.29
F&B at Restaurants & Bars	$ 20.70	48%	$ 9.96
Clothing	$ 31.60	40%	$ 12.56
Taxis/Ground Transportation	$ 44.80	21%	$ 9.32
Other Purchases	$ 73.88	19%	$ 14.17
Watches & Jewelry	$ 260.60	14%	$ 35.10
Retail Purchases of Liquor	$ 22.90	2%	$ 0.41
Telephone & Internet	$ 9.30	1%	$ 0.07
Perfumes & Cosmetics	$ 32.50	1%	$ 0.16
Entertainment/Night Clubs	$ 72.00	1%	$ 0.83
Electronics	$ 30.00	1%	$ 0.14
Total Spend per Cruise Party			**$ 161.92**
Average Size of a Cruise Party			2.3
Total Spend per Cruise Passenger			**$ 70.39**
Cruise Passenger Visits			329,305
Total Cruise Passenger Expenditures			**$ 23,181,140**

[63] The 2008/2009 cruise year includes the twelve months beginning in May, 2008 and ending in April, 2009.

[64] The average shore excursion expenditure is a weighted average of the onshore and Internet purchases and the portion of the onboard purchases paid to local tour operators.

Per passenger spending estimates were derived from the 557 surveys completed by passengers that went ashore during the survey period. As shown in **Table 85,** each passenger cruise party spent an average of $161.92 in Honduras. The average spend per cruise party is the sum of the weighted spending in each of the twelve categories. For example, 48 percent of the survey respondents reported spending an average of $20.70 at local restaurants and/or bars. Spread over the 557 cruise parties that visited Honduras, this represents an average of $9.96 per party. On a per passenger basis, the average total expenditure was $70.39. This represents the sum of per party expenditures, $161.92, divided by the average size of a cruise party in Honduras, 2.3 passengers.

For the entire 2008/2009 cruise year, the estimated 329,305 cruise passengers who visited Honduras spent a total of **$23.2 million** ($US).

Per crew spending estimates were derived from the 316 surveys completed by crew members during the survey period. As shown in **Table 86,** each crew member spent an average of $58.66 in Honduras. The average spend per crew member is the sum of the weighted spending in each of the eleven categories. For example, 76 percent of the survey respondents reported spending an average of $30.80 for food and beverages. Spread over all the crew members that visited Honduras, this represents an average of $23.26 per crew member.

For the entire 2008/2009 cruise year, the estimated 36,839 crew who visited Honduras spent an estimated total of **$2.2 million** ($US).

Table 86 – Estimated Crew Spending ($US) in Honduras, 2008/2009 Cruise Year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	$ 30.80	76%	$ 23.26
Taxis/Ground Transportation	$ 17.10	33%	$ 5.58
Shore Excursions	$ 31.70	14%	$ 4.47
Local Crafts & Souvenirs	$ 22.60	14%	$ 3.23
Clothing	$ 32.40	12%	$ 3.97
Telephone & Internet	$ 18.10	12%	$ 2.22
Other Purchases	$ 34.60	10%	$ 3.53
Watches & Jewelry	$145.00	6%	$ 8.88
Perfumes & Cosmetics	$ 59.00	5%	$ 3.01
Retail Purchases of Liquor	$ 22.50	2%	$ 0.46
Electronics	$ 5.00	1%	$ 0.05
Total Spend per Crew			**$ 58.66**
Cruise Passenger Visits			36,839
Total Cruise Passenger Expenditures			**$ 2,160,976**

Cruise lines made payments to local businesses for a variety of goods and services. Net payments to local vendors for shore excursions have been included with passenger expenditures. However, cruise lines made other local expenditures, including payments for port fees and taxes, navigation services, utilities and other supplies. Based upon data provided by the FCCA member cruise lines, we estimated that all cruise lines spent **$2.9 million** ($US) in

Honduras during the 2008/2009 cruise year. All of these expenditures were payments for port fees and taxes and navigation services.

Economic Contribution of Cruise Tourism Expenditures

As noted in the **Data and Methods** section of the full report, a set of economic impact models were developed for each destination to produce estimates of the economic contribution of cruise tourism. Data for these models were collected from a broad range of local, regional and international sources. The impact models were designed to reflect the economic structure of each destination, including the industrial composition of Gross Domestic Product (GDP), the wage share of GDP by industry and average employee wages by industry.

Table 87 – Total Economic Contribution of Cruise Tourism in Honduras 2008/2009 Cruise Year

	Employment	Wage Income ($US Millions)
Direct Economic Contribution	424	$ 2.0
Total Economic Contribution	632	$ 2.9

As shown in **Table 87**, the $28.3 million in total cruise tourism expenditures generated direct employment of 424 residents of Honduras paying $2.0 million in annual wages. Adding the indirect contribution that results from the spending of those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures generated a total employment contribution of 632 jobs and $2.9 million in wage income in Honduras during the 2008/2009 cruise year.

Figure 57 – Total Employment Impacts by Sector - Honduras

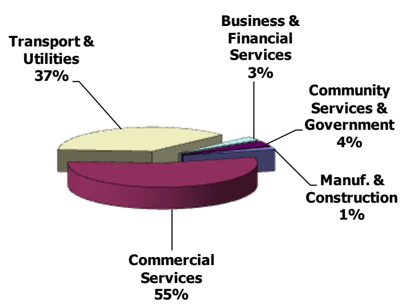
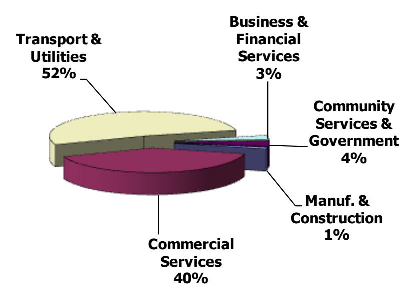


Figure 58 – Total Wage Impacts by Sector Honduras



As shown in **Figures 57 and 58**, the total employment and wage impacts of cruise tourism are concentrated in the commercial and transport sectors which account for about 92 percent of the employment and wage impacts.[65] This is not surprising since the direct impacts account for about 67 percent of the total employment impacts and that virtually all of the cruise tourism expenditures are made with businesses in these sectors. Because of the relatively higher wages in the transport sector compared to the other sectors of the economy, the transport sector accounts for 52 percent of the wage impacts but only 37 percent of the employment impacts. The remainder of the total employment and wage impacts was generated by the indirect spending in the other sectors of the economy.

Passenger Surveys

A total of 569 passenger surveys were completed and returned for tabulation. **Table 88** shows the major attributes of passenger visits in Honduras as derived from the passenger surveys.

Table 88 - Major Attributes of Intransit Passenger Surveys - Honduras

	Number	Percent
Total Respondents	569	
Number Making First Visit	494	86.8%
Number Ashore	557	97.9%
Number Making Onshore Purchases:	438	78.6%
Average Hours Ashore	4.3	
Average Size of Expenditure Party (Persons)	2.3	
Average Onshore Expenditure per Party	$115	
Purchased a Shore Excursion (Tour)	374	67.1%
Purchased Onshore Tour from:		
Cruise Line	295	78.9%
Onshore from Tour Operator	60	16.0%
Travel Agent	19	5.1%
Average Cost of Shore Excursion per Party	$115	
Toured On Own/Did not Tour	183	

- Of the 569 cruise parties that completed the surveys 87% stated that this had been their first visit to Honduras.
- Ninety-eight percent (98%) of the cruise parties that completed the surveys disembarked their cruise ship to visit Honduras.
- Of the cruise parties that went ashore, 79% made at least one purchase while ashore. The typical cruise party consisted of 2.3 passengers and spent an average of 4.3 hours ashore.

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[65] The industry sectors include the following activities:
Manufacturing & Construction: residential and nonresidential construction and all manufacturing
Commercial Services: wholesale and retail trade, lodging and eating and drinking establishments
Transportation & Utilities: tour operators, port services, telecommunications and water and power utilities
Business & Financial Services: banking, insurance, legal, accounting, leasing and other business services
Community Services & Government: education, health and social services and government agencies

- The responding cruise parties reported spending an average of $115 while ashore (excludes shore excursions).
- Sixty-seven percent (67%) of the passengers that went ashore purchased a shore excursion. Seventy-nine percent (79%) of passengers who purchased a tour did so through their cruise line, 16% purchased their tour onshore and 5 percent purchased their tour through their travel agent.
- The typical cruise party that purchased a shore excursion spent $115 for their tour.

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Table 89**. A 10-point scale was used with 10 being the highest score, i.e., extremely satisfied, and 1 being the lowest score, i.e., not at all satisfied.

Table 89 – Passenger Visit Satisfaction* - Honduras

Visit Attributes	Mean Score
Overall Visit	7.7
Visit Met Expectations	7.4
Likelihood of a Return Visit	5.2
Informed of Tours and Activities	7.6
Initial Shoreside Welcome	8.2
Guided Tour	8.4
Historic Sites/Museums	7.1
Variety of Things to See and Do	6.6
Friendliness of Residents	8.2
Overall Shopping Experience	6.7
Courtesy of Employees	8.0
Variety of Shops	5.9
Overall Prices	6.8
Taxis/Local Transportation	7.6

* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows: Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3; Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Cruise passengers were very satisfied with their overall visit to Honduras with a mean score of 7.7. However, the visit did not score as high in terms of meeting expectations. The mean score for “Visit Met Expectations” was lower at 7.4.
- Passengers felt very informed about tours and onshore activities in Honduras with a mean score of 7.6.
- “Guided Tours” (or Shore Excursions) received the highest score of all visit attributes with a mean score of 8.4. Thus, cruise passengers were very satisfied with their shore excursions.

- Passenger interactions with residents and store employees were very positive with "friendliness of residents" receiving a mean score of 8.2 and "courtesy of employees" receiving a mean score of 8.0.
- Categories with slightly lower scores but still above 7.0 (Very Satisfied) were: initial shoreside welcome, historic sites and local transportation.
- Categories with average scores between 5.0 and 7.0 (Somewhat Satisfied) were given for variety of things to see and do and the overall shopping experience, including the variety of shops and overall prices. Thus, while passengers thought shop employees were very courteous, the overall score for their shopping experience was brought down by lower perceptions on the variety of shops (5.9) and overall prices (6.8).
- Cruise passengers stated that they were somewhat likely to return to Honduras for a land-based vacation.

Passenger Demographics

Residents of the United States and the Canada accounted for 97 percent of the responding passengers. The average age of the respondents was 47 years with only 20 percent of the respondents being 65 years of age or older. Honduras passengers had an average household income of $104,300 with 43 percent having over $100,000 in household income.

Figure 59 – Passenger Age Honduras

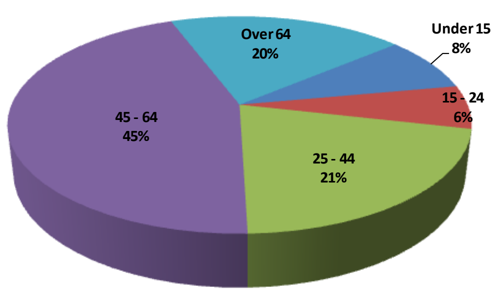
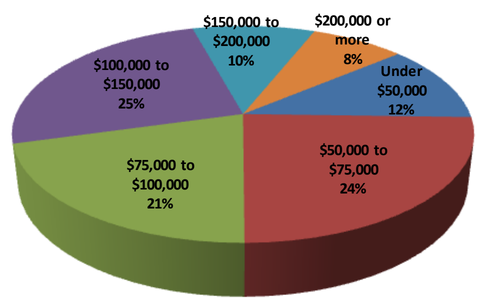


Figure 60 – Passenger Household Income Honduras



Jamaica

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.[66] The surveys were undertaken during the six-month period beginning in November 2008 and ending in April 2009. The survey schedule was designed so that surveys were conducted by FCCA member cruise lines that called at each destination and that the distribution of passenger and crew surveys would reflect the distribution of passenger and crew arrivals by cruise line at each destination. On any given cruise itinerary, passenger and crew surveys were placed in all passenger cabins and crew quarters following a single destination call. The surveys were completed by the passengers and crew in the privacy of their quarters and returned to a designated office on the cruise ship. Thus, passengers and crew were only surveyed once during a cruise itinerary and for a single destination. On a subsequent itinerary, passengers were surveyed following a call at a different destination.

The passenger and crew surveys were designed to collect data for onshore spending and visit satisfaction by both passengers and crew. While the crew survey was slightly shorter than the passenger survey, both surveys were designed to collect the following information:

- hours spent ashore;
- expenditures by category, including shore tours, food & beverages, clothing, etc.;
- visit satisfaction, including shore tour, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation; and
- demographic characteristics, including country of residence, age group, income, etc.

Combining the expenditure data collected from the passenger and crew surveys with data on expenditures by cruise lines for port fees and services, payments to local tour operators for passenger shore excursions purchased onboard the cruise ships, and other provisions purchased locally by the cruise lines, estimates of total cruise tourism expenditures were developed for each participating destination.

Given the direct spending estimates, the economic contribution of these expenditures, as measured by employment and wage income were then estimated for each destination. This process began with the collection of economic data for each destination from a combination of local, regional and international sources. Utilizing all of these data a set of economic impact models were developed for each destination to estimate the direct and total employment and wage impacts. A more detailed description of these models is provided in the **Data and Methods** section of Volume I.

[66] Surveys were conducted on the ships of the following cruise lines: Azamara Cruises, Carnival Cruise Lines, Celebrity Cruises, Disney Cruise Line, Holland America Line, MSC Cruises (USA), Inc., Norwegian Cruise Line, Princess Cruises, P&O Cruises and Royal Caribbean International.

Cruise Tourism Expenditures

Cruise tourism expenditures in destination ports are composed of a broad range of spending including:

- onshore expenditures by passengers which tend to be concentrated in shore excursions and retail purchases of clothing, jewelry and local crafts and souvenirs;
- onshore expenditures by crew which are generally concentrated in purchases of food and beverages, local transportation and retail purchases of clothing and electronics;
- expenditures by cruise lines for port services, such as dockage fees and linesmen, utilities, such as water and power and navigation services; and
- purchases of supplies, such as food and other stores, by the cruise lines from local businesses.

According to data provided by the Port Authority of Jamaica, a total of 977,564 cruise passengers arrived in Jamaica during the 2008/2009 cruise year.[67] These included 948,658 intransit passengers and 28,906 passengers embarking on their cruises in Jamaica. Of the intransit passengers, an estimated 853,792 passengers (90 percent) disembarked and visited Jamaica. Utilizing additional data provided by the visiting cruise lines, we have estimated that 357,729 crew were aboard the cruise ships that sailed to and from Jamaica and that 42 percent, or 149,988 crew, disembarked and visited the island. These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **$101.5 million** ($US) in cruise tourism expenditures in Jamaica during the 2008/2009 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Passenger expenditures were estimated separately for intransit and homeport passengers. Per passenger spending estimates for intransit passengers were derived from the 2,010 surveys completed by passengers that went ashore during the survey period. As shown in **Table 90,** each passenger cruise party spent an average of $205.52 in Jamaica. The average spend per cruise party is the sum of the weighted spending in each of the twelve categories. For example, 43 percent of the survey respondents reported spending an average of $29.10 at local restaurants and/or bars. Spread over the 2,010 cruise parties that visited Jamaica, this represents an average of $12.54 per party. On a per passenger basis, the average total expenditure was $93.42. This represents the sum of per party expenditures, $205.52, divided by the average size of a cruise party in Jamaica, 2.2 passengers.

For the entire 2008/2009 cruise year, the estimated 853,792 intransit cruise passengers who visited Jamaica spent a total of **$79.8 million** ($US) on the island.

[67] The 2008/2009 cruise year includes the twelve months beginning in May, 2008 and ending in April, 2009.

Table 90 – Estimated Intransit Passenger Spending ($US) in Jamaica, 2008/2009 Cruise Year[68]

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	$ 86.55	62%	$ 53.92
Clothing	$ 49.90	56%	$ 28.05
Local Crafts & Souvenirs	$ 35.40	51%	$ 18.02
F&B at Restaurants & Bars	$ 29.10	43%	$ 12.54
Other Purchases	$ 55.33	27%	$ 14.85
Taxis/Ground Transportation	$ 37.70	24%	$ 9.02
Retail Purchases of Liquor	$ 29.50	15%	$ 4.44
Watches & Jewelry	$ 435.00	14%	$ 62.04
Entertainment/Night Clubs	$ 109.00	2%	$ 1.69
Telephone & Internet	$ 10.80	1%	$ 0.13
Perfumes & Cosmetics	$ 51.70	1%	$ 0.62
Electronics	$ 46.10	0%	$ 0.20
Total Spend per Cruise Party			**$ 205.52**
Average Size of a Cruise Party			2.2
Total Spend per Cruise Passenger			**$ 93.42**
Cruise Passenger Visits			853,792
Total Cruise Passenger Expenditures			**$ 79,761,683**

As noted above another 167,013 cruise passengers arrived in Jamaica to begin their cruise in the Caribbean. These embarking passengers were also surveyed using a slightly different survey instrument. The response rate for passengers embarking on their cruise in Barbados, the Dominican Republic and Jamaica was very low. Following discussions with the staff of the homeport cruise ships, we concluded that because the vast majority of the passengers embarking on cruises in these islands arrive on the day of the cruise's departure and leave on the day of its return, only a few passengers on any survey date responded to the survey. As a consequence we aggregated the survey responses for these three homeport islands. Therefore, the following estimates of spending by homeport passengers are based upon the responses of passengers at the three islands.

Per passenger spending estimates for homeport passengers were derived from the 359 surveys completed by passengers that embarked on their cruises from Barbados, the Dominican Republic and Jamaica during the survey period. As shown in **Table 91,** each passenger cruise party spent an average of $144.30 in Jamaica. The calculation of this figure is identical to that calculated for intransit passengers as discussed above. On a per passenger basis, the average total expenditure was $72.15. This figure is relatively low for homeport passengers and reflects the relatively low percentage of homeport passengers purchasing lodging and food and beverages. Those that did make purchases in these categories did spend at a representative level for homeport passengers but just fewer did so (see results for Puerto Rico). For the entire 2008/2009 cruise year, the estimated 28,906 homeport cruise passengers who visited Jamaica spent a total of **$2.1 million** ($US) on the island.

[68] The average shore excursion expenditure is a weighted average of the onshore and Internet purchases and the portion of the onboard purchases paid to local tour operators.

Table 91 – Estimated Homeport Passenger Spending ($US) in Jamaica, 2008/2009 Cruise Year[69]

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	$ 274.24	20%	$ 54.30
F&B at Restaurants & Bars	$ 47.24	16%	$ 7.50
Lodging	$ 220.26	15%	$ 33.70
Taxis/Ground Transportation	$ 36.06	12%	$ 4.52
Retail Purchases of Liquor	$ 33.34	8%	$ 2.60
Local Crafts & Souvenirs	$ 32.68	8%	$ 2.64
Other Purchases	$ 431.86	7%	$ 32.48
Clothing	$ 42.70	5%	$ 2.26
Watches & Jewelry	$ 137.62	2%	$ 2.30
Perfumes & Cosmetics	$ 65.82	2%	$ 1.10
Entertainment/Night Clubs	$ 57.44	1%	$ 0.80
Telephone & Internet	$ 11.97	1%	$ 0.10
Total Spend per Cruise Party			$ 144.30
Average Size of a Cruise Party			2.0
Total Spend per Cruise Passenger			$ 72.15
Cruise Passenger Visits			28,906
Total Cruise Passenger Expenditures			$ 2,085,568

Per crew spending estimates were derived from the 643 surveys completed by crew members during the survey period. As shown in **Table 92,** each crew member spent an average of $51.32 in Jamaica. The average spend per crew member is the sum of the weighted spending in each of the eleven categories. For example, 62 percent of the survey respondents reported spending an average of $22.60 for food and beverages. Spread over all crew members that visited Jamaica, this represents an average of $14.07 per crew member. For the entire 2008/2009 cruise year, the estimated 149,988 crew who visited Jamaica spent an estimated total of **$7.7 million** ($US).

Table 92 – Estimated Crew Spending ($US) in Jamaica, 2008/2009 Cruise Year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	$ 22.60	62%	$ 14.07
Taxis/Ground Transportation	$ 17.00	41%	$ 6.98
Local Crafts & Souvenirs	$ 20.90	20%	$ 4.29
Clothing	$ 34.30	14%	$ 4.77
Other Purchases	$ 26.90	12%	$ 3.21
Watches & Jewelry	$ 86.90	10%	$ 8.63
Telephone & Internet	$ 8.90	8%	$ 0.71
Shore Excursions	$ 62.90	6%	$ 4.02
Perfumes & Cosmetics	$ 48.50	4%	$ 1.93
Retail Purchases of Liquor	$ 24.00	4%	$ 0.95
Entertainment/Night Clubs	$ 53.30	3%	$ 1.76
Total Spend per Crew			$ 51.32
Cruise Passenger Visits			149,988
Total Cruise Passenger Expenditures			$ 7.697,384

69 The average shore excursion expenditure is a weighted average of the onshore and Internet purchases and the portion of the onboard purchases paid to local tour operators.

Cruise lines made payments to local businesses for a variety of goods and services. Net payments to local vendors for shore excursions have been included with passenger expenditures. However, cruise lines made other local expenditures, including payments for port fees and taxes, navigation services, utilities and other supplies. Based upon data provided by the FCCA member cruise lines, we estimated that all cruise lines spent **$11.9 million** ($US) in Jamaica during the 2008/2009 cruise year. Approximately 98 percent of these expenditures were payments for port fees and navigation services while the remaining 2 percent consisted of payments for ship supplies.

Economic Contribution of Cruise Tourism Expenditures

As noted in the **Data and Methods** section of the full report, a set of economic impact models were developed for each destination to produce estimates of the economic contribution of cruise tourism. Data for these models were collected from a broad range of local, regional and international sources. The impact models were designed to reflect the economic structure of each destination, including the industrial composition of Gross Domestic Product (GDP), the wage share of GDP by industry and average employee wages by industry.

Table 93 – Total Economic Contribution of Cruise Tourism in Jamaica, 2008/2009 Cruise Year

	Employment	Wage Income ($US Millions)
Direct Economic Contribution	2,398	$14.0
Total Economic Contribution	3,865	$22.6

As shown in **Table 93**, the $101.5 million in total cruise tourism expenditures generated direct employment of 2,398 residents of Jamaica paying $14.0 million in annual wages. Adding the indirect contribution that results from the spending of those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures generated a total employment contribution of 3,865 jobs and $22.6 million in wage income in Jamaica during the 2008/2009 cruise year.

Figure 61 – Total Employment Impacts by Sector - Jamaica

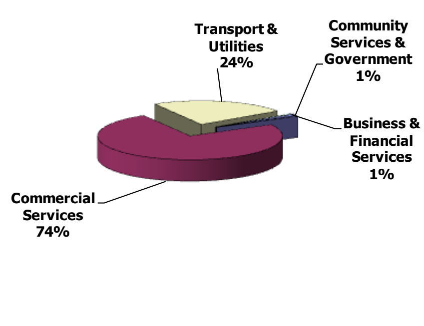
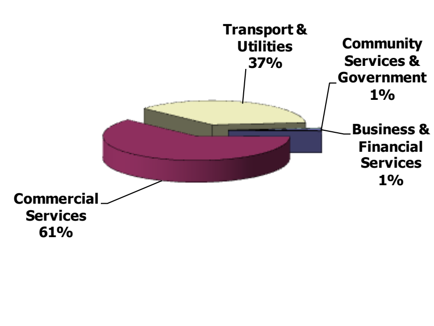


Figure 62 – Total Wage Impacts by Sector Jamaica



As shown in **Figures 61 and 62**, the total employment and wage impacts of cruise tourism are concentrated in the commercial and transport sectors which account for about 98 percent of the employment and wage impacts.[70] This is not surprising since the direct impacts account for more than half of the total employment impacts and that virtually all of the cruise tourism expenditures are made with businesses in these sectors. Because of the relatively higher wages in the transport sector compared to the other sectors of the economy, the transport sector accounts for 37 percent of the wage impacts but only 24 percent of the employment impacts. The remainder of the total employment and wage impacts was generated by the indirect spending in the other sectors of the economy.

Passenger Surveys

A total of 2,107 intransit passenger surveys were completed and returned for tabulation. **Table 94** shows the major attributes of passenger visits in Jamaica as derived from the passenger surveys.

Table 94 - Major Attributes of Intransit Passenger Surveys - Jamaica

	Number	Percent
Total Respondents	2,107	
Number Making First Visit	1,302	61.8%
Number Ashore	2,010	95.4%
Number Making Onshore Purchases:	1,6068	79.9%
Average Hours Ashore	4.5	
Average Size of Expenditure Party (Persons)	2.2	
Average Onshore Expenditure per Party	$152	
Purchased a Shore Excursion (Tour)	1,263	62.3%
Purchased Onshore Tour from:		
Cruise Line	1,004	80.1%
Onshore from Tour Operator	191	15.2%
Travel Agent	58	4.6%
Average Cost of Shore Excursion per Party	$144	
Toured On Own/Did not Tour	757	

- Of the 2,107 cruise parties that completed the surveys 62% stated that this had been their first visit to Jamaica.
- Ninety-five percent (95%) of the cruise parties that completed the surveys disembarked their cruise ship to visit Jamaica.
- Of the cruise parties that went ashore, 80% made at least one purchase while ashore. The typical cruise party consisted of 2.2 passengers and spent an average of 4.5 hours ashore.

[70] The industry sectors include the following activities:
Manufacturing & Construction: residential and nonresidential construction and all manufacturing
Commercial Services: wholesale and retail trade, lodging and eating and drinking establishments
Transportation & Utilities: tour operators, port services, telecommunications and water and power utilities
Business & Financial Services: banking, insurance, legal, accounting, leasing and other business services
Community Services & Government: education, health and social services and government agencies

- The responding cruise parties reported spending an average of $152 while ashore (excludes shore excursions).
- Sixty-two percent (62%) of the passengers that went ashore purchased a shore excursion. Eighty percent (80%) of passengers who purchased a tour did so through their cruise line, just over 15% purchased their tour onshore and nearly 5 percent purchased their tour through their travel agent.
- The typical cruise party that purchased a shore excursion spent $144 for their tour.

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Table 95**. A 10-point scale was used with 10 being the highest score, i.e., extremely satisfied, and 1 being the lowest score, i.e., not at all satisfied.

Table 95 – Passenger Visit Satisfaction* - Jamaica

Visit Attributes	Mean Score
Overall Visit	6.8
Visit Met Expectations	6.4
Likelihood of a Return Visit	4.2
Informed of Tours and Activities	7.7
Initial Shoreside Welcome	7.0
Guided Tour	8.1
Historic Sites/Museums	7.0
Variety of Things to See and Do	6.5
Friendliness of Residents	6.9
Overall Shopping Experience	5.9
Courtesy of Employees	7.3
Variety of Shops	6.1
Overall Prices	6.0
Taxis/Local Transportation	6.9

* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows: Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3; Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Cruise passengers were only somewhat satisfied with their overall visit to Jamaica with a mean score of 6.8. Nor did the visit score as high in terms of meeting expectations. The mean score for "Visit Met Expectations" was lower at 6.4.
- Passengers felt very informed about tours and onshore activities in Jamaica with a mean score of 7.7.
- "Guided Tours" (or Shore Excursions) received the highest score of all visit attributes with a mean score of 8.1. Thus, cruise passengers were very satisfied with their shore excursions.

- Categories with slightly lower scores but still above 7.0 (Very Satisfied) were: initial shoreside welcome, historic sites and courtesy of employees.
- Categories with average scores between 5.0 and 7.0 (Somewhat Satisfied) were given for variety of things to see and do, friendliness of residents, local transportation and the overall shopping experience, including the variety of shops and overall prices. Thus, while passengers thought shop employees were very courteous, the overall score for their shopping experience was brought down by lower perceptions on the variety of shops (6.1) and overall prices (6.0).
- Cruise passengers stated that they were not too likely to return to Jamaica for a land-based vacation.

Passenger Demographics

Residents of the United States and the Canada accounted for 94 percent of the responding passengers. The average age of the respondents was 50 years with only 23 percent of the respondents being 65 years of age or older. Jamaica passengers had an average household income of $101,400 with 40 percent having over $100,000 in household income.

Figure 63 – Passenger Age Jamaica

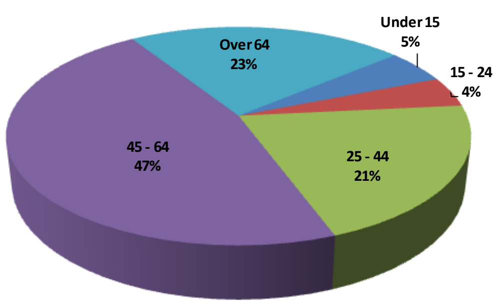
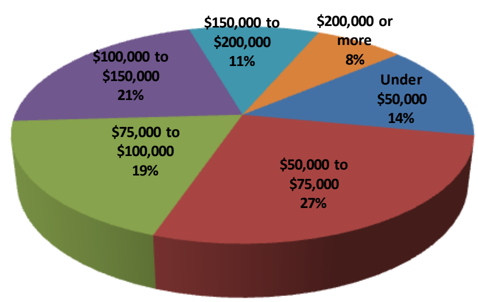


Figure 64 – Passenger Household Income Jamaica



Nicaragua

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.[71] The surveys were undertaken during the six-month period beginning in November 2008 and ending in April 2009. The survey schedule was designed so that surveys were conducted by FCCA member cruise lines that called at each destination and that the distribution of passenger and crew surveys would reflect the distribution of passenger and crew arrivals by cruise line at each destination. On any given cruise itinerary, passenger and crew surveys were placed in all passenger cabins and crew quarters following a single destination call. The surveys were completed by the passengers and crew in the privacy of their quarters and returned to a designated office on the cruise ship. Thus, passengers and crew were only surveyed once during a cruise itinerary and for a single destination. On a subsequent itinerary, passengers were surveyed following a call at a different destination.

The passenger and crew surveys were designed to collect data for onshore spending and visit satisfaction by both passengers and crew. While the crew survey was slightly shorter than the passenger survey, both surveys were designed to collect the following information:

- hours spent ashore;
- expenditures by category, including shore tours, food & beverages, clothing, etc.;
- visit satisfaction, including shore tour, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation; and
- demographic characteristics, including country of residence, age group, income, etc.

Combining the expenditure data collected from the passenger and crew surveys with data on expenditures by cruise lines for port fees and services, payments to local tour operators for passenger shore excursions purchased onboard the cruise ships, and other provisions purchased locally by the cruise lines, estimates of total cruise tourism expenditures were developed for each participating destination.

Given the direct spending estimates, the economic contribution of these expenditures, as measured by employment and wage income were then estimated for each destination. This process began with the collection of economic data for each destination from a combination of local, regional and international sources. Utilizing all of these data a set of economic impact models were developed for each destination to estimate the direct and total employment and wage impacts. A more detailed description of these models is provided in the **Data and Methods** section of Volume I.

[71] Surveys were conducted on the ships of the following cruise lines: Azamara Cruises, Carnival Cruise Lines, Celebrity Cruises, Disney Cruise Line, Holland America Line, MSC Cruises (USA), Inc., Norwegian Cruise Line, Princess Cruises, P&O Cruises and Royal Caribbean International.

Cruise Tourism Expenditures

Cruise tourism expenditures in destination ports are composed of a broad range of spending including:

- onshore expenditures by passengers which tend to be concentrated in shore excursions and retail purchases of clothing, jewelry and local crafts and souvenirs;
- onshore expenditures by crew which are generally concentrated in purchases of food and beverages, local transportation and retail purchases of clothing and electronics;
- expenditures by cruise lines for port services, such as dockage fees and linesmen, utilities, such as water and power and navigation services; and
- purchases of supplies, such as food and other stores, by the cruise lines from local businesses.

According to data obtained from the Nicaragua Institute of Tourism, 61,518 cruise passengers arrived aboard cruise ships during the 2008/2009 cruise year.[72] Of these, an estimated 52,290 passengers (85 percent) disembarked and visited Nicaragua. Utilizing additional data provided by the visiting cruise lines, we have estimated that 31,913 crew were aboard the cruise ships and that 30 percent, or 9,574 crew, disembarked and visited Nicaragua. These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **$2.7 million** ($US) in cruise tourism expenditures in Nicaragua during the 2008/2009 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Table 96 – Estimated Passenger Spending ($US) in Nicaragua, 2008/2009 Cruise Year[73]

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Local Crafts & Souvenirs	$ 17.70	65%	$ 11.54
Shore Excursions	$ 71.19	59%	$ 41.72
F&B at Restaurants & Bars	$ 7.80	47%	$ 3.64
Clothing	$ 15.70	28%	$ 4.36
Other Purchases	$ 14.62	20%	$ 2.92
Taxis/Ground Transportation	$ 23.10	15%	$ 3.56
Retail Purchases of Liquor	$ 11.90	7%	$ 0.86
Watches & Jewelry	$ 35.10	6%	$ 1.98
Telephone & Internet	$ 4.50	3%	$ 0.14
Entertainment/Night Clubs	$ 4.60	1%	$ 0.04
Perfumes & Cosmetics	$ 118.50	0%	$ 0.38
Electronics	$ 45.70	0%	$ 0.12
Total Spend per Cruise Party			**$ 71.26**
Average Size of a Cruise Party			2.0
Total Spend per Cruise Passenger			**$ 35.63**
Cruise Passenger Visits			52,290
Total Cruise Passenger Expenditures			**$ 1,863,059**

[72] The 2008/2009 cruise year includes the twelve months beginning in May, 2008 and ending in April, 2009.
[73] The average shore excursion expenditure is a weighted average of the onshore and Internet purchases and the portion of the onboard purchases paid to local tour operators.

Per passenger spending estimates were derived from the 1,883 surveys completed by passengers that went ashore during the survey period. As shown in **Table 96,** each passenger cruise party spent an average of $71.26 in Nicaragua. The average spend per cruise party is the sum of the weighted spending in each of the twelve categories. For example, 47 percent of the survey respondents reported spending an average of $7.80 at local restaurants and/or bars. Spread over the 1,883 cruise parties that visited Nicaragua, this represents an average of $3.64 per party. On a per passenger basis, the average total expenditure was $35.63. This represents the sum of per party expenditures, $71.26, divided by the average size of a cruise party in Nicaragua, 2.0 passengers.

For the entire 2008/2009 cruise year, the estimated 52,290 cruise passengers who visited Nicaragua spent a total of **$1.9 million** ($US).

Per crew spending estimates were derived from the 445 surveys completed by crew members during the survey period. As shown in **Table 97,** each crew member spent an average of $29.96 in Nicaragua. The average spend per crew member is the sum of the weighted spending in each of the eleven categories. For example, 50 percent of the survey respondents reported spending an average of $22.20 for food and beverages. Spread over all the crew members that visited Nicaragua, this represents an average of $11.10 per crew member.

For the entire 2008/2009 cruise year, the estimated 9,574 crew who visited Nicaragua spent an estimated total of **$0.3 million** ($US).

Table 97 – Estimated Crew Spending ($US) in Nicaragua, 2008/2009 Cruise Year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	$ 22.20	50%	$ 11.10
Taxis/Ground Transportation	$ 16.90	45%	$ 7.64
Local Crafts & Souvenirs	$ 15.70	17%	$ 2.72
Other Purchases	$ 9.30	15%	$ 1.43
Retail Purchases of Liquor	$ 18.10	10%	$ 1.74
Shore Excursions	$ 20.30	8%	$ 1.56
Entertainment/Night Clubs	$ 20.20	7%	$ 1.36
Telephone & Internet	$ 4.90	7%	$ 0.33
Electronics	$ 20.60	5%	$ 0.99
Clothing	$ 17.00	5%	$ 0.82
Watches & Jewelry	$ 6.90	4%	$ 0.27
Total Spend per Crew			**$ 29.96**
Cruise Passenger Visits			9,574
Total Cruise Passenger Expenditures			**$ 286,834**

Cruise lines made payments to local businesses for a variety of goods and services. Net payments to local vendors for shore excursions have been included with passenger expenditures. However, cruise lines made other local expenditures, including payments for port fees and taxes, navigation services, utilities and other supplies. Based upon data provided by the FCCA member cruise lines, we estimated that all cruise lines spent **$0.5 million** ($US) in

Nicaragua during the 2008/2009 cruise year. All of these expenditures were payments for port fees and taxes and navigation services.

Economic Contribution of Cruise Tourism Expenditures

As noted in the **Data and Methods** section of the full report, a set of economic impact models were developed for each destination to produce estimates of the economic contribution of cruise tourism. Data for these models were collected from a broad range of local, regional and international sources. The impact models were designed to reflect the economic structure of each destination, including the industrial composition of Gross Domestic Product (GDP), the wage share of GDP by industry and average employee wages by industry.

Table 98 – Total Economic Contribution of Cruise Tourism in Nicaragua 2008/2009 Cruise Year

	Employment	Wage Income ($US Millions)
Direct Economic Contribution	97	$ 0.3
Total Economic Contribution	141	$ 0.4

As shown in **Table 98**, the $2.7 million in total cruise tourism expenditures generated direct employment of 97 residents of Nicaragua paying $0.3 million in annual wages. Adding the indirect contribution that results from the spending of those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures generated a total employment contribution of 141 jobs and $0.4 million in wage income in Nicaragua during the 2008/2009 cruise year.

Figure 65 – Total Employment Impacts by Sector - Nicaragua

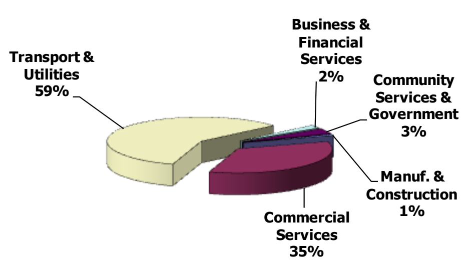
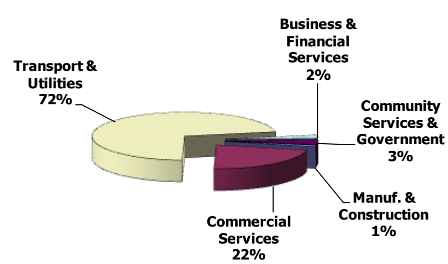


Figure 66 – Total Wage Impacts by Sector Nicaragua



As shown in **Figures 65 and 66**, the total employment and wage impacts of cruise tourism are concentrated in the commercial and transport sectors which account for about 94 percent of the employment and wage impacts.[74] This is not surprising since the direct impacts account for about 70 percent of the total employment impacts and that virtually all of the cruise tourism expenditures are made with businesses in these sectors. Because of the relatively higher wages in the transport sector compared to the other sectors of the economy, the transport sector accounts for 72 percent of the wage impacts but only 59 percent of the employment impacts. The remainder of the total employment and wage impacts was generated by the indirect spending in the other sectors of the economy.

Passenger Surveys

A total of 1,986 passenger surveys were completed and returned for tabulation. **Table 99** shows the major attributes of passenger visits in Nicaragua as derived from the passenger surveys.

Table 99 - Major Attributes of Intransit Passenger Surveys - Nicaragua

	Number	Percent
Total Respondents	1,986	
Number Making First Visit	1,905	95.9%
Number Ashore	1,883	94.8%
Number Making Onshore Purchases:	1,297	68.9%
Average Hours Ashore	4.4	
Average Size of Expenditure Party (Persons)	2.0	
Average Onshore Expenditure per Party	$30	
Purchased a Shore Excursion (Tour)	1,103	58.6%
Purchased Onshore Tour from:		
Cruise Line	985	89.3%
Onshore from Tour Operator	56	5.1%
Travel Agent	62	5.6%
Average Cost of Shore Excursion per Party	$118	
Toured On Own/Did not Tour	780	

- Of the 1,986 cruise parties that completed the surveys 96% stated that this had been their first visit to Nicaragua.
- Ninety-five percent (95%) of the cruise parties that completed the surveys disembarked their cruise ship to visit Nicaragua.
- Of the cruise parties that went ashore, 69% made at least one purchase while ashore. The typical cruise party consisted of 2.0 passengers and spent an average of 4.4 hours ashore.

[74] The industry sectors include the following activities:
Manufacturing & Construction: residential and nonresidential construction and all manufacturing
Commercial Services: wholesale and retail trade, lodging and eating and drinking establishments
Transportation & Utilities: tour operators, port services, telecommunications and water and power utilities
Business & Financial Services: banking, insurance, legal, accounting, leasing and other business services
Community Services & Government: education, health and social services and government agencies

- The responding cruise parties reported spending an average of $30 while ashore (excludes shore excursions).
- Fifty-nine percent (59%) of the passengers that went ashore purchased a shore excursion. Eighty-nine percent (89%) of passengers who purchased a tour did so through their cruise line, 5% purchased their tour onshore and 6 percent purchased their tour through their travel agent.
- The typical cruise party that purchased a shore excursion spent $118 for their tour.

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Table 100**. A 10-point scale was used with 10 being the highest score, i.e., extremely satisfied, and 1 being the lowest score, i.e., not at all satisfied.

Table 100 – Passenger Visit Satisfaction* - Nicaragua

Visit Attributes	Mean Score
Overall Visit	6.5
Visit Met Expectations	6.2
Likelihood of a Return Visit	2.7
Informed of Tours and Activities	7.1
Initial Shoreside Welcome	7.3
Guided Tour	7.2
Historic Sites/Museums	6.2
Variety of Things to See and Do	5.1
Friendliness of Residents	7.5
Overall Shopping Experience	5.6
Courtesy of Employees	7.7
Variety of Shops	4.8
Overall Prices	6.7
Taxis/Local Transportation	6.8

* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows: Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3; Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Cruise passengers were only somewhat satisfied with their overall visit to Nicaragua with a mean score of 6.5. Nor did the visit score as high in terms of meeting expectations. The mean score for "Visit Met Expectations" was lower at 6.2.
- Passengers felt very informed about tours and onshore activities in Nicaragua with a mean score of 7.1.
- Cruise passengers were very satisfied with their shore excursions. "Guided Tours" (or Shore Excursions) received a mean score of 7.2.

- Passengers were very satisfied with their interactions with residents and store employees with "friendliness of residents" receiving a mean score of 7.5 and "courtesy of employees" having a mean score of 7.7.
- Cruise passengers were also very satisfied with their initial shoreside welcome which received a mean score of 7.3.
- Categories with average scores between 5.0 and 7.0 (Somewhat Satisfied) were given for historic sites, variety of things to see and do, local transportation and the overall shopping experience, including the variety of shops and overall prices. Thus, while passengers thought shop employees were very courteous, the overall score for their shopping experience was considered to be only somewhat satisfactory due to even lower scores for the variety of shops (4.8) and overall prices (6.7).
- Cruise passengers stated that they were not at all likely to return to Nicaragua for a land-based vacation.

Passenger Demographics

Residents of the United States and the Canada accounted for 56 percent of the responding passengers. The average age of the respondents was 62 years with 49 percent of the respondents being 65 years of age or older. Nicaragua passengers had an average household income of $92,300 with 32 percent having over $100,000 in household income.

Figure 67 – Passenger Age Nicaragua

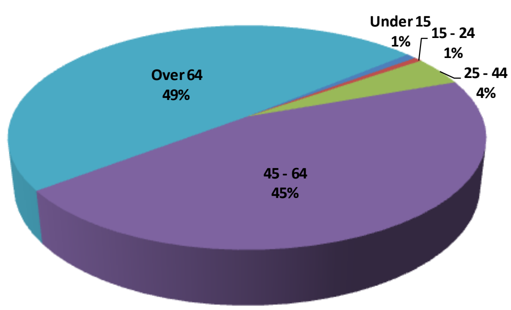
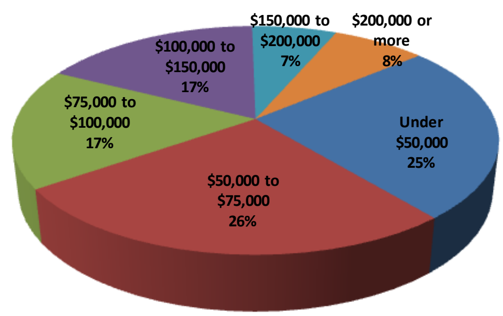


Figure 68 – Passenger Household Income Nicaragua



Puerto Rico

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.[75] The surveys were undertaken during the six-month period beginning in November 2008 and ending in April 2009. The survey schedule was designed so that surveys were conducted by FCCA member cruise lines that called at each destination and that the distribution of passenger and crew surveys would reflect the distribution of passenger and crew arrivals by cruise line at each destination. On any given cruise itinerary, passenger and crew surveys were placed in all passenger cabins and crew quarters following a single destination call. The surveys were completed by the passengers and crew in the privacy of their quarters and returned to a designated office on the cruise ship. Thus, passengers and crew were only surveyed once during a cruise itinerary and for a single destination. On a subsequent itinerary, passengers were surveyed following a call at a different destination.

The passenger and crew surveys were designed to collect data for onshore spending and visit satisfaction by both passengers and crew. While the crew survey was slightly shorter than the passenger survey, both surveys were designed to collect the following information:

- hours spent ashore;
- expenditures by category, including shore tours, food & beverages, clothing, etc.;
- visit satisfaction, including shore tour, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation; and
- demographic characteristics, including country of residence, age group, income, etc.

Combining the expenditure data collected from the passenger and crew surveys with data on expenditures by cruise lines for port fees and services, payments to local tour operators for passenger shore excursions purchased onboard the cruise ships, and other provisions purchased locally by the cruise lines, estimates of total cruise tourism expenditures were developed for each participating destination.

Given the direct spending estimates, the economic contribution of these expenditures, as measured by employment and wage income were then estimated for each destination. This process began with the collection of economic data for each destination from a combination of local, regional and international sources. Utilizing all of these data a set of economic impact models were developed for each destination to estimate the direct and total employment and wage impacts. A more detailed description of these models is provided in the **Data and Methods** section of Volume I.

[75] Surveys were conducted on the ships of the following cruise lines: Azamara Cruises, Carnival Cruise Lines, Celebrity Cruises, Disney Cruise Line, Holland America Line, MSC Cruises (USA), Inc., Norwegian Cruise Line, Princess Cruises, P&O Cruises and Royal Caribbean International.

Cruise Tourism Expenditures

Cruise tourism expenditures in destination ports are composed of a broad range of spending including:

- onshore expenditures by passengers which tend to be concentrated in shore excursions and retail purchases of clothing, jewelry and local crafts and souvenirs;
- onshore expenditures by crew which are generally concentrated in purchases of food and beverages, local transportation and retail purchases of clothing and electronics;
- expenditures by cruise lines for port services, such as dockage fees and linesmen, utilities, such as water and power and navigation services; and
- purchases of supplies, such as food and other stores, by the cruise lines from local businesses.

According to data provided by the Puerto Rico Tourism Company, a total of 1.27 million cruise passengers arrived in Puerto Rico during the 2008/2009 cruise year.[76] These included 861,523 intransit passengers and 406,346 passengers embarking on their cruises in Puerto Rico. Of the intransit passengers, an estimated 775,371 passengers (90 percent) disembarked and visited Puerto Rico. Utilizing additional data provided by the visiting cruise lines, we have estimated that 485,889 crew were aboard the cruise ships that sailed to and from Puerto Rico and that 43 percent, or 210,864 crew, disembarked and visited the island. These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **$182.3 million** ($US) in cruise tourism expenditures in Puerto Rico during the 2008/2009 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Passenger expenditures were estimated separately for intransit and homeport passengers. Per passenger spending estimates for intransit passengers were derived from the 916 surveys completed by passengers that went ashore during the survey period. As shown in **Table 101,** each passenger cruise party spent an average of $160.42 in Puerto Rico. The average spend per cruise party is the sum of the weighted spending in each of the twelve categories. For example, 48 percent of the survey respondents reported spending an average of $39.40 at local restaurants and/or bars. Spread over the 916 cruise parties that visited Puerto Rico, this represents an average of $18.75 per party. On a per passenger basis, the average total expenditure was $69.74. This represents the sum of per party expenditures, $160.42, divided by the average size of a cruise party in Puerto Rico, 2.3 passengers.

For the entire 2008/2009 cruise year, the estimated 775,371 intransit cruise passengers who visited Puerto Rico spent a total of **$54.1 million** ($US) on the island.

[76] The 2008/2009 cruise year includes the twelve months beginning in May, 2008 and ending in April, 2009.

Table 101 – Estimated Intransit Passenger Spending ($US) in Puerto Rico, 2008/2009 Cruise Year[77]

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
F&B at Restaurants & Bars	$ 39.40	48%	$ 18.75
Shore Excursions	$ 55.94	44%	$ 24.78
Clothing	$ 54.90	41%	$ 22.38
Local Crafts & Souvenirs	$ 31.10	38%	$ 11.96
Other Purchases	$ 98.87	23%	$ 22.47
Watches & Jewelry	$ 319.60	14%	$ 45.66
Retail Purchases of Liquor	$ 49.60	11%	$ 5.31
Taxis/Ground Transportation	$ 34.50	10%	$ 3.59
Entertainment/Night Clubs	$ 90.00	4%	$ 3.52
Perfumes & Cosmetics	$ 47.00	3%	$ 1.54
Telephone & Internet	$ 11.00	2%	$ 0.16
Electronics	$ 36.00	1%	$ 0.30
Total Spend per Cruise Party			**$ 160.42**
Average Size of a Cruise Party			2.3
Total Spend per Cruise Passenger			**$ 69.74**
Cruise Passenger Visits			775,371
Total Cruise Passenger Expenditures			**$ 54,077,816**

As noted above another 406,346 cruise passengers arrived in Puerto Rico to begin their cruise in the Caribbean. These embarking passengers were also surveyed using a slightly different survey instrument. Per passenger spending estimates for homeport passengers were derived from the 574 surveys completed by passengers that embarked on their cruises from Puerto Rico during the survey period. The survey data showed that approximately 37 percent of the cruise parties stayed in Puerto Rico for at least one night prior to or after their cruise. This stay averaged 1.7 nights.

As shown in **Table 102,** each passenger cruise party spent an average of $350.54 in Puerto Rico during their pre- and/or post cruise stay. The calculation of this figure is identical to that calculated for intransit passengers as discussed above. On a per passenger basis, the average total expenditure was $159.33. Thus, the typical cruise passenger who stayed one or more nights in Puerto Rico spent an average of $93.72 per day ($159.33 ÷ 1.7 nights)

For the entire 2008/2009 cruise year, the estimated 406,346 homeport cruise passengers who visited Puerto Rico spent a total of **$64.7 million** ($US) on the island.

[77] The average shore excursion expenditure is a weighted average of the onshore and Internet purchases and the portion of the onboard purchases paid to local tour operators.

Table 102 – Estimated Homeport Passenger Spending ($US) in Puerto Rico, 2008/2009 Cruise Year[78]

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
F&B at Restaurants & Bars	$ 131.71	41%	$ 53.92
Lodging	$ 332.71	37%	$ 124.10
Shore Excursions	$ 337.09	15%	$ 51.24
Clothing	$ 131.91	13%	$ 17.01
Local Crafts & Souvenirs	$ 185.14	11%	$ 20.00
Other Purchases	$ 75.15	11%	$ 7.99
Taxis/Ground Transportation	$ 34.53	11%	$ 3.85
Entertainment/Night Clubs	$ 227.69	6%	$ 13.09
Retail Purchases of Liquor	$ 48.48	5%	$ 2.62
Watches & Jewelry	$1,851.26	3%	$ 48.38
Perfumes & Cosmetics	$ 208.85	2%	$ 4.73
Telephone & Internet	$ 62.09	2%	$ 1.30
Electronics	$ 165.74	1%	$ 2.31
Total Spend per Cruise Party			**$ 350.54**
Average Size of a Cruise Party			2.2
Total Spend per Cruise Passenger			**$ 159.33**
Cruise Passenger Visits			406,346
Total Cruise Passenger Expenditures			**$ 64,743,108**

Per crew spending estimates were derived from the 1,422 surveys completed by crew members during the survey period. As shown in **Table 103,** each crew member spent an average of $138.63 in Puerto Rico. The average spend per crew member is the sum of the weighted spending in each of the twelve categories. For example, 65 percent of the survey respondents reported spending an average of $33.80 for food and beverages. Spread over all crew members that visited Puerto Rico, this represents an average of $22.01 per crew member.

Table 103 – Estimated Crew Spending ($US) in Puerto Rico, 2008/2009 Cruise Year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	$ 33.80	65%	$ 22.01
Taxis/Ground Transportation	$ 23.10	49%	$ 11.28
Clothing	$ 97.10	36%	$ 35.47
Telephone & Internet	$ 31.10	18%	$ 5.70
Other Purchases	$ 74.60	17%	$ 12.96
Perfumes & Cosmetics	$ 64.80	12%	$ 8.07
Local Crafts & Souvenirs	$ 29.40	12%	$ 3.50
Electronics	$ 186.40	10%	$ 18.36
Watches & Jewelry	$ 76.60	8%	$ 6.18
Entertainment/Night Clubs	$ 249.10	4%	$ 10.22
Retail Purchases of Liquor	$ 77.00	4%	$ 3.16
Shore Excursions	$ 45.50	4%	$ 1.72
Total Spend per Crew			**$ 138.63**
Cruise Passenger Visits			210,864
Total Cruise Passenger Expenditures			**$ 29,232,076**

[78] The average shore excursion expenditure is a weighted average of the onshore and Internet purchases and the portion of the onboard purchases paid to local tour operators.

For the entire 2008/2009 cruise year, the estimated 210,864 crew who visited Puerto Rico spent an estimated total of **$29.2 million** ($US).

Cruise lines made payments to local businesses for a variety of goods and services. Net payments to local vendors for shore excursions have been included with passenger expenditures. However, cruise lines made other local expenditures, including payments for port fees and taxes, navigation services, utilities and other supplies. Based upon data provided by the FCCA member cruise lines, we estimated that all cruise lines spent **$34.2 million** ($US) in Puerto Rico during the 2008/2009 cruise year. Approximately half of these expenditures were payments for port fees and navigation services while the remaining 50 percent consisted of payments for ship supplies.

Economic Contribution of Cruise Tourism Expenditures

As noted in the **Data and Methods** section of the full report, a set of economic impact models were developed for each destination to produce estimates of the economic contribution of cruise tourism. Data for these models were collected from a broad range of local, regional and international sources. The impact models were designed to reflect the economic structure of each destination, including the industrial composition of Gross Domestic Product (GDP), the wage share of GDP by industry and average employee wages by industry.

Table 104 – Total Economic Contribution of Cruise Tourism in Puerto Rico, 2008/2009 Cruise Year

	Employment	Wage Income ($US Millions)
Direct Economic Contribution	2,366	$32.5
Total Economic Contribution	4,398	$63.2

As shown in **Table 104**, the $182.3 million in total cruise tourism expenditures generated direct employment of 2,366 residents of Puerto Rico paying $32.5 million in annual wages. Adding the indirect contribution that results from the spending of those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures generated a total employment contribution of 4,398 jobs and $63.2 million in wage income in Puerto Rico during the 2008/2009 cruise year.

Figure 69 – Total Employment Impacts by Sector - Puerto Rico

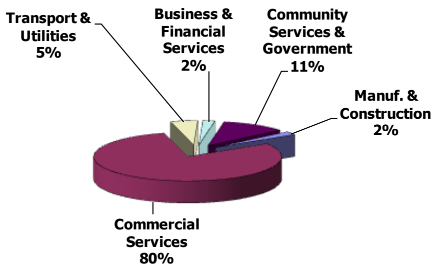
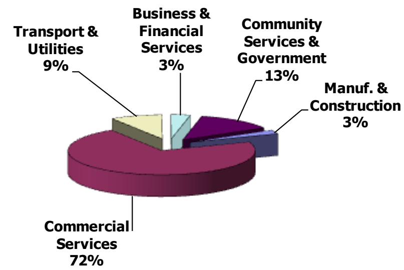


Figure 70 – Total Wage Impacts by Sector Puerto Rico



As shown in **Figures 69 and 70**, the total employment and wage impacts of cruise tourism are concentrated in the commercial and transport sectors which account for about 80 percent of the employment and wage impacts.[79] This is not surprising since the direct impacts account for more than half of the total employment impacts and that virtually all of the cruise tourism expenditures are made with businesses in these sectors. Because of the relatively lower wages in the commercial sector compared to the other sectors of the economy, the commercial sector accounts for 80 percent of the employment impacts but only 72 percent of the wage impacts. The remainder of the total employment and wage impacts was generated by the indirect spending in the other sectors of the economy.

Comparison to 2006 Study

Total passenger and crew visits remained virtually unchanged from the prior study. However, total direct cruise tourism expenditures actually increased by 7.2 percent, over the three year period, increasing from an estimated $170 million during the 2005/2006 cruise year to $182.3 million during the 2008/2009 cruise year. As indicated in **Table 105**, cruise tourism expenditures by passengers and crew increased while spending by the cruise lines decreased slightly.[80]

The 3 percent increase in passenger expenditures is the net result of a slight decline (0.5%) in passenger visits which was offset by a 3.7 percent increase in average passenger expenditures. The increase in average passenger expenditures was primarily the net result of an increase in the average expenditure by passengers in most categories that was partially offset by a slight decline in the percentage of passengers making onshore purchases.

[79] The industry sectors include the following activities:
Manufacturing & Construction: residential and nonresidential construction and all manufacturing
Commercial Services: wholesale and retail trade, lodging and eating and drinking establishments
Transportation & Utilities: tour operators, port services, telecommunications and water and power utilities
Business & Financial Services: banking, insurance, legal, accounting, leasing and other business services
Community Services & Government: education, health and social services and government agencies

[80] These figures do not include spending for fuel.

The 57 percent increase in crew expenditures was principally driven by the 52 percent increase in the average crew expenditure. The average crew expenditure increased due to an increase in the value of most purchases made by crew members which was augmented by an increase in the percentage of crew making onshore purchases.

Table 105 – Comparison of Cruise Tourism Impacts, Current Study versus 2006 Study

	Current Study	2006 Study
Total Onshore Visits (Thousands)	**1,392.6**	**1,390.5**
Passengers	1,181.7	1,186.6
Crew	210.9	203.9
Total Direct Expenditures ($US Millions)	**$ 182.3**	**$ 170.0**
Passengers	$ 118.8	$ 115.0
Crew	$ 29.2	$ 18.6
Cruise Lines	$ 34.2	$ 36.4
Average Per Passenger Expenditure①	**$100.55**	**$ 96.94**
Average Per Crew Expenditure	**$138.63**	**$ 91.13**
Total Employment Impact	**4,398**	**3,865**
Total Wage Impact ($US Millions)	**$ 63.2**	**$ 55.4**

① Includes both intransit and homeport passengers.

As a result of the seven percent increase in direct expenditures the economic impacts also increased. The total employment impact increased by nearly 15 percent while the wage impacts increased by a similar percentage.

Passenger Surveys

A total of 994 intransit passenger surveys were completed and returned for tabulation. **Table 106** shows the major attributes of passenger visits in Puerto Rico as derived from the passenger surveys.

- Of the 994 cruise parties that completed the surveys 54% stated that this had been their first visit to Puerto Rico.
- Ninety-two percent (92%) of the cruise parties that completed the surveys disembarked their cruise ship to visit Puerto Rico.
- Of the cruise parties that went ashore, 67% made at least one purchase while ashore. The typical cruise party consisted of 2.3 passengers and spent an average of 3.9 hours ashore.
- The responding cruise parties reported spending an average of $136 while ashore (excludes shore excursions).
- Forty-four percent (44%) of the passengers that went ashore purchased a shore excursion. Eighty-one percent (81%) of passengers who purchased a tour did so through their cruise line, just over 15% purchased their tour onshore and 4 percent purchased their tour through their travel agent.

- The typical cruise party that purchased a shore excursion spent $75 for their tour.

Table 106 - Major Attributes of Intransit Passenger Surveys - Puerto Rico

	Number	Percent
Total Respondents	994	
Number Making First Visit	535	53.8%
Number Ashore	916	92.2%
Number Making Onshore Purchases:	616	67.2%
Average Hours Ashore	3.9	
Average Size of Expenditure Party (Persons)	2.3	
Average Onshore Expenditure per Party	$136	
Purchased a Shore Excursion (Tour)	406	44.3%
Purchased Onshore Tour from:		
Cruise Line	328	80.8%
Onshore from Tour Operator	61	15.0%
Travel Agent	17	4.2%
Average Cost of Shore Excursion per Party	$75	
Toured On Own/Did not Tour	510	

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Table 107**. A 10-point scale was used with 10 being the highest score, i.e., extremely satisfied, and 1 being the lowest score, i.e., not at all satisfied.

Table 107 – Passenger Visit Satisfaction* - Puerto Rico

Visit Attributes	Mean Score
Overall Visit	6.8
Visit Met Expectations	6.4
Likelihood of a Return Visit	4.1
Informed of Tours and Activities	7.4
Initial Shoreside Welcome	6.9
Guided Tour	7.6
Historic Sites/Museums	7.5
Variety of Things to See and Do	6.4
Friendliness of Residents	7.3
Overall Shopping Experience	6.5
Courtesy of Employees	7.6
Variety of Shops	6.6
Overall Prices	6.6
Taxis/Local Transportation	7.0

* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows: Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3; Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Cruise passengers were only somewhat satisfied with their overall visit to Puerto Rico with a mean score of 6.8. Nor did the visit score as high in terms of meeting expectations. The mean score for "Visit Met Expectations" was lower at 6.4.
- Passengers felt very informed about tours and onshore activities in Puerto Rico with a mean score of 7.4.
- Cruise passengers were very satisfied with their shore excursions. "Guided Tours" (or Shore Excursions) received a mean score of 7.6.
- Passengers were very satisfied with their interactions with residents and store employees with "friendliness of residents" receiving a mean score of 7.3 and "courtesy of employees" having a mean score of 7.6.
- Categories with slightly lower scores but still above 7.0 (Very Satisfied) were: historic sites and local transportation.
- Categories with average scores between 5.0 and 7.0 (Somewhat Satisfied) were given for initial shoreside welcome, variety of things to see and do and the overall shopping experience, including the variety of shops and overall prices. Thus, while passengers thought shop employees were very courteous, the overall score for their shopping experience was considered to be only somewhat satisfactory due to lower scores for the variety of shops (6.6) and overall prices (6.6).
- Cruise passengers stated that they were not too likely to return to Puerto Rico for a land-based vacation.

Passenger Demographics

Residents of the United States and the Canada accounted for 94 percent of the responding passengers. The average age of the respondents was 52 years with 31 percent of the respondents being 65 years of age or older. Puerto Rico passengers had an average household income of $102,600 with 40 percent having over $100,000 in household income.

Figure 71 – Passenger Age
Puerto Rico

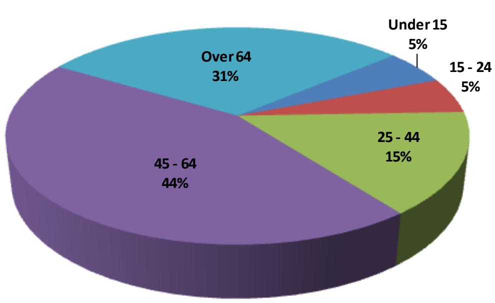
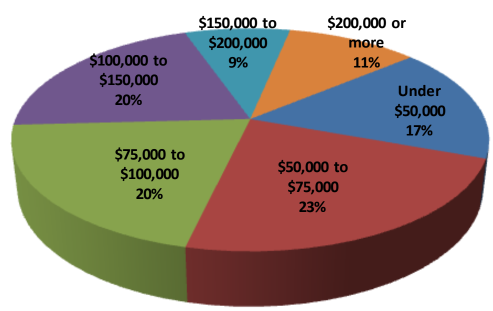


Figure 72 – Passenger Household Income
Puerto Rico



St. Kitts and Nevis

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.[81] The surveys were undertaken during the six-month period beginning in November 2008 and ending in April 2009. The survey schedule was designed so that surveys were conducted by FCCA member cruise lines that called at each destination and that the distribution of passenger and crew surveys would reflect the distribution of passenger and crew arrivals by cruise line at each destination. On any given cruise itinerary, passenger and crew surveys were placed in all passenger cabins and crew quarters following a single destination call. The surveys were completed by the passengers and crew in the privacy of their quarters and returned to a designated office on the cruise ship. Thus, passengers and crew were only surveyed once during a cruise itinerary and for a single destination. On a subsequent itinerary, passengers were surveyed following a call at a different destination.

The passenger and crew surveys were designed to collect data for onshore spending and visit satisfaction by both passengers and crew. While the crew survey was slightly shorter than the passenger survey, both surveys were designed to collect the following information:

- hours spent ashore;
- expenditures by category, including shore tours, food & beverages, clothing, etc.;
- visit satisfaction, including shore tour, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation; and
- demographic characteristics, including country of residence, age group, income, etc.

Combining the expenditure data collected from the passenger and crew surveys with data on expenditures by cruise lines for port fees and services, payments to local tour operators for passenger shore excursions purchased onboard the cruise ships, and other provisions purchased locally by the cruise lines, estimates of total cruise tourism expenditures were developed for each participating destination.

Given the direct spending estimates, the economic contribution of these expenditures, as measured by employment and wage income were then estimated for each destination. This process began with the collection of economic data for each destination from a combination of local, regional and international sources. Utilizing all of these data a set of economic impact models were developed for each destination to estimate the direct and total employment and wage impacts. A more detailed description of these models is provided in the **Data and Methods** section of Volume I.

[81] Surveys were conducted on the ships of the following cruise lines: Azamara Cruises, Carnival Cruise Lines, Celebrity Cruises, Disney Cruise Line, Holland America Line, MSC Cruises (USA), Inc., Norwegian Cruise Line, Princess Cruises, P&O Cruises and Royal Caribbean International.

Cruise Tourism Expenditures

Cruise tourism expenditures in destination ports are composed of a broad range of spending including:

- onshore expenditures by passengers which tend to be concentrated in shore excursions and retail purchases of clothing, jewelry and local crafts and souvenirs;
- onshore expenditures by crew which are generally concentrated in purchases of food and beverages, local transportation and retail purchases of clothing and electronics;
- expenditures by cruise lines for port services, such as dockage fees and linesmen, utilities, such as water and power and navigation services; and
- purchases of supplies, such as food and other stores, by the cruise lines from local businesses.

According to data obtained from the St. Kitts Tourism Authority, an estimated 417,407 cruise passengers arrived aboard cruise ships during the 2008/2009 cruise year.[82] Of these, an estimated 333,926 passengers (80 percent) disembarked and visited St. Kitts. Utilizing additional data provided by the visiting cruise lines, we have estimated that 155,818 crew were aboard the cruise ships and that 35 percent, or 54,536 crew, disembarked and visited St. Kitts. These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **$44 million** ($US) in cruise tourism expenditures in St. Kitts during the 2008/2009 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Table 108 – Estimated Passenger Spending ($US) in St. Kitts, 2008/2009 Cruise Year[83]

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	$ 80.60	58%	$ 47.07
Clothing	$ 54.70	56%	$ 30.47
Local Crafts & Souvenirs	$ 31.30	45%	$ 14.01
F&B at Restaurants & Bars	$ 23.50	38%	$ 8.90
Watches & Jewelry	$ 319.50	25%	$ 79.65
Taxis/Ground Transportation	$ 36.80	19%	$ 6.87
Other Purchases	$ 94.80	16%	$ 15.39
Retail Purchases of Liquor	$ 27.70	12%	$ 3.47
Entertainment/Night Clubs	$ 43.70	3%	$ 1.16
Perfumes & Cosmetics	$ 51.20	2%	$ 1.09
Telephone & Internet	$ 11.70	2%	$ 0.25
Electronics	$ 84.30	1%	$ 0.44
Total Spend per Cruise Party			**$ 208.77**
Average Size of a Cruise Party			2.1
Total Spend per Cruise Passenger			**$ 99.41**
Cruise Passenger Visits			333,926
Total Cruise Passenger Expenditures			**$ 33,196,689**

[82] The 2008/2009 cruise year includes the twelve months beginning in May, 2008 and ending in April, 2009.
[83] The average shore excursion expenditure is a weighted average of the onshore and Internet purchases and the portion of the onboard purchases paid to local tour operators.

Per passenger spending estimates were derived from the 1,388 surveys completed by passengers that went ashore during the survey period. As shown in **Table 108,** each passenger cruise party spent an average of $208.77 in St. Kitts. The average spend per cruise party is the sum of the weighted spending in each of the twelve categories. For example, 38 percent of the survey respondents reported spending an average of $23.50 at local restaurants and/or bars. Spread over the 1,388 cruise parties that visited St. Kitts, this represents an average of $8.90 per party. On a per passenger basis, the average total expenditure was $99.41. This represents the sum of per party expenditures, $208.77, divided by the average size of a cruise party in St. Kitts, 2.1 passengers.

For the entire 2008/2009 cruise year, the estimated 333,926 cruise passengers who visited St. Kitts spent a total of **$33.2 million** ($US).

Per crew spending estimates were derived from the 219 surveys completed by crew members during the survey period. As shown in **Table 109,** each crew member spent an average of $142.14 in St. Kitts. The average spend per crew member is the sum of the weighted spending in each of the twelve categories. For example, 42 percent of the survey respondents reported spending an average of $36.40 for food and beverages. Spread over all the crew members that visited St. Kitts, this represents an average of $15.13 per crew member. For the entire 2008/2009 cruise year, the estimated 54,536 crew who visited St. Kitts spent an estimated total of **$7.8 million** ($US).

Table 109 – Estimated Crew Spending ($US) in St. Kitts, 2008/2009 Cruise Year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	$ 36.40	42%	$ 15.13
Taxis/Ground Transportation	$ 9.00	35%	$ 3.16
Local Crafts & Souvenirs	$ 16.40	32%	$ 5.32
Clothing	$ 88.40	30%	$ 26.41
Entertainment/Night Clubs	$311.80	22%	$ 68.84
Perfumes & Cosmetics	$ 49.50	14%	$ 7.07
Telephone & Internet	$ 7.50	13%	$ 0.97
Other Purchases	$ 20.30	10%	$ 2.11
Watches & Jewelry	$115.60	9%	$ 10.51
Shore Excursions	$ 44.30	5%	$ 2.30
Retail Purchases of Liquor	$ 12.50	3%	$ 0.32
Electronics	$ 0.00	0%	$ 0.00
Total Spend per Crew			$ 142.14
Cruise Passenger Visits			54,536
Total Cruise Passenger Expenditures			$ 7,751,790

Cruise lines made payments to local businesses for a variety of goods and services. Net payments to local vendors for shore excursions have been included with passenger expenditures. However, cruise lines made other local expenditures, including payments for port fees and taxes, navigation services, utilities and other supplies. Based upon data provided by the FCCA member cruise lines, we estimated that all cruise lines spent **$3.0 million** ($US) in St.

Kitts during the 2008/2009 cruise year. Essentially all of these expenditures were payments for port fees and taxes and navigation services.

Economic Contribution of Cruise Tourism Expenditures

As noted in the **Data and Methods** section of the full report, a set of economic impact models were developed for each destination to produce estimates of the economic contribution of cruise tourism. Data for these models were collected from a broad range of local, regional and international sources. The impact models were designed to reflect the economic structure of each destination, including the industrial composition of Gross Domestic Product (GDP), the wage share of GDP by industry and average employee wages by industry.

Table 110 – Total Economic Contribution of Cruise Tourism in St. Kitts 2008/2009 Cruise Year

	Employment	Wage Income ($US Millions)
Direct Economic Contribution	491	$3.8
Total Economic Contribution	756	$5.9

As shown in **Table 110**, the $44 million in total cruise tourism expenditures generated direct employment of 491 residents of St. Kitts paying $3.8 million in annual wages. Adding the indirect contribution that results from the spending of those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures generated a total employment contribution of 756 jobs and $5.9 million in wage income in St. Kitts during the 2008/2009 cruise year.

Figure 73 – Total Employment Impacts by Sector - St. Kitts

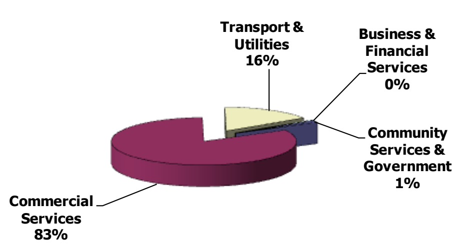
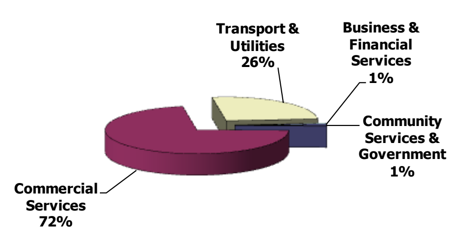


Figure 74 – Total Wage Impacts by Sector St. Kitts



As shown in **Figures 73 and 74**, the total employment and wage impacts of cruise tourism are concentrated in the commercial and transport sectors which account for about 98 percent of the employment and wage impacts.[84] This is not surprising since the direct impacts account for about 65 percent of the total employment impacts and that virtually all of the cruise tourism expenditures are made with businesses in these sectors. Because of the relatively lower wages in the commercial sector compared to the other sectors of the economy, the commercial sector accounts for 83 percent of the employment impacts but only 72 percent of the wage impacts. The remainder of the total employment and wage impacts was generated by the indirect spending in the other sectors of the economy.

Comparison to 2006 Study

Total estimated passenger and crew visits increased by nearly 250 percent from 113,300 visits during the 2005/2006 cruise year to 388,400 during the 2008/2009 cruise year. Total direct expenditures in St. Kitts increased even more dramatically growing by 550 percent from $6.7 million in the 2005/2006 cruise year to $44 million in the 2008/2009 cruise year. As indicated in **Table 111**, cruise tourism expenditures increased among all groups, passengers, crew and cruise lines.

Table 111 – Comparison of Cruise Tourism Impacts, Current Study versus 2006 Study

	Current Study	2006 Study
Total Onshore Visits (Thousands)	**388.4**	**113.3**
Passengers	333.9	93.8
Crew	54.5	19.5
Total Direct Expenditures ($US Millions)	**$ 44.0**	**$ 6.7**
Passengers	$ 33.2	$ 5.4
Crew	$ 7.8	$ 0.4
Cruise Lines	$ 3.0	$ 0.9
Average Per Passenger Expenditure	**$ 99.41**	**$ 57.40**
Average Per Crew Expenditure	**$142.14**	**$ 20.61**
Total Employment Impact	**756**	**205**
Total Wage Impact ($US Millions)	**$ 5.9**	**$ 1.5**

The growth in passenger and crew expenditures was not only driven by the 250 percent increase in onshore visits but also by the 73 percent increase in average passenger expenditures and the seven fold increase in the reported average crew expenditures. These are certainly significant increases and were among the largest estimated among those destinations that participated in both studies. The growth in per passenger expenditures varied across categories, but, in general, the increase was the result of both an increase in the

[84] The industry sectors include the following activities:
Manufacturing & Construction: residential and nonresidential construction and all manufacturing
Commercial Services: wholesale and retail trade, lodging and eating and drinking establishments
Transportation & Utilities: tour operators, port services, telecommunications and water and power utilities
Business & Financial Services: banking, insurance, legal, accounting, leasing and other business services
Community Services & Government: education, health and social services and government agencies

average purchase in each category and an increase in the percentage of passengers making onshore purchases. For example, during the 2005/2006 cruise year passengers who purchased jewelry spent an average of $144. This average purchase value increased to $319 during the 2008/2009 cruise year. In addition the percentage of passengers purchasing jewelry also increased from 17 percent to 25 percent.

In the case of visiting crew, the sharp increase in per crew spending is primarily due to an impressive increase in the percentage of crew reporting purchases in each category. As an example, in the 2006 study 34 percent of crew reported making an average purchase of $23.20 for food and beverages. This increased to 42 percent reporting an average expenditure of $36.40 at restaurants and bars in the current study. Similar increases in the percentage of crew making purchases were reported in most categories.

As a result of the 250 percent increase in direct cruise tourism expenditures from the 2005/2006 cruise year, the economic impacts increased as well. The total employment impact rose by 268 percent over the three-year period while the wage impact increased by 295 percent. The higher growth in wages is due to increased labor productivity and average wages over the intervening period.

Passenger Surveys

A total of 1,442 passenger surveys were completed and returned for tabulation. **Table 112** shows the major attributes of passenger visits in St. Kitts as derived from the passenger surveys.

Table 112 - Major Attributes of Intransit Passenger Surveys - St. Kitts

	Number	Percent
Total Respondents	1,442	
Number Making First Visit	1,248	86.6%
Number Ashore	1,388	96.3%
Number Making Onshore Purchases:	1,127	81.2%
Average Hours Ashore	4.4	
Average Size of Expenditure Party (Persons)	2.1	
Average Onshore Expenditure per Party	$162	
Purchased a Shore Excursion (Tour)	810	58.4%
Purchased Onshore Tour from:		
Cruise Line	592	73.1%
Onshore from Tour Operator	191	23.6%
Travel Agent	27	3.3%
Average Cost of Shore Excursion per Party	$131	
Toured On Own/Did not Tour	578	

- Of the 1,442 cruise parties that completed the surveys 87% stated that this had been their first visit to St. Kitts.
- Ninety-six percent (96%) of the cruise parties that completed the surveys disembarked their cruise ship to visit St. Kitts.

- Of the cruise parties that went ashore, 81% made at least one purchase while ashore. The typical cruise party consisted of 2.1 passengers and spent an average of 4.4 hours ashore.

- The responding cruise parties reported spending an average of $162 while ashore (excludes shore excursions).

- Fifty-eight percent (58%) of the passengers that went ashore purchased a shore excursion. Seventy-three percent (73%) of passengers who purchased a tour did so through their cruise line, nearly 24% purchased their tour onshore and 3 percent purchased their tour through their travel agent.

- The typical cruise party that purchased a shore excursion spent $131 for their tour.

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Table 113**. A 10-point scale was used with 10 being the highest score, i.e., extremely satisfied, and 1 being the lowest score, i.e., not at all satisfied.

Table 113 – Passenger Visit Satisfaction* - St. Kitts

Visit Attributes	Mean Score
Overall Visit	7.8
Visit Met Expectations	7.4
Likelihood of a Return Visit	5.0
Informed of Tours and Activities	7.7
Initial Shoreside Welcome	7.6
Guided Tour	8.1
Historic Sites/Museums	7.2
Variety of Things to See and Do	6.9
Friendliness of Residents	8.3
Overall Shopping Experience	7.6
Courtesy of Employees	8.2
Variety of Shops	7.3
Overall Prices	7.1
Taxis/Local Transportation	7.8

* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows:
Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3;
Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Cruise passengers were very satisfied with their overall visit to St. Kitts with a mean score of 7.8. However, the visit did not score as high in terms of meeting expectations. The mean score for "Visit Met Expectations" was lower at 7.4.

- Passengers felt very informed about tours and onshore activities in St. Kitts with a mean score of 7.7.

- "Guided Tours" (or Shore Excursions) received the third highest score of all visit attributes with a mean score of 8.1. Thus, cruise passengers were very satisfied with their shore excursions.
- Passenger interactions with residents and store employees were very positive with "friendliness of residents" receiving a mean score of 8.3 and "courtesy of employees" having a mean score of 8.2.
- Categories with slightly lower scores but still above 7.0 (Very Satisfied) were: initial shoreside welcome, historic sites and local transportation.
- Only " variety of things to see and do" received a mean score lower than 7.0. The mean score for this category was 6.9 (Somewhat Satisfied)
- Passengers were also very satisfied with their shopping experience which received a mean score of 7.6. It was already noted that passengers were very satisfied with shop employees but they were also very satisfied the variety of shops (7.3) and overall prices (7.1).
- Cruise passengers stated that they were somewhat likely to return to St. Kitts for a land-based vacation.

Passenger Demographics

Residents of the United States and the Canada accounted for 91 percent of the responding passengers. The average age of the respondents was 54 years with 28 percent of the respondents being 65 years of age or older. St. Kitts passengers had an average household income of $104,400 with 42 percent having over $100,000 in household income.

Figure 75 – Passenger Age St. Kitts

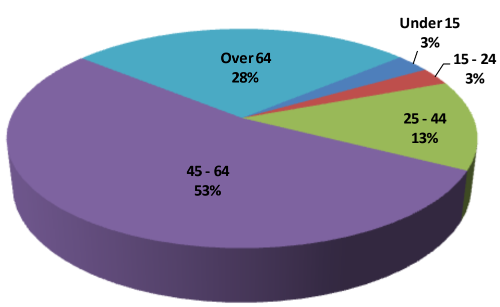
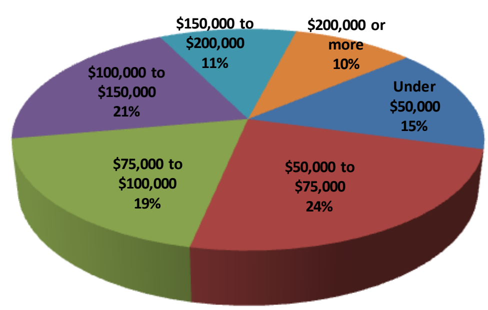


Figure 76 – Passenger Household Income St. Kitts



St. Lucia

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.[85] The surveys were undertaken during the six-month period beginning in November 2008 and ending in April 2009. The survey schedule was designed so that surveys were conducted by FCCA member cruise lines that called at each destination and that the distribution of passenger and crew surveys would reflect the distribution of passenger and crew arrivals by cruise line at each destination. On any given cruise itinerary, passenger and crew surveys were placed in all passenger cabins and crew quarters following a single destination call. The surveys were completed by the passengers and crew in the privacy of their quarters and returned to a designated office on the cruise ship. Thus, passengers and crew were only surveyed once during a cruise itinerary and for a single destination. On a subsequent itinerary, passengers were surveyed following a call at a different destination.

The passenger and crew surveys were designed to collect data for onshore spending and visit satisfaction by both passengers and crew. While the crew survey was slightly shorter than the passenger survey, both surveys were designed to collect the following information:

- hours spent ashore;
- expenditures by category, including shore tours, food & beverages, clothing, etc.;
- visit satisfaction, including shore tour, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation; and
- demographic characteristics, including country of residence, age group, income, etc.

Combining the expenditure data collected from the passenger and crew surveys with data on expenditures by cruise lines for port fees and services, payments to local tour operators for passenger shore excursions purchased onboard the cruise ships, and other provisions purchased locally by the cruise lines, estimates of total cruise tourism expenditures were developed for each participating destination.

Given the direct spending estimates, the economic contribution of these expenditures, as measured by employment and wage income were then estimated for each destination. This process began with the collection of economic data for each destination from a combination of local, regional and international sources. Utilizing all of these data a set of economic impact models were developed for each destination to estimate the direct and total employment and wage impacts. A more detailed description of these models is provided in the **Data and Methods** section of Volume I.

[85] Surveys were conducted on the ships of the following cruise lines: Azamara Cruises, Carnival Cruise Lines, Celebrity Cruises, Disney Cruise Line, Holland America Line, MSC Cruises (USA), Inc., Norwegian Cruise Line, Princess Cruises, P&O Cruises and Royal Caribbean International.

Cruise Tourism Expenditures

Cruise tourism expenditures in destination ports are composed of a broad range of spending including:

- onshore expenditures by passengers which tend to be concentrated in shore excursions and retail purchases of clothing, jewelry and local crafts and souvenirs;
- onshore expenditures by crew which are generally concentrated in purchases of food and beverages, local transportation and retail purchases of clothing and electronics;
- expenditures by cruise lines for port services, such as dockage fees and linesmen, utilities, such as water and power and navigation services; and
- purchases of supplies, such as food and other stores, by the cruise lines from local businesses.

According to data obtained from the CTO and FCCA, an estimated 665,000 cruise passengers arrived aboard cruise ships during the 2008/2009 cruise year.[86] Of these, an estimated 532,000 passengers (80 percent) disembarked and visited St. Lucia. Utilizing additional data provided by the visiting cruise lines, we have estimated that 283,662 crew were aboard the cruise ships and that 40 percent, or 113,465 crew, disembarked and visited St. Lucia. These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **$45.7 million** ($US) in cruise tourism expenditures in St. Lucia during the 2008/2009 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Table 114 – Estimated Passenger Spending ($US) in St. Lucia, 2008/2009 Cruise Year[87]

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	$ 68.84	65%	$ 45.68
Local Crafts & Souvenirs	$ 24.60	43%	$ 12.96
Clothing	$ 39.20	41%	$ 16.04
F&B at Restaurants & Bars	$ 16.50	39%	$ 6.36
Taxis/Ground Transportation	$ 35.40	25%	$ 8.86
Other Purchases	$ 95.07	19%	$ 18.29
Watches & Jewelry	$ 240.00	12%	$ 30.07
Retail Purchases of Liquor	$ 23.40	8%	$ 1.93
Perfumes & Cosmetics	$ 57.30	5%	$ 2.75
Telephone & Internet	$ 7.30	3%	$ 0.21
Entertainment/Night Clubs	$ 90.00	1%	$ 0.61
Electronics	$ 33.50	0%	$ 0.15
Total Spend per Cruise Party			**$ 143.91**
Average Size of a Cruise Party			2.1
Total Spend per Cruise Passenger			**$ 68.53**
Cruise Passenger Visits			532,000
Total Cruise Passenger Expenditures			**$ 36,458,834**

[86] The 2008/2009 cruise year includes the twelve months beginning in May, 2008 and ending in April, 2009.
[87] The average shore excursion expenditure is a weighted average of the onshore and Internet purchases and the portion of the onboard purchases paid to local tour operators.

Per passenger spending estimates were derived from the 1,243 surveys completed by passengers that went ashore during the survey period. As shown in **Table 114,** each passenger cruise party spent an average of $143.91 in St. Lucia. The average spend per cruise party is the sum of the weighted spending in each of the twelve categories. For example, 39 percent of the survey respondents reported spending an average of $16.50 at local restaurants and/or bars. Spread over the 1,243 cruise parties that visited St. Lucia, this represents an average of $6.36 per party. On a per passenger basis, the average total expenditure was $68.53. This represents the sum of per party expenditures, $143.91, divided by the average size of a cruise party in St. Lucia, 2.1 passengers.

For the entire 2008/2009 cruise year, the estimated 532,000 cruise passengers who visited St. Lucia spent a total of **$36.5 million** ($US).

Per crew spending estimates were derived from the 716 surveys completed by crew members during the survey period. As shown in **Table 115,** each crew member spent an average of $37.66 in St. Lucia. The average spend per crew member is the sum of the weighted spending in each of the twelve categories. For example, 73 percent of the survey respondents reported spending an average of $24.10 for food and beverages. Spread over all the crew members that visited St. Lucia, this represents an average of $17.51 per crew member.

For the entire 2008/2009 cruise year, the estimated 113,465 crew who visited St. Lucia spent an estimated total of **$4.3 million** ($US).

Table 115 – Estimated Crew Spending ($US) in St. Lucia, 2008/2009 Cruise Year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	$ 24.10	73%	$ 17.51
Taxis/Ground Transportation	$ 10.90	29%	$ 3.13
Local Crafts & Souvenirs	$ 11.20	19%	$ 2.11
Other Purchases	$ 24.00	13%	$ 3.12
Clothing	$ 21.00	12%	$ 2.54
Telephone & Internet	$ 13.30	9%	$ 1.25
Shore Excursions	$ 19.80	7%	$ 1.31
Perfumes & Cosmetics	$ 55.40	5%	$ 2.73
Retail Purchases of Liquor	$ 15.80	4%	$ 0.57
Watches & Jewelry	$123.00	2%	$ 2.76
Electronics	$ 13.30	1%	$ 0.18
Entertainment/Night Clubs	$ 33.30	1%	$ 0.45
Total Spend per Crew			$ 37.66
Cruise Passenger Visits			113,465
Total Cruise Passenger Expenditures			$ 4,273,084

Cruise lines made payments to local businesses for a variety of goods and services. Net payments to local vendors for shore excursions have been included with passenger expenditures. However, cruise lines made other local expenditures, including payments for port fees and taxes, navigation services, utilities and other supplies. Based upon data provided by the FCCA member cruise lines, we estimated that all cruise lines spent **$4.9 million** ($US) in St.

Lucia during the 2008/2009 cruise year. Essentially all of these expenditures were payments for port fees and taxes and navigation services.

Economic Contribution of Cruise Tourism Expenditures

As noted in the **Data and Methods** section of the full report, a set of economic impact models were developed for each destination to produce estimates of the economic contribution of cruise tourism. Data for these models were collected from a broad range of local, regional and international sources. The impact models were designed to reflect the economic structure of each destination, including the industrial composition of Gross Domestic Product (GDP), the wage share of GDP by industry and average employee wages by industry.

Table 116 – Total Economic Contribution of Cruise Tourism in St. Lucia 2008/2009 Cruise Year

	Employment	Wage Income ($US Millions)
Direct Economic Contribution	797	$6.2
Total Economic Contribution	1,203	$9.3

As shown in **Table 116**, the $45.7 million in total cruise tourism expenditures generated direct employment of 797 residents of St. Lucia paying $6.2 million in annual wages. Adding the indirect contribution that results from the spending of those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures generated a total employment contribution of 1,203 jobs and $9.3 million in wage income in St. Lucia during the 2008/2009 cruise year.

Figure 77 – Total Employment Impacts by Sector - St. Lucia

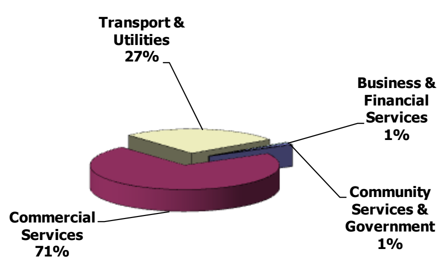
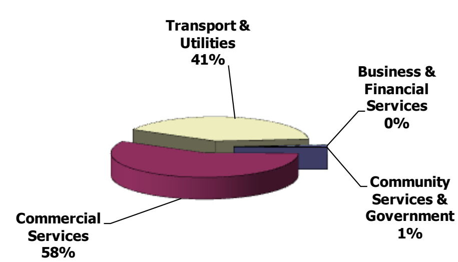


Figure 78 – Total Wage Impacts by Sector St. Lucia



As shown in **Figures 77 and 78**, the total employment and wage impacts of cruise tourism are concentrated in the commercial and transport sectors which account for about 98 percent of the employment and wage impacts.[88] This is not surprising since the direct impacts account for about 65 percent of the total employment impacts and that virtually all of the cruise tourism expenditures are made with businesses in these sectors. Because of the relatively higher wages in the transport sector compared to the other sectors of the economy, the transport sector accounts for 41 percent of the wage impacts but only 27 percent of the employment impacts. The remainder of the total employment and wage impacts was generated by the indirect spending in the other sectors of the economy.

Comparison to 2006 Study

Total estimated passenger and crew visits increased by 53 percent from 422,000 visits during the 2005/2006 cruise year to 645,500 during the 2008/2009 cruise year. Total direct expenditures in St. Lucia increased more slowly growing by 31 percent from $34.8 million in the 2005/2006 cruise year to $45.7million in the 2008/2009 cruise year. As indicated in **Table 117**, cruise tourism expenditures increased among all groups, passengers, crew and cruise lines.

Table 117 – Comparison of Cruise Tourism Impacts, Current Study versus 2006 Study

	Current Study	2006 Study
Total Onshore Visits (Thousands)	**645.5**	**422.0**
Passengers	532.0	345.7
Crew	113.5	76.3
Total Direct Expenditures ($US Millions)	**$ 45.7**	**$ 34.8**
Passengers	$ 36.5	$ 28.6
Crew	$ 4.3	$ 2.4
Cruise Lines	$ 4.9	$ 3.8
Average Per Passenger Expenditure	**$ 68.53**	**$ 82.62**
Average Per Crew Expenditure	**$ 37.66**	**$ 31.01**
Total Employment Impact	**1,203**	**1,035**
Total Wage Impact ($US Millions)	**$ 9.3**	**$ 6.7**

The increase in passenger expenditures was the net result of a 17 percent decline in the average expenditure per passenger which was more than offset by the 65 percent increase in total passenger visits. The decline in per passenger expenditures was due to a decline in the percentage of passengers making onshore purchases and the average value of those purchases. For example, for the two largest expenditure categories, jewelry and shore excursions, the percentage of passengers making such purchases fell from

[88] The industry sectors include the following activities:
Manufacturing & Construction: residential and nonresidential construction and all manufacturing
Commercial Services: wholesale and retail trade, lodging and eating and drinking establishments
Transportation & Utilities: tour operators, port services, telecommunications and water and power utilities
Business & Financial Services: banking, insurance, legal, accounting, leasing and other business services
Community Services & Government: education, health and social services and government agencies

14% to 12% in the case of jewelry and from 75% to 65% for shore excursions. This was also matched by a decline in the average value of purchases in these categories, for jewelry the average value of an actual purchase fell from $294 to $240 while the average effective value of a shore excursion fell from $90 to $70.

In the case of crew expenditures, the growth in total crew expenditures was primarily driven by an increase in the percentage of crew making onshore purchases. For example, for food and beverages, the largest crew expenditure category, 73 percent of the crew reported making such onshore purchases during the 2008/2009 cruise year. This percentage was only 48 percent in the prior study. At the same time, the crew reported spending $24 when purchasing food in the current study which was down from nearly $27 in the previous study.

As a result of the 31 percent increase in direct cruise tourism expenditures from the 2005/2006 cruise year, the economic impacts increased as well. The total employment impact rose by 16 percent over the three-year period while the wage impact increased by 39 percent. The higher growth in wages is due to increased labor productivity and average wages over the intervening period.

Passenger Surveys

A total of 1,301 passenger surveys were completed and returned for tabulation. **Table 118** shows the major attributes of passenger visits in St. Lucia as derived from the passenger surveys.

Table 118 - Major Attributes of Intransit Passenger Surveys - St. Lucia

	Number	Percent
Total Respondents	1,301	
Number Making First Visit	939	72.2%
Number Ashore	1,243	95.5%
Number Making Onshore Purchases:	894	71.9%
Average Hours Ashore	4.5	
Average Size of Expenditure Party (Persons)	2.1	
Average Onshore Expenditure per Party	$98	
Purchased a Shore Excursion (Tour)	813	65.4%
Purchased Onshore Tour from:		
Cruise Line	569	70.0%
Onshore from Tour Operator	215	26.4%
Travel Agent	29	3.6%
Average Cost of Shore Excursion per Party	$116	
Toured On Own/Did not Tour	894	

- Of the 1,301 cruise parties that completed the surveys 72% stated that this had been their first visit to St. Lucia.
- Ninety-six percent (96%) of the cruise parties that completed the surveys disembarked their cruise ship to visit St. Lucia.

- Of the cruise parties that went ashore, 72% made at least one purchase while ashore. The typical cruise party consisted of 2.1 passengers and spent an average of 4.5 hours ashore.

- The responding cruise parties reported spending an average of $98 while ashore (excludes shore excursions).

- Sixty-five percent (65%) of the passengers that went ashore purchased a shore excursion. Seventy percent (70%) of passengers who purchased a tour did so through their cruise line, 26% purchased their tour onshore and nearly 4 percent purchased their tour through their travel agent.

- The typical cruise party that purchased a shore excursion spent $116 for their tour.

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Table 119**. A 10-point scale was used with 10 being the highest score, i.e., extremely satisfied, and 1 being the lowest score, i.e., not at all satisfied.

Table 119 – Passenger Visit Satisfaction* - St. Lucia

Visit Attributes	Mean Score
Overall Visit	7.5
Visit Met Expectations	7.1
Likelihood of a Return Visit	4.6
Informed of Tours and Activities	7.6
Initial Shoreside Welcome	7.2
Guided Tour	8.1
Historic Sites/Museums	7.3
Variety of Things to See and Do	7.0
Friendliness of Residents	7.8
Overall Shopping Experience	6.3
Courtesy of Employees	7.6
Variety of Shops	6.3
Overall Prices	6.0
Taxis/Local Transportation	7.2

* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows: Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3; Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Cruise passengers were very satisfied with their overall visit to St. Lucia with a mean score of 7.5. However, the visit did not score as high in terms of meeting expectations. The mean score for “Visit Met Expectations” was lower at 7.1.

- Passengers felt very informed about tours and onshore activities in St. Lucia with a mean score of 7.6.

- "Guided Tours" (or Shore Excursions) received the highest score of all visit attributes with a mean score of 8.1. Thus, cruise passengers were very satisfied with their shore excursions.
- Passenger interactions with residents and store employees were very positive with "friendliness of residents" receiving a mean score of 7.8 and "courtesy of employees" having a mean score of 7.6.
- Categories with slightly lower scores but still above 7.0 (Very Satisfied) were: initial shoreside welcome, historic sites, variety of things to see and do and local transportation.
- Cruise passengers were only somewhat satisfied with their overall shopping experience. Thus, while passengers thought shop employees were very courteous, the overall score for their shopping experience was brought down by lower perceptions on the variety of shops (6.3) and overall prices (6.0).
- Cruise passengers stated that they were not too likely to return to St. Lucia for a land-based vacation.

Passenger Demographics

Residents of the United States and the Canada accounted for 91 percent of the responding passengers. The average age of the respondents was 56 years with 34 percent of the respondents being 65 years of age or older. St. Lucia passengers had an average household income of $98,800 with 37 percent having over $100,000 in household income.

Figure 79 – Passenger Age
St. Lucia

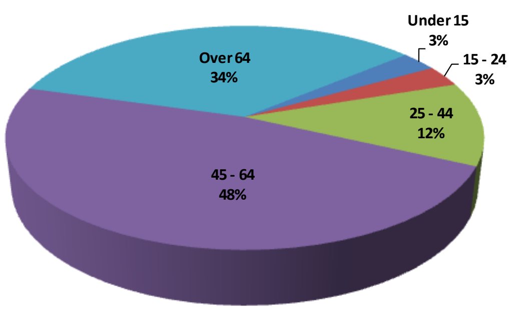
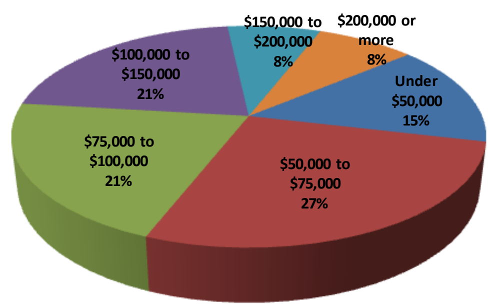


Figure 80 – Passenger Household Income
St. Lucia



St. Maarten

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.[89] The surveys were undertaken during the six-month period beginning in November 2008 and ending in April 2009. The survey schedule was designed so that surveys were conducted by FCCA member cruise lines that called at each destination and that the distribution of passenger and crew surveys would reflect the distribution of passenger and crew arrivals by cruise line at each destination. On any given cruise itinerary, passenger and crew surveys were placed in all passenger cabins and crew quarters following a single destination call. The surveys were completed by the passengers and crew in the privacy of their quarters and returned to a designated office on the cruise ship. Thus, passengers and crew were only surveyed once during a cruise itinerary and for a single destination. On a subsequent itinerary, passengers were surveyed following a call at a different destination.

The passenger and crew surveys were designed to collect data for onshore spending and visit satisfaction by both passengers and crew. While the crew survey was slightly shorter than the passenger survey, both surveys were designed to collect the following information:

- hours spent ashore;
- expenditures by category, including shore tours, food & beverages, clothing, etc.;
- visit satisfaction, including shore tour, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation; and
- demographic characteristics, including country of residence, age group, income, etc.

Combining the expenditure data collected from the passenger and crew surveys with data on expenditures by cruise lines for port fees and services, payments to local tour operators for passenger shore excursions purchased onboard the cruise ships, and other provisions purchased locally by the cruise lines, estimates of total cruise tourism expenditures were developed for each participating destination.

Given the direct spending estimates, the economic contribution of these expenditures, as measured by employment and wage income were then estimated for each destination. This process began with the collection of economic data for each destination from a combination of local, regional and international sources. Utilizing all of these data a set of economic impact models were developed for each destination to estimate the direct and total employment and wage impacts. A more detailed description of these models is provided in the **Data and Methods** section of Volume I.

[89] Surveys were conducted on the ships of the following cruise lines: Azamara Cruises, Carnival Cruise Lines, Celebrity Cruises, Disney Cruise Line, Holland America Line, MSC Cruises (USA), Inc., Norwegian Cruise Line, Princess Cruises, P&O Cruises and Royal Caribbean International.

Cruise Tourism Expenditures

Cruise tourism expenditures in destination ports are composed of a broad range of spending including:

- onshore expenditures by passengers which tend to be concentrated in shore excursions and retail purchases of clothing, jewelry and local crafts and souvenirs;
- onshore expenditures by crew which are generally concentrated in purchases of food and beverages, local transportation and retail purchases of clothing and electronics;
- expenditures by cruise lines for port services, such as dockage fees and linesmen, utilities, such as water and power and navigation services; and
- purchases of supplies, such as food and other stores, by the cruise lines from local businesses.

According to data obtained from the CTO and FCCA, an estimated 1.28 million cruise passengers arrived aboard cruise ships during the 2008/2009 cruise year.[90] Of these, an estimated 1.15 million passengers (90 percent) disembarked and visited St. Maarten. Utilizing additional data provided by the visiting cruise lines, we have estimated that 724,450 crew were aboard the cruise ships and that 45 percent, or 326,003 crew, disembarked and visited St. Maarten. These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **$230.3 million** ($US) in cruise tourism expenditures in St. Maarten during the 2008/2009 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Table 120 – Estimated Passenger Spending ($US) in St. Maarten, 2008/2009 Cruise Year[91]

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
F&B at Restaurants & Bars	$ 25.50	53%	$ 13.51
Clothing	$ 56.00	51%	$ 28.45
Shore Excursions	$ 70.44	47%	$ 33.04
Taxis/Ground Transportation	$ 25.40	46%	$ 11.70
Local Crafts & Souvenirs	$ 37.60	39%	$ 14.76
Watches & Jewelry	$ 493.90	32%	$ 160.71
Other Purchases	$ 202.29	22%	$ 45.32
Retail Purchases of Liquor	$ 42.30	16%	$ 6.69
Perfumes & Cosmetics	$ 74.80	6%	$ 4.09
Electronics	$ 220.70	3%	$ 5.83
Entertainment/Night Clubs	$ 68.50	2%	$ 1.34
Telephone & Internet	$ 7.70	1%	$ 0.11
Total Spend per Cruise Party			**$ 325.55**
Average Size of a Cruise Party			2.2
Total Spend per Cruise Passenger			**$ 147.98**
Cruise Passenger Visits			1,152,000
Total Cruise Passenger Expenditures			**$ 170,470,072**

90 The 2008/2009 cruise year includes the twelve months beginning in May, 2008 and ending in April, 2009.
91 The average shore excursion expenditure is a weighted average of the onshore and Internet purchases and the portion of the onboard purchases paid to local tour operators.

Per passenger spending estimates were derived from the 1,885 surveys completed by passengers that went ashore during the survey period. As shown in **Table 120,** each passenger cruise party spent an average of $325.55 in St. Maarten. The average spend per cruise party is the sum of the weighted spending in each of the twelve categories. For example, 53 percent of the survey respondents reported spending an average of $25.50 at local restaurants and/or bars. Spread over the 1,885 cruise parties that visited St. Maarten, this represents an average of $13.51 per party. On a per passenger basis, the average total expenditure was $147.98. This represents the sum of per party expenditures, $325.55, divided by the average size of a cruise party in St. Maarten, 2.2 passengers.

For the entire 2008/2009 cruise year, the estimated 1.15 million cruise passengers who visited St. Maarten spent a total of **$170.5 million** ($US).

Per crew spending estimates were derived from the 830 surveys completed by crew members during the survey period. As shown in **Table 121,** each crew member spent an average of $149.45 in St. Maarten. The average spend per crew member is the sum of the weighted spending in each of the eleven categories. For example, 64 percent of the survey respondents reported spending an average of $35.50 for food and beverages. Spread over all the crew members that visited St. Maarten, this represents an average of $22.77 per crew member.

For the entire 2008/2009 cruise year, the estimated 326,003 crew who visited St. Maarten spent an estimated total of **$48.7 million** ($US).

Table 121 – Estimated Crew Spending ($US) in St. Maarten, 2008/2009 Cruise Year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	$ 35.50	64%	$ 22.77
Taxis/Ground Transportation	$ 10.80	44%	$ 4.77
Clothing	$ 62.10	24%	$ 15.08
Other Purchases	$ 67.30	20%	$ 13.28
Electronics	$ 280.50	18%	$ 49.50
Retail Purchases of Liquor	$ 33.70	10%	$ 3.39
Watches & Jewelry	$ 252.70	10%	$ 24.45
Entertainment/Night Clubs	$ 96.40	8%	$ 8.23
Local Crafts & Souvenirs	$ 34.00	8%	$ 2.84
Telephone & Internet	$ 63.50	7%	$ 4.22
Shore Excursions	$ 24.10	4%	$ 0.92
Total Spend per Crew			**$ 149.45**
Cruise Passenger Visits			326,003
Total Cruise Passenger Expenditures			**$ 48,721,074**

Cruise lines made payments to local businesses for a variety of goods and services. Net payments to local vendors for shore excursions have been included with passenger expenditures. However, cruise lines made other local expenditures, including payments for port fees and taxes, navigation services, utilities and other supplies. Based upon data provided by the FCCA member cruise lines, we estimated that all cruise lines spent **$11.0 million** ($US) in

St. Maarten during the 2008/2009 cruise year. Essentially all of these expenditures were payments for port fees and taxes and navigation services.

Economic Contribution of Cruise Tourism Expenditures

As noted in the **Data and Methods** section of the full report, a set of economic impact models were developed for each destination to produce estimates of the economic contribution of cruise tourism. Data for these models were collected from a broad range of local, regional and international sources. The impact models were designed to reflect the economic structure of each destination, including the industrial composition of Gross Domestic Product (GDP), the wage share of GDP by industry and average employee wages by industry.

Table 122 – Total Economic Contribution of Cruise Tourism in St. Maarten 2008/2009 Cruise Year

	Employment	Wage Income ($US Millions)
Direct Economic Contribution	3,057	$ 58.6
Total Economic Contribution	5,531	$106.3

As shown in **Table 122**, the $230.3 million in total cruise tourism expenditures generated direct employment of 3,057 residents of St. Maarten paying $58.6 million in annual wages. Adding the indirect contribution that results from the spending of those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures generated a total employment contribution of 5,531 jobs and $106.3 million in wage income in St. Maarten during the 2008/2009 cruise year.

Figure 81 – Total Employment Impacts by Sector - St. Maarten

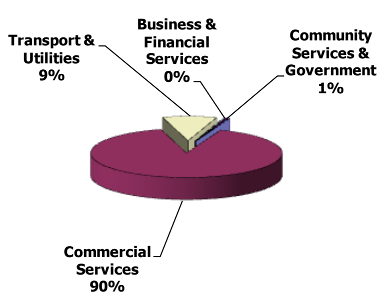
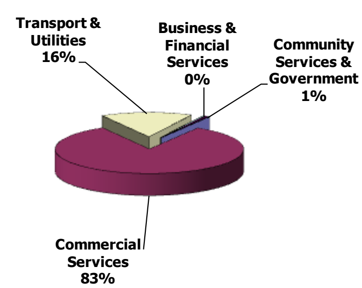


Figure 82 – Total Wage Impacts by Sector St. Maarten



As shown in **Figures 81 and 82**, the total employment and wage impacts of cruise tourism are concentrated in the commercial and transport sectors which account for about 99 percent of the employment and wage impacts.[92] This is not surprising since the direct impacts account for more than half of the total employment impacts and that virtually all of the cruise tourism expenditures are made with businesses in these sectors. Because of the relatively lower wages in the commercial sector relative to the other sectors of the St. Maarten economy, the commercial sector accounts for 90 percent of the employment impacts but only 83 percent of the wage impacts. The remainder of the total employment and wage impacts was generated by the indirect spending in the other sectors of the economy.

Comparison to 2006 Study

Total estimated passenger and crew visits declined by 7 percent from 1.59 million visits during the 2005/2006 cruise year to 1.48 million during the 2008/2009 cruise year. Total direct expenditures in St. Maarten decreased at a similar rate falling from $246.4 million in the 2005/2006 cruise year to $230.3 million in the 2008/2009 cruise year. As indicated in **Table 123**, cruise tourism expenditures declined for passengers and increased slightly for crew and cruise lines.

Table 123 – Comparison of Cruise Tourism Impacts, Current Study versus 2006 Study

	Current Study	2006 Study
Total Onshore Visits (Thousands)	**1,478.0**	**1,594.1**
Passengers	1,152.0	1,304.3
Crew	326.0	289.8
Total Direct Expenditures ($US Millions)	**$230.3**	**$246.4**
Passengers	$ 170.5	$ 189.3
Crew	$ 48.7	$ 46.2
Cruise Lines	$ 11.0	$ 10.9
Average Per Passenger Expenditure	**$147.98**	**$145.15**
Average Per Crew Expenditure	**$149.45**	**$159.55**
Total Employment Impact	**5,531**	**5,590**
Total Wage Impact ($US Millions)	**$ 106.3**	**$ 99.3**

The decline in passenger expenditures was the net result of a 12 percent decline in passenger visits which was only partially offset by the 2 percent increase in average passenger expenditures. The small increase in per passenger expenditures was the net result of cruise parties spending more for clothing, local crafts, local transportation and other purchases which was partially offset by lower spending for shore excursions and

[92] The industry sectors include the following activities:
Manufacturing & Construction: residential and nonresidential construction and all manufacturing
Commercial Services: wholesale and retail trade, lodging and eating and drinking establishments
Transportation & Utilities: tour operators, port services, telecommunications and water and power utilities
Business & Financial Services: banking, insurance, legal, accounting, leasing and other business services
Community Services & Government: education, health and social services and government agencies

jewelry. In addition, a smaller percentage of cruise passengers made onshore purchases in most categories during the 2008/2009 cruise year than in the 2005/2006 cruise year .

In the case of crew expenditures, the growth in total crew expenditures was the net result of a 12 percent increase crew visits that was partly offset by a 6 percent decrease in the average per crew expenditure. The decline in per crew expenditures was concentrated in lower spending by crew for electronic goods and other retail purchases. These were somewhat offset by increased spending for food and beverages and jewelry.

As a result of the 7 percent decrease in direct cruise tourism expenditures from the 2005/2006 cruise year, the total employment impact fell slightly by one percent over the three-year period while the wage impact increased by 7 percent. The higher growth in wages is due to increased labor productivity and average wages over the intervening period.

Passenger Surveys

A total of 1,947 passenger surveys were completed and returned for tabulation. **Table 124** shows the major attributes of passenger visits in St. Maarten as derived from the passenger surveys.

Table 124 - Major Attributes of Intransit Passenger Surveys - St. Maarten

	Number	Percent
Total Respondents	1,947	
Number Making First Visit	1,072	55.1%
Number Ashore	1,885	96.8%
Number Making Onshore Purchases:	1,589	84.3%
Average Hours Ashore	4.8	
Average Size of Expenditure Party (Persons)	2.2	
Average Onshore Expenditure per Party	$292	
Purchased a Shore Excursion (Tour)	884	46.9%
Purchased Onshore Tour from:		
Cruise Line	733	82.9%
Onshore from Tour Operator	123	13.9%
Travel Agent	28	3.2%
Average Cost of Shore Excursion per Party	$116	
Toured On Own/Did not Tour	1,001	

- Of the 1,947 cruise parties that completed the surveys 55% stated that this had been their first visit to St. Maarten.
- Ninety-seven percent (97%) of the cruise parties that completed the surveys disembarked their cruise ship to visit St. Maarten.
- Of the cruise parties that went ashore, 84% made at least one purchase while ashore. The typical cruise party consisted of 2.2 passengers and spent an average of 4.8 hours ashore.
- The responding cruise parties reported spending an average of $292 while ashore (excludes shore excursions).

- Forty-seven percent (47%) of the passengers that went ashore purchased a shore excursion. Eighty-three percent (83%) of passengers who purchased a tour did so through their cruise line, 14% purchased their tour onshore and 3 percent purchased their tour through their travel agent.
- The typical cruise party that purchased a shore excursion spent $116 for their tour.

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Table 125**. A 10-point scale was used with 10 being the highest score, i.e., extremely satisfied, and 1 being the lowest score, i.e., not at all satisfied.

Table 125 – Passenger Visit Satisfaction* - St. Maarten

Visit Attributes	Mean Score
Overall Visit	8.0
Visit Met Expectations	7.5
Likelihood of a Return Visit	5.1
Informed of Tours and Activities	7.8
Initial Shoreside Welcome	7.7
Guided Tour	8.1
Historic Sites/Museums	6.9
Variety of Things to See and Do	7.3
Friendliness of Residents	8.0
Overall Shopping Experience	7.6
Courtesy of Employees	8.1
Variety of Shops	7.4
Overall Prices	7.3
Taxis/Local Transportation	8.1

* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows:
Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3;
Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Cruise passengers were very satisfied with their overall visit to St. Maarten with a mean score of 8.0. However, the visit did not score as high in terms of meeting expectations. The mean score for "Visit Met Expectations" was lower at 7.5.
- Passengers felt very informed about tours and onshore activities in St. Maarten with a mean score of 7.8.
- "Guided Tours" (or Shore Excursions) received the highest score of all visit attributes with a mean score of 8.1. Thus, cruise passengers were very satisfied with their shore excursions.

- Passenger interactions with residents and store employees were very positive with "friendliness of residents" receiving a mean score of 8.0 and "courtesy of employees" having a mean score of 8.1.

- Categories with slightly lower scores but still above 7.0 (Very Satisfied) were: initial shoreside welcome, variety of things to see and do and local transportation.

- Cruise passengers were only somewhat satisfied with the historic sites which had a mean score of 6.9.

- Cruise passengers were very satisfied with their overall shopping experience. As noted above, passengers thought shop employees were very courteous and were very satisfied with the variety of shops (7.4) and overall prices (7.3).

- Cruise passengers stated that they were somewhat likely to return to St. Maarten for a land-based vacation.

Passenger Demographics

Residents of the United States and the Canada accounted for 93 percent of the responding passengers. The average age of the respondents was 54 years with 34 percent of the respondents being 65 years of age or older. St. Maarten passengers had an average household income of $100,600 with 38 percent having over $100,000 in household income.

Figure 83 – Passenger Age
St. Maarten

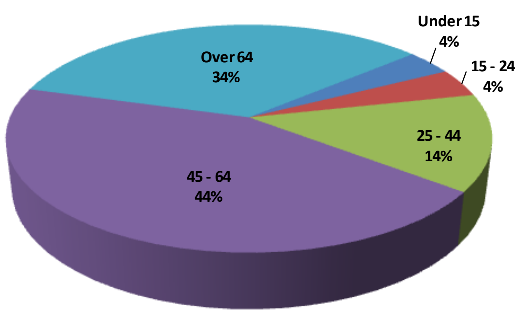
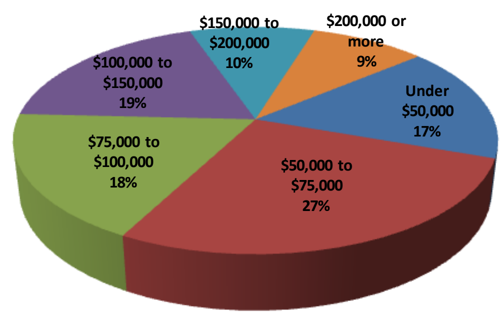


Figure 84 – Passenger Household Income
St. Maarten



St. Vincent and the Grenadines

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.[93] The surveys were undertaken during the six-month period beginning in November 2008 and ending in April 2009. The survey schedule was designed so that surveys were conducted by FCCA member cruise lines that called at each destination and that the distribution of passenger and crew surveys would reflect the distribution of passenger and crew arrivals by cruise line at each destination. On any given cruise itinerary, passenger and crew surveys were placed in all passenger cabins and crew quarters following a single destination call. The surveys were completed by the passengers and crew in the privacy of their quarters and returned to a designated office on the cruise ship. Thus, passengers and crew were only surveyed once during a cruise itinerary and for a single destination. On a subsequent itinerary, passengers were surveyed following a call at a different destination.

The passenger and crew surveys were designed to collect data for onshore spending and visit satisfaction by both passengers and crew. While the crew survey was slightly shorter than the passenger survey, both surveys were designed to collect the following information:

- hours spent ashore;
- expenditures by category, including shore tours, food & beverages, clothing, etc.;
- visit satisfaction, including shore tour, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation; and
- demographic characteristics, including country of residence, age group, income, etc.

Combining the expenditure data collected from the passenger and crew surveys with data on expenditures by cruise lines for port fees and services, payments to local tour operators for passenger shore excursions purchased onboard the cruise ships, and other provisions purchased locally by the cruise lines, estimates of total cruise tourism expenditures were developed for each participating destination.

Given the direct spending estimates, the economic contribution of these expenditures, as measured by employment and wage income were then estimated for each destination. This process began with the collection of economic data for each destination from a combination of local, regional and international sources. Utilizing all of these data a set of economic impact models were developed for each destination to estimate the direct and total employment and wage impacts. A more detailed description of these models is provided in the **Data and Methods** section of Volume I.

[93] Surveys were conducted on the ships of the following cruise lines: Azamara Cruises, Carnival Cruise Lines, Celebrity Cruises, Disney Cruise Line, Holland America Line, MSC Cruises (USA), Inc., Norwegian Cruise Line, Princess Cruises, P&O Cruises and Royal Caribbean International.

Cruise Tourism Expenditures

Cruise tourism expenditures in destination ports are composed of a broad range of spending including:

- onshore expenditures by passengers which tend to be concentrated in shore excursions and retail purchases of clothing, jewelry and local crafts and souvenirs;
- onshore expenditures by crew which are generally concentrated in purchases of food and beverages, local transportation and retail purchases of clothing and electronics;
- expenditures by cruise lines for port services, such as dockage fees and linesmen, utilities, such as water and power and navigation services; and
- purchases of supplies, such as food and other stores, by the cruise lines from local businesses.

According to data obtained from the Ministry of Tourism, 146,666 cruise passengers arrived aboard cruise ships during the 2008/2009 cruise year.[94] Of these, an estimated 124,666 passengers (85 percent) disembarked and visited St. Vincent and the Grenadines. Utilizing additional data provided by the visiting cruise lines, we have estimated that 66,213 crew were aboard the cruise ships and that 30 percent, or 19,864 crew, disembarked and visited St. Vincent and the Grenadines. These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **$6.8 million** ($US) in cruise tourism expenditures in St. Vincent and the Grenadines during the 2008/2009 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Table 126 – Estimated Passenger Spending ($US) in St. Vincent and the Grenadines, 2008/2009 Cruise Year[95]

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
F&B at Restaurants & Bars	$ 15.60	50%	$ 7.88
Shore Excursions	$ 71.22	49%	$ 34.83
Local Crafts & Souvenirs	$ 16.50	33%	$ 5.50
Taxis/Ground Transportation	$ 33.30	28%	$ 9.42
Clothing	$ 32.30	20%	$ 6.62
Other Purchases	$ 38.09	15%	$ 5.68
Retail Purchases of Liquor	$ 13.30	7%	$ 0.88
Watches & Jewelry	$ 91.90	3%	$ 2.57
Telephone & Internet	$ 6.40	2%	$ 0.11
Entertainment/Night Clubs	$ 17.00	1%	$ 0.11
Perfumes & Cosmetics	$ 14.60	1%	$ 0.09
Electronics	$ 10.20	0%	$ 0.02
Total Spend per Cruise Party			$ 73.71
Average Size of a Cruise Party			2.2
Total Spend per Cruise Passenger			$ 33.50
Cruise Passenger Visits			124,666
Total Cruise Passenger Expenditures			$ 4,176,356

[94] The 2008/2009 cruise year includes the twelve months beginning in May, 2008 and ending in April, 2009.
[95] The average shore excursion expenditure is a weighted average of the onshore and Internet purchases and the portion of the onboard purchases paid to local tour operators.

Per passenger spending estimates were derived from the 605 surveys completed by passengers that went ashore during the survey period. As shown in **Table 126,** each passenger cruise party spent an average of $73.71 in St. Vincent and the Grenadines. The average spend per cruise party is the sum of the weighted spending in each of the twelve categories. For example, 50 percent of the survey respondents reported spending an average of $15.60 at local restaurants and/or bars. Spread over the 605 cruise parties that visited St. Vincent and the Grenadines, this represents an average of $7.88 per party. On a per passenger basis, the average total expenditure was $33.50. This represents the sum of per party expenditures, $73.71, divided by the average size of a cruise party in St. Vincent and the Grenadines, 2.2 passengers.

For the entire 2008/2009 cruise year, the estimated 124,666 cruise passengers who visited St. Vincent and the Grenadines spent a total of **$4.2 million** ($US).

Per crew spending estimates were derived from the 176 surveys completed by crew members during the survey period. As shown in **Table 127**, crew members made limited purchases on the island. Each crew member spent an average of $17.61 in St. Vincent and the Grenadines. The average spend per crew member is the sum of the weighted spending in each of the five categories. For example, 50 percent of the survey respondents reported spending an average of $14.20 for ground transportation. Spread over all the crew members that visited St. Vincent and the Grenadines, this represents an average of $7.10 per crew member.

For the entire 2008/2009 cruise year, the estimated 19,864 crew who visited St. Vincent and the Grenadines spent an estimated total of **$0.35 million** ($US).

Table 127 – Estimated Crew Spending ($US) in St. Vincent and the Grenadines, 2008/2009 Cruise Year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
Taxis/Ground Transportation	$ 14.20	50%	$ 7.10
Watches & Jewelry	$ 14.60	40%	$ 5.84
Entertainment/Night Clubs	$ 17.00	15%	$ 2.55
Retail Purchases of Liquor	$ 17.50	10%	$ 1.75
Other Purchases	$ 7.30	5%	$ 0.37
Local Crafts & Souvenirs	$ 0.00	0 %	$ 0.00
Clothing	$ 0.00	0 %	$ 0.00
Telephone & Internet	$ 0.00	0 %	$ 0.00
Perfumes & Cosmetics	$ 0.00	0 %	$ 0.00
F&B at Restaurants & Bars	$ 0.00	0 %	$ 0.00
Electronics	$ 0.00	0 %	$ 0.00
Shore Excursions	$ 0.00	0 %	$ 0.00
Total Spend per Crew			**$ 17.61**
Cruise Passenger Visits			19,864
Total Cruise Passenger Expenditures			**$ 349,803**

Cruise lines made payments to local businesses for a variety of goods and services. Net payments to local vendors for shore excursions have been included with passenger expenditures. However, cruise lines made other local expenditures, including payments for port fees and taxes, navigation services, utilities and other supplies. Based upon data provided by the FCCA member cruise lines, we estimated that all cruise lines spent **$2.3 million** ($US) in St. Vincent and the Grenadines during the 2008/2009 cruise year. Essentially all of these expenditures were payments for port fees and taxes and navigation services.

Economic Contribution of Cruise Tourism Expenditures

As noted in the **Data and Methods** section of the full report, a set of economic impact models were developed for each destination to produce estimates of the economic contribution of cruise tourism. Data for these models were collected from a broad range of local, regional and international sources. The impact models were designed to reflect the economic structure of each destination, including the industrial composition of Gross Domestic Product (GDP), the wage share of GDP by industry and average employee wages by industry.

Table 128 – Total Economic Contribution of Cruise Tourism in St. Vincent and the Grenadines 2008/2009 Cruise Year

	Employment	Wage Income ($US Millions)
Direct Economic Contribution	105	$1.0
Total Economic Contribution	159	$1.5

As shown in **Table 128**, the $6.8 million in total cruise tourism expenditures generated direct employment of 105 residents of St. Vincent and the Grenadines paying $1.0 million in annual wages. Adding the indirect contribution that results from the spending of those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures generated a total employment contribution of 159 jobs and $1.5 million in wage income in St. Vincent and the Grenadines during the 2008/2009 cruise year.

Figure 85 – Total Employment Impacts by Sector - St. Vincent and the Grenadines

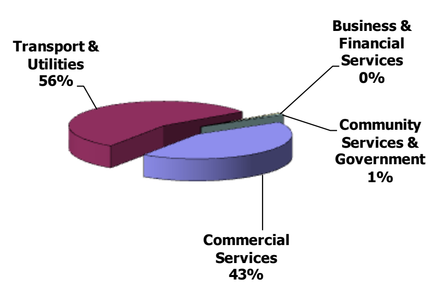
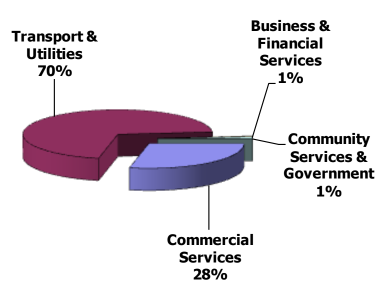


Figure 86 – Total Wage Impacts by Sector St. Vincent and the Grenadines



As shown in **Figures 85 and 86**, the total employment and wage impacts of cruise tourism are concentrated in the commercial and transport sectors which account for about 98 percent of the employment and wage impacts.[96] This is not surprising since the direct impacts account for about 65 percent of the total employment impacts and that virtually all of the cruise tourism expenditures are made with businesses in these sectors. Because of the relatively higher wages in the transport sector compared to the other sectors of the economy, the transport sector accounts for 70 percent of the wage impacts but only 56 percent of the employment impacts. The remainder of the total employment and wage impacts was generated by the indirect spending in the other sectors of the economy.

Passenger Surveys

A total of 864 passenger surveys were completed and returned for tabulation. **Table 129** shows the major attributes of passenger visits in St. Vincent and the Grenadines as derived from the passenger surveys.

- Of the 864 cruise parties that completed the surveys 86% stated that this had been their first visit to St. Vincent and the Grenadines.
- Eighty-six percent (86%) of the cruise parties that completed the surveys disembarked their cruise ship to visit St. Vincent and the Grenadines.

Table 129 - Major Attributes of Passenger Surveys - St. Vincent and the Grenadines

	Number	Percent
Total Respondents	864	
Number Making First Visit	742	85.9%
Number Ashore	605	70.0%
Number Making Onshore Purchases:	463	76.5%
Average Hours Ashore	3.4	
Average Size of Expenditure Party (Persons)	2.2	
Average Onshore Expenditure per Party	$39	
Purchased a Shore Excursion (Tour)	296	48.9%
Purchased Onshore Tour from:		
Cruise Line	232	78.4%
Onshore from Tour Operator	60	20.3%
Travel Agent	4	1.4%
Average Cost of Shore Excursion per Party	$103	
Toured On Own/Did not Tour	309	

[96] The industry sectors include the following activities:
Manufacturing & Construction: residential and nonresidential construction and all manufacturing
Commercial Services: wholesale and retail trade, lodging and eating and drinking establishments
Transportation & Utilities: tour operators, port services, telecommunications and water and power utilities
Business & Financial Services: banking, insurance, legal, accounting, leasing and other business services
Community Services & Government: education, health and social services and government agencies

- Of the cruise parties that went ashore, 76% made at least one purchase while ashore. The typical cruise party consisted of 2.2 passengers and spent an average of 3.4 hours ashore.

- The responding cruise parties reported spending an average of $39 while ashore (excludes shore excursions).

- Forty-nine percent (49%) of the passengers that went ashore purchased a shore excursion. Seventy-eight percent (78%) of passengers who purchased a tour did so through their cruise line, 20% purchased their tour onshore and just under 2 percent purchased their tour through their travel agent.

- The typical cruise party that purchased a shore excursion spent $103 for their tour.

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Table 130**. A 10-point scale was used with 10 being the highest score, i.e., extremely satisfied, and 1 being the lowest score, i.e., not at all satisfied.

Table 130 – Passenger Visit Satisfaction* - St. Vincent and the Grenadines

Visit Attributes	Mean Score
Overall Visit	6.7
Visit Met Expectations	6.3
Likelihood of a Return Visit	3.7
Informed of Tours and Activities	7.5
Initial Shoreside Welcome	7.3
Guided Tour	8.8
Historic Sites/Museums	7.0
Variety of Things to See and Do	5.9
Friendliness of Residents	7.5
Overall Shopping Experience	5.0
Courtesy of Employees	7.3
Variety of Shops	4.7
Overall Prices	5.3
Taxis/Local Transportation	6.7

* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows:
Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3;
Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Cruise passengers were only somewhat satisfied with their overall visit to St. Vincent and the Grenadines with a mean score of 6.7. The visit scored even lower in terms of meeting expectations. The mean score for “Visit Met Expectations” was lower at 6.3.

- Passengers felt very informed about tours and onshore activities in St. Vincent and the Grenadines with a mean score of 7.5.
- "Guided Tours" (or Shore Excursions) received the highest score of all visit attributes with a mean score of 8.8. This was among the highest scores for shore excursions. Thus, cruise passengers were very satisfied with their shore excursions which were clearly the highlight of their visit.
- Passenger interactions with residents and store employees were very positive with "friendliness of residents" receiving a mean score of 7.5 and "courtesy of employees" having a mean score of 7.3.
- Categories with slightly lower scores but still above 7.0 (Very Satisfied) were: initial shoreside welcome and historic sites.
- Categories with average scores between 5.0 and 7.0 (Somewhat Satisfied) were given for variety of things to see and do, local transportation and the overall shopping experience, including the variety of shops and overall prices. Thus, while passengers thought shop employees were very courteous, the overall score for their shopping experience was brought down by lower perceptions on the variety of shops (4.7) and overall prices (5.3).
- Cruise passengers stated that they were not too likely to return to St. Vincent and the Grenadines for a land-based vacation.

Passenger Demographics

Residents of the United Kingdom accounted for 95 percent of the responding passengers. The average age of the respondents was 57 years with 33 percent of the respondents being 65 years of age or older. St. Vincent and the Grenadines passengers had an average household income of $80,000 with only 21 percent having over $100,000 in household income.

Figure 87 – Passenger Age
St. Vincent and the Grenadines

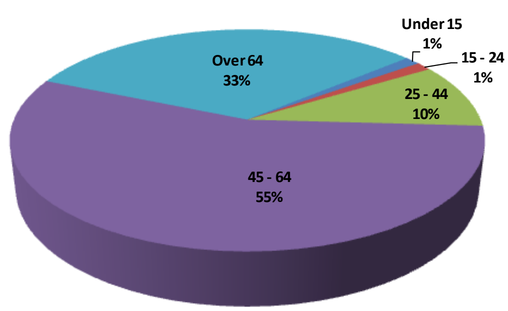
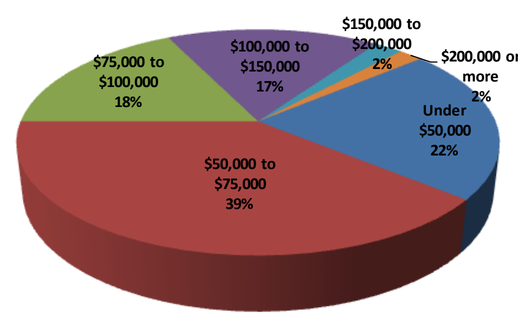


Figure 88 – Passenger Household Income
St. Vincent and the Grenadines



Trinidad and Tobago

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.[97] The surveys were undertaken during the six-month period beginning in November 2008 and ending in April 2009. The survey schedule was designed so that surveys were conducted by FCCA member cruise lines that called at each destination and that the distribution of passenger and crew surveys would reflect the distribution of passenger and crew arrivals by cruise line at each destination. On any given cruise itinerary, passenger and crew surveys were placed in all passenger cabins and crew quarters following a single destination call. The surveys were completed by the passengers and crew in the privacy of their quarters and returned to a designated office on the cruise ship. Thus, passengers and crew were only surveyed once during a cruise itinerary and for a single destination. On a subsequent itinerary, passengers were surveyed following a call at a different destination.

The passenger and crew surveys were designed to collect data for onshore spending and visit satisfaction by both passengers and crew. While the crew survey was slightly shorter than the passenger survey, both surveys were designed to collect the following information:

- hours spent ashore;
- expenditures by category, including shore tours, food & beverages, clothing, etc.;
- visit satisfaction, including shore tour, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation; and
- demographic characteristics, including country of residence, age group, income, etc.

Combining the expenditure data collected from the passenger and crew surveys with data on expenditures by cruise lines for port fees and services, payments to local tour operators for passenger shore excursions purchased onboard the cruise ships, and other provisions purchased locally by the cruise lines, estimates of total cruise tourism expenditures were developed for each participating destination.

Given the direct spending estimates, the economic contribution of these expenditures, as measured by employment and wage income were then estimated for each destination. This process began with the collection of economic data for each destination from a combination of local, regional and international sources. Utilizing all of these data a set of economic impact models were developed for each destination to estimate the direct and total employment and wage impacts. A more detailed description of these models is provided in the **Data and Methods** section of Volume I.

[97] Surveys were conducted on the ships of the following cruise lines: Azamara Cruises, Carnival Cruise Lines, Celebrity Cruises, Disney Cruise Line, Holland America Line, MSC Cruises (USA), Inc., Norwegian Cruise Line, Princess Cruises, P&O Cruises and Royal Caribbean International.

Cruise Tourism Expenditures

Cruise tourism expenditures in destination ports are composed of a broad range of spending including:

- onshore expenditures by passengers which tend to be concentrated in shore excursions and retail purchases of clothing, jewelry and local crafts and souvenirs;
- onshore expenditures by crew which are generally concentrated in purchases of food and beverages, local transportation and retail purchases of clothing and electronics;
- expenditures by cruise lines for port services, such as dockage fees and linesmen, utilities, such as water and power and navigation services; and
- purchases of supplies, such as food and other stores, by the cruise lines from local businesses.

According to data obtained from the Trinidad Tourism Development Company, 46,196 cruise passengers arrived aboard cruise ships during the 2008/2009 cruise year.[98] Of these, an estimated 39,267 passengers (85 percent) disembarked and visited Trinidad and Tobago. Utilizing additional data provided by the visiting cruise lines, we have estimated that 20,035 crew were aboard the cruise ships and that 35 percent, or 7,012 crew, disembarked and visited Trinidad and Tobago. These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **$2.9 million** ($US) in cruise tourism expenditures in Trinidad and Tobago during the 2008/2009 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Table 131 – Estimated Passenger Spending ($US) in Trinidad and Tobago, 2008/2009 Cruise Year[99]

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	$ 59.66	53%	$ 31.38
Local Crafts & Souvenirs	$ 17.60	49%	$ 8.68
Clothing	$ 26.80	27%	$ 7.12
F&B at Restaurants & Bars	$ 14.30	26%	$ 3.74
Other Purchases	$ 38.16	24%	$ 9.26
Taxis/Ground Transportation	$ 51.60	20%	$ 10.32
Retail Purchases of Liquor	$ 18.60	7%	$ 1.26
Watches & Jewelry	$ 364.50	6%	$ 20.00
Telephone & Internet	$ 11.90	2%	$ 0.20
Entertainment/Night Clubs	$ 6.30	1%	$ 0.04
Perfumes & Cosmetics	$ 35.60	1%	$ 0.44
Electronics	$ 17.50	1%	$ 0.10
Total Spend per Cruise Party			**$ 92.54**
Average Size of a Cruise Party			2.0
Total Spend per Cruise Passenger			**$ 46.27**
Cruise Passenger Visits			39,267
Total Cruise Passenger Expenditures			**$ 1,816,865**

[98] The 2008/2009 cruise year includes the twelve months beginning in May, 2008 and ending in April, 2009.
[99] The average shore excursion expenditure is a weighted average of the onshore and Internet purchases and the portion of the onboard purchases paid to local tour operators.

Per passenger spending estimates were derived from the 1,426 surveys completed by passengers that went ashore during the survey period. As shown in **Table 131,** each passenger cruise party spent an average of $92.54 in Trinidad and Tobago. The average spend per cruise party is the sum of the weighted spending in each of the twelve categories. For example, 26 percent of the survey respondents reported spending an average of $14.30 at local restaurants and/or bars. Spread over the 1,426 cruise parties that visited Trinidad and Tobago, this represents an average of $3.74 per party. On a per passenger basis, the average total expenditure was $46.27. This represents the sum of per party expenditures, $92.54, divided by the average size of a cruise party in Trinidad and Tobago, 2.0 passengers.

For the entire 2008/2009 cruise year, the estimated 39,267 cruise passengers who visited Trinidad and Tobago spent a total of **$1.8 million** ($US).

Per crew spending estimates were derived from the 386 surveys completed by crew members during the survey period. As shown in **Table 132,** each crew member spent an average of $66.95 in Trinidad and Tobago. The average spend per crew member is the sum of the weighted spending in each of the twelve categories. For example, 73 percent of the survey respondents reported spending an average of $21.90 for food and beverages. Spread over all the crew members that visited Trinidad and Tobago, this represents an average of $16.02 per crew member.

For the entire 2008/2009 cruise year, the estimated 7,012 crew who visited Trinidad and Tobago spent an estimated total of **$0.47 million** ($US).

Table 132 – Estimated Crew Spending ($US) in Trinidad and Tobago, 2008/2009 Cruise Year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	$ 21.90	73%	$ 16.02
Taxis/Ground Transportation	$ 14.20	37%	$ 5.26
Clothing	$ 44.00	21%	$ 9.17
Other Purchases	$ 44.60	17%	$ 7.64
Local Crafts & Souvenirs	$ 25.70	17%	$ 4.40
Telephone & Internet	$ 18.10	12%	$ 2.18
Watches & Jewelry	$ 225.90	6%	$ 12.55
Perfumes & Cosmetics	$ 46.00	5%	$ 2.13
Retail Purchases of Liquor	$ 27.90	4%	$ 1.16
Shore Excursions	$ 10.30	3%	$ 0.31
Electronics	$ 282.50	2%	$ 5.23
Entertainment/Night Clubs	$ 48.80	2%	$ 0.90
Total Spend per Crew			$ 66.95
Cruise Passenger Visits			7,012
Total Cruise Passenger Expenditures			$ 469,470

Cruise lines made payments to local businesses for a variety of goods and services. Net payments to local vendors for shore excursions have been included with passenger expenditures. However, cruise lines made other local expenditures, including payments for port fees and taxes, navigation services, utilities and other supplies. Based upon data provided by

the FCCA member cruise lines, we estimated that all cruise lines spent **$0.6 million** ($US) in Trinidad and Tobago during the 2008/2009 cruise year. Essentially all of these expenditures were payments for port fees and taxes and navigation services.

Economic Contribution of Cruise Tourism Expenditures

As noted in the **Data and Methods** section of the full report, a set of economic impact models were developed for each destination to produce estimates of the economic contribution of cruise tourism. Data for these models were collected from a broad range of local, regional and international sources. The impact models were designed to reflect the economic structure of each destination, including the industrial composition of Gross Domestic Product (GDP), the wage share of GDP by industry and average employee wages by industry.

Table 133 – Total Economic Contribution of Cruise Tourism in Trinidad and Tobago 2008/2009 Cruise Year

	Employment	Wage Income ($US Millions)
Direct Economic Contribution	93	$1.0
Total Economic Contribution	143	$1.6

As shown in **Table 133**, the $2.9 million in total cruise tourism expenditures generated direct employment of 93 residents of Trinidad and Tobago paying $1.0 million in annual wages. Adding the indirect contribution that results from the spending of those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures generated a total employment contribution of 143 jobs and $1.6 million in wage income in Trinidad and Tobago during the 2008/2009 cruise year.

Figure 89 – Total Employment Impacts by Sector - Trinidad and Tobago

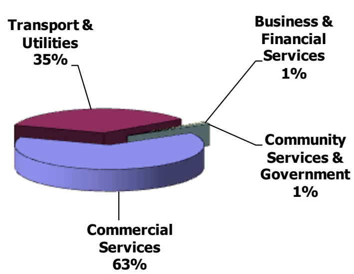
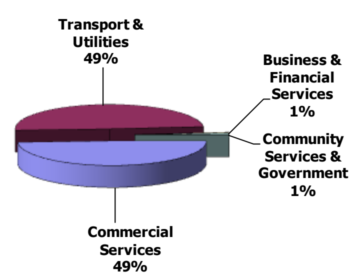


Figure 90 – Total Wage Impacts by Sector Trinidad and Tobago



As shown in **Figures 89 and 90**, the total employment and wage impacts of cruise tourism are concentrated in the commercial and transport sectors which account for about 98 percent of the employment and wage impacts.[100] This is not surprising since the direct impacts account for about 65 percent of the total employment impacts and that virtually all of the cruise tourism expenditures are made with businesses in these sectors. Because of the relatively higher wages in the transport sector compared to the other sectors of the economy, the transport sector accounts for 49 percent of the wage impacts but only 35 percent of the employment impacts. The remainder of the total employment and wage impacts was generated by the indirect spending in the other sectors of the economy.

Passenger Surveys

A total of 1,611 passenger surveys were completed and returned for tabulation. **Table 134** shows the major attributes of passenger visits in Trinidad and Tobago as derived from the passenger surveys.

- Of the 1,611 cruise parties that completed the surveys 82% stated that this had been their first visit to Trinidad and Tobago.
- Eighty-eight percent (88%) of the cruise parties that completed the surveys disembarked their cruise ship to visit Trinidad and Tobago.

Table 134 - Major Attributes of Passenger Surveys - Trinidad and Tobago

	Number	Percent
Total Respondents	1,611	
Number Making First Visit	1,319	81.9%
Number Ashore	1,426	88.5%
Number Making Onshore Purchases:	820	57.5%
Average Hours Ashore	3.6	
Average Size of Expenditure Party (Persons)	2.0	
Average Onshore Expenditure per Party	$61	
Purchased a Shore Excursion (Tour)	750	52.6%
Purchased Onshore Tour from:		
Cruise Line	571	76.1%
Onshore from Tour Operator	153	20.4%
Travel Agent	26	3.5%
Average Cost of Shore Excursion per Party	$98	
Toured On Own/Did not Tour	676	

[100] The industry sectors include the following activities:
Manufacturing & Construction: residential and nonresidential construction and all manufacturing
Commercial Services: wholesale and retail trade, lodging and eating and drinking establishments
Transportation & Utilities: tour operators, port services, telecommunications and water and power utilities
Business & Financial Services: banking, insurance, legal, accounting, leasing and other business services
Community Services & Government: education, health and social services and government agencies

- Of the cruise parties that went ashore, 58% made at least one purchase while ashore. The typical cruise party consisted of 2.0 passengers and spent an average of 3.6 hours ashore.

- The responding cruise parties reported spending an average of $61 while ashore (excludes shore excursions).

- Fifty-three percent (53%) of the passengers that went ashore purchased a shore excursion. Seventy-six percent (76%) of passengers who purchased a tour did so through their cruise line, 20% purchased their tour onshore and nearly 4 percent purchased their tour through their travel agent.

- The typical cruise party that purchased a shore excursion spent $98 for their tour.

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Table 135**. A 10-point scale was used with 10 being the highest score, i.e., extremely satisfied, and 1 being the lowest score, i.e., not at all satisfied.

Table 135 – Passenger Visit Satisfaction* - Trinidad and Tobago

Visit Attributes	Mean Score
Overall Visit	6.5
Visit Met Expectations	6.0
Likelihood of a Return Visit	3.2
Informed of Tours and Activities	7.1
Initial Shoreside Welcome	7.3
Guided Tour	7.7
Historic Sites/Museums	6.6
Variety of Things to See and Do	5.9
Friendliness of Residents	7.7
Overall Shopping Experience	5.1
Courtesy of Employees	7.4
Variety of Shops	4.8
Overall Prices	5.7
Taxis/Local Transportation	7.1

* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows: Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3; Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Cruise passengers were only somewhat satisfied with their overall visit to Trinidad and Tobago with a mean score of 6.5. The visit scored even lower in terms of meeting expectations. The mean score for "Visit Met Expectations" was lower at 6.0.

- Passengers felt very informed about tours and onshore activities in Trinidad and Tobago with a mean score of 7.1.

- "Guided Tours" (or Shore Excursions) received the highest score of all visit attributes with a mean score of 7.7. Thus, cruise passengers were very satisfied with their shore excursions which were clearly the highlight of their visit.
- Passenger interactions with residents and store employees were very positive with "friendliness of residents" receiving a mean score of 7.7 and "courtesy of employees" having a mean score of 7.4.
- Categories with slightly lower scores but still above 7.0 (Very Satisfied) were: initial shoreside welcome and local transportation.
- Categories with average scores between 5.0 and 7.0 (Somewhat Satisfied) were given for historic sites, variety of things to see and do and the overall shopping experience, including the variety of shops and overall prices. Thus, while passengers thought shop employees were very courteous, the overall score for their shopping experience was brought down by lower perceptions on the variety of shops (4.8) and overall prices (5.7).
- Cruise passengers stated that they were not too likely to return to Trinidad and Tobago for a land-based vacation.

Passenger Demographics

Residents of the United Kingdom accounted for 39 percent of the responding passengers with residents of the United States accounting for 45 percent. The average age of the respondents was 61 years with 50 percent of the respondents being 65 years of age or older. Trinidad and Tobago passengers had an average household income of $105,100 with 39 percent having over $100,000 in household income.

Figure 91 – Passenger Age Trinidad and Tobago

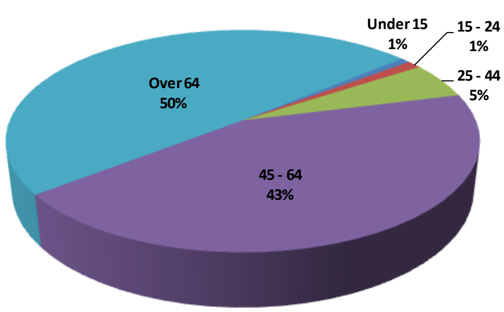
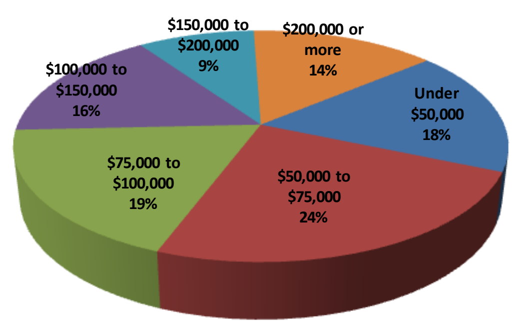


Figure 92 – Passenger Household Income Trinidad and Tobago



Turks and Caicos

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.[101] The surveys were undertaken during the six-month period beginning in November 2008 and ending in April 2009. The survey schedule was designed so that surveys were conducted by FCCA member cruise lines that called at each destination and that the distribution of passenger and crew surveys would reflect the distribution of passenger and crew arrivals by cruise line at each destination. On any given cruise itinerary, passenger and crew surveys were placed in all passenger cabins and crew quarters following a single destination call. The surveys were completed by the passengers and crew in the privacy of their quarters and returned to a designated office on the cruise ship. Thus, passengers and crew were only surveyed once during a cruise itinerary and for a single destination. On a subsequent itinerary, passengers were surveyed following a call at a different destination.

The passenger and crew surveys were designed to collect data for onshore spending and visit satisfaction by both passengers and crew. While the crew survey was slightly shorter than the passenger survey, both surveys were designed to collect the following information:

- hours spent ashore;
- expenditures by category, including shore tours, food & beverages, clothing, etc.;
- visit satisfaction, including shore tour, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation; and
- demographic characteristics, including country of residence, age group, income, etc.

Combining the expenditure data collected from the passenger and crew surveys with data on expenditures by cruise lines for port fees and services, payments to local tour operators for passenger shore excursions purchased onboard the cruise ships, and other provisions purchased locally by the cruise lines, estimates of total cruise tourism expenditures were developed for each participating destination.

Given the direct spending estimates, the economic contribution of these expenditures, as measured by employment and wage income were then estimated for each destination. This process began with the collection of economic data for each destination from a combination of local, regional and international sources. Utilizing all of these data a set of economic impact models were developed for each destination to estimate the direct and total employment and wage impacts. A more detailed description of these models is provided in the **Data and Methods** section of Volume I.

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[101] Surveys were conducted on the ships of the following cruise lines: Azamara Cruises, Carnival Cruise Lines, Celebrity Cruises, Disney Cruise Line, Holland America Line, MSC Cruises (USA), Inc., Norwegian Cruise Line, Princess Cruises, P&O Cruises and Royal Caribbean International.

Cruise Tourism Expenditures

Cruise tourism expenditures in destination ports are composed of a broad range of spending including:

- onshore expenditures by passengers which tend to be concentrated in shore excursions and retail purchases of clothing, jewelry and local crafts and souvenirs;
- onshore expenditures by crew which are generally concentrated in purchases of food and beverages, local transportation and retail purchases of clothing and electronics;
- expenditures by cruise lines for port services, such as dockage fees and linesmen, utilities, such as water and power and navigation services; and
- purchases of supplies, such as food and other stores, by the cruise lines from local businesses.

According to data obtained from Ministry of Tourism, 325,958 cruise passengers arrived aboard cruise ships during the 2008/2009 cruise year.[102] Of these, an estimated 277,064 passengers (85 percent) disembarked and visited the Turks and Caicos. Utilizing additional data provided by the visiting cruise lines, we have estimated that 144,213 crew were aboard the cruise ships and that 40 percent, or 57,685 crew, disembarked and visited the Turks and Caicos. These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **$25.1 million** ($US) in cruise tourism expenditures in the Turks and Caicos during the 2008/2009 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Table 136 – Estimated Passenger Spending ($US) in the Turks and Caicos, 2008/2009 Cruise Year[103]

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
F&B at Restaurants & Bars	$ 34.90	55%	$ 19.09
Clothing	$ 55.60	50%	$ 28.10
Local Crafts & Souvenirs	$ 25.90	37%	$ 9.62
Shore Excursions	$ 94.55	31%	$ 29.41
Watches & Jewelry	$ 176.50	20%	$ 35.97
Other Purchases	$ 45.67	16%	$ 7.52
Taxis/Ground Transportation	$ 31.50	12%	$ 3.61
Retail Purchases of Liquor	$ 38.00	12%	$ 4.39
Perfumes & Cosmetics	$ 50.50	5%	$ 2.33
Telephone & Internet	$ 25.90	1%	$ 0.19
Entertainment/Night Clubs	$ 85.80	1%	$ 0.53
Electronics	$ 106.20	0%	$ 0.42
Total Spend per Cruise Party			$ 141.18
Average Size of a Cruise Party			2.1
Total Spend per Cruise Passenger			$ 67.22
Cruise Passenger Visits			277,064
Total Cruise Passenger Expenditures			$ 18,624,968

[102] The 2008/2009 cruise year includes the twelve months beginning in May, 2008 and ending in April, 2009.
[103] The average shore excursion expenditure is a weighted average of the onshore and Internet purchases and the portion of the onboard purchases paid to local tour operators.

Per passenger spending estimates were derived from the 1,831 surveys completed by passengers that went ashore during the survey period. As shown in **Table 136,** each passenger cruise party spent an average of $141.18 in the Turks and Caicos. The average spend per cruise party is the sum of the weighted spending in each of the twelve categories. For example, 55 percent of the survey respondents reported spending an average of $34.90 at local restaurants and/or bars. Spread over the 1,831 cruise parties that visited the Turks and Caicos, this represents an average of $19.09 per party. On a per passenger basis, the average total expenditure was $67.22. This represents the sum of per party expenditures, $141.18, divided by the average size of a cruise party in the Turks and Caicos, 2.1 passengers.

For the entire 2008/2009 cruise year, the estimated 277,064 cruise passengers who visited the Turks and Caicos spent a total of **$18.6 million** ($US).

An insufficient number of crew surveys was collected in the Turks and Caicos. As a consequence per crew spending estimates were estimated for the Turks and Caicos using responses from four similarly sized destinations in the eastern Caribbean: Antigua, Dominica, Grenada and St. Kitts. Based upon these data, and as shown in **Table 137,** crew members were estimated to have spent an average of $61.00 in the Turks and Caicos. The average spend per crew member is the sum of the weighted spending in each of the twelve categories. For example, 67 percent of the survey respondents reported spending an average of $24.18 for food and beverages. Spread over all the crew members that visited the Turks and Caicos, this represents an average of $16.19 per crew member.

For the entire 2008/2009 cruise year, the estimated, 57,865 crew who visited the Turks and Caicos spent an estimated total of **$3.5 million** ($US).

Table 137 – Estimated Crew Spending ($US) in the Turks and Caicos, 2008/2009 Cruise Year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	$ 24.18	67%	$ 16.19
Taxis/Ground Transportation	$ 14.12	23%	$ 3.26
Clothing	$ 50.86	16%	$ 8.26
Local Crafts & Souvenirs	$ 16.77	15%	$ 2.54
Other Purchases	$ 46.63	10%	$ 4.77
Perfumes & Cosmetics	$ 49.97	9%	$ 4.41
Telephone & Internet	$ 11.02	8%	$ 0.86
Shore Excursions	$ 20.87	7%	$ 1.47
Entertainment/Night Clubs	$ 197.40	5%	$ 9.95
Watches & Jewelry	$ 126.63	4%	$ 5.68
Retail Purchases of Liquor	$ 21.34	3%	$ 0.66
Electronics	$ 150.30	2%	$ 2.95
Total Spend per Crew			**$ 61.00**
Cruise Passenger Visits			57,865
Total Cruise Passenger Expenditures			**$ 3,529,765**

Cruise lines made payments to local businesses for a variety of goods and services. Net payments to local vendors for shore excursions have been included with passenger expenditures. However, cruise lines made other local expenditures, including payments for port fees and taxes, navigation services, utilities and other supplies. Based upon data provided by the FCCA member cruise lines, we estimated that all cruise lines spent **$3.0 million** ($US) in The Turks and Caicos during the 2008/2009 cruise year. Essentially all of these expenditures were payments for port fees and taxes and navigation services.

Economic Contribution of Cruise Tourism Expenditures

As noted in the **Data and Methods** section of the full report, a set of economic impact models were developed for each destination to produce estimates of the economic contribution of cruise tourism. Data for these models were collected from a broad range of local, regional and international sources. The impact models were designed to reflect the economic structure of each destination, including the industrial composition of Gross Domestic Product (GDP), the wage share of GDP by industry and average employee wages by industry.

Table 138 – Total Economic Contribution of Cruise Tourism in the Turks and Caicos 2008/2009 Cruise Year

	Employment	Wage Income ($US Millions)
Direct Economic Contribution	304	$4.9
Total Economic Contribution	473	$7.7

As shown in **Table 138**, the $25.1 million in total cruise tourism expenditures generated direct employment of 304 residents of the Turks and Caicos paying $4.9 million in annual wages. Adding the indirect contribution that results from the spending of those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures generated a total employment contribution of 473 jobs and $7.7 million in wage income in The Turks and Caicos during the 2008/2009 cruise year.

Figure 93 – Total Employment Impacts by Sector - The Turks and Caicos

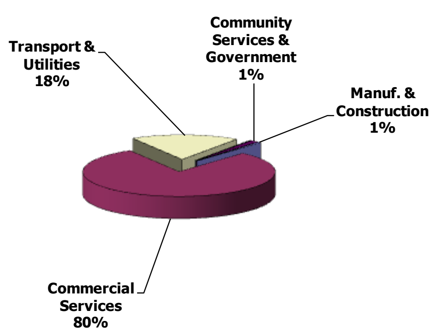
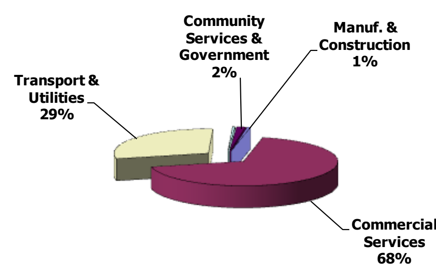


Figure 94 – Total Wage Impacts by Sector The Turks and Caicos



As shown in **Figures 93 and 94**, the total employment and wage impacts of cruise tourism are concentrated in the commercial and transport sectors which account for about 98 percent of the employment and wage impacts.[104] This is not surprising since the direct impacts account for about 65 percent of the total employment impacts and that virtually all of the cruise tourism expenditures are made with businesses in these sectors. Because of the relatively higher wages in the transport sector compared to the other sectors of the economy, the transport sector accounts for 29 percent of the wage impacts but only 18 percent of the employment impacts. The remainder of the total employment and wage impacts was generated by the indirect spending in the other sectors of the economy.

Passenger Surveys

A total of 1,923 passenger surveys were completed and returned for tabulation. **Table 139** shows the major attributes of passenger visits in the Turks and Caicos as derived from the passenger surveys.

- Of the 1,923 cruise parties that completed the surveys 86% stated that this had been their first visit to the Turks and Caicos.
- Ninety-five percent (95%) of the cruise parties that completed the surveys disembarked their cruise ship to visit the Turks and Caicos.

Table 139 - Major Attributes of Passenger Surveys - The Turks and Caicos

	Number	Percent
Total Respondents	1,923	
Number Making First Visit	1,663	86.5%
Number Ashore	1,831	95.2%
Number Making Onshore Purchases:	1,300	71.0%
Average Hours Ashore	3.5	
Average Size of Expenditure Party (Persons)	2.1	
Average Onshore Expenditure per Party	$110	
Purchased a Shore Excursion (Tour)	570	31.1%
Purchased Onshore Tour from:		
Cruise Line	452	79.3%
Onshore from Tour Operator	77	13.5%
Travel Agent	41	7.2%
Average Cost of Shore Excursion per Party	$135	
Toured On Own/Did not Tour	676	

[104] The industry sectors include the following activities:
Manufacturing & Construction: residential and nonresidential construction and all manufacturing
Commercial Services: wholesale and retail trade, lodging and eating and drinking establishments
Transportation & Utilities: tour operators, port services, telecommunications and water and power utilities
Business & Financial Services: banking, insurance, legal, accounting, leasing and other business services
Community Services & Government: education, health and social services and government agencies

- Of the cruise parties that went ashore, 71% made at least one purchase while ashore. The typical cruise party consisted of 2.1 passengers and spent an average of 3.5 hours ashore.

- The responding cruise parties reported spending an average of $110 while ashore (excludes shore excursions).

- Thirty-one percent (31%) of the passengers that went ashore purchased a shore excursion. Seventy-nine percent (79%) of passengers who purchased a tour did so through their cruise line, 14% purchased their tour onshore and 7 percent purchased their tour through their travel agent.

- The typical cruise party that purchased a shore excursion spent $135 for their tour.

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Table 140**. A 10-point scale was used with 10 being the highest score, i.e., extremely satisfied, and 1 being the lowest score, i.e., not at all satisfied.

Table 140 – Passenger Visit Satisfaction* - The Turks and Caicos

Visit Attributes	Mean Score
Overall Visit	6.9
Visit Met Expectations	6.3
Likelihood of a Return Visit	4.1
Informed of Tours and Activities	7.0
Initial Shoreside Welcome	7.6
Guided Tour	7.7
Historic Sites/Museums	5.7
Variety of Things to See and Do	5.3
Friendliness of Residents	7.7
Overall Shopping Experience	6.5
Courtesy of Employees	7.7
Variety of Shops	6.2
Overall Prices	5.8
Taxis/Local Transportation	6.5

* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows:
Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3; Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Cruise passengers were only somewhat satisfied with their overall visit to the Turks and Caicos with a mean score of 6.9. The visit scored even lower in terms of meeting expectations. The mean score for "Visit Met Expectations" was lower at 6.3.

- Passengers felt very informed about tours and onshore activities in the Turks and Caicos with a mean score of 7.0.

- "Guided Tours" (or Shore Excursions) received the highest score of all visit attributes with a mean score of 7.7. Thus, cruise passengers were very satisfied with their shore excursions.
- Passenger interactions with residents and store employees were very positive with "friendliness of residents" and "courtesy of employees" with each having a mean score of 7.7.
- Cruise passengers were very satisfied with their initial shoreside welcome which received a mean score of 7.6.
- Categories with average scores between 5.0 and 7.0 (Somewhat Satisfied) were given for historic sites, variety of things to see and do, local transportation and the overall shopping experience, including the variety of shops and overall prices. Thus, while passengers thought shop employees were very courteous, the overall score for their shopping experience was brought down by lower perceptions on the variety of shops (6.2) and overall prices (5.8).
- Cruise passengers stated that they were not too likely to return to the Turks and Caicos for a land-based vacation.

Passenger Demographics

Residents of the United States and Canada accounted for 95 percent of the respondents. The average age of the respondents was 54 years with 30 percent of the respondents being 65 years of age or older. The Turks and Caicos passengers had an average household income of $101,700 with 40 percent having over $100,000 in household income.

Figure 95 – Passenger Age
The Turks and Caicos

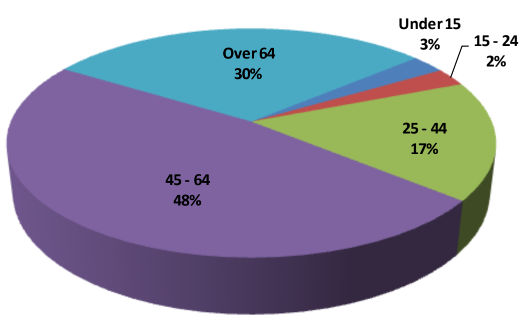
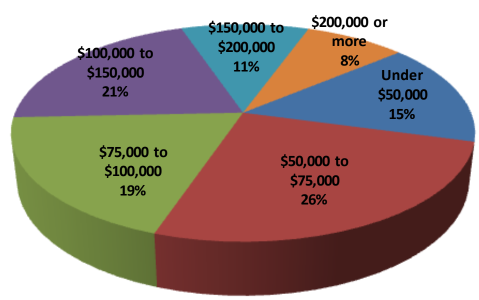


Figure 96 – Passenger Household Income
The Turks and Caicos



U.S. Virgin Islands

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.[105] The surveys were undertaken during the six-month period beginning in November 2008 and ending in April 2009. The survey schedule was designed so that surveys were conducted by FCCA member cruise lines that called at each destination and that the distribution of passenger and crew surveys would reflect the distribution of passenger and crew arrivals by cruise line at each destination. On any given cruise itinerary, passenger and crew surveys were placed in all passenger cabins and crew quarters following a single destination call. The surveys were completed by the passengers and crew in the privacy of their quarters and returned to a designated office on the cruise ship. Thus, passengers and crew were only surveyed once during a cruise itinerary and for a single destination. On a subsequent itinerary, passengers were surveyed following a call at a different destination.

The passenger and crew surveys were designed to collect data for onshore spending and visit satisfaction by both passengers and crew. While the crew survey was slightly shorter than the passenger survey, both surveys were designed to collect the following information:

- hours spent ashore;
- expenditures by category, including shore tours, food & beverages, clothing, etc.;
- visit satisfaction, including shore tour, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation; and
- demographic characteristics, including country of residence, age group, income, etc.

Combining the expenditure data collected from the passenger and crew surveys with data on expenditures by cruise lines for port fees and services, payments to local tour operators for passenger shore excursions purchased onboard the cruise ships, and other provisions purchased locally by the cruise lines, estimates of total cruise tourism expenditures were developed for each participating destination.

Given the direct spending estimates, the economic contribution of these expenditures, as measured by employment and wage income were then estimated for each destination. This process began with the collection of economic data for each destination from a combination of local, regional and international sources. Utilizing all of these data a set of economic impact models were developed for each destination to estimate the direct and total employment and wage impacts. A more detailed description of these models is provided in the **Data and Methods** section of Volume I.

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[105] Surveys were conducted on the ships of the following cruise lines: Azamara Cruises, Carnival Cruise Lines, Celebrity Cruises, Disney Cruise Line, Holland America Line, MSC Cruises (USA), Inc., Norwegian Cruise Line, Princess Cruises, P&O Cruises and Royal Caribbean International.

Cruise Tourism Expenditures

Cruise tourism expenditures in destination ports are composed of a broad range of spending including:

- onshore expenditures by passengers which tend to be concentrated in shore excursions and retail purchases of clothing, jewelry and local crafts and souvenirs;
- onshore expenditures by crew which are generally concentrated in purchases of food and beverages, local transportation and retail purchases of clothing and electronics;
- expenditures by cruise lines for port services, such as dockage fees and linesmen, utilities, such as water and power and navigation services; and
- purchases of supplies, such as food and other stores, by the cruise lines from local businesses.

According to data obtained from the CTO and FCCA, an estimated 1.75 million cruise passengers arrived aboard cruise ships during the 2008/2009 cruise year.[106] Of these, an estimated 1.58 million passengers (90 percent) disembarked and visited U.S. Virgin Islands. Utilizing additional data provided by the visiting cruise lines, we have estimated that 672,177 crew were aboard the cruise ships and that 50 percent, or 336,089 crew, disembarked and visited the U.S. Virgin Islands. These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **$384.4 million** ($US) in cruise tourism expenditures in the U.S. Virgin Islands during the 2008/2009 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Table 141 – Estimated Passenger Spending ($US) in the U.S. Virgin Islands, 2008/2009 Cruise Year[107]

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Clothing	$ 55.30	54%	$ 29.76
Taxis/Ground Transportation	$ 25.70	54%	$ 13.78
Shore Excursions	$ 70.81	51%	$ 36.25
F&B at Restaurants & Bars	$ 30.40	46%	$ 14.11
Watches & Jewelry	$ 655.80	39%	$ 258.62
Local Crafts & Souvenirs	$ 34.60	36%	$ 12.29
Other Purchases	$ 76.99	21%	$ 15.90
Retail Purchases of Liquor	$ 59.20	20%	$ 11.61
Perfumes & Cosmetics	$ 71.60	9%	$ 6.36
Electronics	$ 174.20	3%	$ 5.40
Telephone & Internet	$ 12.30	2%	$ 0.23
Entertainment/Night Clubs	$ 107.20	1%	$ 1.47
Total Spend per Cruise Party			$ 405.78
Average Size of a Cruise Party			2.1
Total Spend per Cruise Passenger			$ 193.22
Cruise Passenger Visits			1,575,000
Total Cruise Passenger Expenditures			$ 304,327,541

[106] The 2008/2009 cruise year includes the twelve months beginning in May, 2008 and ending in April, 2009.
[107] The average shore excursion expenditure is a weighted average of the onshore and Internet purchases and the portion of the onboard purchases paid to local tour operators.

Per passenger spending estimates were derived from the 1,765 surveys completed by passengers that went ashore during the survey period. As shown in **Table 141,** each passenger cruise party spent an average of $405.78 in the Virgin Islands. The average spend per cruise party is the sum of the weighted spending in each of the twelve categories. For example, 46 percent of the survey respondents reported spending an average of $30.40 at local restaurants and/or bars. Spread over the 1,765 cruise parties that visited the U.S. Virgin Islands, this represents an average of $14.11 per party. On a per passenger basis, the average total expenditure was $193.22. This represents the sum of per party expenditures, $405.78, divided by the average size of a cruise party in the U.S. Virgin Islands, 2.1 passengers.

For the entire 2008/2009 cruise year, the estimated 1.58 million cruise passengers who visited the U.S. Virgin Islands spent a total of **$304.3 million** ($US).

Per crew spending estimates were derived from the 518 surveys completed by crew members during the survey period. As shown in **Table 142,** each crew member spent an average of $152.58 in the Virgin Islands. The average spend per crew member is the sum of the weighted spending in each of the twelve categories. For example, 70 percent of the survey respondents reported spending an average of $29.40 for food and beverages. Spread over all the crew members that visited the U.S. Virgin Islands, this represents an average of $20.59 per crew member.

For the entire 2008/2009 cruise year, the estimated 336,089 crew who visited the U.S. Virgin Islands spent an estimated total of **$51.3 million** ($US).

Table 142 – Estimated Crew Spending ($US) in the U.S. Virgin Islands, 2008/2009 Cruise Year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	$ 29.40	70%	$ 20.59
Telephone & Internet	$ 23.10	33%	$ 7.52
Taxis/Ground Transportation	$ 17.90	25%	$ 4.49
Other Purchases	$ 48.10	20%	$ 9.43
Local Crafts & Souvenirs	$ 24.20	15%	$ 3.70
Perfumes & Cosmetics	$ 94.90	14%	$ 13.40
Electronics	$ 227.10	10%	$ 23.56
Watches & Jewelry	$ 695.90	9%	$ 60.16
Retail Purchases of Liquor	$ 56.00	7%	$ 3.71
Shore Excursions	$ 41.20	7%	$ 2.72
Entertainment/Night Clubs	$ 77.70	3%	$ 2.46
Clothing	$ 48.80	2%	$ 0.84
Total Spend per Crew			**$ 152.58**
Cruise Passenger Visits			336,089
Total Cruise Passenger Expenditures			**$ 51,280,383**

Cruise lines made payments to local businesses for a variety of goods and services. Net payments to local vendors for shore excursions have been included with passenger expenditures. However, cruise lines made other local expenditures, including payments for port fees and taxes, navigation services, utilities and other supplies. Based upon data provided by

the FCCA member cruise lines, we estimated that all cruise lines spent **$28.6 million** ($US) in the Virgin Islands during the 2008/2009 cruise year. Approximately 70 percent of these expenditures were payments for port fees and navigation services while the remaining 30 percent consisted of payments for ship supplies.

Economic Contribution of Cruise Tourism Expenditures

As noted in the **Data and Methods** section of the full report, a set of economic impact models were developed for each destination to produce estimates of the economic contribution of cruise tourism. Data for these models were collected from a broad range of local, regional and international sources. The impact models were designed to reflect the economic structure of each destination, including the industrial composition of Gross Domestic Product (GDP), the wage share of GDP by industry and average employee wages by industry.

Table 143 – Total Economic Contribution of Cruise Tourism in the U.S. Virgin Islands 2008/2009 Cruise Year

	Employment	Wage Income ($US Millions)
Direct Economic Contribution	3,589	$ 79.9
Total Economic Contribution	6,688	$146.6

As shown in **Table 143**, the $384.4 million in total cruise tourism expenditures generated direct employment of 3,589 residents of the U.S. Virgin Islands paying $79.9 million in annual wages. Adding the indirect contribution that results from the spending of those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures generated a total employment contribution of 6,688 jobs and $144.6 million in wage income in the U.S. Virgin Islands during the 2008/2009 cruise year.

Figure 97 – Total Employment Impacts by Sector - U.S. Virgin Islands

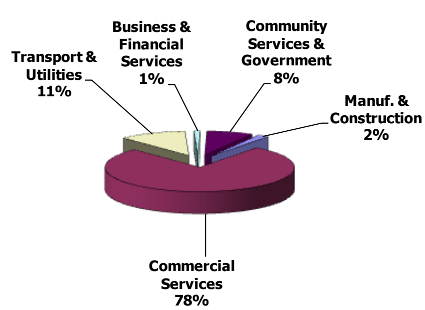
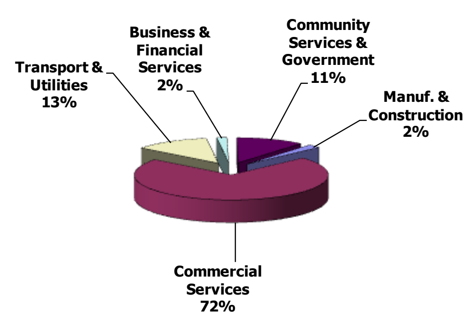


Figure 98 – Total Wage Impacts by Sector U.S. Virgin Islands



As shown in **Figures 97 and 98**, the total employment and wage impacts of cruise tourism are concentrated in the commercial and transport sectors which account for about 85 percent of the employment and wage impacts.[108] This is not surprising since the direct impacts account for more than half of the total employment impacts and that virtually all of the cruise tourism expenditures are made with businesses in these sectors. Because of the relatively lower wages in the commercial sector relative to the other sectors of the U.S. Virgin Islands economy, the commercial sector accounts for 78 percent of the employment impacts but only 72 percent of the wage impacts. The remainder of the total employment and wage impacts was generated by the indirect spending in the other sectors of the economy.

Comparison to 2006 Study

Total estimated passenger and crew visits declined by just over 3 percent from 1.98 million visits during the 2005/2006 cruise year to 1.91 million during the 2008/2009 cruise year. However, total direct expenditures in the U.S. Virgin Islands increased by 6 percent from $361.6 million in the 2005/2006 cruise year to $384.4 million in the 2008/2009 cruise year. As indicated in **Table 144**, cruise tourism expenditures increased in all three components of spending, passengers, crew and cruise lines.

Table 144 – Comparison of Cruise Tourism Impacts, Current Study versus 2006 Study

	Current Study	2006 Study
Total Onshore Visits (Thousands)	**1,911.1**	**1,983.1**
Passengers	1,575.0	1,631.5
Crew	336.1	351.5
Total Direct Expenditures ($US Millions)	**$384.4**	**$361.6**
Passengers	$ 304.3	$ 288.3
Crew	$ 51.3	$ 50.6
Cruise Lines	$ 28.6	$ 22.7
Average Per Passenger Expenditure	**$193.22**	**$176.69**
Average Per Crew Expenditure	**$152.58**	**$143.83**
Total Employment Impact	**6,688**	**6,165**
Total Wage Impact ($US Millions)	**$ 146.6**	**$ 135.6**

The increase in passenger expenditures was the net result of a 3 percent decline in passenger visits which was more than offset by the 9 percent increase in average passenger expenditures. The increase in per passenger expenditures was primarily driven by an increase in the average value of actual purchases in most categories. The percentage of passengers making onshore purchases was fairly stable and as a consequence the weighted average of passenger expenditures increased.

[108] The industry sectors include the following activities:
Manufacturing & Construction: residential and nonresidential construction and all manufacturing
Commercial Services: wholesale and retail trade, lodging and eating and drinking establishments
Transportation & Utilities: tour operators, port services, telecommunications and water and power utilities
Business & Financial Services: banking, insurance, legal, accounting, leasing and other business services
Community Services & Government: education, health and social services and government agencies

In the case of crew expenditures, the growth in total crew expenditures was the net result of a 4 percent decrease crew visits that was offset by a 6 percent increase in the average per crew expenditure. The growth in the average crew expenditures was principally driven by an increase in the weighted average purchase of jewelry which more than doubled from the 2005/2006 cruise year.

As a result of the 6 percent increase in direct cruise tourism expenditures from the 2005/2006 cruise year, the total employment and wage impacts increased by 8 percent over the three-year period.

Passenger Surveys

A total of 1,878 passenger surveys were completed and returned for tabulation. **Table 145** shows the major attributes of passenger visits in the U.S. Virgin Islands as derived from the passenger surveys.

Table 145 - Major Attributes of Intransit Passenger Surveys - U.S. Virgin Islands

	Number	Percent
Total Respondents	1,878	
Number Making First Visit	828	44.1%
Number Ashore	1,765	94.0%
Number Making Onshore Purchases:	1,453	82.3%
Average Hours Ashore	4.6	
Average Size of Expenditure Party (Persons)	2.1	
Average Onshore Expenditure per Party	$367	
Purchased a Shore Excursion (Tour)	903	51.2%
Purchased Onshore Tour from:		
Cruise Line	716	79.3%
Onshore from Tour Operator	116	12.8%
Travel Agent	71	7.9%
Average Cost of Shore Excursion per Party	$110	
Toured On Own/Did not Tour	862	

- Of the 1,878 cruise parties that completed the surveys 44% stated that this had been their first visit to the U.S. Virgin Islands.
- Ninety-four percent (94%) of the cruise parties that completed the surveys disembarked their cruise ship to visit the U.S. Virgin Islands.
- Of the cruise parties that went ashore, 82% made at least one purchase while ashore. The typical cruise party consisted of 2.1 passengers and spent an average of 4.6 hours ashore.
- The responding cruise parties reported spending an average of $367 while ashore (excludes shore excursions).
- Fifty-one percent (51%) of the passengers that went ashore purchased a shore excursion. Seventy-nine percent (79%) of passengers who purchased a tour did so through their cruise line, 13% purchased their tour onshore and 8 percent purchased their tour through their travel agent.

- The typical cruise party that purchased a shore excursion spent $110 for their tour.

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Table 146**. A 10-point scale was used with 10 being the highest score, i.e., extremely satisfied, and 1 being the lowest score, i.e., not at all satisfied.

Table 146 – Passenger Visit Satisfaction* - U.S. Virgin Islands

Visit Attributes	Mean Score
Overall Visit	8.0
Visit Met Expectations	7.4
Likelihood of a Return Visit	5.4
Informed of Tours and Activities	8.0
Initial Shoreside Welcome	7.6
Guided Tour	8.1
Historic Sites/Museums	7.2
Variety of Things to See and Do	7.4
Friendliness of Residents	8.0
Overall Shopping Experience	7.5
Courtesy of Employees	8.1
Variety of Shops	7.2
Overall Prices	7.1
Taxis/Local Transportation	7.7

* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows: Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3; Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Cruise passengers were very satisfied with their overall visit to the U.S. Virgin Islands with a mean score of 8.0. However, the visit did not score as high in terms of meeting expectations. The mean score for “Visit Met Expectations” was lower at 7.4.
- Passengers felt very informed about tours and onshore activities in the U.S. Virgin Islands with a mean score of 8.0.
- “Guided Tours” (or Shore Excursions) received the highest score of all visit attributes with a mean score of 8.1. Thus, cruise passengers were very satisfied with their shore excursions.
- Passenger interactions with residents and store employees were very positive with “friendliness of residents” receiving a mean score of 8.0 and “courtesy of employees” having a mean score of 8.1.

- Categories with slightly lower scores but still above 7.0 (Very Satisfied) were: initial shoreside welcome, historic sites, variety of things to see and do and local transportation.
- Cruise passengers were very satisfied with their overall shopping experience. As noted above, passengers thought shop employees were very courteous and were very satisfied with the variety of shops (7.2) and overall prices (7.1).
- Cruise passengers stated that they were somewhat likely to return to the U.S. Virgin Islands for a land-based vacation.

Passenger Demographics

Residents of the United States and the Canada accounted for 95 percent of the responding passengers. The average age of the respondents was 55 years with 33 percent of the respondents being 65 years of age or older. The U.S. Virgin Islands' passengers had an average household income of $102,800 with 42 percent having over $100,000 in household income.

Figure 99 – Passenger Age
U.S. Virgin Islands

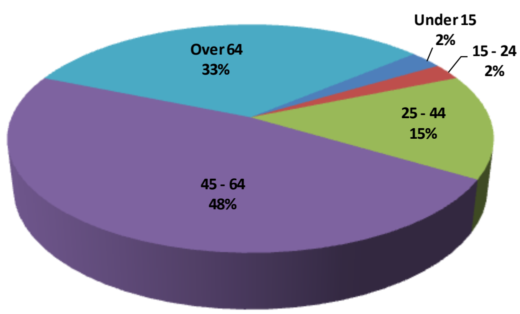
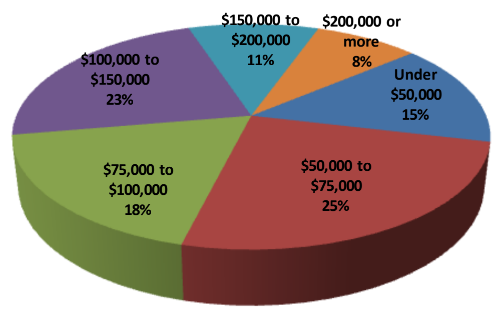


Figure 100 – Passenger Household Income
U.S. Virgin Islands



DESTINATIONS OF WESTERN MEXICO

Acapulco

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.[109] The surveys were undertaken during the six-month period beginning in November 2008 and ending in April 2009. The survey schedule was designed so that surveys were conducted by FCCA member cruise lines that called at each destination and that the distribution of passenger and crew surveys would reflect the distribution of passenger and crew arrivals by cruise line at each destination. On any given cruise itinerary, passenger and crew surveys were placed in all passenger cabins and crew quarters following a single destination call. The surveys were completed by the passengers and crew in the privacy of their quarters and returned to a designated office on the cruise ship. Thus, passengers and crew were only surveyed once during a cruise itinerary and for a single destination. On a subsequent itinerary, passengers were surveyed following a call at a different destination.

The passenger and crew surveys were designed to collect data for onshore spending and visit satisfaction by both passengers and crew. While the crew survey was slightly shorter than the passenger survey, both surveys were designed to collect the following information:

- hours spent ashore;
- expenditures by category, including shore tours, food & beverages, clothing, etc.;
- visit satisfaction, including shore tour, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation; and
- demographic characteristics, including country of residence, age group, income, etc.

Combining the expenditure data collected from the passenger and crew surveys with data on expenditures by cruise lines for port fees and services, payments to local tour operators for passenger shore excursions purchased onboard the cruise ships, and other provisions purchased locally by the cruise lines, estimates of total cruise tourism expenditures were developed for each participating destination.

Given the direct spending estimates, the economic contribution of these expenditures, as measured by employment and wage income were then estimated for each destination. This process began with the collection of economic data for each destination from a combination of local, regional and international sources. Utilizing all of these data a set of economic impact models were developed for each destination to estimate the direct and total employment and wage impacts. A more detailed description of these models is provided in the **Data and Methods** section of Volume I.

[109] Surveys were conducted on the ships of the following cruise lines: Azamara Cruises, Carnival Cruise Lines, Celebrity Cruises, Disney Cruise Line, Holland America Line, MSC Cruises (USA), Inc., Norwegian Cruise Line, Princess Cruises, P&O Cruises and Royal Caribbean International.

Cruise Tourism Expenditures

Cruise tourism expenditures in destination ports are composed of a broad range of spending including:

- onshore expenditures by passengers which tend to be concentrated in shore excursions and retail purchases of clothing, jewelry and local crafts and souvenirs;
- onshore expenditures by crew which are generally concentrated in purchases of food and beverages, local transportation and retail purchases of clothing and electronics;
- expenditures by cruise lines for port services, such as dockage fees and linesmen, utilities, such as water and power and navigation services; and
- purchases of supplies, such as food and other stores, by the cruise lines from local businesses.

Based upon data provided by API – Acapulco and the FCCA, an estimated 184,189 cruise passengers arrived aboard cruise ships during the 2008/2009 cruise year.[110] Of these, an estimated 165,770 passengers (90 percent) disembarked and visited Acapulco. Utilizing additional data provided by the visiting cruise lines, we have estimated that 92,094 crew were aboard the cruise ships and that 45 percent, or 41,400 crew, disembarked and visited the destination. These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **$21.4** million ($US) in cruise tourism expenditures in Acapulco during the 2008/2009 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Table 147 – Estimated Passenger Spending ($US) in Acapulco, 2008/2009 Cruise Year[111]

Purchase Categories	Average Spend per Party	Share of All Onshore Purchasers	Weighted Average Spend per Party
Shore Excursions	$ 64.64	62%	$ 40.27
Clothing	$ 38.30	47%	$ 17.85
Local Crafts & Souvenirs	$ 32.80	41%	$ 13.44
Watches & Jewelry	$ 196.10	39%	$ 77.07
F&B at Restaurants & Bars	$ 30.80	36%	$ 11.24
Taxis/Ground Transportation	$ 42.50	27%	$ 11.51
Other Purchases	$ 32.72	22%	$ 8.17
Telephone & Internet	$ 7.80	9%	$ 0.71
Retail Purchases of Liquor	$ 28.90	6%	$ 1.72
Entertainment/Night Clubs	$ 29.00	3%	$ 0.99
Perfumes & Cosmetics	$ 45.70	2%	$ 0.82
Electronics	$ 41.90	1%	$ 0.27
Total Spend per Cruise Party			$ 184.06
Average Size of a Cruise Party			2.1
Total Spend per Cruise Passenger			$ 87.65
Cruise Passenger Visits			165,770
Total Cruise Passenger Expenditures			$ 14,529,219

110 The 2008/2009 cruise year includes the twelve months beginning in May, 2008 and ending in April, 2009.

111 The average shore excursion expenditure is a weighted average of the onshore and Internet purchases and the portion of the onboard purchases paid to local tour operators.

Per passenger spending estimates were derived from the 1,654 surveys completed by passengers that went ashore during the survey period. As shown in **Table 147,** each passenger cruise party spent an average of $184.06. The average spend per cruise party is the sum of the weighted spending in each of the twelve categories. For example, 47 percent of the survey respondents reported spending an average of $38.30 for articles of clothing in Acapulco. Spread over the 1,654 cruise parties that visited Acapulco, this represents an average of $17.85 per party. On a per passenger basis, the average total expenditure was $87.65. This represents the sum of per party expenditures, $184.06, divided by the average size of a cruise party in Acapulco, 2.1 passengers.

For the entire 2008/2009 cruise year, the estimated 165,770 cruise passengers who visited Acapulco spent a total of **$14.5 million** ($US) in Acapulco.

Per crew spending estimates were derived from the 578 surveys completed by crew members during the survey period. As shown in **Table 148,** each crew member spent an average of $69.80 in Acapulco. The average spend per crew member is the sum of the weighted spending in each of the twelve categories. For example, 77 percent of the survey respondents reported spending an average of $27.00 for food and beverages. Spread over all the crew members that visited Acapulco, this represents an average of $20.80 per crew member.

Table 148 – Estimated Crew Spending ($US) in Acapulco, 2008/2009 Cruise Year

Purchase Categories	Average Spend per Crew	Share of All Onshore Purchasers	Weighted Average Spend per Crew
F&B at Restaurants & Bars	$ 27.00	77%	$ 20.80
Taxis/Ground Transportation	$ 11.70	48%	$ 5.60
Other Purchases	$ 34.50	21%	$ 7.33
Clothing	$ 34.40	20%	$ 7.05
Local Crafts & Souvenirs	$ 17.10	18%	$ 3.17
Telephone & Internet	$ 10.80	16%	$ 1.68
Entertainment/Night Clubs	$ 35.00	13%	$ 4.41
Shore Excursions	$ 24.40	8%	$ 2.03
Perfumes & Cosmetics	$ 35.30	7%	$ 2.53
Watches & Jewelry	$ 251.50	5%	$ 13.66
Retail Purchases of Liquor	$ 36.20	2%	$ 0.89
Electronics	$ 33.10	2%	$ 0.65
Total Spend per Crew			**$ 69.80**
Crew Visits			41,400
Total Crew Expenditures			**$ 2,889,720**

For the entire 2008/2009 cruise year, the estimated 41,400 crew who visited Acapulco spent an estimated total of **$2.9 million** ($US).

Cruise lines made payments to local tour operators for shore excursions purchased on cruise ships. Net payments to local vendors for shore excursions have been included with passenger expenditures. However, cruise lines made other payments for port fees and taxes. Based upon

data provided by the FCCA member cruise lines, we estimated that all cruise lines spent **$4.0 million** ($US) in Acapulco during the 2008/2009 cruise year.

Economic Contribution of Cruise Tourism Expenditures

As noted in the **Data and Methods** section of the full report, a set of economic impact models were developed for each destination to produce estimates of the economic contribution of cruise tourism. Data for these models were collected from the Instituto Nacional Estadistica Geografia e Infomatica. The impact models were designed to reflect the economic structure of each destination, including the industrial composition of gross production, the wage share of production by industry and average employee wages by industry.

Table 149 – Total Economic Contribution of Cruise Tourism in Acapulco, 2008/2009 Cruise Year

	Employment	Wage Income ($US Millions)
Direct Economic Contribution	431	$2.1
Total Economic Contribution	636	$3.5

As shown in **Table 149**, the $21.4 million in total cruise tourism expenditures in Acapulco generated direct employment of 431 residents of Acapulco paying $2.1 million in annual wages. Adding the indirect contribution that results from the spending of those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures generated a total employment contribution of 636 jobs and $3.5 million in wage income in Acapulco during the 2008/2009 cruise year.

Figure 101 – Total Employment Impacts by Sector - Acapulco

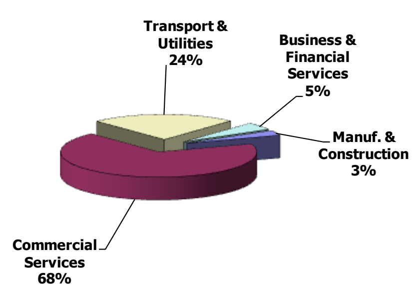
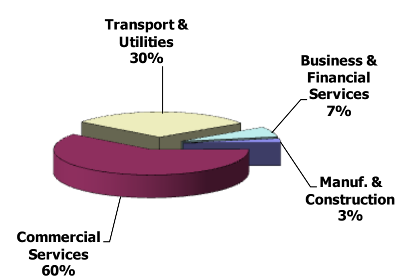


Figure 102 – Total Wage Impacts by Sector Acapulco



As shown in **Figures 101 and 102**, the total employment and wage impacts of cruise tourism are concentrated in the commercial and transport sectors which account for 90 percent of the total impacts. This is not surprising since the direct impacts account for two-thirds of the total employment impacts and that virtually all of the cruise tourism expenditures are made with businesses in these sectors, i.e., retail establishments, restaurants and bars, tour companies and ports. Because of the relatively higher wages in the transport sector compared to the other sectors of the economy, the transport sector accounts for 30 percent of the wage impacts but only 24 percent of the employment impacts. The remainder of the total employment and wage impacts was generated by the indirect spending in the other sectors of the economy.[112]

Passenger Surveys

A total of 1,742 passenger surveys were completed and returned for tabulation. **Table 150** shows the major attributes of passenger visits in the Acapulco as derived from the passenger surveys.

Table 150 - Major Attributes of Intransit Passenger Surveys - Acapulco

	Number	Percent
Total Respondents	1,742	
Number Making First Visit	1,125	64.6%
Number Ashore	1,654	94.9%
Number Making Onshore Purchases:	1,219	73.7%
Average Hours Ashore	4.6	
Average Size of Expenditure Party (Persons)	2.1	
Average Onshore Expenditure per Party	$144	
Purchased a Shore Excursion (Tour)	1,031	62.3%
Purchased Onshore Tour from:		
Cruise Line	796	77.2%
Onshore from Tour Operator	169	15.4%
Travel Agent	76	7.4%
Average Cost of Shore Excursion per Party	$106	
Toured On Own/Did not Tour	623	

- Of the 1,742 cruise parties that completed the surveys 65% stated that this had been their first visit to Acapulco.
- Ninety-five percent (95%) of the cruise parties that completed the surveys disembarked their cruise ship to visit Acapulco.
- Of the cruise parties that went ashore, 74% made at least one purchase while ashore. The typical cruise party consisted of 2.1 passengers and spent an average of 4.6 hours ashore.
- The responding cruise parties reported spending an average of $144 while ashore (excludes shore excursions).
- Sixty-two percent (62%) of the passengers that went ashore purchased a shore excursion. Seventy-seven percent (77%) of passengers who purchased a tour did so through their cruise line, 15% purchased their tour onshore and nearly 8 percent purchased their tour through their travel agent.

[112] The industry sectors include the following activities:
Manufacturing & Construction: residential and nonresidential construction and all manufacturing
Commercial Services: wholesale and retail trade, lodging and eating and drinking establishments
Transportation & Utilities: tour operators, port services, telecommunications and water and power utilities
Business & Financial Services: banking, insurance, legal, accounting, leasing and other business services
Community Services & Government: education, health and social services and government agencies

- The typical cruise party that purchased a shore excursion spent $106 for their tour.

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Table 151**. A 10-point scale was used with 10 being the highest score, i.e., extremely satisfied, and 1 being the lowest score, i.e., not at all satisfied.

Table 151 – Passenger Visit Satisfaction* - Acapulco

Visit Attributes	Mean Score
Overall Visit	7.2
Visit Met Expectations	6.9
Likelihood of a Return Visit	3.8
Informed of Tours and Activities	7.8
Initial Shoreside Welcome	7.2
Guided Tour	8.2
Historic Sites/Museums	7.2
Variety of Things to See and Do	7.1
Friendliness of Residents	7.5
Overall Shopping Experience	6.4
Courtesy of Employees	7.6
Variety of Shops	6.6
Overall Prices	6.3
Taxis/Local Transportation	7.2

* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows: Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3; Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Cruise passengers were very satisfied with their overall visit to Acapulco with a mean score of 7.2. However, the visit did not score as high in terms of meeting expectations. The mean score for "Visit Met Expectations" was lower at 6.9.
- Passengers felt very informed about tours and onshore activities in Acapulco with a mean score of 7.8.
- "Guided Tours" (or Shore Excursions) received the highest score of all visit attributes with a mean score of 8.2. Thus, cruise passengers were very satisfied with their shore excursions.
- Passenger interactions with residents and store employees were very positive with "friendliness of residents" receiving a mean score of 7.5 and "courtesy of employees" having a mean score of 7.6.
- Categories with slightly lower scores but still above 7.0 (Very Satisfied) were: initial shoreside welcome, historic sites, variety of things to see and do and local transportation.

- Cruise passengers were somewhat satisfied with their overall shopping experience. Thus, while passengers thought shop employees were very courteous, the overall score for their shopping experience was brought down by lower perceptions on the variety of shops (6.6) and overall prices (6.3).

- Cruise passengers stated that they were not too likely to return to Acapulco for a land-based vacation.

Passenger Demographics

Residents of the United States and the Canada accounted for 96 percent of the responding passengers. The average age of the respondents was 61 years with 52 percent of the respondents being 65 years of age or older. The Acapulco passengers had an average household income of $95,400 with 33 percent having over $100,000 in household income.

Figure 103 – Passenger Age Acapulco

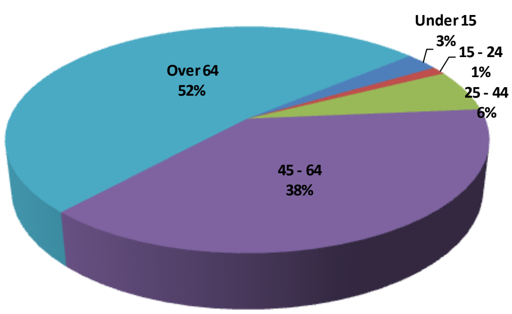
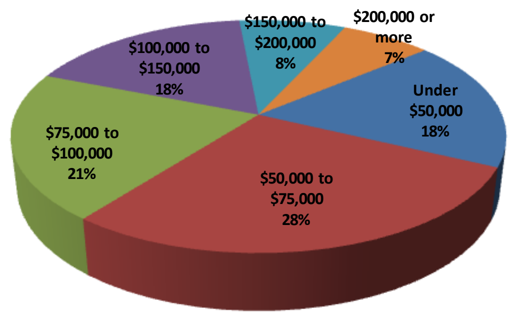


Figure 104 – Passenger Household Income Acapulco



Cabo San Lucas

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.[113] The surveys were undertaken during the six-month period beginning in November 2008 and ending in April 2009. The survey schedule was designed so that surveys were conducted by FCCA member cruise lines that called at each destination and that the distribution of passenger and crew surveys would reflect the distribution of passenger and crew arrivals by cruise line at each destination. On any given cruise itinerary, passenger and crew surveys were placed in all passenger cabins and crew quarters following a single destination call. The surveys were completed by the passengers and crew in the privacy of their quarters and returned to a designated office on the cruise ship. Thus, passengers and crew were only surveyed once during a cruise itinerary and for a single destination. On a subsequent itinerary, passengers were surveyed following a call at a different destination.

The passenger and crew surveys were designed to collect data for onshore spending and visit satisfaction by both passengers and crew. While the crew survey was slightly shorter than the passenger survey, both surveys were designed to collect the following information:

- hours spent ashore;
- expenditures by category, including shore tours, food & beverages, clothing, etc.;
- visit satisfaction, including shore tour, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation; and
- demographic characteristics, including country of residence, age group, income, etc.

Combining the expenditure data collected from the passenger and crew surveys with data on expenditures by cruise lines for port fees and services, payments to local tour operators for passenger shore excursions purchased onboard the cruise ships, and other provisions purchased locally by the cruise lines, estimates of total cruise tourism expenditures were developed for each participating destination.

Given the direct spending estimates, the economic contribution of these expenditures, as measured by employment and wage income were then estimated for each destination. This process began with the collection of economic data for each destination from a combination of local, regional and international sources. Utilizing all of these data a set of economic impact models were developed for each destination to estimate the direct and total employment and wage impacts. A more detailed description of these models is provided in the **Data and Methods** section of Volume I.

[113] Surveys were conducted on the ships of the following cruise lines: Azamara Cruises, Carnival Cruise Lines, Celebrity Cruises, Disney Cruise Line, Holland America Line, MSC Cruises (USA), Inc., Norwegian Cruise Line, Princess Cruises, P&O Cruises and Royal Caribbean International.

Cruise Tourism Expenditures

Cruise tourism expenditures in destination ports are composed of a broad range of spending including:

- onshore expenditures by passengers which tend to be concentrated in shore excursions and retail purchases of clothing, jewelry and local crafts and souvenirs;
- onshore expenditures by crew which are generally concentrated in purchases of food and beverages, local transportation and retail purchases of clothing and electronics;
- expenditures by cruise lines for port services, such as dockage fees and linesmen, utilities, such as water and power and navigation services; and
- purchases of supplies, such as food and other stores, by the cruise lines from local businesses.

Based upon data provided by Fonatur Constructora and the FCCA, an estimated 1.08 million cruise passengers arrived aboard cruise ships during the 2008/2009 cruise year.[114] Of these, an estimated 968,010 passengers (90 percent) disembarked and visited Cabo San Lucas. Utilizing additional data provided by the visiting cruise lines, we have estimated that 402,616 crew were aboard the cruise ships and that 30 percent, or 120,800 crew, disembarked and visited the destination. These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **$95.3** million ($US) in cruise tourism expenditures in Cabo San Lucas during the 2008/2009 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Table 152 – Estimated Passenger Spending ($US) in Cabo San Lucas, 2008/2009 Cruise Year[115]

Purchase Categories	Average Spend per Party	Share of All Onshore Purchasers	Weighted Average Spend per Party
F&B at Restaurants & Bars	$ 31.50	60%	$ 19.04
Shore Excursions	$ 94.46	47%	$ 44.39
Clothing	$ 44.00	46%	$ 20.22
Local Crafts & Souvenirs	$ 32.30	46%	$ 15.00
Watches & Jewelry	$ 253.90	25%	$ 64.56
Taxis/Ground Transportation	$ 23.30	20%	$ 4.65
Other Purchases	$ 64.27	18%	$ 11.25
Retail Purchases of Liquor	$ 33.10	7%	$ 2.32
Perfumes & Cosmetics	$ 45.60	2%	$ 1.04
Telephone & Internet	$ 12.30	2%	$ 0.28
Entertainment/Night Clubs	$ 81.20	1%	$ 0.92
Electronics	$ 24.30	0%	$ 0.05
Total Spend per Cruise Party			**$ 183.72**
Average Size of a Cruise Party			2.3
Total Spend per Cruise Passenger			**$ 79.87**
Cruise Passenger Visits			968.010
Total Cruise Passenger Expenditures			**$ 77,316,945**

[114] The 2008/2009 cruise year includes the twelve months beginning in May, 2005 and ending in April, 2006.

[115] The average shore excursion expenditure is a weighted average of the onshore and Internet purchases and the portion of the onboard purchases paid to local tour operators.

Per passenger spending estimates were derived from the 1,812 surveys completed by passengers that went ashore during the survey period. As shown in **Table 152,** each passenger cruise party spent an average of $183.72. The average spend per cruise party is the sum of the weighted spending in each of the twelve categories. For example, 46 percent of the survey respondents reported spending an average of $44.00 for articles of clothing in Cabo San Lucas. Spread over the 1,812 cruise parties that visited Cabo San Lucas, this represents an average of $20.22 per party. On a per passenger basis, the average total expenditure was $79.87. This represents the sum of per party expenditures, $183.72, divided by the average size of a cruise party in Cabo San Lucas, 2.3 passengers.

For the entire 2008/2009 cruise year, the estimated 968,010 cruise passengers who visited Cabo San Lucas spent a total of **$77.3 million** ($US) in Cabo San Lucas.

Per crew spending estimates were derived from the 564 surveys completed by crew members during the survey period. As shown in **Table 153,** each crew member spent an average of $54.25 in Cabo San Lucas. The average spend per crew member is the sum of the weighted spending in each of the twelve categories. For example, 82 percent of the survey respondents reported spending an average of $32.00 for food and beverages. Spread over all the crew members that visited Cabo San Lucas, this represents an average of $26.08 per crew member.

Table 153 – Estimated Crew Spending ($US) in Cabo San Lucas, 2008/2009 Cruise Year

Purchase Categories	Average Spend per Crew	Share of All Onshore Purchasers	Weighted Average Spend per Crew
F&B at Restaurants & Bars	$ 32.00	82%	$ 26.08
Taxis/Ground Transportation	$ 11.70	30%	$ 3.56
Clothing	$ 25.80	18%	$ 4.66
Local Crafts & Souvenirs	$ 20.00	15%	$ 3.08
Other Purchases	$ 63.10	8%	$ 4.73
Telephone & Internet	$ 14.90	8%	$ 1.25
Shore Excursions	$ 30.30	6%	$ 1.67
Perfumes & Cosmetics	$ 76.00	6%	$ 4.35
Retail Purchases of Liquor	$ 27.20	6%	$ 1.56
Watches & Jewelry	$ 43.50	4%	$ 1.92
Entertainment/Night Clubs	$ 23.30	1%	$ 0.31
Electronics	$ 81.70	1%	$ 1.08
Total Spend per Crew			**$ 54.25**
Crew Visits			120,800
Total Crew Expenditures			**$ 6,553,400**

For the entire 2008/2009 cruise year, the estimated 120,800 crew who visited Cabo San Lucas spent an estimated total of **$6.6 million** ($US).

Cruise lines made payments to local tour operators for shore excursions purchased on cruise ships. Net payments to local vendors for shore excursions have been included with passenger expenditures. However, cruise lines made other payments for port fees and taxes. Based upon data provided by the FCCA member cruise lines, we estimated that all cruise lines spent **$11.3**

million ($US) in Cabo San Lucas during the 2008/2009 cruise year. Approximately 85 percent of these expenditures were payments for port fees and navigation services while the remaining 15 percent consisted of payments for ship supplies.

Economic Contribution of Cruise Tourism Expenditures

As noted in the **Data and Methods** section of the full report, a set of economic impact models were developed for each destination to produce estimates of the economic contribution of cruise tourism. Data for these models were collected from the Instituto Nacional Estadistica Geografia e Infomatica. The impact models were designed to reflect the economic structure of each destination, including the industrial composition of gross production, the wage share of production by industry and average employee wages by industry.

Table 154 – Total Economic Contribution of Cruise Tourism in Cabo San Lucas, 2008/2009 Cruise Year

	Employment	Wage Income ($US Millions)
Direct Economic Contribution	1,745	$10.5
Total Economic Contribution	2,745	$16.7

As shown in **Table 154**, the $95.3 million in total cruise tourism expenditures in Cabo San Lucas generated direct employment of 1,745 residents of Cabo San Lucas paying $10.5 million in annual wages. Adding the indirect contribution that results from the spending of those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures generated a total employment contribution of 2,745 jobs and $16.7 million in wage income in Cabo San Lucas during the 2008/2009 cruise year.

Figure 105 – Total Employment Impacts by Sector - Cabo San Lucas

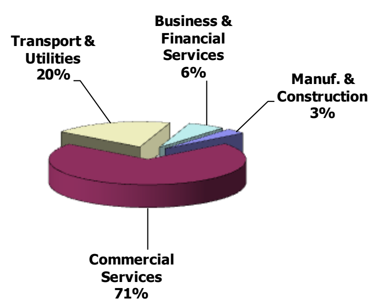
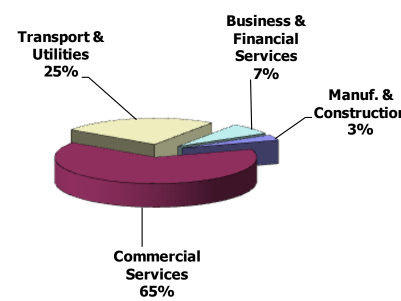


Figure 106 – Total Wage Impacts by Sector Cabo San Lucas



As shown in **Figures 105 and 106**, the total employment and wage impacts of cruise tourism are concentrated in the commercial and transport sectors which account for 90 percent of the total impacts. This is not surprising since the direct impacts account for two-thirds of the total employment impacts and that virtually all of the cruise tourism expenditures are made with businesses in these sectors, i.e., retail establishments, restaurants and bars, tour companies and ports. Because of the relatively higher wages in the transport sector compared to the other sectors of the economy, the transport sector accounts for 25 percent of the wage impacts but only 20 percent of the employment impacts. The remainder of the total employment and wage impacts was generated by the indirect spending in the other sectors of the economy.[116]

Passenger Surveys

A total of 1,959 passenger surveys were completed and returned for tabulation. **Table 155** shows the major attributes of passenger visits in the Cabo San Lucas as derived from the passenger surveys.

Table 155 - Major Attributes of Intransit Passenger Surveys - Cabo San Lucas

	Number	Percent
Total Respondents	1,959	
Number Making First Visit	1,207	61.6%
Number Ashore	1,812	92.5%
Number Making Onshore Purchases:	1,400	77.3%
Average Hours Ashore	4.1	
Average Size of Expenditure Party (Persons)	2.3	
Average Onshore Expenditure per Party	$138	
Purchased a Shore Excursion (Tour)	852	47.0%
Purchased Onshore Tour from:		
Cruise Line	630	73.9%
Onshore from Tour Operator	177	20.8%
Travel Agent	45	5.3%
Average Cost of Shore Excursion per Party	$143	
Toured On Own/Did not Tour	960	

- Of the 1,959 cruise parties that completed the surveys 62% stated that this had been their first visit to Cabo San Lucas.
- Ninety-two percent (92%) of the cruise parties that completed the surveys disembarked their cruise ship to visit Cabo San Lucas.
- Of the cruise parties that went ashore, 77% made at least one purchase while ashore. The typical cruise party consisted of 2.3 passengers and spent an average of 4.1 hours ashore.
- The responding cruise parties reported spending an average of $138 while ashore (excludes shore excursions).
- Forty-seven percent (47%) of the passengers that went ashore purchased a shore excursion. Seventy-four percent (74%) of passengers who purchased a tour did so

[116] The industry sectors include the following activities:
Manufacturing & Construction: residential and nonresidential construction and all manufacturing
Commercial Services: wholesale and retail trade, lodging and eating and drinking establishments
Transportation & Utilities: tour operators, port services, telecommunications and water and power utilities
Business & Financial Services: banking, insurance, legal, accounting, leasing and other business services
Community Services & Government: education, health and social services and government agencies

through their cruise line, 21% purchased their tour onshore and 5 percent purchased their tour through their travel agent.

- The typical cruise party that purchased a shore excursion spent $143 for their tour.

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Table 156**. A 10-point scale was used with 10 being the highest score, i.e., extremely satisfied, and 1 being the lowest score, i.e., not at all satisfied.

Table 156 – Passenger Visit Satisfaction* - Cabo San Lucas

Visit Attributes	Mean Score
Overall Visit	7.5
Visit Met Expectations	7.2
Likelihood of a Return Visit	5.4
Informed of Tours and Activities	7.5
Initial Shoreside Welcome	7.6
Guided Tour	8.2
Historic Sites/Museums	6.7
Variety of Things to See and Do	6.9
Friendliness of Residents	7.5
Overall Shopping Experience	6.7
Courtesy of Employees	7.7
Variety of Shops	6.8
Overall Prices	6.3
Taxis/Local Transportation	7.2

* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows: Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3; Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Cruise passengers were very satisfied with their overall visit to Cabo San Lucas with a mean score of 7.5. However, the visit did not score as high in terms of meeting expectations. The mean score for "Visit Met Expectations" was lower at 7.2.
- Passengers felt very informed about tours and onshore activities in Cabo San Lucas with a mean score of 7.5.
- "Guided Tours" (or Shore Excursions) received the highest score of all visit attributes with a mean score of 8.2. Thus, cruise passengers were very satisfied with their shore excursions.
- Passenger interactions with residents and store employees were very positive with "friendliness of residents" receiving a mean score of 7.5 and "courtesy of employees" having a mean score of 7.7.

- Categories with slightly lower scores but still above 7.0 (Very Satisfied) were: initial shoreside welcome and local transportation.
- Categories with average scores between 5.0 and 7.0 (Somewhat Satisfied) were given for historic sites, variety of things to see and do and the overall shopping experience, including the variety of shops and overall prices. Thus, while passengers thought shop employees were very courteous, the overall score for their shopping experience was brought down by lower perceptions on the variety of shops (6.8) and overall prices (6.3).
- Cruise passengers stated that they were somewhat likely to return to Cabo San Lucas for a land-based vacation.

Passenger Demographics

Residents of the United States and the Canada accounted for 98 percent of the responding passengers. The average age of the respondents was 52 years with only 28 percent of the respondents being 65 years of age or older. The Cabo San Lucas passengers had an average household income of $103,900 with 42 percent having over $100,000 in household income.

Figure 107 – Passenger Age Cabo San Lucas

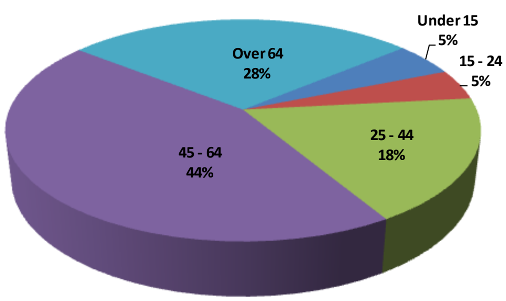
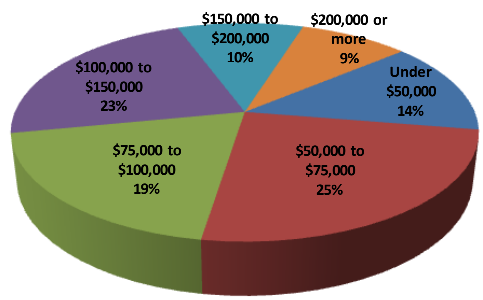


Figure 108 – Passenger Household Income Cabo San Lucas



Ensenada

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.[117] The surveys were undertaken during the six-month period beginning in November 2008 and ending in April 2009. The survey schedule was designed so that surveys were conducted by FCCA member cruise lines that called at each destination and that the distribution of passenger and crew surveys would reflect the distribution of passenger and crew arrivals by cruise line at each destination. On any given cruise itinerary, passenger and crew surveys were placed in all passenger cabins and crew quarters following a single destination call. The surveys were completed by the passengers and crew in the privacy of their quarters and returned to a designated office on the cruise ship. Thus, passengers and crew were only surveyed once during a cruise itinerary and for a single destination. On a subsequent itinerary, passengers were surveyed following a call at a different destination.

The passenger and crew surveys were designed to collect data for onshore spending and visit satisfaction by both passengers and crew. While the crew survey was slightly shorter than the passenger survey, both surveys were designed to collect the following information:

- hours spent ashore;
- expenditures by category, including shore tours, food & beverages, clothing, etc.;
- visit satisfaction, including shore tour, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation; and
- demographic characteristics, including country of residence, age group, income, etc.

Combining the expenditure data collected from the passenger and crew surveys with data on expenditures by cruise lines for port fees and services, payments to local tour operators for passenger shore excursions purchased onboard the cruise ships, and other provisions purchased locally by the cruise lines, estimates of total cruise tourism expenditures were developed for each participating destination.

Given the direct spending estimates, the economic contribution of these expenditures, as measured by employment and wage income were then estimated for each destination. This process began with the collection of economic data for each destination from a combination of local, regional and international sources. Utilizing all of these data a set of economic impact models were developed for each destination to estimate the direct and total employment and wage impacts. A more detailed description of these models is provided in the **Data and Methods** section of Volume I.

[117] Surveys were conducted on the ships of the following cruise lines: Azamara Cruises, Carnival Cruise Lines, Celebrity Cruises, Disney Cruise Line, Holland America Line, MSC Cruises (USA), Inc., Norwegian Cruise Line, Princess Cruises, P&O Cruises and Royal Caribbean International.

Cruise Tourism Expenditures

Cruise tourism expenditures in destination ports are composed of a broad range of spending including:

- onshore expenditures by passengers which tend to be concentrated in shore excursions and retail purchases of clothing, jewelry and local crafts and souvenirs;
- onshore expenditures by crew which are generally concentrated in purchases of food and beverages, local transportation and retail purchases of clothing and electronics;
- expenditures by cruise lines for port services, such as dockage fees and linesmen, utilities, such as water and power and navigation services; and
- purchases of supplies, such as food and other stores, by the cruise lines from local businesses.

Based upon data provided by the Ensenada Cruiseport Village and the FCCA, an estimated 592,319 cruise passengers arrived aboard cruise ships during the 2008/2009 cruise year.[118] Of these, an estimated 533,087 passengers (90 percent) disembarked and visited Ensenada. Utilizing additional data provided by the visiting cruise lines, we have estimated that 223,108 crew were aboard the cruise ships and that 40 percent, or 89,200 crew, disembarked and visited the destination. These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **$46.4** million ($US) in cruise tourism expenditures in Ensenada during the 2008/2009 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Table 157 – Estimated Passenger Spending ($US) in Ensenada, 2008/2009 Cruise Year[119]

Purchase Categories	Average Spend per Party	Share of All Onshore Purchasers	Weighted Average Spend per Party
F&B at Restaurants & Bars	$ 28.90	58%	$ 16.66
Shore Excursions	$ 54.32	56%	$ 30.20
Local Crafts & Souvenirs	$ 37.30	56%	$ 20.78
Clothing	$ 35.90	41%	$ 14.81
Taxis/Ground Transportation	$ 14.20	41%	$ 5.81
Watches & Jewelry	$ 73.20	32%	$ 23.16
Other Purchases	$ 83.46	24%	$ 20.30
Retail Purchases of Liquor	$ 29.00	12%	$ 3.55
Perfumes & Cosmetics	$ 46.70	3%	$ 1.27
Telephone & Internet	$ 16.70	2%	$ 0.26
Entertainment/Night Clubs	$169.10	1%	$ 1.73
Electronics	$ 5.00	0%	$ 0.00
Total Spend per Cruise Party			**$ 138.53**
Average Size of a Cruise Party			2.4
Total Spend per Cruise Passenger			**$ 57.73**
Cruise Passenger Visits			533,087
Total Cruise Passenger Expenditures			**$ 30,772,563**

[118] The 2008/2009 cruise year includes the twelve months beginning in May, 2005 and ending in April, 2006.

[119] The average shore excursion expenditure is a weighted average of the onshore and Internet purchases and the portion of the onboard purchases paid to local tour operators.

Per passenger spending estimates were derived from the 913 surveys completed by passengers that went ashore during the survey period. As shown in **Table 157,** each passenger cruise party spent an average of $138.53. The average spend per cruise party is the sum of the weighted spending in each of the twelve categories. For example, 41 percent of the survey respondents reported spending an average of $35.90 for articles of clothing in Ensenada. Spread over the 913 cruise parties that visited Ensenada, this represents an average of $14.81 per party. On a per passenger basis, the average total expenditure was $57.73. This represents the sum of per party expenditures, $138.53, divided by the average size of a cruise party in Ensenada, 2.4 passengers.

For the entire 2008/2009 cruise year, the estimated 533,087 cruise passengers who visited Ensenada spent a total of **$30.8 million** ($US) in Ensenada.

An insufficient number of crew surveys was collected in Ensenada. As a consequence per crew spending estimates were estimated for Ensenada using responses from all four Mexico West destinations: Acapulco, Cabo San Lucas, Huatulco and Ensenada. Based upon these data, and as shown in **Table 158,** crew members were estimated to have spent an average of $65.12 in Ensenada. The average spend per crew member is the sum of the weighted spending in each of the twelve categories. For example, 81 percent of the survey respondents reported spending an average of $29.80 for food and beverages. Spread over all the crew members that visited the western Mexico destinations, this represents an average of $24.02 per crew member.

Table 158 – Estimated Crew Spending ($US) in Ensenada, 2008/2009 Cruise Year

Purchase Categories	Average Spend per Crew	Share of All Onshore Purchasers	Weighted Average Spend per Crew
F&B at Restaurants & Bars	$ 29.80	81%	$ 24.02
Taxis/Ground Transportation	$ 11.80	39%	$ 4.58
Clothing	$ 30.50	19%	$ 5.88
Other Purchases	$ 38.70	17%	$ 6.74
Local Crafts & Souvenirs	$ 20.20	15%	$ 3.10
Telephone & Internet	$ 11.30	15%	$ 1.68
Perfumes & Cosmetics	$ 45.10	8%	$ 3.37
Shore Excursions	$ 33.30	7%	$ 2.30
Entertainment/Night Clubs	$ 57.80	6%	$ 3.34
Watches & Jewelry	$ 152.60	5%	$ 7.54
Retail Purchases of Liquor	$ 42.30	3%	$ 1.40
Electronics	$ 102.20	1%	$ 1.17
Total Spend per Crew			**$ 65.12**
Crew Visits			89,200
Total Crew Expenditures			**$ 5,808,704**

For the entire 2008/2009 cruise year, the estimated 89,200 crew who visited Ensenada spent an estimated total of **$5.8 million** ($US).

Cruise lines made payments to local tour operators for shore excursions purchased on cruise ships. Net payments to local vendors for shore excursions have been included with passenger expenditures. However, cruise lines made other payments for port fees and taxes. Based upon

data provided by the FCCA member cruise lines, we estimated that all cruise lines spent **$9.8 million** ($US) in Ensenada during the 2008/2009 cruise year. Approximately 85 percent of these expenditures were payments for port fees and navigation services while the remaining 15 percent consisted of payments for ship supplies.

Economic Contribution of Cruise Tourism Expenditures

As noted in the **Data and Methods** section of the full report, a set of economic impact models were developed for each destination to produce estimates of the economic contribution of cruise tourism. Data for these models were collected from the Instituto Nacional Estadistica Geografia e Infomatica. The impact models were designed to reflect the economic structure of each destination, including the industrial composition of gross production, the wage share of production by industry and average employee wages by industry.

Table 159 – Total Economic Contribution of Cruise Tourism in Ensenada, 2008/2009 Cruise Year

	Employment	Wage Income ($US Millions)
Direct Economic Contribution	797	$5.1
Total Economic Contribution	1,279	$8.4

As shown in **Table 159**, the $46.4 million in total cruise tourism expenditures in Ensenada generated direct employment of 797 residents of Ensenada paying $5.1 million in annual wages. Adding the indirect contribution that results from the spending of those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures generated a total employment contribution of 1,279 jobs and $8.4 million in wage income in Ensenada during the 2008/2009 cruise year.

Figure 109 – Total Employment Impacts by Sector - Ensenada

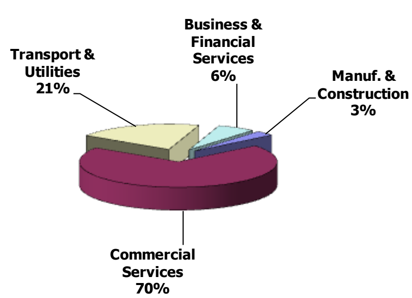
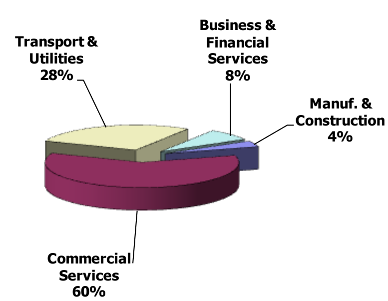


Figure 110 – Total Wage Impacts by Sector Ensenada



As shown in **Figures 109 and 110**, the total employment and wage impacts of cruise tourism are concentrated in the commercial and transport sectors which account for 90 percent of the total impacts. This is not surprising since the direct impacts account for about 60 percent of the total employment impacts and that virtually all of the cruise tourism expenditures are made with businesses in these sectors, i.e., retail establishments, restaurants and bars, tour companies and ports. Because of the relatively higher wages in the transport sector compared to the other sectors of the economy, the transport sector accounts for 28 percent of the wage impacts but only 21 percent of the employment impacts. The remainder of the total employment and wage impacts was generated by the indirect spending in the other sectors of the economy.[120]

Passenger Surveys

A total of 1,000 passenger surveys were completed and returned for tabulation. **Table 160** shows the major attributes of passenger visits in the Ensenada as derived from the passenger surveys.

Table 160 - Major Attributes of Intransit Passenger Surveys - Ensenada

	Number	Percent
Total Respondents	1,000	
Number Making First Visit	547	54.7%
Number Ashore	913	91.3%
Number Making Onshore Purchases:	781	85.5%
Average Hours Ashore	4.2	
Average Size of Expenditure Party (Persons)	2.4	
Average Onshore Expenditure per Party	$108	
Purchased a Shore Excursion (Tour)	508	55.6%
Purchased Onshore Tour from:		
Cruise Line	331	65.2%
Onshore from Tour Operator	165	32.5%
Travel Agent	12	2.4%
Average Cost of Shore Excursion per Party	$77	
Toured On Own/Did not Tour	405	

- Of the 1,000 cruise parties that completed the surveys 55% stated that this had been their first visit to Ensenada.
- Ninety-one percent (91%) of the cruise parties that completed the surveys disembarked their cruise ship to visit Ensenada.
- Of the cruise parties that went ashore, 86% made at least one purchase while ashore. The typical cruise party consisted of 2.4 passengers and spent an average of 4.2 hours ashore.
- The responding cruise parties reported spending an average of $108 while ashore (excludes shore excursions).

[120] The industry sectors include the following activities:
Manufacturing & Construction: residential and nonresidential construction and all manufacturing
Commercial Services: wholesale and retail trade, lodging and eating and drinking establishments
Transportation & Utilities: tour operators, port services, telecommunications and water and power utilities
Business & Financial Services: banking, insurance, legal, accounting, leasing and other business services
Community Services & Government: education, health and social services and government agencies

- Fifty-six percent (56%) of the passengers that went ashore purchased a shore excursion. Sixty-five percent (65%) of passengers who purchased a tour did so through their cruise line, 33% purchased their tour onshore and 2 percent purchased their tour through their travel agent.
- The typical cruise party that purchased a shore excursion spent $77 for their tour.

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Table 151**. A 10-point scale was used with 10 being the highest score, i.e., extremely satisfied, and 1 being the lowest score, i.e., not at all satisfied.

Table 161 – Passenger Visit Satisfaction* - Ensenada

Visit Attributes	Mean Score
Overall Visit	7.5
Visit Met Expectations	7.2
Likelihood of a Return Visit	4.8
Informed of Tours and Activities	8.0
Initial Shoreside Welcome	7.9
Guided Tour	8.3
Historic Sites/Museums	7.3
Variety of Things to See and Do	6.6
Friendliness of Residents	7.9
Overall Shopping Experience	7.3
Courtesy of Employees	8.0
Variety of Shops	7.2
Overall Prices	7.1
Taxis/Local Transportation	8.0

* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows:
Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3;
Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Cruise passengers were very satisfied with their overall visit to Ensenada with a mean score of 7.5. However, the visit did not score as high in terms of meeting expectations. The mean score for "Visit Met Expectations" was lower at 7.2.
- Passengers felt very informed about tours and onshore activities in Ensenada with a mean score of 8.0.
- "Guided Tours" (or Shore Excursions) received the highest score of all visit attributes with a mean score of 8.3. Thus, cruise passengers were very satisfied with their shore excursions.

- Passenger interactions with residents and store employees were very positive with "friendliness of residents" receiving a mean score of 7.9 and "courtesy of employees" having a mean score of 8.0.
- Categories with slightly lower scores but still above 7.0 (Very Satisfied) were: initial shoreside welcome, historic sites and local transportation.
- Cruise passengers were only somewhat satisfied with the variety of things to see and do which received a mean score of 6.6.
- Cruise passengers were very satisfied with their overall shopping experience. As noted above, passengers thought shop employees were very courteous and were very satisfied with the variety of shops (7.2) and overall prices (7.1).
- Cruise passengers stated that they were not too likely to return to Ensenada for a land-based vacation.

Passenger Demographics

Residents of the United States and the Canada accounted for 99 percent of the responding passengers. The average age of the respondents was 48 years with only 21 percent of the respondents being 65 years of age or older. The Ensenada passengers had an average household income of $97,500 with 37 percent having over $100,000 in household income.

Figure 111 – Passenger Age Ensenada

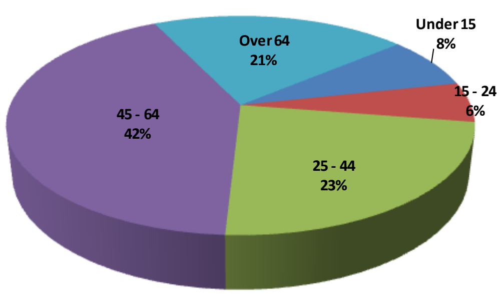
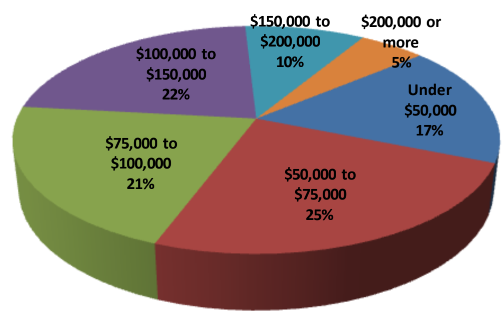


Figure 112 – Passenger Household Income Ensenada



Huatulco

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.[121] The surveys were undertaken during the six-month period beginning in November 2008 and ending in April 2009. The survey schedule was designed so that surveys were conducted by FCCA member cruise lines that called at each destination and that the distribution of passenger and crew surveys would reflect the distribution of passenger and crew arrivals by cruise line at each destination. On any given cruise itinerary, passenger and crew surveys were placed in all passenger cabins and crew quarters following a single destination call. The surveys were completed by the passengers and crew in the privacy of their quarters and returned to a designated office on the cruise ship. Thus, passengers and crew were only surveyed once during a cruise itinerary and for a single destination. On a subsequent itinerary, passengers were surveyed following a call at a different destination.

The passenger and crew surveys were designed to collect data for onshore spending and visit satisfaction by both passengers and crew. While the crew survey was slightly shorter than the passenger survey, both surveys were designed to collect the following information:

- hours spent ashore;
- expenditures by category, including shore tours, food & beverages, clothing, etc.;
- visit satisfaction, including shore tour, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation; and
- demographic characteristics, including country of residence, age group, income, etc.

Combining the expenditure data collected from the passenger and crew surveys with data on expenditures by cruise lines for port fees and services, payments to local tour operators for passenger shore excursions purchased onboard the cruise ships, and other provisions purchased locally by the cruise lines, estimates of total cruise tourism expenditures were developed for each participating destination.

Given the direct spending estimates, the economic contribution of these expenditures, as measured by employment and wage income were then estimated for each destination. This process began with the collection of economic data for each destination from a combination of local, regional and international sources. Utilizing all of these data a set of economic impact models were developed for each destination to estimate the direct and total employment and wage impacts. A more detailed description of these models is provided in the **Data and Methods** section of Volume I.

[121] Surveys were conducted on the ships of the following cruise lines: Azamara Cruises, Carnival Cruise Lines, Celebrity Cruises, Disney Cruise Line, Holland America Line, MSC Cruises (USA), Inc., Norwegian Cruise Line, Princess Cruises, P&O Cruises and Royal Caribbean International.

Cruise Tourism Expenditures

Cruise tourism expenditures in destination ports are composed of a broad range of spending including:

- onshore expenditures by passengers which tend to be concentrated in shore excursions and retail purchases of clothing, jewelry and local crafts and souvenirs;
- onshore expenditures by crew which are generally concentrated in purchases of food and beverages, local transportation and retail purchases of clothing and electronics;
- expenditures by cruise lines for port services, such as dockage fees and linesmen, utilities, such as water and power and navigation services; and
- purchases of supplies, such as food and other stores, by the cruise lines from local businesses.

Based upon data provided by Fonatur Constructora and the FCCA, an estimated 139,932 cruise passengers arrived aboard cruise ships during the 2008/2009 cruise year.[122] Of these, an estimated 125,939 passengers (90 percent) disembarked and visited Huatulco. Utilizing additional data provided by the visiting cruise lines, we have estimated that 66,820 crew were aboard the cruise ships and that 30 percent, or 20,000 crew, disembarked and visited the destination. These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **$10.1** million ($US) in cruise tourism expenditures in Huatulco during the 2008/2009 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Table 162 – Estimated Passenger Spending ($US) in Huatulco, 2008/2009 Cruise Year[123]

Purchase Categories	Average Spend per Party	Share of All Onshore Purchasers	Weighted Average Spend per Party
Shore Excursions	$ 65.00	49%	$ 31.85
F&B at Restaurants & Bars	$ 16.60	49%	$ 8.12
Clothing	$ 26.30	43%	$ 11.28
Local Crafts & Souvenirs	$ 24.50	42%	$ 10.26
Taxis/Ground Transportation	$ 16.60	21%	$ 3.54
Other Purchases	$ 15.21	21%	$ 3.14
Watches & Jewelry	$ 131.00	20%	$ 26.92
Retail Purchases of Liquor	$ 20.10	11%	$ 2.20
Electronics	$ 4.00	5%	$ 0.20
Telephone & Internet	$ 5.10	4%	$ 0.22
Perfumes & Cosmetics	$ 15.30	2%	$ 0.32
Entertainment/Night Clubs	$ 20.00	0%	$ 0.06
Total Spend per Cruise Party			$ 98.11
Average Size of a Cruise Party			2.0
Total Spend per Cruise Passenger			$ 49.06
Cruise Passenger Visits			125,939
Total Cruise Passenger Expenditures			$ 6,177,938

[122] The 2008/2009 cruise year includes the twelve months beginning in May, 2005 and ending in April, 2006.
[123] The average shore excursion expenditure is a weighted average of the onshore and Internet purchases and the portion of the onboard purchases paid to local tour operators.

Per passenger spending estimates were derived from the 1,381 surveys completed by passengers that went ashore during the survey period. As shown in **Table 162,** each passenger cruise party spent an average of $98.11. The average spend per cruise party is the sum of the weighted spending in each of the twelve categories. For example, 43 percent of the survey respondents reported spending an average of $26.30 for articles of clothing in Huatulco. Spread over the 1,381 cruise parties that visited Huatulco, this represents an average of $11.28 per party. On a per passenger basis, the average total expenditure was $49.06. This represents the sum of per party expenditures, $98.11, divided by the average size of a cruise party in Huatulco, 2.0 passengers.

For the entire 2008/2009 cruise year, the estimated 125,939 cruise passengers who visited Huatulco spent a total of **$6.2 million** ($US) in Huatulco.

Per crew spending estimates were derived from the 432 surveys completed by crew members during the survey period. As shown in **Table 163,** each crew member spent an average of $37.02 in Huatulco. The average spend per crew member is the sum of the weighted spending in each of the twelve categories. For example, 84 percent of the survey respondents reported spending an average of $23.10 for food and beverages. Spread over all the crew members that visited Huatulco, this represents an average of $19.33 per crew member.

Table 163 – Estimated Crew Spending ($US) in Huatulco, 2008/2009 Cruise Year

Purchase Categories	Average Spend per Crew	Share of All Onshore Purchasers	Weighted Average Spend per Crew
F&B at Restaurants & Bars	$ 23.10	84%	$ 19.33
Taxis/Ground Transportation	$ 7.30	24%	$ 1.73
Local Crafts & Souvenirs	$ 16.00	16%	$ 2.53
Clothing	$ 20.90	12%	$ 2.53
Other Purchases	$ 19.10	12%	$ 2.21
Telephone & Internet	$ 14.00	7%	$ 1.03
Watches & Jewelry	$ 49.80	5%	$ 2.36
Entertainment/Night Clubs	$ 186.70	2%	$ 2.95
Perfumes & Cosmetics	$ 59.30	2%	$ 1.25
Retail Purchases of Liquor	$ 37.30	2%	$ 0.59
Shore Excursions	$ 36.70	1%	$ 0.51
Electronics	$ 0.00	0%	$ 0.00
Total Spend per Crew			**$ 37.02**
Crew Visits			20,000
Total Crew Expenditures			**$ 740,400**

For the entire 2008/2009 cruise year, the estimated 20,000 crew who visited Huatulco spent an estimated total of **$0.7 million** ($US).

Cruise lines made payments to local tour operators for shore excursions purchased on cruise ships. Net payments to local vendors for shore excursions have been included with passenger expenditures. However, cruise lines made other payments for port fees and taxes. Based upon

data provided by the FCCA member cruise lines, we estimated that all cruise lines spent **$3.1 million** ($US) in Huatulco during the 2008/2009 cruise year.

Economic Contribution of Cruise Tourism Expenditures

As noted in the **Data and Methods** section of the full report, a set of economic impact models were developed for each destination to produce estimates of the economic contribution of cruise tourism. Data for these models were collected from the Instituto Nacional Estadistica Geografia e Infomatica. The impact models were designed to reflect the economic structure of each destination, including the industrial composition of gross production, the wage share of production by industry and average employee wages by industry.

Table 164 – Total Economic Contribution of Cruise Tourism in Huatulco, 2008/2009 Cruise Year

	Employment	Wage Income ($US Millions)
Direct Economic Contribution	222	$1.1
Total Economic Contribution	347	$1.7

As shown in **Table 164**, the $10.1 million in total cruise tourism expenditures in Huatulco generated direct employment of 222 residents of Huatulco paying $1.1 million in annual wages. Adding the indirect contribution that results from the spending of those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures generated a total employment contribution of 347 jobs and $1.7 million in wage income in Huatulco during the 2008/2009 cruise year.

Figure 113 – Total Employment Impacts by Sector - Huatulco

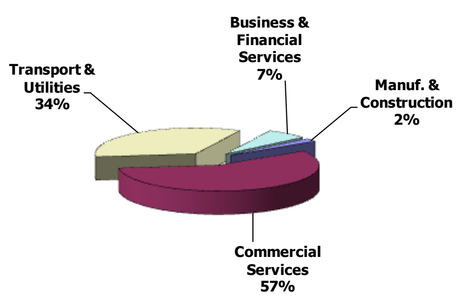
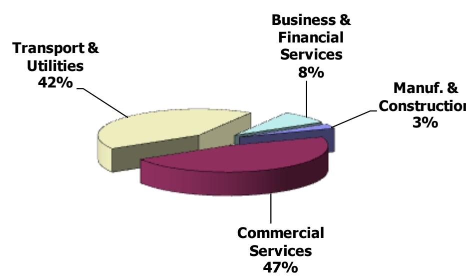


Figure 114 – Total Wage Impacts by Sector Huatulco



As shown in **Figures 113 and 114**, the total employment and wage impacts of cruise tourism are concentrated in the commercial and transport sectors which account for 90 percent of the total impacts. This is not surprising since the direct impacts account for two-thirds of the total employment impacts and that virtually all of the cruise tourism expenditures are made with businesses in these sectors, i.e., retail establishments, restaurants and bars, tour companies and ports. Because of the relatively higher wages in the transport sector compared to the other sectors of the economy, the transport sector accounts for 42 percent of the wage impacts but only 34 percent of the employment impacts. The remainder of the total employment and wage impacts was generated by the indirect spending in the other sectors of the economy.[124]

Passenger Surveys

A total of 1,436 passenger surveys were completed and returned for tabulation. **Table 165** shows the major attributes of passenger visits in the Huatulco as derived from the passenger surveys.

Table 165 - Major Attributes of Intransit Passenger Surveys - Huatulco

	Number	Percent
Total Respondents	1,436	
Number Making First Visit	1,297	90.3%
Number Ashore	1,381	96.2%
Number Making Onshore Purchases:	998	72.3%
Average Hours Ashore	3.6	
Average Size of Expenditure Party (Persons)	2.0	
Average Onshore Expenditure per Party	$128	
Purchased a Shore Excursion (Tour)	676	49.0%
Purchased Onshore Tour from:		
Cruise Line	582	86.1%
Onshore from Tour Operator	65	9.6%
Travel Agent	29	4.3%
Average Cost of Shore Excursion per Party	$94	
Toured On Own/Did not Tour	705	

- Of the 1,436 cruise parties that completed the surveys 90% stated that this had been their first visit to Huatulco.
- Ninety-six percent (96%) of the cruise parties that completed the surveys disembarked their cruise ship to visit Huatulco.
- Of the cruise parties that went ashore, 72% made at least one purchase while ashore. The typical cruise party consisted of 2.0 passengers and spent an average of 3.6 hours ashore.
- The responding cruise parties reported spending an average of $128 while ashore (excludes shore excursions).
- Forty-nine percent (49%) of the passengers that went ashore purchased a shore excursion. Eighty-six percent (86%) of passengers who purchased a tour did so through their cruise line, 10% purchased their tour onshore and 4 percent purchased their tour through their travel agent.

[124] The industry sectors include the following activities:
Manufacturing & Construction: residential and nonresidential construction and all manufacturing
Commercial Services: wholesale and retail trade, lodging and eating and drinking establishments
Transportation & Utilities: tour operators, port services, telecommunications and water and power utilities
Business & Financial Services: banking, insurance, legal, accounting, leasing and other business services
Community Services & Government: education, health and social services and government agencies

- The typical cruise party that purchased a shore excursion spent $94 for their tour.

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Table 166**. A 10-point scale was used with 10 being the highest score, i.e., extremely satisfied, and 1 being the lowest score, i.e., not at all satisfied.

Table 166 – Passenger Visit Satisfaction* - Huatulco

Visit Attributes	Mean Score
Overall Visit	7.8
Visit Met Expectations	7.5
Likelihood of a Return Visit	4.6
Informed of Tours and Activities	7.5
Initial Shoreside Welcome	7.9
Guided Tour	7.7
Historic Sites/Museums	6.5
Variety of Things to See and Do	6.4
Friendliness of Residents	8.1
Overall Shopping Experience	7.1
Courtesy of Employees	8.2
Variety of Shops	6.8
Overall Prices	6.8
Taxis/Local Transportation	7.3

* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows: Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3; Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Cruise passengers were very satisfied with their overall visit to Huatulco with a mean score of 7.8. However, the visit did not score as high in terms of meeting expectations. The mean score for "Visit Met Expectations" was lower at 7.5.
- Passengers felt very informed about tours and onshore activities in Huatulco with a mean score of 7.5.
- Cruise passengers were very satisfied with their shore excursions. "Guided Tours" (or Shore Excursions) received a mean score of 7.7.
- Passenger interactions with residents and store employees were very positive with "friendliness of residents" receiving a mean score of 8.1 and "courtesy of employees" having a mean score of 8.2.
- Categories with slightly lower scores but still above 7.0 (Very Satisfied) were: initial shoreside welcome, and local transportation.
- Cruise passengers were only somewhat satisfied with the historic sites and variety of things to see and do which received respective mean scores of 6.5 and 6.4.

- Cruise passengers were very satisfied with their overall shopping experience. However, the overall score fell well below the score for employee courtesy as a result of lower perceptions on the variety of shops (6.8) and overall prices (6.8).
- Cruise passengers stated that they were not too likely to return to Huatulco for a land-based vacation.

Passenger Demographics

Residents of the United States and the Canada accounted for 89 percent of the responding passengers. The average age of the respondents was 64 years with 61 percent of the respondents being 65 years of age or older. The Huatulco passengers had an average household income of $96,700 with 35 percent having over $100,000 in household income.

Figure 115 – Passenger Age Huatulco

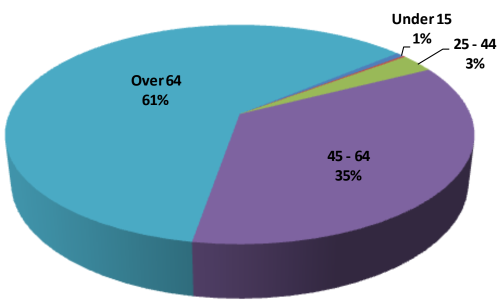
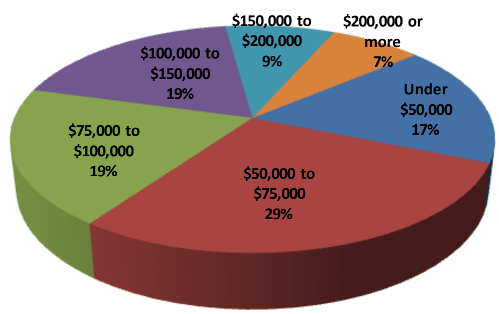


Figure 116 – Passenger Household Income Huatulco



BREA

BUSINESS RESEARCH & ECONOMIC ADVISORS

BREA specializes in custom market analyses for clients throughout the private and public sectors. These unique market analyses integrate economic, financial, and demographic trends with primary market research, proprietary client data, and advanced statistical and modeling techniques. This approach results in comprehensive and actionable analysis, databases and models, designed to support planning, sales and marketing, and education within client organizations.

Dr. Moody, President of BREA, has more than twenty-five years of experience in consulting and forecasting with a wide range of international product and service companies, including consumer products, leisure, retailing, gaming, business services, telecommunications, and utility and financial services. Typical consulting assignments provide critical analysis and insight into market dynamics, product demand, economic trends, consumer behavior and public policy.

BREA has provided specialized consulting support, including market research, economic impact studies and demand analyses, to the cruise lines, port service providers and industry associations. Among BREA's recent clients are: Port of Philadelphia and Camden, Tampa Port Authority, Port of San Diego, Royal Caribbean Cruises Ltd., Carnival Corp., P&O Ports of North America, and the International Council of Cruise Lines. Since studies are designed to meet the specific needs of each client, they can incorporate many dimensions of the market and include a variety of ancillary services.

BREA provides the following services:

Market Research: design and implementation of primary market research instruments using telephone, mail, and intercept surveys. Test instruments are designed to collect information on product demand, attributes of consumers and users, perceived product attributes, and customer satisfaction.

Economic Impact Studies: thorough analysis of industries and consumption behavior and their contribution to or impact on national and regional (state, metropolitan areas, counties, etc.) economies.

Statistical and Econometric Modeling: developing quantitative models relating market and product demand to key economic factors and demographic market/consumer attributes. Models can be used for forecasting, trend analysis and divergence/convergence analysis.

Market Studies and Trend Analyses: detailed descriptions of markets (defined as products, regions, industries, consumer segments, etc.) and comprehensive analyses of underlying market forces (such as economic and financial conditions, competitive environment, technology, etc.).

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