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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*

VOLUME I AGGREGATE ANALYSIS



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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 of similar projects undertaken in 2006 and 2009. A total of 21 destinations participated in this study of which 20 participated in 2009. These destinations were located in the Caribbean and Central and South America. The participating destinations and their sponsoring organizations are shown in **Table ES-1**.

Table ES-1 – Participating Destinations and Sponsoring Organizations

Destinations	Sponsoring Agencies
Antigua & Barbuda	Ministry of Tourism
Aruba	Aruba Ports Authority
The Bahamas	Ministry of Tourism
Barbados	Barbados Port Inc.
Belize	Belize Tourism Board
British Virgin Islands	Government of the British Virgin Islands
Cayman Islands	Department of Tourism
Colombia	Sociedad Portuaria Regional de Cartagena Proexport Colombia
Costa Rica	Instituto Costarricense de Turismo
Curacao	Curacao Ports Authority
Dominica	Dominica Air and Sea Ports Authority
Dominican Republic	Ministry of Tourism
Grenada	Board of Tourism
Honduras	Port of Roatan
Nicaragua	Nicaragua Institute of Tourism
Puerto Rico (San Juan)	Puerto Rico Tourism Company
St. Kitts and Nevis	St. Kitts Tourism Authority
St. Maarten	St. Maarten Harbour Group of Companies
St. Vincent and the Grenadines	Ministry of Tourism and Industry
Turks and Caicos	Ministry of Tourism
U. S. Virgin Islands	Department of Tourism

Economic Impacts

During the 2011/2012 cruise year¹ cruise tourism generated significant economic benefits to the 21 participating destinations. As shown in **Table ES-2 cruise tourism generated nearly \$2.0 billion in direct expenditures, 45,225 jobs and \$728 million in employee wages** among the 21 destinations included in the study.² Five destinations had direct cruise tourism

¹ The economic contribution of cruise tourism to the 21 destinations was estimated for the 12-month period from May, 2011 through April, 2012 which is referred to as the 2011/2012 cruise year throughout this report.

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

expenditures of \$100 million or more. Nine destinations had direct expenditures between \$25 and \$100 million while seven had direct expenditures less than \$25 million.

Table ES-2 – Total Economic Contribution of Cruise Tourism by Destination, 2011/2012 Cruise Year

Destinations	Total Cruise Tourism Expenditures (\$US Millions)	Total Employment	Total Employee Wage Income (\$US Millions)
Antigua & Barbuda	\$ 45.0	1,246	\$ 11.5
Aruba	\$ 63.7	1,542	\$ 25.9
The Bahamas	\$ 393.8	8,668	\$ 146.2
Barbados	\$ 53.7	1,794	\$ 18.3
Belize	\$ 61.0	1,798	\$ 18.4
British Virgin Islands	\$ 30.3	504	\$ 10.0
Cayman Islands	\$ 157.7	3,547	\$ 66.6
Colombia	\$ 33.4	819	\$ 4.9
Costa Rica	\$ 18.5	537	\$ 3.0
Curacao	\$ 39.4	735	\$ 12.9
Dominica	\$ 18.0	484	\$ 3.7
Dominican Republic	\$ 21.4	746	\$ 3.0
Grenada	\$ 15.2	434	\$ 2.9
Honduras	\$ 20.4	473	\$ 2.2
Nicaragua	\$ 2.0	111	\$ 0.3
Puerto Rico (San Juan)	\$ 186.6	4,998	\$ 70.3
St. Kitts and Nevis	\$ 70.6	1,123	\$ 9.1
St. Maarten	\$ 356.2	8,123	\$ 159.8
St. Vincent and the Grenadines	\$ 3.0	80	\$ 0.8
Turks and Caicos	\$ 60.6	1,115	\$ 18.6
U. S. Virgin Islands	\$ 339.8	6,349	\$ 139.6
All Destinations	\$1,990.0	45,225	\$ 728.1

The Bahamas led all destinations with \$393.8 million, followed by St. Maarten with \$356.2 million, the U.S. Virgin Islands with \$339.8 million, Puerto Rico with \$186.6 million and the Cayman Islands with \$157.7. Combined, these five destinations with \$1.43 billion in direct expenditures accounted for 72 percent of the total cruise tourism expenditures among the 21 destinations.

The next nine destinations with expenditures between \$25 and \$100 million accounted for 23 percent of the total cruise tourism expenditures with a combined total of \$457.7 million in direct spending. Direct spending among these nine destinations ranged from \$30.3 million in the British Virgin Islands to \$70.6 million in St. Kitts and Nevis. In addition to St. Kitts, Aruba (\$63.7 million), Belize (\$61 million), the Turks and Caicos (\$60.6 million) and Barbados (\$53.7 million) had total cruise tourism expenditures in excess of \$50 million.

The remaining seven destinations with less than \$25 million in direct cruise tourism expenditures had a combined total of \$98.5 million in direct cruise tourism expenditures and accounted for 5 percent of the total among the 21 destinations. Cruise tourism expenditures

among these destinations ranged from \$2.0 million in Nicaragua to \$21.4 million in the Dominican Republic. In addition to the Dominican Republic, Honduras (\$20.4 million), Costa Rica (\$18.5 million), Dominica (\$18 million) and Grenada (\$15.2 million) had direct expenditures in excess of \$15 million.

The analysis of cruise tourism expenditures revealed the following economic impacts³ for the top five destinations:

- The Bahamas led all Caribbean destinations with \$394 million in cruise tourism expenditures. It also led all destinations with just over 4.4 million onshore passenger and crew visits. This was more than double volume of the next highest destination, the U.S. Virgin Islands. These expenditures, in turn, generated an estimated 8,668 jobs paying \$146 million in wage income during the 2011/2012 cruise year.
- St. Maarten had the highest average per passenger onshore expenditure of \$185 per passenger visit. It also had the second highest average crew expenditure of \$135 per visit. With an estimated 1.9 million onshore passenger and crew visits, St. Maarten benefitted \$356 million in total cruise tourism expenditures, the second highest level among the 21 destinations. These expenditures generated total employment of 8,123 residents and wage income of \$160 million.
- The U.S. Virgin Islands had the third highest level of direct cruise sector expenditures with \$340 million in spending. It also had the second highest average per passenger spending rate of just over \$147 per passenger visit. In addition, the U.S.V.I. had the second highest volume of onshore passenger and crew visits with 2.1 million visits. The \$340 million in cruise tourism expenditures generated an estimated 6,349 jobs paying nearly \$140 million in wage income during the 2011/2012 cruise year.
- Puerto Rico benefitted from \$187 million in total cruise tourism expenditures which, in turn, generated nearly 5,000 jobs and \$70.3 million in wages during the 2011/2012 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 2011/2012 cruise year with over 490,000 embarkations. The island destination ranked fifth in passenger and crew onshore visits with 1.3 million visits.
- The Cayman Islands had the fourth highest number of passenger and crew onshore visits with 1.5 million visits. Combined with an average per passenger onshore expenditure of \$93.70 per visit and an average crew expenditure of \$57.50 per visits, the Cayman Islands ranked fifth in direct cruise tourism expenditures. The \$158 million in cruise tourism spending in the Cayman Islands generated 3,547 total jobs and \$66.6 million in wage income during the 2011/2012 cruise year.

Among the 20 destinations that participated in both the current and 2009 studies, eight showed an increase in cruise tourism expenditures from the 2008/2009 cruise years, three experienced no change and direct spending fell in nine destinations. In each of the eight destinations that

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

experienced an increase in expenditures (Aruba, the Bahamas, Colombia, Dominica, St. Kitts and Nevis, St. Maarten and the Turks and Caicos) total passenger and crew visits increased over the three-year period. This increase in onshore visits was enhanced by increases in the average expenditure per visit in Aruba, Colombia, Dominica, St. Kitts and Nevis and St. Maarten. In the remaining three destinations (the Bahamas, Belize and the Turks and Caicos), the increase in visits was partially offset by a decline in average per visit expenditures.

Three destinations experienced only a marginal increase in cruise tourism expenditures of less than 2.5 percent. In Barbados both passenger and crew onshore visits and average expenditures per visit (includes homeport passengers) remained virtually unchanged. In Curacao the increase in visits was offset by a decline in the average spending per visit. Finally, in Puerto Rico a decline in onshore visits was offset by an increase in the average spend per visit.

Finally among the nine destinations with a decline in total expenditures, four (Antigua, the Cayman Islands, Honduras and St. Vincent and the Grenadines) experienced a decline in both onshore passenger and crew visits and average expenditures per visit. Both the Dominican Republic and Nicaragua experienced an increase in spending per visit but it was not strong enough to offset the decline in onshore visits. Finally, in Costa Rica, Grenada and the U.S. Virgin Islands the decline in average spending per visit offset gains in onshore visits by passengers and crew.

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.⁴ A total of **28,822** passenger surveys⁵ and **7,915** crew surveys were completed and returned for tabulation.

⁴ Surveys were conducted on the ships of the following cruise lines: Carnival Cruise Lines, Celebrity Cruises, Disney Cruise Line, Holland America Line, Norwegian Cruise Line, Princess Cruises, P&O Cruises and Royal Caribbean International.

⁵ This includes both port-of-call (intransit) and port-of-embarkation (homeport) passengers.

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 during the survey period. The survey period commenced in the beginning of December 2011 and concluded at the end of May 2012.

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 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**, data collected from the participating destinations indicated that 15.44 million cruise passengers that disembarked cruise ships visited the destinations or embarked on their cruise in one of the four homeports. These passengers spent \$1.48 billion for shore excursions and other goods and services during the 2011/2012 cruise year. Average per passenger expenditures ranged from a low of \$27.10 in St. Vincent and the Grenadines to a high of \$185.40 in St. Maarten and averaged \$95.92 per passenger visit across the 21 destinations.

St. Maarten with \$294 million in total passenger expenditures led all destinations and accounted for 20 percent of total passenger spending among the 21 destinations. Four additional destinations had passenger expenditures in excess of \$100 million. Passengers spent \$264 million in the U.S. Virgin Islands, \$242 million in the Bahamas, \$131 million in Puerto Rico and \$122 million in the Cayman Islands. Combined, these passenger onshore expenditures in the five destinations accounted for 71 percent of the onshore passenger expenditures among the 21 destinations and 53 percent of total cruise tourism expenditures of the cruise lines and their passengers and crew.

These five destinations can be considered high volume destinations with more than one million passenger visits per cruise year, ranging from 1.1 million in Puerto Rico to 3.7 million in the

Bahamas. Average spending per passenger ranged from \$64.80 per passenger the Bahamas to \$185.40 in St. Maarten. Of the five destinations only the Bahamas and the Cayman Islands had average passenger expenditure below the all destination average of \$95.92. Combined the five destinations had an average passenger expenditure of \$110.55, 15 percent above the all destination average.

Table ES-3 – Passengers Onshore Visits and Expenditures by Destination, 2011/2012 Cruise Year

Destinations	Passenger Onshore Visits (Thousands)	Average Expenditure per Passenger	Total Passenger Expenditures (\$US Millions)
Antigua & Barbuda	524.1	\$ 65.30	\$ 34.2
Aruba	533.5	\$ 95.40	\$ 50.9
The Bahamas^①	3,725.6	\$ 64.80	\$ 241.5
Barbados^②	606.8	\$ 65.60	\$ 39.8
Belize	608.4	\$ 73.00	\$ 44.4
British Virgin Islands	361.1	\$ 65.50	\$ 23.7
Cayman Islands	1,296.0	\$ 93.70	\$ 121.5
Colombia^②	260.8	\$ 98.80	\$ 25.8
Costa Rica	174.4	\$ 71.50	\$ 12.5
Curacao	407.5	\$ 71.70	\$ 29.2
Dominica	294.6	\$ 47.80	\$ 14.1
Dominican Republic^②	238.0	\$ 69.50	\$ 16.5
Grenada	274.9	\$ 40.80	\$ 11.2
Honduras	265.0	\$ 62.20	\$ 16.5
Nicaragua	31.3	\$ 45.60	\$ 1.4
Puerto Rico (San Juan) ^②	1,112.3	\$ 118.10	\$ 131.4
St. Kitts and Nevis	560.6	\$ 108.90	\$ 61.1
St. Maarten	1,586.4	\$ 185.40	\$ 294.1
St. Vincent and the Grenadines	58.8	\$ 27.10	\$ 1.6
Turks and Caicos	724.2	\$ 63.90	\$ 46.3
U. S. Virgin Islands	1,795.9	\$ 146.70	\$ 263.5
All Destinations	15,440.3	\$95.92	\$1,481.1

^① Only includes passenger visits at Nassau and Freeport.

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

Another eight destinations had passenger expenditures between \$25 and \$100 million. These were: Antigua & Barbuda, Aruba, Barbados, Belize, Colombia, Curacao, St. Kitts and Nevis and the Turks and Caicos. Onshore passenger expenditures among these eight destinations totaled \$331 million and accounted for 22% of total passenger expenditures among the 21 participating destinations. Total passenger onshore spending in this group of destinations ranged from a low of \$25.8 million in Colombia to a high of \$61.1 million in St. Kitts and Nevis and averaged \$41.5 million among the eight destinations.

Excluding Colombia, the seven destinations are considered to be medium volume destinations with passenger onshore visits ranging from 500,000 to one million. Among these destinations passenger visits ranged from 524,100 in Antigua to 724,200 in St. Kitts. Among the medium volume destinations per passenger expenditures averaged \$77.14 per visit, ranging from \$65.30

in Antigua to \$108.90 in St. Kitts. Among these seven destinations, only Aruba and St. Kitts had average passenger expenditures above the all destination average. Thus, average per passenger expenditures for the medium volume group of destinations was about 20% below the all destination average.

Passenger onshore expenditures in the remaining eight destinations totaled \$97.5 million and accounted for 7% of total passenger expenditures among the 21 participating destinations. Passenger spending in this group averaged \$12.2 million per destination, ranging from \$1.4 million in Nicaragua to \$23.7 million in the British Virgin Islands.

Including Colombia, these nine destinations are considered to be low volume destinations with cruise year passenger visits of less than 500,000. Among these destinations passenger visits ranged from 31,300 in Nicaragua to 361,100 in the British Virgin Islands. Among the low volume destinations per passenger expenditures averaged \$64.21 per visit, 33 percent below the all destination average. Average passenger expenditures ranged from \$21.80 in St. Vincent and the Grenadines to \$98.80 in Colombia. Colombia was the only destination in this group with an average passenger expenditure above the all destination average.

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 21 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 15.44 million total passenger visits (transit visits + embarkations) 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 \$30.85 during a single onshore visit. Since the average party size was 2.1 passengers, the average spend for food and beverages was \$14.69 per passenger ($30.85 \div 2.1$). However, not all cruise parties made such a purchase at each destination. The survey data indicated that at any individual cruise call 46.9% of the cruise parties actually purchased food and beverages. Thus, the weighted spend per passenger across all onshore passenger visits was \$6.89 ($\$14.69 \times .469$). Finally, total estimated passenger purchases of food and beverages across all 21 destinations for the entire 2011/2012 cruise year was estimated by multiplying the weighted average spend per passenger (\$6.89) by the total number of onshore visits (15.44 million). Thus, total passenger purchases of food and beverages for the 2011/2012 cruise year across all 21 destinations were estimated to be \$106.5 million. Similar calculations were made for each category.

Table ES-4 – Average Passenger Expenditures by Category – All 21 Participating Destinations

Purchase Categories	Average Spend per Passenger (\$US)	Share of All Onshore Visits ^①	Weighted Average Spend per Passenger	Total Passenger Expenditures (\$US Millions)
Shore Excursions ^②	\$ 35.70	49.1%	\$ 17.53	\$ 270.7
F&B at Restaurants & Bars	\$ 14.69	46.9%	\$ 6.89	\$ 106.5
Clothing	\$ 23.67	43.2%	\$ 10.24	\$ 158.0
Local Crafts & Souvenirs	\$ 13.25	42.8%	\$ 5.68	\$ 87.7
Taxis/Ground Transportation	\$ 16.58	24.8%	\$ 4.10	\$ 63.4
Watches & Jewelry	\$ 196.76	19.2%	\$ 37.77	\$ 583.2
Other Purchases	\$ 32.83	18.8%	\$ 6.17	\$ 95.3
Retail Purchases of Liquor	\$ 18.11	9.6%	\$ 1.73	\$ 26.7
Perfumes & Cosmetics	\$ 25.45	4.4%	\$ 1.12	\$ 17.3
Entertainment/Night Clubs	\$ 32.26	2.2%	\$ 0.69	\$ 10.7
Lodging ^③	\$ 148.20	2.1%	\$ 3.15	\$ 48.6
Telephone & Internet	\$ 16.87	1.7%	\$ 0.29	\$ 4.5
Electronics	\$ 85.17	0.6%	\$ 0.55	\$ 8.5
Total			\$95.92	\$1,481.1

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 separately 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 - \$54.80; travel agents/other - \$73.80; and onshore tour operators - \$26.10. The weighted average actual spend across all sources was \$52.19.

③ Lodging expenditures only apply to those passengers who embarked on cruises in San Juan, Barbados, the Dominican Republic 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 \$95.92 at each destination call during their cruise vacation with total passenger expenditures in the 21 destinations reaching \$1.48 billion during the 2011/2012 cruise year.
- Just over 75 percent of passenger expenditures were made in four categories: watches and jewelry (\$583 million), shore excursions (\$271 million), clothing (\$158 million), and food and beverages (\$106 million). Combined, cruise passengers spent an estimated \$1.12 billion in these four categories.
- The most popular expenditure was for shore excursions with almost half (49 percent) of all passengers making such a purchase at each destination. Local tour operators received an average of \$35.70 per passenger directly from cruise passengers and cruise lines (**see Note below table**). The weighted average expenditure was \$17.53 per passenger. Total payments to tour operators in the 21 participating destinations were an estimated \$271 million.
- Passengers that purchased watches and jewelry spent an average of \$196.76 on such purchases. Since only 19.2 percent of passengers purchased watches and jewelry the average jewelry expenditure per passenger was \$37.77. Total expenditures on watches and jewelry were an estimated \$583 million.

- On average, just under half of the cruise passengers purchased food and beverages, clothing and local crafts and souvenirs at each destination call. Visiting passengers spent an average of \$10.24 on clothing, \$6.89 on food and beverages and \$5.68 for local crafts and souvenirs at each port call. Combined, passengers spent an estimated total of \$352 million in these three categories, 24 percent of total passenger expenditures.

Crew Visits and Expenditures

As shown in **Table ES-5**, the estimated 2.7 million crew members that visited the 21 participating destinations spent just under \$262 million for goods and services during the 2011/2012 cruise year. Average expenditures per crew ranged from a low of \$21.40 in St. Vincent and the Grenadines to a high of \$138.30 in the U.S. Virgin Islands and averaged \$96.98 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.

Table ES-5 Crew Visits and Expenditures by Destination, 2011/2012 Cruise Year

Destinations	Crew Visits (Thousands)	Average Expenditure per Crew	Total Crew Expenditures (\$US Millions)
Antigua & Barbuda	83.8	\$ 74.30	\$ 6.2
Aruba	86.9	\$ 101.10	\$ 8.8
The Bahamas	714.6	\$ 111.00	\$ 79.3
Barbados	120.0	\$ 48.90	\$ 5.9
Belize	73.6	\$ 102.30	\$ 7.5
British Virgin Islands	65.9	\$ 47.00	\$ 3.1
Cayman Islands	196.1	\$ 57.50	\$ 11.3
Colombia	36.2	\$ 42.40	\$ 1.5
Costa Rica	46.2	\$ 44.40	\$ 2.0
Curacao	68.2	\$ 72.80	\$ 5.0
Dominica	41.2	\$ 46.80	\$ 1.9
Dominican Republic	25.4	\$ 40.00	\$ 1.0
Grenada	45.3	\$ 44.70	\$ 2.0
Honduras	32.0	\$ 38.50	\$ 1.2
Nicaragua	5.5	\$ 43.50	\$ 0.2
Puerto Rico (San Juan)	185.3	\$ 122.20	\$ 22.6
St. Kitts and Nevis	71.3	\$ 65.00	\$ 4.6
St. Maarten	333.3	\$ 135.50	\$ 45.2
St. Vincent and the Grenadines	6.9	\$ 21.40	\$ 0.1
Turks and Caicos	122.0	\$ 41.20	\$ 5.0
U. S. Virgin Islands	342.4	\$ 138.30	\$ 47.3
All Destinations	2,702.4	\$96.98	\$261.9

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 for the top five destinations:

- Crew visiting the Bahamas spent an estimated \$79.3 million, the highest level of crew expenditures among the 21 participating destinations. A total of 714,600 crew were estimated to have made an onshore visit during the 2011/2012 cruise year, the highest number of visits among the 21 participating destinations. Crew spent an average of \$111 per visit, the fourth highest average. Crew expenditures were concentrated in entertainment venues and restaurants and bars which accounted for nearly 70 percent of their spending in the Bahamas.
- The U.S. Virgin Islands had the highest crew expenditure rate of \$138.30 and the second highest number of estimated crew onshore visits, 342,400. As a result, the crew visits to the island generated the second highest level of crew onshore expenditures of \$47.3 million during the 2011/2012 cruise year. In the U.S.V.I. crew expenditures were concentrated on retail purchases of electronics, which accounted for 34% of their total expenditures in the U.S. Virgin Islands. These were followed by purchases of food and beverages, clothing and watches and jewelry. Combined these three categories accounted for another 30 percent of their total expenditures.
- With the second highest average expenditure of \$135.50 per crew visit and the third highest number of crew onshore visits (333,300), St. Maarten had the third highest total expenditure among the 21 participating destinations, \$45.2 million. In St. Maarten crew expenditures were also concentrated on retail purchases of electronics and jewelry. These were followed by spending for food and beverages and clothing. These four categories accounted for 57 percent of total crew spending in St. Maarten.
- Crew visiting Puerto Rico spent an average of \$122.20, the third highest crew expenditure rate. With an estimated 185,300 onshore visits, crew spent an estimated \$22.6 million in Puerto Rico during the 2011/2012 cruise year. Crew spending in Puerto Rico was concentrated in clothing, food and beverages and jewelry. Combined these three categories accounted for 75 percent of total crew expenditures in Puerto Rico.
- Crew visiting the Cayman Islands spent an average of \$57.50. With an estimated 196,100 onshore visits, crew spent an estimated \$11.3 million during the 2011/2012 cruise year. Crew spending was concentrated in food and beverages and jewelry followed by retail purchases of liquor and shore excursions. Combined, there four categories accounted for 68 percent of total crew expenditures in the Cayman Islands.

Among the remaining 16 destinations total crew expenditures averaged \$3.5 million per destination. Six destinations, Antigua, Aruba, Barbados, Belize, Curacao and the Turks and Caicos had crew expenditures of \$5 million or more. Aruba (\$101.10) and Belize (102.30) had average crew expenditure rates above the all destination average of \$96.98. Other destinations with average crew spending visit above \$50 were Antigua (\$74.30), Curacao (\$72.80) and St. Kitts (\$65.00).

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 passenger taxes and port services, such as navigation and utility services, and 2) payments to local businesses for supplies and services, such as food and beverages and other stores.

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 \$246.9 million in the 21 participating destinations during the 2011/2012 cruise year for port fees and taxes, utilities, navigation services and ship supplies.

Table ES-6 –Total Expenditures by Cruise Lines by Destination, 2011/2012 Cruise Year

Destinations	Estimated Expenditures (\$US Millions)
Antigua & Barbuda	\$ 4.5
Aruba	\$ 4.0
The Bahamas	\$ 73.0
Barbados	\$ 8.0
Belize	\$ 9.1
British Virgin Islands	\$ 3.5
Cayman Islands	\$ 24.9
Colombia	\$ 6.1
Costa Rica	\$ 4.0
Curacao	\$ 5.2
Dominica	\$ 2.0
Dominican Republic	\$ 3.8
Grenada	\$ 1.9
Honduras	\$ 2.6
Nicaragua	\$ 0.3
Puerto Rico (San Juan)	\$ 32.6
St. Kitts and Nevis	\$ 4.9
St. Maarten	\$ 16.9
St. Vincent and the Grenadines	\$ 1.3
Turks and Caicos	\$ 9.3
U. S. Virgin Islands	\$ 28.9
All Destinations	\$246.9

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:

- The Bahamas had the highest total expenditures by cruise lines among the 21 participating destinations, \$73.0 million. The expenditures by cruise lines in the Bahamas were concentrated in port fees and services which accounted for over 95 percent of total cruise line expenditures.⁶
- Puerto Rico had the second highest level of cruise line expenditures at \$32.6 million. As the major Caribbean homeport, the purchase of ship supplies is more important than in most other destinations accounting for nearly one-third of the total expenditures made by cruise lines.

⁶ This figure includes passenger head taxes paid for passenger arrivals at the private islands of the cruise lines.

- The U.S. Virgin Islands were third with \$28.9 million in cruise line expenditures. Even though the Virgin Islands is primarily a port-of-call, the purchase of ship supplies accounted for 20 percent of the total expenditures made by cruise lines.
- The Cayman Islands were fourth with \$24.9 million in cruise line expenditures during the 2011/2012 cruise year. Port and navigation fees, including passenger-based fees, accounted for 90 percent of cruise line spending in the Cayman Islands.
- St. Maarten was fifth with \$16.9 million in cruise line expenditures during the 2011/2012 cruise year. Over 95 percent of these expenditures were for port and navigation fees.

In each of the remaining 16 destinations expenditures by cruises lines during the 2011/2012 cruise year were under \$10 million, ranging from a low of \$300,000 in Nicaragua to a high of \$9.3 million in the Turks and Caicos. Overall, the cruise lines spent \$70.6 million in the 16 destinations for an average of \$4.4 million per destination.

Passenger Attributes and Satisfaction

A total of 27,889 transit 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 the transit passenger visits across all destinations as derived from the passenger surveys.⁷

Table ES-7 – Major Attributes of Port-of-Call Passenger Visits – All Destinations⁸

	Number	Percent
Total Respondents	27,889	
Number Making First Visit	18,769	67.3%
Number Ashore	27,122	97.2%
Number Making Onshore Purchases:	21,061	77.7%
Average Hours Ashore	4.2	
Average Size of Expenditure Party (Persons)	2.1	
Average Onshore Expenditure per Party^①	\$127.70	
Purchased a Shore Excursion (Tour)	14,958	55.1%
Purchased Onshore Tour from:		
Cruise Line	11,192	74.8%
Onshore from Tour Operator	2,318	15.5%
Travel Agent/Other	1,448	9.7%
Average Cost of Shore Excursion per Party^②	\$123.20	

^①This figure excludes the purchases of shore excursions which are reported at the bottom of the table.

^②This figure includes the value of shore excursions purchased onboard cruise ships and is not adjusted for fees retained by the cruise lines.

⁷ Homeport surveys were conducted on cruise ships embarking on their cruises from Barbados and San Juan, PR. The attributes of these homeport passengers are discussed in the destination analyses.

⁸ These data are the unweighted results summed across all surveys collected. The passenger attributes and satisfaction scores for each destination are reported in Volume II of this study.

The major attributes of passenger visits are:

- Of the 27,889 cruise parties that completed the surveys 67.3 percent stated that this had been their first visit to the destination.
- Ninety-seven percent (97 percent) of the cruise parties that completed the surveys disembarked their cruise ship to visit the destination.
- Of the cruise parties that went ashore, 77.7 percent made at least one purchase while ashore, excluding shore excursions. The typical cruise party consisted of 2.1 passengers and spent an average of 4.2 hours ashore.
- The responding cruise parties reported spending an average of \$127.70 while ashore (excludes shore excursions).
- Fifty-five percent (55 percent) of the passengers that went ashore purchased a shore excursion. Nearly 75 percent of passengers who purchased a tour did so through their cruise line, 15.5 percent purchased their tour onshore and nearly 10 percent purchased their tour through their travel agents or other means.
- The typical cruise party that purchased a shore excursion spent \$123.20 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.

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 7.6. While destination visits did not score as high in terms of meeting expectations, the mean score for "Visit Met Expectations" of 7.2 implied that the visit exceeded expectations.
- Passengers felt very informed about tours and onshore activities in the destinations 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 8.3. Thus, cruise passengers were very satisfied with their shore excursions.
- Passenger interactions with residents and store employees were very positive with "friendliness of residents" and "courtesy of employees" having respective mean scores of 8.0 and 7.9.
- Categories with slightly lower scores but still above 7.0 (Very Satisfied) were: initial shoreside welcome, historic sites/museums 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.

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

Visit Attributes	Mean Score
Overall Visit	7.6
Visit Met Expectations	7.2
Informed of Tours and Activities	7.8
Initial Shoreside Welcome	7.6
Guided Tour	8.3
Historic Sites/Museums	7.3
Variety of Things to See and Do	6.9
Friendliness of Residents	8.0
Overall Shopping Experience	6.8
Courtesy of Employees	7.9
Variety of Shops	6.6
Overall Prices	6.6
Taxis/Local Transportation	7.4

* 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.

Comparison to the 2009 Study

While the current study covers fewer destinations than the 2008/2009 study, 21 versus 29 destinations, it is possible to draw some general observations about the two studies.⁹ As shown in **Table ES-9**, due to the smaller number of destinations analyzed in the current study, the total value of cruise tourism expenditures and their subsequent economic impacts are generally lower than those reported in the earlier study. As shown in the table, we have estimated that direct cruise tourism expenditures totaled \$1.99 billion during the 2011/2012 cruise year among the 21 participating destinations. This is 12.7 percent lower than the \$2.28 billion in direct cruise tourism expenditures estimated for the 29 participating destinations during the 2008/2009 cruise year. Similarly, the number of passenger onshore visits and the employment impacts are also lower for the current study. However, the income impacts are just slightly higher, 0.7 percent, due to the combination of increased productivity and wage rates.

However, if the expenditures are normalized on a per passenger basis, per passenger spending across the 21 destinations of the current study are only slightly lower than those of the 2008/2009 study. The \$1.99 billion in total expenditures among the 21 destinations of the current study equates to \$128.89 per onshore passenger visit; whereas, in the 2008/2009 study, the \$2.28 billion in total expenditures among the 29 destinations equated to \$129.62 per onshore passenger visit. The marginal decline of only 0.5 percent is primarily the net result of the 1.4 percent decline in average per passenger spending by passengers and the 8.8 percent increase in average per crew expenditures.

⁹ The main reason for the lower number of participating destinations is the lack of participation by Mexican cruise destinations.

Table ES-9 – Comparison of Cruise Tourism Expenditures – All Destinations

	2011/2012 Cruise Year	2008/2009 Cruise Year	Percent Difference
Number of Participating Destinations	21	29	--
Total Direct Cruise Tourism Spending (US \$ Billions)	\$1.99	\$2.28	-12.7%
Total Passenger Onshore Visits (Millions)	15.44	17.56	-12.1%
Total Expenditures per Passenger (US \$)	\$128.89	\$129.62	-0.5%
Total Employment Impact	45,225	56,271	-19.6%
Total Income Impacts (US \$ Millions)	\$728.1	\$723.0	+0.7%
Average per Passenger Expenditures	\$95.92	\$97.26	-1.4%
Average Per Crew Expenditures	\$96.98	\$89.24	+8.8%

Second, looking at just the 20 destinations that are common to the two studies¹⁰ the total direct cruise tourism expenditures increased by 16 percent from \$1.69 billion in 2008/2009 to \$1.96 billion in 2011/2012 (see **Table ES-10**). This was the net result of an 18 percent increase in cruise passenger onshore visits and a 1.7 percent decline in average total spend per passenger. The normalized total expenditures per passenger in the 20 common destinations fell from \$132.23 in the 2008/2009 cruise year to \$129.97 in the 2011/2012 cruise year. As indicated in Table ES-10, the decline in the average total spend per passenger is the result of a 0.8 percent decline in the average onshore spending by passengers and a 3.6 percent decline in the average crew expenditures. As a result of the increase in total direct cruise tourism expenditures among the 20 destinations, the employment and income increased by 15.6 percent and 18.7 percent respectively.

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

	2011/2012 Cruise Year	2008/2009 Cruise Year	Percent Difference
Number of Participating Destinations	20	20	--
Total Direct Cruise Tourism Spending (US \$ Billions)	\$1.96	\$1.69	+16.0%
Total Passenger Onshore Visits (Millions)	15.08	12.78	+18.0%
Total Expenditures per Passenger (US \$)	\$129.97	\$132.23	-1.7%
Total Employment Impact	44,722	38,689	+15.6%
Total Income Impacts (US \$ Millions)	\$718.1	\$605.0	+18.7%
Average per Passenger Expenditures	\$97.12	\$ 97.93	-0.8%
Average Per Crew Expenditures	\$98.15	\$101.86	-3.6%

Third, an analysis of expenditures by category indicates that the decline in passenger expenditures on a per passenger basis among the 20 destinations in both studies was the net result of a slight increase in per passenger spending in individual expenditure categories that was offset by a slightly larger decline in the percentage of passengers making purchases in most of those categories. Thus, it appears that cruise passengers during the 2011/2012 cruise year were more selective in making purchases than during the 2008/2009 cruise year; but, when they did make a purchase they were willing to spend more. This is

¹⁰ These destinations are Antigua, Aruba, the Bahamas, Barbados, Belize, the Cayman Islands, Colombia, Costa Rica, Curacao, Dominica, the Dominican Republic, Grenada, Honduras, Nicaragua, Puerto Rico, St. Kitts, St. Maarten, St. Vincent and the Grenadines, the Turks and Caicos, and the U.S.V.I.

especially true for the major expenditures categories, shore excursions, food and beverages, clothing and jewelry.

Finally, average crew spending also fell between the two periods. Among the 20 common destinations, per crew expenditures averaged \$101.86 during the 2008/2009 cruise year but decreased by 3.6 percent to \$98.15 during the 2011/2012 cruise year. This decline was the result of the combined impact of a decrease in spending by crew in most categories, as well as a decline in the percentage of crew making onshore purchases.

In conclusion, the increase in the economic impacts during the 2011/2012 cruise year relative to the 2008/2009 cruise year among the 20 common destinations is primarily the result of an increase in passenger onshore visits and the resulting increase in total direct cruise tourism expenditures. These impacts were then partially offset by a decline in the average onshore expenditures by passengers and crew.

INTRODUCTION

This study analyzes the contribution of cruise tourism on the economies of 21 destinations located in the Caribbean and Central and South America.¹¹ The study was funded by the Florida-Caribbean Cruise Association (FCCA) and the 21 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 lines¹², 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, 2011 and ending in April, 2012 utilizing economic data collected from local, regional and international sources.

The Caribbean and Central and South American 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 42.8 million bed days deployed throughout the Caribbean, including the Bahamas, in 2011 accounting for nearly 40 percent of the industry's global bed day capacity.¹³ CLIA also reported that the average cruise length was 7.1 days. Thus, cruise ships operating in the region had sufficient capacity to carry over 6.0 million passengers in 2011.

In a separate report recently published by the Caribbean Tourist Organization (CTO)¹⁴, the group reported that about 20 million cruise passengers arrived at the 22 Caribbean destinations for which it provides data during 2011, an increase of 1.7 percent from 2010. Since cruise ships call at multiple destinations on any single itinerary, passenger arrivals are always significantly higher than passenger capacity. The increase reported for Caribbean cruise passenger arrivals for 2011 was concentrated among the destinations in the Eastern Caribbean, i.e., the Bahamas, St. Maarten, Antigua and the U.S. Virgin Islands.

Both, the proximity of the Caribbean 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. Data obtained

¹¹ Participating destinations contributed to the funding of this study and also provided cruise related data, such as passenger arrivals and port fees. The 21 participating destinations are: Antigua and Barbuda; Aruba; the Bahamas; Barbados; Belize; the British Virgin Islands; the Cayman Islands; Colombia; Costa Rica; Curacao; Dominica; the Dominican Republic; Grenada; Honduras; Nicaragua; San Juan, PR; St. Kitts and Nevis; St. Maarten; St. Vincent and the Grenadines; the Turks and Caicos; the U.S. Virgin Islands.

¹² The FCCA member lines that supplied onshore expenditure data are as follows: Carnival Cruise Lines, Celebrity Cruises, Disney Cruise Line, Holland America Line, Norwegian Cruise Line, Princess Cruises and Royal Caribbean International.

¹³ CLIA, [The Overview: 2009 CLIA Cruise Market Overview](#).

¹⁴ CTO, [2008 Tourist Statistics](#), August 21, 2009.

from our survey of cruise passengers indicated that 75 percent of the surveyed passengers were residents of the United States, 12 percent were from Canada and 10 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. This distribution of passengers by country of residence is very similar to the 2008/2009 cruise year distribution.

Passenger and Crew Arrivals at Participating Destinations

Table 1– Estimated Passenger and Crew Arrivals (Thousands) at the Participating Destinations, 2011/2012 Cruise Year

Destinations	Passengers	Crew	Total
Antigua & Barbuda	594.8	232.0	826.8
Aruba	590.2	249.8	839.9
The Bahamas ^①	4,292.2	1,721.6	6,013.8
Barbados ^②	770.6	311.5	1,082.1
Belize	731.2	292.4	1,023.6
British Virgin Islands	407.6	177.7	585.3
Cayman Islands	1,443.2	530.0	1,973.2
Colombia ^②	293.4	114.7	408.1
Costa Rica	199.6	127.6	327.1
Curacao	443.4	177.3	620.8
Dominica	336.7	122.6	459.2
Dominican Republic ^②	270.0	101.8	371.8
Grenada	309.6	131.7	441.3
Honduras	311.7	128.0	439.8
Nicaragua	34.8	17.1	51.9
Puerto Rico (San Juan) ^②	1,176.7	473.7	1,650.4
St. Kitts and Nevis	629.2	226.0	855.2
St. Maarten	1,754.9	672.9	2,427.8
St. Vincent and the Grenadines	65.3	23.1	88.4
Turks and Caicos	804.7	305.0	1,109.7
U. S. Virgin Islands	1,997.6	745.6	2,743.3
All Destinations	17,457.6	6,882.0	24,339.6

^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

Based upon data collected from the participating destinations and the CTO, an estimated 17.46 million passengers were onboard cruise ships (passenger arrivals) that called at the 21 participating destinations during the 2011/2012 cruise year (see **Table 1**). Some of the participating destinations are not included in the CTO cruise passenger data while the CTO data includes destinations that were not participants in this study, including destinations in the

western Caribbean and Central America. Consequently, the 17.46 million passenger arrivals¹⁵ estimated for the 21 participating destinations is 12 percent lower than the total Caribbean cruise passenger arrivals reported by the CTO for 2011.¹⁶ Adding the 6.8 million crew arrivals, the cruise industry brought 24.3 million passenger and crew arrivals to the 21 participating destinations during the 2011/2012 cruise year.

Eight of the participating destinations, the Bahamas, Barbados, Belize, the Cayman Islands, Puerto Rico, St. Maarten, the Turks and Caicos and the U.S. Virgin Islands, had combined passenger and crew arrivals in excess of 1 million. Combined, these eight destinations accounted for 74 percent of all passenger and crew arrivals among the 21 destinations. An estimated 17.04 million passengers and crew arrived at the destinations of the Eastern Caribbean,¹⁷ 70 percent of the total arrivals among the 21 participating destinations. Another 3.07 million passengers and crew arrived at the Southern Caribbean¹⁸ destinations, 13 percent of the total arrivals. Finally, the destinations of the Western Caribbean¹⁹ accounted for 17 percent of total arrivals with 4.22 million passenger and crew arrivals.

DATA AND METHODS

To achieve the primary objective of this project, the estimation of 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.

¹⁵ 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.

¹⁶ The following participating destinations are not included in the CTO data: Colombia, Costa Rica, Honduras, Nicaragua, St. Kitts, and the Turks & Caicos. At the same time, the CTO data includes the following destinations which did not participate in this study: Bermuda, Cozumel, Haiti, Jamaica, Martinique, St. Lucia and Trinidad & Tobago.

¹⁷ For the purposes of this study the Eastern Caribbean includes the following ten destinations: Antigua, the Bahamas, the British Virgin Islands, Dominica, the Dominican Republic, Puerto Rico, St. Kitts, St. Marten and the U.S. Virgin Islands.

¹⁸ For the purposes of this report the Southern Caribbean includes the following five destinations: Aruba, Barbados, Curacao, Grenada and St. Vincent and the Grenadines.

¹⁹ For purposes of this report the Western Caribbean includes the following six destinations: Belize, the Cayman Islands, Colombia, Costa Rica, Honduras and Nicaragua.

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 discuss the data and methods that were employed in both phases of this project.

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 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 December 2011 and concluded at the end of May 2012.

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 300 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 10th on the Equinox following its call in Costa Rica and on the Noordam following its call in Barbados would be considered two distributions. Thus, on any given day surveys might have been conducted aboard multiple ships at different destinations. A total of 28,822 passenger surveys and 7,915 crew surveys were returned for processing.

Table 2 – Completed Passenger and Crew Surveys by Destination[ⓐ]

Destinations	Passengers	Crew
Antigua & Barbuda	1,756	329
Aruba	1,866	822
The Bahamas	1,125	476
Barbados	1,846	324
Belize	1,078	486
British Virgin Islands	698	363
Cayman Islands	1,662	311
Colombia	1,800	940
Costa Rica	1,548	66
Curacao	1,698	591
Dominica	1,815	411
Dominican Republic	368	86
Grenada	511	144
Honduras	1,466	574
Nicaragua	1,099	48
Puerto Rico (San Juan)	2,006	118
St. Kitts and Nevis	1,301	694
St. Maarten	1,194	391
St. Vincent and the Grenadines	813	90
Turks and Caicos	1,469	373
U. S. Virgin Islands	1,703	278
All Destinations	28,822	7,915

[ⓐ] Includes passengers and crew 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 cruise lines also reported the percentage of passengers and crew onboard their ships that actually disembarked and visited each destination. These percentages were used to estimate onshore visits by passengers and crew from the passenger and crew arrival data.

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 effective onshore 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 2010
- Colombia: Department of National Statistics
- Grenada: Ministry of Finance
- 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
- 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 indirect 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 nearly 40 percent higher than the direct impacts, resulting in an implicit employment multiplier of 2.4. 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 – Passenger and Crew Surveys

Samples of the passenger (Transit 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 and Central America 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)

QA. Please check the name of the cruise line you are sailing with:

- Carnival Celebrity Crystal Disney Holland America Norwegian Princess
 P&O Regent Seven Seas Royal Caribbean Seabourn Other (Please specify): _____

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 the ship anchored offshore and you had to use a tender boat 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 Other (Explain) _____

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 Other (Explain) _____

Q10. Did you make any purchases (excluding your shore excursion) during your onshore visit in Puerto Rico today?

- Yes No (If No, Go to Q14 on back)

Q11. How much in total (excluding shore excursions) 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+

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:	<input type="checkbox"/> 10	<input type="checkbox"/> 9	<input type="checkbox"/> 8	<input type="checkbox"/> 7	<input type="checkbox"/> 6	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Guided Tour:	<input type="checkbox"/> 10	<input type="checkbox"/> 9	<input type="checkbox"/> 8	<input type="checkbox"/> 7	<input type="checkbox"/> 6	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Shopping Experience:	<input type="checkbox"/> 10	<input type="checkbox"/> 9	<input type="checkbox"/> 8	<input type="checkbox"/> 7	<input type="checkbox"/> 6	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Historic Sites/Museums:	<input type="checkbox"/> 10	<input type="checkbox"/> 9	<input type="checkbox"/> 8	<input type="checkbox"/> 7	<input type="checkbox"/> 6	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Variety of things to see and do:	<input type="checkbox"/> 10	<input type="checkbox"/> 9	<input type="checkbox"/> 8	<input type="checkbox"/> 7	<input type="checkbox"/> 6	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Friendliness of the residents:	<input type="checkbox"/> 10	<input type="checkbox"/> 9	<input type="checkbox"/> 8	<input type="checkbox"/> 7	<input type="checkbox"/> 6	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Overall shopping experience:	<input type="checkbox"/> 10	<input type="checkbox"/> 9	<input type="checkbox"/> 8	<input type="checkbox"/> 7	<input type="checkbox"/> 6	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Courtesy of employees:	<input type="checkbox"/> 10	<input type="checkbox"/> 9	<input type="checkbox"/> 8	<input type="checkbox"/> 7	<input type="checkbox"/> 6	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Variety of Shops:	<input type="checkbox"/> 10	<input type="checkbox"/> 9	<input type="checkbox"/> 8	<input type="checkbox"/> 7	<input type="checkbox"/> 6	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Overall Prices:	<input type="checkbox"/> 10	<input type="checkbox"/> 9	<input type="checkbox"/> 8	<input type="checkbox"/> 7	<input type="checkbox"/> 6	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Taxis/Local Transportation:	<input type="checkbox"/> 10	<input type="checkbox"/> 9	<input type="checkbox"/> 8	<input type="checkbox"/> 7	<input type="checkbox"/> 6	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Overall visit in "destination":	<input type="checkbox"/> 10	<input type="checkbox"/> 9	<input type="checkbox"/> 8	<input type="checkbox"/> 7	<input type="checkbox"/> 6	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 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 or more Female: 1 2 3 4 5 or more

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

Under 15: 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)?

<input type="checkbox"/> Under \$50,000	<input type="checkbox"/> \$50,000 to \$74,999	<input type="checkbox"/> \$75,000 to \$99,999
<input type="checkbox"/> \$100,000 to \$149,999	<input type="checkbox"/> \$150,000 to \$199,999	<input type="checkbox"/> \$200,000 or more

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

CONFIDENTIAL CRUISE PASSENGER SURVEY

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 and Central America 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)

QA. Please check the name of the cruise line you are sailing with:

- Carnival Celebrity Crystal Disney Holland America Norwegian Princess
 P&O Regent Seven Seas Royal Caribbean Seabourn Other (Please specify): _____

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 (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 Other (Explain) _____

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 Marine-based activity tour Other (Explain) _____

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**)

Q13. Please record the value of all purchases (in U.S. dollars) that all persons in your cabin made during your **on-shore visit** to Puerto Rico prior to your cruise. * **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:	\$ _____	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? _____

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

Q19. How many persons in your cabin are: Male: 1 2 3 4 5 or more Female: 1 2 3 4 5 or more

Q20. How many persons in your cabin are in each age group? (Leave Blank if "0")

Under 15: 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+

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)?

<input type="checkbox"/> Under \$50,000	<input type="checkbox"/> \$50,000 to \$74,999	<input type="checkbox"/> \$75,000 to \$99,999
<input type="checkbox"/> \$100,000 to \$149,999	<input type="checkbox"/> \$150,000 to \$199,999	<input type="checkbox"/> \$200,000 or more

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

Puerto Rico - Crew
CONFIDENTIAL CREW SURVEY

The Florida-Caribbean Cruise Association (FCCA) and the cruise destinations of the Caribbean and Central America 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)

QA. Please check the name of the cruise line you are crewing with:

- Input boxes for Carnival, Celebrity, Crystal, Disney, Holland America, Norwegian, Princess, P&O, Regent Seven Seas, Royal Caribbean, Seabourn

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).

Table with 4 columns for purchase categories: Food and Beverages, Taxis/Ground Transportation, Retail Purchases of Watches & Jewelry, Entertainment Venues/Nightclubs/Casinos, Retail purchases of perfume & cosmetics, Tours purchased on shore or the internet only, Local Crafts and Souvenirs, Retail Purchases of Liquor, Retail Purchases of Electronics, Telephone & Internet Communications, 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)

Table with 12 rows of satisfaction items (e.g., Guided Tour, Shopping Experience, Historic Sites/Museums, etc.) and 11 columns of rating options from 10 to 0 Not applicable.

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 2011/2012 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 an estimated 18.1 million passenger and crew onshore visits during the 2011/2012 cruise year. It is these onshore visits that generate the local spending that creates employment and income in each destination. Visits to the

Eastern Caribbean destinations accounted for 71 percent of all visits to the 21 destinations and totaled 12.91 million visits. Visits to the Southern Caribbean destinations totaled 2.21 million and accounted for 12 percent of total destination visits. The Western Caribbean destinations accounted for the remaining 17 percent, 3.03 million visits.

Based upon data collected from the cruise lines, it was estimated that an average of 88 percent of cruise passengers disembarked at port calls across all destinations. This ranged from 85 percent or less in such destinations as Barbados, Belize, the Dominican Republic and Honduras, to 90 percent or more in Aruba, Curacao, Nicaragua, Puerto Rico, St. Maarten, St. Vincent and the Grenadines, the Turks and Caicos and the U.S. Virgin Islands. 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, 2011/2012 Cruise Year

Destinations	Passengers	Crew	Total
Antigua & Barbuda	524.1	83.8	607.8
Aruba	533.5	86.9	620.4
The Bahamas^①	3,725.6	714.6	4,440.3
Barbados^②	606.8	120.0	726.8
Belize	608.4	73.6	682.0
British Virgin Islands	361.1	65.9	427.0
Cayman Islands	1,296.0	196.1	1,492.1
Colombia^②	260.8	36.2	297.0
Costa Rica	174.4	46.2	220.6
Curacao	407.5	68.2	475.7
Dominica	294.6	41.2	335.8
Dominican Republic^②	238.0	25.4	263.5
Grenada	274.9	45.3	320.2
Honduras	265.0	32.0	297.0
Nicaragua	31.3	5.5	36.9
Puerto Rico (San Juan)^②	1,112.3	185.3	1,297.6
St. Kitts and Nevis	560.6	71.3	632.0
St. Maarten	1,586.4	333.3	1,919.7
St. Vincent and the Grenadines	58.8	6.9	65.7
Turks and Caicos	724.2	122.0	846.2
U. S. Virgin Islands	1,795.9	342.4	2,138.2
All Destinations	15,440.3	2,702.4	18,142.7

^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.

Onshore crew visits were estimated by data provided by the cruise lines which tracks the number of passengers and crew that disembark at each destination call. These data indicated that a much smaller percentage of crew onboard cruise ships disembark at each port-of-call. The survey data indicated that this figure averaged about 39 percent across all destinations and ranged from 30 percent or lower in many of the smaller destinations, such as Belize, the

Dominican Republic, Honduras and St. Vincent and the Grenadines to 40 percent or more in the larger destinations, such as the Bahamas, St. Maarten, the Turks and Caicos and the U.S. Virgin Islands.

Passenger Shore Excursions

As noted previously, more passengers purchased shore excursions than any other category of 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 56 percent of all transit cruise passengers purchased shore excursions at each destination visit. The vast majority, 74.8 percent purchased their shore excursions from the cruise line, 15.5 percent purchased their tour directly from local tour operators and 9.7% percent purchased their tour through a travel agent or some other means. The remaining 44 percent of transit 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, 82 percent of passengers visiting Costa Rica purchased a shore excursion while only 36 percent of passengers visiting the Bahamas did so. In terms of sales channel, nearly 87 percent of passengers visiting the Turks and Caicos purchased their tour through the cruise line while only about 55 percent of passengers visiting St. Vincent and the Grenadines reported doing so.

Fewer than half of visiting passengers reported purchasing shore excursions in the following seven destination: the Bahamas (36.3%), Curacao (49.9%), Puerto Rico (48.9%), St. Maarten (46.6%), St. Vincent and the Grenadines (35.6%), the Turks and Caicos (44.2%) and the U.S. Virgin Islands (45.5%). This is a diversified group of destinations that includes four of the most popular or high volume destinations (one million or more passenger arrivals), one medium volume destination (between 500,000 and one million passenger arrivals) and two low volume destination (less than 500,000 passenger arrivals). In another eight destinations more than 60 percent of visiting passengers reported purchasing shore excursions. These included: Belize (70.3%), British Virgin Islands (60.8%), Colombia (75.8%), Costa Rica (82.4%), Dominica (63.6%), the Dominican Republic (63.5%), Honduras (63.9%) and Nicaragua (64.8%). This group consists of one medium volume and seven low volume 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 75 percent of shore excursions were purchased from the cruise lines in nine destinations: Aruba (77.9%),

Barbados 78.6%), Colombia (82.2%), Costa Rica (81.1%), the Dominican Republic (78.5%), Nicaragua (89.6%), St. Maarten (80.6%), the Turks and Caicos (86.8%) and the U.S. Virgin Islands (75.8%). Again, this is a very diversified group with two high volume, three medium volume and four low volume destinations.

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

Destinations	Purchased a Tour	Purchased a Tour from			Did Not Purchase a Tour
		Cruise Line	Onshore	Travel Agent/Other	
Antigua & Barbuda	51.6%	69.4%	21.5%	9.1%	48.4%
Aruba	50.2%	77.9%	13.3%	8.8%	49.8%
Bahamas	36.3%	63.8%	26.3%	9.9%	63.7%
Barbados ^①	54.0%	78.6%	11.3%	10.1%	46.0%
Belize	70.3%	70.4%	15.1%	14.5%	29.7%
British Virgin Islands	60.8%	66.2%	24.9%	8.9%	39.2%
Cayman Islands	55.9%	71.9%	18.3%	9.8%	44.1%
Colombia ^①	75.8%	82.2%	9.5%	8.3%	24.2%
Costa Rica	82.4%	81.1%	9.3%	9.6%	17.6%
Curacao	49.9%	73.1%	18.8%	8.1%	50.1%
Dominica	63.6%	74.0%	14.5%	11.5%	36.4%
Dominican Republic ^①	63.5%	78.5%	14.6%	6.9%	36.5%
Grenada	50.7%	67.4%	23.1%	9.5%	49.3%
Honduras	63.9%	68.5%	17.0%	14.5%	36.1%
Nicaragua	64.8%	89.6%	3.8%	6.6%	35.2%
Puerto Rico (San Juan) ^①	48.9%	62.6%	31.3%	6.1%	51.1%
St. Kitts and Nevis	59.4%	71.5%	17.2%	11.3%	40.6%
St. Maarten	46.6%	80.6%	8.6%	10.8%	53.4%
St. Vincent and the Grenadines	35.6%	54.5%	29.3%	16.2%	64.4%
Turks and Caicos	44.2%	86.8%	7.1%	6.1%	55.8%
U. S. Virgin Islands	45.5%	75.8%	16.6%	7.6%	54.5%
All Destinations ^①	56.2%	74.8%	15.5%	9.7%	43.8%

^① Only includes passengers onboard cruise ships making transit calls.

Finally, there were only five destinations in which shore operators accounted for about 25 percent or more of tour purchases. These were: the Bahamas (26.3%), the British Virgin Islands (24.9%), Grenada (23.1%), Puerto Rico (31.3%) and St. Vincent and the Grenadines (29.3%). This group included two high volume and 3 low volume destinations.

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 local effective or net expenditure per passenger for onshore excursions.

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 highly likely that higher value tours are purchased on a cruise ship relative to those purchased on shore.

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	Other ^①	
Antigua & Barbuda	\$52.44	\$22.86	\$45.60	\$31.71
Aruba	\$54.84	\$23.87	\$47.68	\$29.90
Bahamas	\$72.01	\$31.31	\$62.62	\$43.10
Barbados ^②	\$56.37	\$24.95	\$49.02	\$42.02
Belize	\$63.63	\$28.05	\$55.33	\$39.45
British Virgin Islands	\$56.05	\$24.39	\$48.74	\$38.70
Cayman Islands	\$61.20	\$26.61	\$53.22	\$29.85
Colombia ^②	\$53.35	\$23.20	\$46.39	\$38.07
Costa Rica	\$87.02	\$37.83	\$75.79	\$44.97
Curacao	\$47.09	\$21.70	\$41.03	\$28.33
Dominica	\$54.63	\$23.75	\$47.50	\$35.63
Dominican Republic ^②	\$58.08	\$26.26	\$50.51	\$22.23
Grenada	\$45.81	\$19.92	\$39.88	\$25.25
Honduras	\$54.64	\$23.76	\$47.51	\$31.81
Nicaragua	\$61.15	\$26.59	\$53.17	\$47.48
Puerto Rico (San Juan) ^②	\$44.52	\$19.36	\$38.71	\$25.08
St. Kitts and Nevis	\$67.12	\$29.18	\$58.37	\$48.36
St. Maarten	\$53.84	\$23.41	\$46.81	\$32.14
St. Vincent and the Grenadines	\$47.12	\$20.49	\$40.98	\$31.22
Turks and Caicos	\$53.11	\$23.09	\$46.27	\$31.93
U. S. Virgin Islands	\$55.64	\$24.19	\$48.58	\$28.12
All Destinations^②	\$57.05	\$24.80	\$49.61	\$36.41

^① Includes purchases made through travel agents and purchases made through an unspecified channel.

^② Only includes passengers onboard cruise ships making transit calls.

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 75 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 approximately 30 percent when calculating the local effective price. The discounts varied slightly across destinations but the destination-specific discounts ranged between 25 and 45 percent with the discount in most destinations ranging

between 25 percent and 35 percent. The purchase made directly from onshore operators was not discounted at all.

Thus, on average local tour operators received an average of \$36.41 for tours purchased by transit passengers.²⁰ This figure is 47 percent higher than the average price paid directly to a tour operator and 36 percent lower than the average price received by the cruise lines. The effective local price for a shore excursion ranged from a low of \$22.23 in the Dominican Republic to a high of \$48.36 in St. Kitts and Nevis. In addition to St. Kitts, four destinations, the Bahamas (\$43.10), Barbados (\$42.02), Costa Rica (\$44.97) and Nicaragua (47.48) had effective local prices in excess of \$40 per passenger while five destinations, the Cayman Islands (\$29.85), Curacao (\$28.33), Grenada (\$25.25), Nicaragua (\$25.08) and the U.S. Virgin Islands (\$28.12), in addition to the Dominican Republic had effective local prices less than \$30 per passenger.

Total Passenger Expenditures

As shown in **Table 7**, the 15.44 million cruise passengers that visited the 21 participating destinations spent \$1.48 billion for shore excursions and other goods and services during the 2011/2012 cruise year. Average per passenger expenditures ranged from a low of \$27.10 in St. Vincent and the Grenadines to a high of \$185.40 in St. Maarten and averaged \$95.92 per passenger visit across the 21 destinations.

St. Maarten, with \$294 million in total passenger expenditures, led all destinations and accounted for 20 percent of all passenger spending among the 21 destinations. Four additional destinations had passenger expenditures in excess of \$100 million. Passengers spent \$263 million in the U.S. Virgin Islands, \$242 million in the Bahamas, \$131 million in Puerto Rico and \$122 million in the Cayman Islands. Combined, these passenger onshore expenditures in the five destinations accounted for 71 percent of the onshore passenger expenditures among the 21 destinations and 53 percent of total direct expenditures by the cruise lines and their passengers and crew. These five destinations are also high volume destinations.

Another eight destinations had passenger expenditures between \$25 and \$100 million. These were: Antigua & Barbuda, Aruba, Barbados, Belize, Colombia, Curacao, St. Kitts and Nevis and the Turks and Caicos. Onshore passenger expenditures among these eight destinations totaled \$331 million and accounted for 22% of total passenger expenditures among the 21 participating destinations. Total passenger onshore spending in this group of destinations ranged from a low of \$25.8 million in Colombia to a high of \$61.1 million in St. Kitts and Nevis and averaged \$41.5 million among the eight destinations. Among these eight destinations, six are medium volume and two are low volume destinations.

²⁰ This figure is lower for the small number of homeport passengers, \$25.92. This is due to the fact that most of these excursions are purchased directly from local tour operators.

Passenger onshore expenditures in the remaining eight destinations (under \$25 million) totaled \$97.5 million and accounted for 7% of total passenger expenditures among the 21 participating destinations. Passenger spending in this group averaged \$12.2 million per destination, ranging from \$1.4 million in Nicaragua to \$23.7 million in the British Virgin Islands. All eight of these destinations are low volume destinations.

Table 7 – Passenger Onshore Visits and Expenditures by Destination, 2011/2012 Cruise Year

Destinations	Passenger Onshore Visits (Thousands)	Average Expenditure per Passenger	Total Passenger Expenditures (\$US Millions)
Antigua & Barbuda	524.1	\$ 65.30	\$ 34.2
Aruba	533.5	\$ 95.40	\$ 50.9
Bahamas ^①	3,725.6	\$ 64.80	\$ 241.5
Barbados ^②	606.8	\$ 65.60	\$ 39.8
Belize	608.4	\$ 73.00	\$ 44.4
British Virgin Islands	361.1	\$ 65.50	\$ 23.7
Cayman Islands	1,296.0	\$ 93.70	\$ 121.5
Colombia ^②	260.8	\$ 98.80	\$ 25.8
Costa Rica	174.4	\$ 71.50	\$ 12.5
Curacao	407.5	\$ 71.70	\$ 29.2
Dominica	294.6	\$ 47.80	\$ 14.1
Dominican Republic ^②	238.0	\$ 69.50	\$ 16.5
Grenada	274.9	\$ 40.80	\$ 11.2
Honduras	265.0	\$ 62.20	\$ 16.5
Nicaragua	31.3	\$ 45.60	\$ 1.4
Puerto Rico (San Juan) ^②	1,112.3	\$ 118.10	\$ 131.4
St. Kitts and Nevis	560.6	\$ 108.90	\$ 61.1
St. Maarten	1,586.4	\$ 185.40	\$ 294.1
St. Vincent and the Grenadines	58.8	\$ 27.10	\$ 1.6
Turks and Caicos	724.2	\$ 63.90	\$ 46.3
U. S. Virgin Islands	1,795.9	\$ 146.70	\$ 263.5
All Destinations	15,440.3	\$95.92	\$1,481.1

^① Only includes passenger visits at Nassau and Freeport.

^② Includes passengers aboard both transit and homeport cruise ships.

Transit Passenger Expenditures by Category

Of the 15.44 million passenger visits 96%, or 14.77 million, were made by transit 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 transit passenger visits. For example, those cruise parties that reported purchasing food and beverages in a restaurant or bar spent an average of \$13.22 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 47 percent of the cruise passengers actually purchased food and beverages. Thus, the weighted spend per passenger across all onshore passengers was \$6.22 (\$13.22×.47). Finally, total passenger purchases of

food and beverages across all 21 destinations for the entire 2011/2012 cruise year was estimated by multiplying the weighted average spend per passenger (\$6.22) by the total number of onshore visits (14.77 million). Thus, total passenger purchases of food and beverages for the 2011/2012 cruise year across all 21 destinations were estimated to be \$91.8 million. Similar calculations were made for each category.

Table 8 – Average Transit 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 Excursions ^①	\$ 36.41	49.2%	\$ 17.93	\$ 264.8
F&B at Restaurants & Bars	\$ 13.22	47.0%	\$ 6.22	\$ 91.8
Clothing	\$ 24.23	43.3%	\$ 10.49	\$ 154.9
Local Crafts & Souvenirs	\$ 13.69	43.0%	\$ 5.88	\$ 86.9
Taxis/Ground Transportation	\$ 15.54	24.8%	\$ 3.85	\$ 56.9
Watches & Jewelry	\$205.25	19.2%	\$ 39.43	\$ 582.3
Other Purchases	\$ 26.74	18.8%	\$ 5.04	\$ 74.4
Retail Purchases of Liquor	\$ 17.62	9.6%	\$ 1.69	\$ 24.9
Perfumes & Cosmetics	\$ 26.12	4.4%	\$ 1.15	\$ 17.0
Entertainment/Night Clubs	\$ 31.47	2.2%	\$ 0.68	\$ 10.0
Telephone & Internet	\$ 17.40	1.7%	\$ 0.30	\$ 4.4
Electronics	\$ 88.26	0.6%	\$ 0.57	\$ 8.4
Total			\$93.21	\$1,376.7

^① This is the effective average onshore expenditure made to local tour operators 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 transit passenger onshore spending:

- The typical transit cruise passenger spent an average of \$93.21 at each destination call during their cruise vacation with total passenger expenditures in the 21 destinations reaching \$1.38 billion during the 2011/2012 cruise year, 93 percent of total passenger expenditures.
- Nearly 80 percent of transit passenger expenditures were made in four categories: watches and jewelry (\$582 million), shore excursions (\$265 million), clothing (\$155 million), and food and beverages (\$92 million). Combined, cruise passengers spent an estimated \$1.26 billion in these four categories.
- The most popular expenditure was for shore excursions with nearly half (49 percent) of all transit passengers making such a purchase. Local tour operators received an average of \$36.41 per passenger directly from cruise passengers and cruise lines. The weighted average expenditure was \$17.93 per passenger. Total payments to tour operators in the 21 participating destinations were an estimated \$265 million.
- Transit passengers that purchased watches and jewelry spent an average of \$205.25 on such purchases. Since only 19.2 percent of passengers purchased watches and jewelry the average jewelry expenditure per passenger was \$39.43. Total expenditures on watches and jewelry were an estimated \$582 million.

- Slightly less than half of the transit cruise passengers purchased food and beverages, local crafts and souvenirs, and clothing in each destination. On average, visiting passengers spent \$6.22 on food and beverages, \$5.88 for local crafts and souvenirs and \$10.49 on clothing at each port call. Combined, passengers spent a total of \$334 million in these three categories.

Homeport Passenger Expenditures by Category

Of the total of 15.44 million passenger onshore visits in the 21 participating destinations during the 2011/2012 cruise year, 670,600 visits were made by homeport passengers embarking on their cruises from: San Juan, PR, Barbados, Cartagena, and the Dominican Republic. 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.

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)
Lodging	\$179.05	40.5%	\$ 72.50	\$ 48.6
F&B at Restaurants & Bars	\$ 54.61	40.0%	\$ 21.85	\$ 14.7
Taxis/Ground Transportation	\$ 26.34	36.9%	\$ 9.72	\$ 6.5
Shore Excursions ^①	\$ 63.12	14.0%	\$ 8.84	\$ 5.9
Retail Purchases of Liquor	\$ 22.20	12.3%	\$ 2.73	\$ 1.8
Other Purchases	\$ 295.87	10.5%	\$ 31.17	\$ 20.9
Clothing	\$ 47.14	9.8%	\$ 4.64	\$ 3.1
Local Crafts & Souvenirs	\$ 16.96	6.9%	\$ 1.17	\$ 0.8
Entertainment/Night Clubs	\$ 29.81	3.6%	\$ 1.06	\$ 0.7
Watches & Jewelry	\$ 40.34	3.3%	\$ 1.33	\$ 0.9
Perfumes & Cosmetics	\$ 22.35	2.1%	\$ 0.46	\$ 0.3
Telephone & Internet	\$ 8.50	0.7%	\$ 0.06	\$ 0.0
Electronics	\$ 142.45	0.1%	\$ 0.09	\$ 0.1
Total			\$ 155.62	\$ 104.4

^① This is the effective average onshore expenditure made to local tour operators 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.

For example, those homeport cruise parties²¹ that reported purchasing food and beverages in a restaurant or bar spent an average of \$54.61 per passenger during their pre- or post-cruise stay. However, not all cruise parties made such a purchase at each port of embarkation. The survey data indicated that at any individual embarkation 40 percent of the cruise passengers actually purchased food and beverages. Thus, the weighted spend per passenger across all homeport passengers was \$21.85 ($\$54.61 \times .40$). Finally, total passenger purchases of food and beverages across all four homeports for the entire 2011/2012 cruise year was estimated by

²¹ The average homeport cruise party consisted of 2.2 passengers. An estimated 45 percent of the cruise parties had a pre- and/or post-cruise stay that averaged 1.5 nights.

multiplying the weighted average spend per passenger (\$21.85) by the total number of embarkations (670,600). Thus, total passenger purchases of food and beverages for the 2011/2012 cruise year across the five destinations were estimated to be \$14.7 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 \$155.62 at their homeport call during their cruise vacation with total passenger expenditures in the four destinations reaching \$104.4 million during the 2011/2012 cruise year, 7 percent of total passenger expenditures.
- Nearly 77 percent of homeport passenger expenditures were made in four categories: lodging (\$48.6 million), other/unspecified purchases (\$20.9 million), food and beverages (\$14.7 million), and taxis/ground transportation (\$6.5 million). Combined, cruise passengers spent an estimated \$90.7 million in these four categories.
- Accommodations and food and beverages were purchased by about 40 percent of all homeport passengers. Passengers purchasing accommodations spent an average of \$179.05 for the pre- and/or post- cruise overnight stay. Those passengers who purchased food and beverages spent an average of \$54.61. The weighted average expenditure for both accommodations and food and beverages was \$94.35. Total payments to hotels and eating and drinking establishments in the four destinations were an estimated \$63.3 million, 60 percent of total expenditures by homeport passengers.
- While shore excursions are not as popular in homeports as in transit ports, only 14 percent of homeport passengers purchased a tour, the average effective onshore price of these tours was considerably higher than those purchased by transit passengers, \$63.12 versus \$36.41. Shore excursions by homeport passengers generated a total of \$5.9 million in the four homeports.

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 2.7 million crew members that visited the 21 participating destinations spent nearly \$262 million for goods and services during the 2011/2012 cruise year.

With nearly two-thirds of crew purchasing food and beverages in each destination, they spent an estimated total of \$51.1 million at bars and restaurants. Crew spent another \$45.5 million on entertainment, primarily at bars and night clubs. Combining the two categories crew spending at restaurants, bars and night clubs accounted for 37 percent of total crew expenditures. Crew spent almost equal amounts on clothing and jewelry, \$32.2 and \$31.3 million respectively. Combined these two categories accounted for 24 percent of total crew spending during the

2011/2012 cruise year. By comparison, only 3.4 percent of crew purchased shore excursions and spent a total of \$9.6 million in the 21 destinations accounting for 4 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	\$ 28.89	65.5%	\$ 18.91	\$ 51.1
Taxis/Ground Transportation	\$ 13.64	25.1%	\$ 3.42	\$ 9.2
Clothing	\$ 65.27	18.2%	\$ 11.90	\$ 32.2
Other Purchases	\$ 124.00	10.9%	\$ 13.47	\$ 36.3
Local Crafts & Souvenirs	\$ 21.82	10.6%	\$ 2.32	\$ 6.2
Entertainment/Night Clubs	\$ 191.52	8.8%	\$ 16.85	\$ 45.5
Telephone & Internet	\$ 20.52	8.2%	\$ 1.69	\$ 4.6
Perfumes & Cosmetics	\$ 13.51	6.6%	\$ 0.89	\$ 2.4
Watches & Jewelry	\$ 178.88	6.5%	\$ 11.57	\$ 31.3
Electronics	\$ 197.97	5.4%	\$ 10.61	\$ 28.6
Retail Purchases of Liquor	\$ 40.68	4.4%	\$ 1.80	\$ 4.9
Shore Excursions	\$ 106.27	3.4%	\$ 3.56	\$ 9.6
Total			\$ 96.98	\$ 261.9

Table 11 shows the distribution of the \$261.9 million in crew expenditures across the 21 participating destinations. Average expenditures per crew ranged from a low of \$21.40 in St. Vincent and the Grenadines to a high of \$138.30 in the U.S. Virgin Islands and as indicated above averaged \$96.98 across all destinations.

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

- Crew visiting the Bahamas spent an estimated \$79.3 million, the highest level of spending among the 21 destinations. A total of 714,600 crew were estimated to have made an onshore visit during the 2011/2012 cruise year and spent an average of \$111.00 per visit. Crew expenditures were concentrated in purchases of jewelry and spending at restaurants and bars and entertainment venues.
- The U.S. Virgin Islands had the highest crew expenditure rate (\$138.30) and the second highest number of estimated crew onshore visits, 342,400. As a result, the crew visits to the islands generated the second highest level of crew onshore expenditures of \$47.3 million during the 2011/2012 cruise year. In the U.S.V.I. crew expenditures were concentrated on retail purchases of electronics and food and beverages. These were followed by expenditures for clothing and jewelry.
- With the second highest average expenditure of \$135.50 per crew member and the third highest number of crew onshore visits, St. Maarten had the third highest total expenditure among the 21 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 clothing. The 333,300 crew members that visited St. Maarten spent an estimated \$45.2 million during the 2011/2012 cruise year.

- Crew visiting Puerto Rico spent an average of \$122.20. With an estimated 185,300 onshore visits crew spent an estimated \$22.6 million in Puerto Rico during the 2011/2012 cruise year. Crew spending in Puerto Rico was concentrated in clothing, food and beverages and jewelry.
- Crew visiting the Cayman Islands spent an average of \$57.50. With an estimated 196,100 onshore visits crew spent an estimated \$11.3 million during the 2011/2012 cruise year. Crew spending was concentrated in food and beverages and jewelry followed by retail purchases of liquor.

Among the remaining 16 destinations total crew expenditures averaged \$3.5 million per destination. Six destinations, Antigua, Aruba, Barbados, Belize, Curacao and the Turks and Caicos had crew expenditures of \$5 million or more. Aruba (\$101.10) and Belize (102.30) had average crew expenditure rates above the all destination average of \$96.98. Other destinations with average crew spending visit above \$50 were Antigua (\$74.30), Curacao (\$72.80) and St. Kitts (\$65.00).

Table 11 – Crew Expenditures by Destination, 2011/2012 Cruise Year

Destinations	Crew Onshore Visits (Thousands)	Average Expenditure per Crew	Total Crew Expenditures (\$US Millions)
Antigua & Barbuda	83.8	\$ 74.30	\$ 6.2
Aruba	86.9	\$ 101.10	\$ 8.8
Bahamas ^①	714.6	\$ 111.00	\$ 79.3
Barbados ^②	120.0	\$ 48.90	\$ 5.9
Belize	73.6	\$ 102.30	\$ 7.5
British Virgin Islands	65.9	\$ 47.00	\$ 3.1
Cayman Islands	196.1	\$ 57.50	\$ 11.3
Colombia ^②	36.2	\$ 42.40	\$ 1.5
Costa Rica	46.2	\$ 44.40	\$ 2.0
Curacao	68.2	\$ 72.80	\$ 5.0
Dominica	41.2	\$ 46.80	\$ 1.9
Dominican Republic ^②	25.4	\$ 40.00	\$ 1.0
Grenada	45.3	\$ 44.70	\$ 2.0
Honduras	32.0	\$ 38.50	\$ 1.2
Nicaragua	5.5	\$ 43.50	\$ 0.2
Puerto Rico (San Juan) ^②	185.3	\$ 122.20	\$ 22.6
St. Kitts and Nevis	71.3	\$ 65.00	\$ 4.6
St. Maarten	333.3	\$ 135.50	\$ 45.2
St. Vincent and the Grenadines	6.9	\$ 21.40	\$ 0.1
Turks and Caicos	122.0	\$ 41.20	\$ 5.0
U. S. Virgin Islands	342.4	\$ 138.30	\$ 47.3
All Destinations	2,702.4	\$96.98	\$261.9

^① Only includes crew visits at Nassau and Freeport.

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

Total Passenger and Crew Expenditures for an Transit Call

Table 12 – Average Onshore Expenditures (\$US) of a Transit Call by a 3,500 Passenger Cruise Ship

	Arrivals	Onshore Visits	Average Spend	Total
Passengers	3,500	3,080	\$ 93.21	\$ 287,090
Crew	1,400	546	\$ 96.98	\$ 52,950
Total	4,900	3,626	\$ 93.78	\$ 340,040

While passenger and crew spending obviously varies across destinations, we have estimated the average passenger and crew expenditures for a typical transit port call by one of the industry's 3,500 passenger ships with 1,400 crew (see **Table 12**). During the typical transit call, such a cruise ship would generate approximately 3,080 passenger visits (88 percent of passenger arrivals) and 546 crew visits (39 percent of crew arrivals). Passengers are estimated to generate \$287,090 ($\$93.21 \times 3,080$) in onshore spending while crew are expected to add an additional \$52,950 ($\96.98×546) for total onshore spending of \$340,040.

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 \$246.9 million in the 21 participating destinations during the 2011/2012 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 which accounted for 71 percent of cruise line spending among the 21 destinations:

- The Bahamas had the highest total expenditures by cruise lines among the 21 participating destinations, \$73.0 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.²²

- Puerto Rico had the second highest level of cruise line expenditures at \$32.6 million. As the major Caribbean homeport, the purchase of ship supplies is more important than in most other destinations accounting for one-third of the total expenditures made by cruise lines.
- The U.S. Virgin Islands were third with \$28.9 million in cruise line expenditures. Even though the Virgin Islands is primarily a port-of-call, the purchase of ship supplies accounted for 20 percent of the total expenditures made by cruise lines.
- The Cayman Islands received \$24.9 million in cruise line expenditures during the 2011/2012 cruise year. About 90 percent of the cruise lines expenditures were for port fees and navigation services.
- St. Maarten had the fifth highest total with \$16.9 million in cruise line expenditures during the 2011/2012 cruise year. Over 95 percent of these expenditures were for port fees and navigation services.

Table 13 – Total Cruise Line Expenditures by Destination, 2011/2012 Cruise Year

Destinations	Estimated Expenditures (\$US Millions)
Antigua & Barbuda	\$ 4.5
Aruba	\$ 4.0
Bahamas	\$ 73.0
Barbados ①	\$ 8.0
Belize	\$ 9.1
British Virgin Islands	\$ 3.5
Cayman Islands	\$ 24.9
Colombia ①	\$ 6.1
Costa Rica	\$ 4.0
Curacao	\$ 5.2
Dominica	\$ 2.0
Dominican Republic ①	\$ 3.8
Grenada	\$ 1.9
Honduras	\$ 2.6
Nicaragua	\$ 0.3
Puerto Rico (San Juan) ①	\$ 32.6
St. Kitts and Nevis	\$ 4.9
St. Maarten	\$ 16.9
St. Vincent and the Grenadines	\$ 1.3
Turks and Caicos	\$ 9.3
U. S. Virgin Islands	\$ 28.9
All Destinations	\$246.9

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

²² This figure includes passenger head taxes paid passenger arrivals at the private islands of the cruise lines.

In each of the remaining 16 destinations expenditures by cruises lines during the 2011/2012 cruise year were under \$10 million, ranging from a low of \$300,000 in Nicaragua to a high of \$9.3 million in the Turks and Caicos. Overall, the cruise lines spent \$70.6 million in the 16 destinations for an average of \$4.4 million per destination.

Direct Cruise Tourism Expenditures

As shown in **Table 14**, the 18.14 million passenger and crew visits generated an estimated \$1.74 billion in spending for local goods and services in the 21 destinations. The cruise lines added another \$247 million in spending for port services and other local goods and services, bringing total cruise tourism expenditures to \$1.99 billion during the 2011/2012 cruise year.

Table 14 – Total Cruise Tourism Expenditures (\$US Millions) by Destination, 2011/2012 Cruise Year*

Destinations	Passengers	Crew	Cruise Line	Total
Antigua & Barbuda	\$ 34.2	\$ 6.2	\$ 4.5	\$ 45.0
Aruba	\$ 50.9	\$ 8.8	\$ 4.0	\$ 63.7
Bahamas ^①	\$ 241.5	\$ 79.3	\$ 73.0	\$ 393.8
Barbados ^②	\$ 39.8	\$ 5.9	\$ 8.0	\$ 53.7
Belize	\$ 44.4	\$ 7.5	\$ 9.1	\$ 61.0
British Virgin Islands	\$ 23.7	\$ 3.1	\$ 3.5	\$ 30.3
Cayman Islands	\$ 121.5	\$ 11.3	\$ 24.9	\$ 157.7
Colombia ^②	\$ 25.8	\$ 1.5	\$ 6.1	\$ 33.4
Costa Rica	\$ 12.5	\$ 2.0	\$ 4.0	\$ 18.5
Curacao	\$ 29.2	\$ 5.0	\$ 5.2	\$ 39.4
Dominica	\$ 14.1	\$ 1.9	\$ 2.0	\$ 18.0
Dominican Republic ^②	\$ 16.5	\$ 1.0	\$ 3.8	\$ 21.4
Grenada	\$ 11.2	\$ 2.0	\$ 1.9	\$ 15.2
Honduras	\$ 16.5	\$ 1.2	\$ 2.6	\$ 20.4
Nicaragua	\$ 1.4	\$ 0.2	\$ 0.3	\$ 2.0
Puerto Rico (San Juan) ^②	\$ 131.4	\$ 22.6	\$ 32.6	\$ 186.6
St. Kitts and Nevis	\$ 61.1	\$ 4.6	\$ 4.9	\$ 70.6
St. Maarten	\$ 294.1	\$ 45.2	\$ 16.9	\$ 356.2
St. Vincent and the Grenadines	\$ 1.6	\$ 0.1	\$ 1.3	\$ 3.0
Turks and Caicos	\$ 46.3	\$ 5.0	\$ 9.3	\$ 60.6
U. S. Virgin Islands	\$ 263.5	\$ 47.3	\$ 28.9	\$ 339.8
All Destinations	\$1,481.1	\$261.9	\$246.9	\$1,990.0

*Note: Columns may not sum to totals due to rounding.

Five destinations had direct cruise tourism expenditures in excess of \$100 million. Nine destinations had direct expenditures between \$25 and \$100 million while seven had direct expenditures less than \$25 million.

The Bahamas led all destinations with \$393.8 million, followed by St. Maarten with \$356.2 million, the U.S. Virgin Islands with \$339.8 million, Puerto Rico with \$186.6 million and the Cayman Islands with \$157.7. Combined, these five destinations with \$1.43 billion in direct

expenditures accounted for 72 percent of the total cruise tourism expenditures among the 21 destinations. All five of these destinations are high volume destinations.

The next nine destinations with expenditures between \$25 and \$100 million accounted for 23 percent of the total cruise tourism expenditures with a combined total of \$457.7 million in direct spending. These included the five medium volume destinations of Antigua, Barbados, Belize, St. Kitts and Nevis and the Turks and Caicos and the three low volume destinations of the British Virgin Islands, Colombia and Curacao.

The remaining seven destinations (Costa Rica, Dominica, the Dominican Republic, Grenada, Honduras, Nicaragua and St. Vincent and the Grenadines) with less than \$25 million in direct cruise tourism expenditures had a combined total of \$98.5 million in direct cruise tourism expenditures and accounted for 5 percent of the total among the 21 destinations. These are all low volume destinations.

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 18.14 million passenger and crew visits to the 21 participating destinations during the 2011/2012 cruise year generated \$1.99 billion in direct spending by the cruise lines and their passengers and crew. As shown in **Table 15** the businesses that directly supplied the shore excursions and other goods and services employed an estimated 25,584 employees and paid annual wages of \$406.8 million. While the impacts vary across destinations, on average every

\$77,800 in cruise tourism expenditures generated a direct job in a destinations and that 20 percent of cruise tourism expenditures ended up as income for the impacted workers.

Table 15 – Direct Economic Impact of Cruise Tourism by Destination, 2011/2012 Cruise Year*

Destinations	Total Cruise Tourism Expenditures (\$US Millions)	Direct Employment	Direct Employee Wage Income (\$US Millions)
Antigua & Barbuda	\$ 45.0	760	\$ 6.9
Aruba	\$ 63.7	824	\$ 14.2
Bahamas ^①	\$ 393.8	4,987	\$ 85.6
Barbados ^②	\$ 53.7	947	\$ 10.3
Belize	\$ 61.0	1,192	\$ 12.2
British Virgin Islands	\$ 30.3	313	\$ 5.7
Cayman Islands	\$ 157.7	1,974	\$ 36.7
Colombia ^②	\$ 33.4	518	\$ 3.2
Costa Rica	\$ 18.5	381	\$ 2.1
Curacao	\$ 39.4	424	\$ 7.5
Dominica	\$ 18.0	308	\$ 2.4
Dominican Republic ^②	\$ 21.4	478	\$ 2.0
Grenada	\$ 15.2	270	\$ 1.9
Honduras	\$ 20.4	320	\$ 1.5
Nicaragua	\$ 2.0	77	\$ 0.2
Puerto Rico (San Juan) ^②	\$ 186.6	2,684	\$ 35.9
St. Kitts and Nevis	\$ 70.6	712	\$ 5.7
St. Maarten	\$ 356.2	4,274	\$ 85.9
St. Vincent and the Grenadines	\$ 3.0	52	\$ 0.5
Turks and Caicos	\$ 60.6	715	\$ 11.9
U. S. Virgin Islands	\$ 339.8	3,375	\$ 74.4
All Destinations	\$1,990.0	25,584	\$406.8

*Note: Columns may not sum to totals due to rounding.

① Only includes crew visits at Nassau and Freeport.

② Includes crew aboard both transit and homeport cruise ships.

The Bahamas led all Caribbean destinations with just over 4.4 million onshore passenger and crew visits. This was more than double the volume of the next highest destination, the U.S. Virgin Islands. Combined with an average passenger onshore expenditure of \$64.80, The Bahamas had the third highest total of passenger expenditures, \$242 million. The Bahamas also had the highest level of cruise line expenditures of \$73 million. Combining all direct expenditures, the cruise sector generated \$393.8 million in cruise tourism expenditures. These expenditures, in turn, generated an estimated 4,987 direct jobs paying \$85.6 million in direct wage income during the 2011/2012 cruise year.

St. Maarten had the highest per passenger onshore expenditure of \$185 per passenger visit. It also had the second highest average crew expenditure of \$135 per visit. With an estimated 1.9 million onshore passenger and crew visits St. Maarten ranked third in total visits. The spending by the cruise lines and their passengers and crew generated \$356.2 million in cruise tourism

expenditures in St. Maarten. This spending then resulted in the direct employment of 4,274 residents and wage income of \$85.9 million. One direct job was generated for every \$83,300 in cruise tourism expenditures in this destination. St. Maarten has an above average wage structure and, consequently, the wage income of the impacted workers accounted for nearly 25 percent of the direct expenditures.

The U.S. Virgin Islands, with the second highest per passenger spending rate of just over \$147 per passenger visit and the second highest volume of onshore passenger and crew visits with 2.1 million visits, had the third highest level of direct cruise sector expenditures with \$339.8 million in spending. These total cruise tourism expenditures generated an estimated 3,375 direct jobs paying \$74.4 million in wage income during the 2011/2012 cruise year. Due to the large volume of high value duty free shopping at this destination, it required over \$100,700 in cruise tourism expenditures to create a direct job. The direct wage income accounted for 22 percent of the direct expenditures.

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 2011/2012 cruise year with over 490,000 embarkations. The island destination also ranked fifth in passenger and crew onshore visits with 1.3 million visits. The spending by the cruise lines and their passenger and crew resulted in \$186.6 million in total cruise tourism expenditures which, in turn, generated 2,684 direct jobs and \$35.9 million in wages during the 2011/2012 cruise year. One direct job was created for every \$69,500 in direct cruise tourism expenditures and wages accounted for 19 percent of the direct expenditures.

The Cayman Islands had the fourth highest number of passenger and crew onshore visits with 1.5 million visits. Combined with average per passenger onshore expenditure of \$93.70 per visit and an average crew expenditure of \$57.50, the Cayman Islands ranked fifth in direct cruise tourism expenditures. The \$158 million in cruise tourism spending in the Cayman Islands generated 1,974 direct jobs and \$36.7 million in wage income during the 2011/2012 cruise year. One direct job was created for every \$79,900 in direct cruise tourism expenditures and wages accounted for 23 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 reduce 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 40 percent higher than the direct impacts, resulting in an implicit employment multiplier of 2.4. 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.

As shown in **Table 16**, the \$1.99 billion in direct cruise tourism expenditures generated total employment of 45,225 residents of the 21 destinations and \$728 million in employee wages during the 2011/2012 cruise year.

Table 16 – Total Economic Impact of Cruise Tourism by Destination, 2011/2012 Cruise Year*

Destinations	Total Cruise Tourism Expenditures (\$US Millions)	Total Employment	Total Employee Wage Income (\$US Millions)
Antigua & Barbuda	\$ 45.0	1,246	\$ 11.5
Aruba	\$ 63.7	1,542	\$ 25.9
Bahamas ^①	\$ 393.8	8,668	\$ 146.2
Barbados ^②	\$ 53.7	1,794	\$ 18.3
Belize	\$ 61.0	1,798	\$ 18.4
British Virgin Islands	\$ 30.3	504	\$ 10.0
Cayman Islands	\$ 157.7	3,547	\$ 66.6
Colombia ^②	\$ 33.4	819	\$ 4.9
Costa Rica	\$ 18.5	537	\$ 3.0
Curacao	\$ 39.4	735	\$ 12.9
Dominica	\$ 18.0	484	\$ 3.7
Dominican Republic ^②	\$ 21.4	746	\$ 3.0
Grenada	\$ 15.2	434	\$ 2.9
Honduras	\$ 20.4	473	\$ 2.2
Nicaragua	\$ 2.0	111	\$ 0.3
Puerto Rico (San Juan) ^②	\$ 186.6	4,998	\$ 70.3
St. Kitts and Nevis	\$ 70.6	1,123	\$ 9.1
St. Maarten	\$ 356.2	8,123	\$ 159.8
St. Vincent and the Grenadines	\$ 3.0	80	\$ 0.8
Turks and Caicos	\$ 60.6	1,115	\$ 18.6
U. S. Virgin Islands	\$ 339.8	6,349	\$ 139.6
All Destinations	\$1,990.0	45,225	\$ 728.1

*Note: Columns may not sum to totals due to rounding.

① Only includes crew visits at Nassau and Freeport.

② Includes crew aboard both transit and homeport cruise ships.

The Bahamas with the highest volume of passenger and crew visits, just over 4.4 million crew visits, had the highest economic impact. Combining all direct expenditures, the cruise sector

generated \$394 million in cruise tourism expenditures. These expenditures, in turn, generated an estimated 8,668 jobs paying \$146 million in wage income during the 2011/2012 cruise year. Thus, in the Bahamas every \$1 million in direct cruise tourism expenditures generated 22 jobs throughout the Bahamian economy which paid an average annual wage of about US\$16,000.

St. Maarten had the highest per passenger onshore expenditure of \$185 per passenger visit. It also had the second highest average crew expenditure of \$135 per visit. The \$356 million in cruise tourism expenditures in St. Maarten generated total employment of 8,123 residents and wage income of \$160 million. Thus, in the St. Maarten every \$1 million in direct cruise tourism expenditures generated 23 jobs throughout the island's economy which paid an average annual wage of about US\$20,000.

The U.S. Virgin Islands had the third highest level of direct cruise sector expenditures with \$340 million in spending. It also had the second highest per passenger spending rate of just over \$147 per passenger visit. The \$340 million in cruise tourism expenditures generated an estimated 6,349 jobs paying nearly \$140 million in wage income during the 2011/2012 cruise year. These direct expenditures generated 219 jobs throughout the economy of the U.S.V.I. for every \$1 million in expenditures. These jobs, in turn, paid an average annual wage of nearly US\$22,000.

Puerto Rico benefitted from \$187 million in total cruise tourism expenditures which, in turn, generated nearly 5,000 jobs and \$70.3 million in wages during the 2011/2012 cruise year. As noted above, the economic impacts of cruise tourism in Puerto Rico were generated by both homeport and port-of-call visits. These direct expenditures generated approximately 27 jobs throughout the island's economy for every \$1 million in expenditures. These jobs also paid an average annual wage of about US\$14,000.

The Cayman Islands had the fourth highest number of passenger and crew onshore visits with 1.5 million visits. Combined with average per passenger onshore expenditure of \$93.70 per visit and an average crew expenditure of \$57.50, the Cayman Islands ranked fifth in direct cruise tourism expenditures. The \$158 million in cruise tourism spending in the Cayman Islands generated 3,547 total jobs and \$66.6 million in wage income during the 2011/2012 cruise year. Thus, in the Cayman Islands every \$1 million in direct cruise tourism expenditures generated 22 jobs throughout the economy which paid an average annual wage of about US\$19,000.

Among the six medium volume destinations, the total employment impacts exceeded one thousand jobs, ranging from 1,115 total jobs in the Turks and Caicos to 1,798 jobs in Belize. In Antigua, with an employment impact of 1,246 jobs, every \$1 million in direct spending generated nearly 28 jobs with an average annual wage of US\$9,200. In Aruba, \$1 million of direct spending generated 24 jobs for a total employment impact of 1,542 jobs paying US\$16,800 in annual wage income. Barbados, with both transit and homeport calls, benefitted from 1,794 total jobs generated by cruise tourism spending. Thus, over 30 jobs were generated for every \$1 million in direct spending. These jobs paid an average of US\$10,200 in annual

wage income. Belize had a similar employment impact of 1,798 jobs. Thus, nearly 30 jobs were generated for every \$1 million in direct spending. These jobs also paid an average of US\$10,200 in wage income. In St. Kitts and Nevis \$1 million of direct spending generated 16 jobs for a total employment impact of 1,123 jobs paying over US\$8,100 in annual wage income. Finally, the Turks and Caicos benefitted from 1,115 total jobs generated by cruise tourism spending. Thus, over 18 jobs were generated for every \$1 million in direct spending. These jobs paid an average of US\$16,700 in annual wage income.

Among the ten low volume destinations, the total employment impacts averaged nearly 500 jobs per destination, ranging from 80 in St. Vincent and the Grenadines to 819 in Colombia. On average every \$1 million in direct cruise tourism expenditures generated nearly 27 jobs with an average annual income of nearly US\$10,000.

Comparison to 2009 Study

While the current study covers less destinations than the 2009 study, 21 versus 29 destinations, 20 of the destinations in the current study also participated in the 2009 study. Thus, it is possible to draw some general observations about the two studies.

As shown in **Table 17**, due to the smaller number of destinations analyzed in the current study, the total value of cruise tourism expenditures and their subsequent economic impacts are generally lower than those reported in the earlier study. As shown in the table, we have estimated that direct cruise tourism expenditures totaled \$1.99 billion during the 2011/2012 cruise year among the 21 participating destinations. This is 12.7 percent lower than the \$2.28 billion in direct cruise tourism expenditures estimated for the 29 participating destinations during the 2008/2009 cruise year. Similarly, the number of passenger onshore visits and the employment impacts are also lower for the current study. However, the income impacts are just slightly higher, 0.7 percent, due to the combination of increased productivity and wage rates.

Table 17 – Comparison of Cruise Tourism Expenditures – All Destinations

	2011/2012 Cruise Year	2008/2009 Cruise Year	Percent Difference
Number of Participating Destinations	21	29	--
Total Direct Cruise Tourism Spending (US \$ Billions)	\$1.99	\$2.28	-12.7%
Total Passenger Onshore Visits (Millions)	15.44	17.56	-12.1%
Total Expenditures per Passenger (US \$)	\$128.89	\$129.62	-0.5%
Total Employment Impact	45,225	56,271	-19.6%
Total Income Impacts (US \$ Millions)	\$728.1	\$723.0	+0.7%
Average per Passenger Expenditures	\$95.92	\$97.26	-1.4%
Average Per Crew Expenditures	\$96.98	\$89.24	+8.8%

Second, looking at just the 20 destinations that are common to the two studies²³ the total direct cruise tourism expenditures increased by 16 percent from \$1.69 billion in 2008/2009 to \$1.96 billion in 2011/2012 (see **Table 18**). This was the net result of an 18 percent increase in cruise passenger onshore visits and a 1.7 percent decline in average total spend per passenger. The normalized total expenditures per passenger in the 20 common destinations fell from \$138.33 in the 2008/2009 cruise year to \$129.97 in the 2011/2012 cruise year. As indicated in Table 18, the decline in the average total spend per passenger is the result of a 0.8 percent decline in the average onshore spending by passengers and a 3.6 percent decline in the average crew expenditures. As a result of the 16 percent increase in total direct cruise tourism expenditures among the 20 destinations, the employment and income increased by 15.6 percent and 18.7 percent respectively.

Table 18 – Comparison of Cruise Tourism Expenditures – Common Destinations

	2011/2012 Cruise Year	2008/2009 Cruise Year	Percent Difference
Number of Participating Destinations	20	20	--
Total Direct Cruise Tourism Spending (US \$ Billions)	\$1.96	\$1.69	+16.0%
Total Passenger Onshore Visits (Millions)	15.08	12.78	+18.0%
Total Expenditures per Passenger (US \$)	\$129.97	\$132.23	-1.7%
Total Employment Impact	44,722	38,689	+15.6%
Total Income Impacts (US \$ Millions)	\$718.1	\$605.0	+18.7%
Average per Passenger Expenditures	\$97.12	\$97.93	-0.8%
Average Per Crew Expenditures	\$98.15	\$101.86	-3.6%

Third, the decline in passenger expenditures on a per passenger basis among the 20 destinations from the 2008/2009 cruise year was the net result of a slight increase in per passenger spending in individual expenditure categories that was offset by similarly small decline in the percentage of passengers making purchases in most of those categories. Thus, it appears that cruise passengers during the 2011/2012 cruise year were more selective in making purchases than during the 2008/2009 cruise year; but, when they did make a purchase they were willing to spend more. This is especially true for the major expenditures categories, shore excursions, food and beverages, clothing and jewelry.

Finally, average crew spending also fell between the two periods. Among the 20 common destinations, per crew expenditures averaged \$101.86 during the 2008/2009 cruise year but decreased by 3.6 percent to \$98.15 during the 2011/2012 cruise year. This decline was the result of the combined impact of a decrease in spending by crew in most categories, as well as a decline in the percentage of crew making onshore purchases.

In conclusion, the increase in the economic impacts during the 2011/2012 cruise year relative to the 2008/2009 cruise year among the 20 common destinations is primarily the result of an increase in passenger onshore visits and the resulting increase in total direct cruise tourism expenditures. These

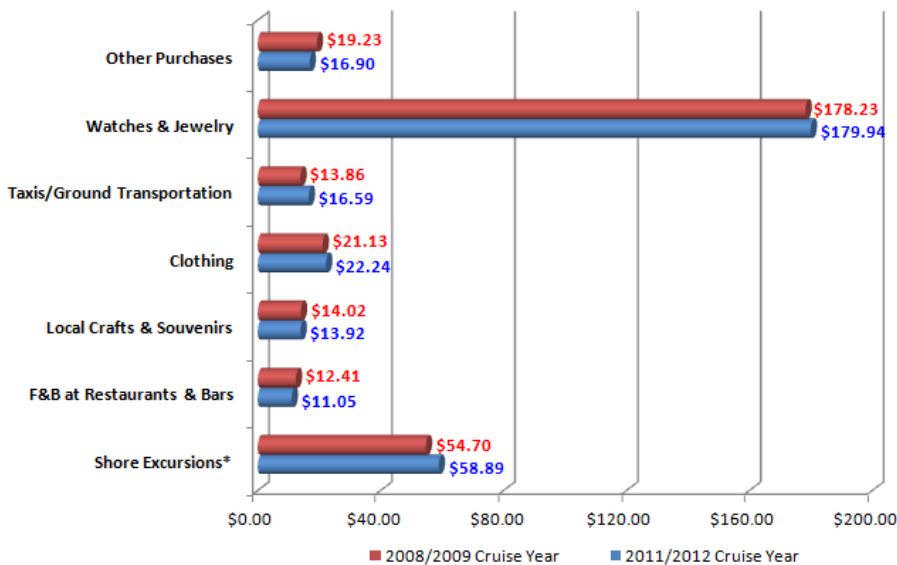
²³ These destinations are Antigua, Aruba, the Bahamas, Barbados, Belize, the Cayman Islands, Colombia, Costa Rica, Curacao, Dominica, the Dominican Republic, Grenada, Honduras, Nicaragua, Puerto Rico, St. Kitts, St. Maarten, St. Vincent and the Grenadines, the Turks and Caicos, and the U.S.V.I.

impacts were then partially offset by a decline in the average onshore expenditures by passengers and crew.

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 2009 studies. The increase in average expenditure by category is shown in **Figure 1**. These are the unweighted expenditures per passenger, that is the average passenger expenditure made by those passengers that actually purchased goods in a particular category. For example, in the 2008/2009 cruise year passengers that purchased jewelry in a Caribbean destination spent an average of \$178.33 while in the 2011/2012 cruise year, passengers purchasing jewelry spent \$179.94. 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 2011/2012 cruise year for four of the seven categories shown in Figure 1. The percentage increases occurred in taxis and ground transportation (20%), shore excursions (8%), clothing (5%) and watches and jewelry (1%). Average expenditures for food and beverages declined by 11 percent while spending for local crafts fell by one percent and spending for other purchases declined by 12 percent. When all categories are included, cruise passengers spent more in most categories during the 2011/2012 cruise year, especially those with the highest average expenditures including jewelry, shore excursions and clothing.

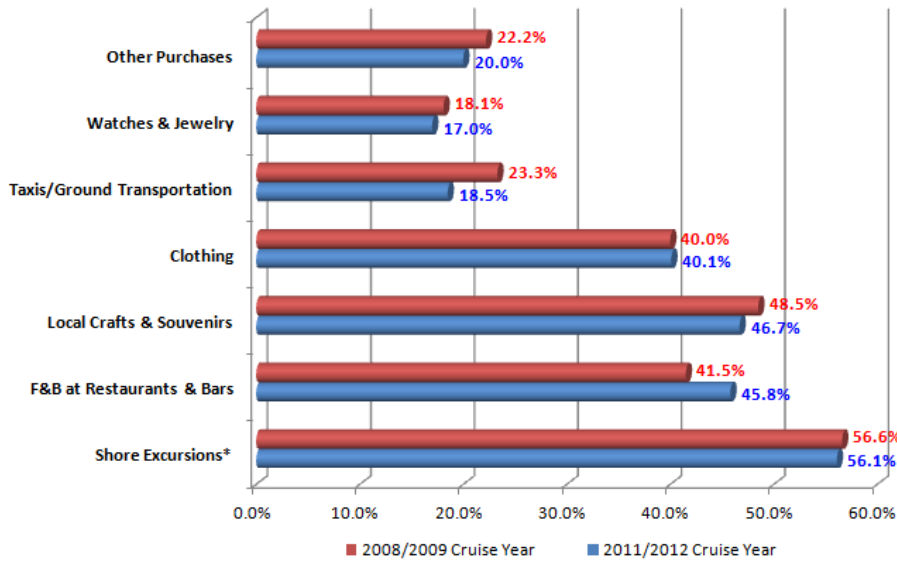
Figure 1 – Average Unweighted Passenger Expenditures by Category



However, as stated above this increase in the average expenditure was offset by a decrease in the percentage of passengers making onshore purchases. As shown in **Figure 2** a smaller percentage of passengers made an onshore purchase during the 2011/2012 cruise year in five of the seven major categories. For example, during the 2008/2009 cruise year, 18.1% of passengers reported purchasing jewelry. This percentage declined to 17.0% during the 2011/2012 cruise year. Similar declines were

recorded for ground transportation, local crafts, shore excursions and other purchases. A slightly higher percentage of passengers purchased clothing and food and beverages during the 2011/2012 cruise year than during the 2008/2009 cruise year. 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

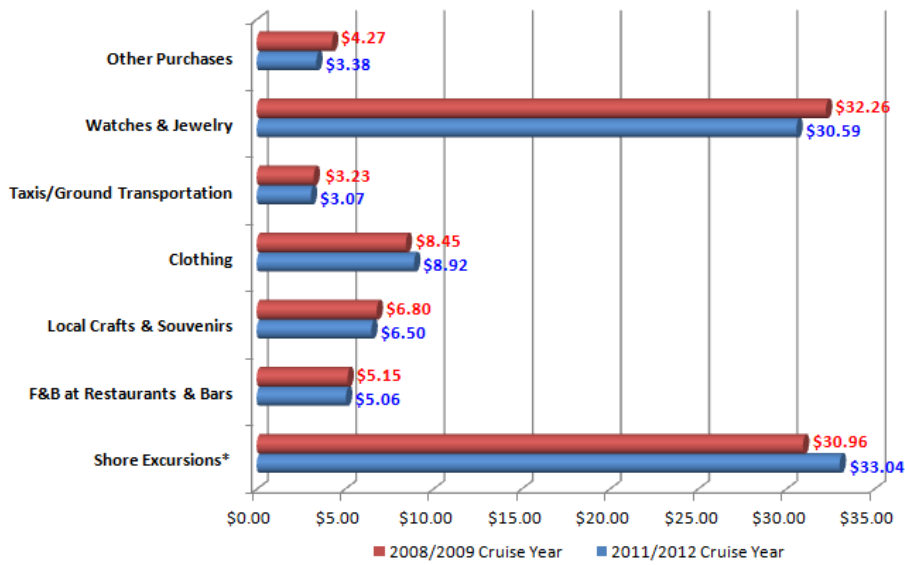


Thus, when the unweighted average per passenger expenditures were weighted by the share of onshore purchasers, the weighted expenditure for some categories increased and fell for others (see **Figure 3**). The weighted average expenditure fell for watches and jewelry (-5%), food and beverages (-2%), local crafts (-4%), ground transportation (-5%) and other purchases (-20%). Thus, the decline in unweighted spending for local crafts and other purchases was enhanced by a decline in the share of passengers purchasing these goods, while the increase in unweighted spending for watches and jewelry and ground transportation was offset by the decline in the percentage of passengers purchasing these goods. While the percentage of passengers purchasing food and beverages increased it was not high enough to offset the 11 percent decline in unweighted expenditures.

The weighted average expenditure rose for shore excursions (+7%) as the increase in unweighted spending for tours was only partially offset by the slight decline in the percentage of passengers purchasing tours. Finally, weighted clothing expenditures increased as both the unweighted expenditures and the percentage of passengers purchasing clothing both increased.

The net result was a slight decline of 0.8 percent in the average weighted expenditure of cruise passengers during the 2011/2012 year to \$97.12 per passenger visit from \$97.93 per passenger visit in the 2008/2009 cruise year.

Figure 3 – Average Weighted Expenditure by Category



On a destination basis, there was considerable variability in the change in estimated passenger and crew expenditures from the 2009 study. As shown in **Table 19**, the change in per passenger expenditures ranged from a decrease of 24 percent in the U.S. Virgin Islands to an increase of 60 percent in the Dominican Republic. Even with the 24 percent decline in average passenger expenditures, the U.S.V.I. still had the second highest average passenger expenditure. Among the 20 destinations common to both studies, nine showed an increase in per passenger expenditures and eleven showed a decrease. The increases were concentrated in the low volume destinations, five of the nine destinations, but two medium and two high volume destinations also experienced an increase. The declines were fairly evenly spread across the destinations as categorized by the volume of passenger visits. Declines were experienced by four low volume, four medium volume and three high volume destinations. 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 negative with 13 destinations showing a decrease and only seven showing an increase. In those destinations in which the change was negative, crew tended to spend less when they made onshore purchases and a smaller percentage of crew made onshore purchases. For those destinations with increases in average crew expenditures, generally the increase in unweighted expenditures more than offset the decline in the share of crew making onshore purchases.

Table 19 – Passenger and Crew Expenditures – Average per Visit – 2012 and 2009 Cruise Tourism Studies

Destinations	2012 Study		2009 Study		Ratio: 2012/2009	
	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	\$65.30	\$74.30	\$72.06	\$54.16	-9.4%	37.2%
Aruba	\$95.44	\$101.10	\$87.41	\$69.34	9.2%	45.8%
Bahamas	\$64.81	\$111.00	\$83.93	\$77.95	-22.8%	42.4%
Barbados ⓪	\$65.64	\$48.90	\$69.10	\$54.26	-5.0%	-9.9%
Belize	\$73.00	\$102.30	\$87.96	\$66.24	-17.0%	54.4%
Cayman Islands	\$93.75	\$57.50	\$96.78	\$108.81	-3.1%	-47.2%
Colombia ⓪	\$98.79	\$42.40	\$90.03	\$65.64	9.7%	-35.4%
Costa Rica	\$71.45	\$44.40	\$67.28	\$51.97	6.2%	-14.6%
Curacao	\$71.70	\$72.80	\$81.21	\$116.88	-11.7%	-37.7%
Dominica	\$47.78	\$46.80	\$45.87	\$56.41	4.2%	-17.0%
Dominican Republic ⓪	\$69.47	\$40.00	\$43.42	\$47.59	60.0%	-15.9%
Grenada	\$40.82	\$44.70	\$49.01	\$40.30	-16.7%	10.9%
Honduras	\$62.24	\$38.50	\$70.39	\$58.66	-11.6%	-34.4%
Nicaragua	\$45.64	\$43.50	\$35.63	\$29.96	28.1%	45.2%
Puerto Rico (San Juan) ⓪	\$118.11	\$122.20	\$100.55	\$138.63	17.5%	-11.9%
St. Kitts	\$108.90	\$65.00	\$99.41	\$142.14	9.5%	-54.3%
St. Maarten	\$185.40	\$135.50	\$147.98	\$149.45	25.3%	-9.3%
St. Vincent & the Grenadines	\$27.05	\$21.40	\$33.50	\$17.61	-19.2%	21.5%
Turks & Caicos	\$63.88	\$41.20	\$67.22	\$61.00	-5.0%	-32.5%
U. S. Virgin Islands	\$146.70	\$138.30	\$193.22	\$152.58	-24.1%	-9.4%

⓪ Includes transit and homeport cruise ships.

Table 20 shows estimated total expenditures for the 2011/2012 and 2008/2009 cruise years for those twenty destinations common to both studies. As indicated in the table nine destinations had an increase in total passenger expenditures and eleven had a decrease. Of the nine destinations with an increase in total passenger expenditures six (Aruba, Colombia, Dominica, Puerto Rico, St. Kitts and St. Maarten) experienced an increase in average expenditures as shown in Table 19. In three destinations (the Bahamas, Curacao and the Turks and Caicos), the increase in onshore passenger visits offset the decline in average passenger spending.

Among the eleven destinations with a decline in total passenger expenditures eight (Antigua, Barbados, Belize, the Cayman Islands, Grenada, Honduras, St. Vincent and the Grenadines and the U.S. Virgin Islands) experienced a decrease in average expenditures as shown in Table 19. In three destinations (Costa Rica, the Dominican Republic and Nicaragua), the decline in onshore passenger visits offset the increase in average passenger spending.

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

Destinations	2012 Study		2009 Study		Ratio: 2012/2009	
	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	\$34.20	\$6.20	\$38.30	\$5.50	-10.7%	12.7%
Aruba	\$50.90	\$8.80	\$42.60	\$6.50	19.5%	35.4%
Bahamas	\$241.50	\$79.30	\$169.50	\$28.00	42.5%	183.2%
Barbados ^⓪	\$39.80	\$5.90	\$42.00	\$6.40	-5.2%	-7.8%
Belize	\$44.40	\$7.50	\$45.70	\$4.50	-2.8%	66.7%
Cayman Islands	\$121.50	\$11.30	\$126.40	\$21.80	-3.9%	-48.2%
Colombia ^⓪	\$25.80	\$1.50	\$19.00	\$2.10	35.8%	-28.6%
Costa Rica	\$12.50	\$2.00	\$18.00	\$2.40	-30.6%	-16.7%
Curacao	\$29.20	\$5.00	\$28.00	\$6.80	4.3%	-26.5%
Dominica	\$14.10	\$1.90	\$10.60	\$2.10	33.0%	-9.5%
Dominican Republic ^⓪	\$16.50	\$1.00	\$17.90	\$2.80	-7.8%	-64.3%
Grenada	\$11.20	\$2.00	\$13.40	\$1.90	-16.4%	5.3%
Honduras	\$16.50	\$1.20	\$23.20	\$2.20	-28.9%	-45.5%
Nicaragua	\$1.40	\$0.20	\$1.90	\$0.30	-26.3%	-33.3%
Puerto Rico (San Juan) ^⓪	\$131.40	\$22.60	\$118.80	\$29.20	10.6%	-22.6%
St. Kitts	\$61.10	\$4.60	\$33.20	\$7.80	84.0%	-41.0%
St. Maarten	\$294.10	\$45.20	\$170.50	\$48.70	72.5%	-7.2%
St. Vincent & the Grenadines	\$1.60	\$0.10	\$4.20	\$0.30	-61.9%	-66.7%
Turks & Caicos	\$46.30	\$5.00	\$18.60	\$3.50	148.9%	42.9%
U. S. Virgin Islands	\$263.50	\$47.30	\$304.30	\$51.30	-13.4%	-7.8%

^⓪ Includes transit and homeport cruise ships.

With respect to the change in crew expenditures 14 destinations experienced a decline in total crew spending and seven showed an increase in the 2011/2012 cruise year from the 2008/2009 cruise year. Among the 14 destinations with a decline in total crew expenditures twelve also experienced a decline in average expenditures per crew visit. Two destinations, Nicaragua and St. Vincent and the Grenadines, experienced an increase in average expenditures per crew visit but a decline in total crew visits. Among the seven destinations with an increase in total crew expenditures six also experienced an increase in average expenditures per crew visit. One destination, the Turks and Caicos, experienced a decrease in average expenditures per crew visit but an increase in total crew visits. Again, a discussion of the primary causes of these changes is provided in Volume II where the impacts for each destination are reported.

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.

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
Bahamas	\$393.8	1	8,668	1	\$146.2	2
St. Maarten	\$356.2	2	8,123	2	\$159.8	1
U. S. Virgin Islands	\$339.8	3	6,349	3	\$139.6	3
Puerto Rico (San Juan)	\$186.6	4	4,998	4	\$70.3	4
Cayman Islands	\$157.7	5	3,547	5	\$66.6	5
St. Kitts and Nevis	\$70.6	6	1,123	10	\$9.1	13
Aruba	\$63.7	7	1,542	8	\$25.9	6
Belize	\$61.0	8	1,798	6	\$18.4	8
Turks and Caicos	\$60.6	9	1,115	11	\$18.6	7
Barbados	\$53.7	10	1,794	7	\$18.3	9
Antigua & Barbuda	\$45.0	11	1,246	9	\$11.5	11
Curacao	\$39.4	12	735	14	\$12.9	10
Colombia	\$33.4	13	819	12	\$4.9	14
British Virgin Islands	\$30.3	14	504	16	\$10.0	12
Dominican Republic	\$21.4	15	746	13	\$3.0	17
Honduras	\$20.4	16	473	18	\$2.2	19
Costa Rica	\$18.5	17	537	15	\$3.0	16
Dominica	\$18.0	18	484	17	\$3.7	15
Grenada	\$15.2	19	434	19	\$2.9	18
St. Vincent and the Grenadines	\$3.0	20	80	21	\$0.8	20
Nicaragua	\$2.0	21	111	20	\$0.3	21
All Destinations	\$1,990.0		45,225		\$728.1	

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
St. Maarten	1,586.4	3	\$185.40	1	\$294.1	1
U. S. Virgin Islands	1,795.9	2	\$146.70	2	\$263.5	2
Bahamas	3,725.6	1	\$64.80	15	\$241.5	3
Puerto Rico (San Juan)	1,112.3	5	\$118.10	3	\$131.4	4
Cayman Islands	1,296.0	4	\$93.70	7	\$121.5	5
St. Kitts and Nevis	560.6	9	\$108.90	4	\$61.1	6
Aruba	533.5	10	\$95.40	6	\$50.9	7
Turks and Caicos	724.2	6	\$63.90	16	\$46.3	8
Belize	608.4	7	\$73.00	8	\$44.4	9
Barbados	606.8	8	\$65.60	12	\$39.8	10
Antigua & Barbuda	524.1	11	\$65.30	14	\$34.2	11
Curacao	407.5	12	\$71.70	9	\$29.2	12
Colombia	260.8	17	\$98.80	5	\$25.8	13
British Virgin Islands	361.1	13	\$65.50	13	\$23.7	14
Dominican Republic	238.0	18	\$69.50	11	\$16.5	15
Honduras	265.0	16	\$62.20	17	\$16.5	16
Dominica	294.6	14	\$47.80	18	\$14.1	17
Costa Rica	174.4	19	\$71.50	10	\$12.5	18
Grenada	274.9	15	\$40.80	20	\$11.2	19
St. Vincent and the Grenadines	58.8	20	\$27.10	21	\$1.6	20
Nicaragua	31.3	21	\$45.60	19	\$1.4	21
All Destinations	15,440.3		\$95.92		\$1,481.1	

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
Bahamas	714.6	1	\$111.00	4	\$79.3	1
U. S. Virgin Islands	342.4	2	\$138.30	1	\$47.3	2
St. Maarten	333.3	3	\$135.50	2	\$45.2	3
Puerto Rico (San Juan)	185.3	5	\$122.20	3	\$22.6	4
Cayman Islands	196.1	4	\$57.50	10	\$11.3	5
Aruba	86.9	8	\$101.10	6	\$8.8	6
Belize	73.6	10	\$102.30	5	\$7.5	7
Antigua & Barbuda	83.8	9	\$74.30	7	\$6.2	8
Barbados	120	7	\$48.90	11	\$5.9	9
Curacao	68.2	12	\$72.80	8	\$5.0	10
Turks and Caicos	122	6	\$41.20	18	\$5.0	11
St. Kitts and Nevis	71.3	11	\$65.00	9	\$4.6	12
British Virgin Islands	65.9	13	\$47.00	12	\$3.1	13
Costa Rica	46.2	14	\$44.40	15	\$2.0	14
Grenada	45.3	15	\$44.70	14	\$2.0	15
Dominica	41.2	16	\$46.80	13	\$1.9	16
Colombia	36.2	17	\$42.40	17	\$1.5	17
Honduras	32	18	\$38.50	20	\$1.2	18
Dominican Republic	25.4	19	\$40.00	19	\$1.0	19
Nicaragua	5.5	21	\$43.50	16	\$0.2	20
St. Vincent and the Grenadines	6.9	20	\$21.40	21	\$0.1	21
All Destinations	2,702.4		\$96.98		\$261.9	

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

Destinations	Estimated Expenditures (\$US Millions)	Rank
Bahamas	\$73.0	1
Puerto Rico (San Juan)	\$32.6	2
U. S. Virgin Islands	\$28.9	3
Cayman Islands	\$24.9	4
St. Maarten	\$16.9	5
Turks and Caicos	\$9.3	6
Belize	\$9.1	7
Barbados	\$8.0	8
Colombia	\$6.1	9
Curacao	\$5.2	10
St. Kitts and Nevis	\$4.9	11
Antigua & Barbuda	\$4.5	12
Aruba	\$4.0	13
Costa Rica	\$4.0	14
Dominican Republic	\$3.8	15
British Virgin Islands	\$3.5	16
Honduras	\$2.6	17
Dominica	\$2.0	18
Grenada	\$1.9	19
St. Vincent and the Grenadines	\$1.3	20
Nicaragua	\$0.3	21
All Destinations	\$246.9	

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

Destinations	First Visit	Rank	Number of Previous Visits				
			1	2	3	4	5+
Nicaragua	91%	1	5.1%	2.0%	1.3%	0.1%	0.5%
Colombia	84%	2	9.3%	2.8%	1.0%	0.8%	2.2%
Honduras	82%	3	9.3%	4.1%	1.6%	1.0%	2.0%
Turks and Caicos	80%	4	10.8%	4.8%	2.1%	0.5%	1.8%
Costa Rica	79%	5	12.7%	4.5%	1.4%	1.0%	1.4%
Dominican Republic	78%	6	12.5%	4.6%	2.2%	0.5%	2.2%
St. Vincent and the Grenadines	75%	7	12.5%	5.3%	4.9%	1.0%	1.3%
Belize	75%	8	11.8%	5.2%	3.7%	2.3%	2.0%
Dominica	74%	9	13.4%	5.9%	3.1%	1.1%	2.4%
St. Kitts and Nevis	74%	10	10.7%	6.7%	3.9%	1.2%	3.5%
Antigua & Barbuda	67%	11	12.8%	8.3%	5.0%	2.8%	4.2%
Aruba	65%	12	17.1%	6.6%	4.7%	2.2%	4.3%
Grenada	65%	13	13.1%	8.0%	5.7%	3.5%	4.7%
Curacao	65%	14	14.5%	6.0%	5.4%	2.8%	6.3%
Cayman Islands	63%	15	15.3%	8.1%	4.4%	3.2%	6.0%
British Virgin Islands	60%	16	11.5%	7.2%	6.4%	3.9%	11.1%
Barbados	54%	17	16.1%	9.8%	6.2%	5.1%	8.8%
Puerto Rico (San Juan)	54%	18	16.4%	9.5%	5.5%	4.2%	10.4%
St. Maarten	48%	19	17.8%	11.1%	7.2%	5.4%	10.5%
Bahamas	47%	20	14.9%	10.5%	6.6%	5.0%	16.0%
U. S. Virgin Islands	39%	21	13.4%	10.7%	8.6%	7.3%	21.1%
All Destinations	67%		13.1%	6.8%	4.3%	4.3%	4.6%

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	5.6	1	9.0%	20.0%	38.0%	33.0%
Belize	4.7	2	20.0%	26.0%	33.0%	21.0%
U. S. Virgin Islands	4.5	3	16.0%	37.0%	34.0%	13.0%
Honduras	4.5	4	14.0%	34.0%	41.0%	11.0%
St. Maarten	4.5	5	11.0%	39.0%	41.0%	9.0%
St. Kitts and Nevis	4.4	6	14.0%	39.0%	39.0%	8.0%
Nicaragua	4.3	7	27.0%	23.0%	35.0%	15.0%
Antigua & Barbuda	4.3	8	19.0%	37.0%	32.0%	12.0%
Bahamas	4.3	9	20.0%	40.0%	28.0%	12.0%
Puerto Rico (San Juan)	4.3	10	14.0%	45.0%	32.0%	9.0%
Cayman Islands	4.3	11	11.0%	42.0%	40.0%	7.0%
Barbados	4.2	12	18.0%	40.0%	34.0%	8.0%
British Virgin Islands	4.1	13	20.0%	42.0%	30.0%	8.0%
Curacao	4.1	14	15.0%	48.0%	29.0%	8.0%
Aruba	4.0	15	19.0%	46.0%	29.0%	6.0%
Dominica	3.8	16	27.0%	39.0%	27.0%	7.0%
Dominican Republic	3.8	17	25.0%	43.0%	26.0%	6.0%
Turks and Caicos	3.8	18	16.0%	56.0%	25.0%	3.0%
Grenada	3.7	19	27.0%	43.0%	26.0%	4.0%
Colombia	3.6	20	14.0%	69.0%	17.0%	0.0%
St. Vincent and the Grenadines	3.5	21	37.0%	35.0%	20.0%	8.0%
All Destinations	4.2		18.0%	41.0%	31.0%	10.0%

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
Costa Rica	8.4	1	63.0%	22.0%	8.0%	4.0%	3.0%	93.0%	7.0%
St. Kitts and Nevis	8.0	2	53.0%	29.0%	10.0%	5.0%	3.0%	92.0%	8.0%
Barbados	7.9	3	50.0%	29.0%	14.0%	3.0%	4.0%	93.0%	7.0%
Cayman Islands	7.9	4	49.0%	31.0%	12.0%	4.0%	4.0%	92.0%	8.0%
U. S. Virgin Islands	7.9	5	48.0%	32.0%	12.0%	5.0%	3.0%	92.0%	8.0%
Puerto Rico (San Juan)	7.8	6	46.0%	30.0%	15.0%	5.0%	4.0%	91.0%	9.0%
St. Maarten	7.8	7	47.0%	31.0%	13.0%	5.0%	4.0%	91.0%	9.0%
Curacao	7.7	8	45.0%	30.0%	18.0%	5.0%	2.0%	93.0%	7.0%
Colombia	7.6	9	40.0%	35.0%	16.0%	6.0%	3.0%	91.0%	9.0%
Aruba	7.6	10	42.0%	33.0%	15.0%	6.0%	4.0%	90.0%	10.0%
Honduras	7.6	11	48.0%	26.0%	13.0%	6.0%	7.0%	87.0%	13.0%
Bahamas	7.5	12	42.0%	28.0%	19.0%	6.0%	5.0%	89.0%	11.0%
Turks and Caicos	7.5	13	44.0%	28.0%	16.0%	6.0%	6.0%	88.0%	12.0%
British Virgin Islands	7.4	14	43.0%	29.0%	15.0%	7.0%	6.0%	87.0%	13.0%
Belize	7.4	15	44.0%	27.0%	15.0%	6.0%	8.0%	86.0%	14.0%
Antigua & Barbuda	7.3	16	42.0%	28.0%	14.0%	7.0%	9.0%	84.0%	16.0%
Grenada	7.1	17	35.0%	32.0%	17.0%	8.0%	8.0%	84.0%	16.0%
Dominican Republic	6.8	18	40.0%	21.0%	17.0%	7.0%	15.0%	78.0%	22.0%
Dominica	6.7	19	36.0%	24.0%	15.0%	11.0%	14.0%	75.0%	25.0%
Nicaragua	6.6	20	29.0%	33.0%	15.0%	10.0%	13.0%	77.0%	23.0%
St. Vincent and the Grenadines	6.3	21	31.0%	24.0%	17.0%	11.0%	17.0%	72.0%	28.0%
All Destinations	7.6		44.0%	29.0%	15.0%	6.0%	6.0%	88.0%	12.0%

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

Destinations	Mean Score	Rank	Extremely Satisfied	Very Satisfied	Somewhat Satisfied	Not Too Satisfied	Not At All Satisfied	Satisfied	Not Satisfied
Costa Rica	8.4	1	63.0%	22.0%	8.0%	4.0%	3.0%	93.0%	7.0%
St. Kitts and Nevis	8.0	2	53.0%	29.0%	10.0%	5.0%	3.0%	92.0%	8.0%
Barbados	7.9	3	50.0%	29.0%	14.0%	3.0%	4.0%	93.0%	7.0%
Cayman Islands	7.9	4	49.0%	31.0%	12.0%	4.0%	4.0%	92.0%	8.0%
U. S. Virgin Islands	7.9	5	48.0%	32.0%	12.0%	5.0%	3.0%	92.0%	8.0%
Puerto Rico (San Juan)	7.8	6	46.0%	30.0%	15.0%	5.0%	4.0%	91.0%	9.0%
St. Maarten	7.8	7	47.0%	31.0%	13.0%	5.0%	4.0%	91.0%	9.0%
Curacao	7.7	8	45.0%	30.0%	18.0%	5.0%	2.0%	93.0%	7.0%
Colombia	7.6	9	40.0%	35.0%	16.0%	6.0%	3.0%	91.0%	9.0%
Aruba	7.6	10	42.0%	33.0%	15.0%	6.0%	4.0%	90.0%	10.0%
Honduras	7.6	11	48.0%	26.0%	13.0%	6.0%	7.0%	87.0%	13.0%
Bahamas	7.5	12	42.0%	28.0%	19.0%	6.0%	5.0%	89.0%	11.0%
Turks and Caicos	7.5	13	44.0%	28.0%	16.0%	6.0%	6.0%	88.0%	12.0%
British Virgin Islands	7.4	14	43.0%	29.0%	15.0%	7.0%	6.0%	87.0%	13.0%
Belize	7.4	15	44.0%	27.0%	15.0%	6.0%	8.0%	86.0%	14.0%
Antigua & Barbuda	7.3	16	42.0%	28.0%	14.0%	7.0%	9.0%	84.0%	16.0%
Grenada	7.1	17	35.0%	32.0%	17.0%	8.0%	8.0%	84.0%	16.0%
Dominican Republic	6.8	18	40.0%	21.0%	17.0%	7.0%	15.0%	78.0%	22.0%
Dominica	6.7	19	36.0%	24.0%	15.0%	11.0%	14.0%	75.0%	25.0%
Nicaragua	6.6	20	29.0%	33.0%	15.0%	10.0%	13.0%	77.0%	23.0%
St. Vincent and the Grenadines	6.3	21	31.0%	24.0%	17.0%	11.0%	17.0%	72.0%	28.0%
All Destinations	7.6		44.0%	29.0%	15.0%	6.0%	6.0%	88.0%	12.0%

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
U. S. Virgin Islands	5.8	1	30.0%	17.0%	18.0%	10.0%	25.0%	65.0%	35.0%
Cayman Islands	5.5	2	24.0%	20.0%	19.0%	9.0%	28.0%	63.0%	37.0%
Bahamas	5.4	3	22.0%	20.0%	21.0%	12.0%	25.0%	63.0%	37.0%
British Virgin Islands	5.4	4	26.0%	19.0%	15.0%	11.0%	29.0%	60.0%	40.0%
St. Kitts and Nevis	5.0	5	19.0%	19.0%	20.0%	10.0%	32.0%	58.0%	42.0%
St. Maarten	5.0	6	20.0%	18.0%	18.0%	10.0%	34.0%	56.0%	44.0%
Puerto Rico (San Juan)	5.0	7	19.0%	18.0%	18.0%	13.0%	32.0%	55.0%	45.0%
Honduras	4.8	8	21.0%	16.0%	18.0%	9.0%	36.0%	55.0%	45.0%
Barbados	4.8	9	19.0%	17.0%	16.0%	9.0%	39.0%	52.0%	48.0%
Belize	4.7	10	19.0%	17.0%	17.0%	13.0%	34.0%	53.0%	47.0%
Costa Rica	4.6	11	15.0%	18.0%	19.0%	11.0%	37.0%	52.0%	48.0%
Aruba	4.5	12	14.0%	17.0%	19.0%	12.0%	38.0%	50.0%	50.0%
Antigua & Barbuda	4.5	13	17.0%	16.0%	16.0%	10.0%	41.0%	49.0%	51.0%
Turks and Caicos	4.4	14	16.0%	15.0%	16.0%	11.0%	42.0%	47.0%	53.0%
Curacao	4.2	15	13.0%	15.0%	18.0%	12.0%	42.0%	46.0%	54.0%
Dominican Republic	3.8	16	14.0%	13.0%	13.0%	9.0%	51.0%	40.0%	60.0%
Grenada	3.7	17	11.0%	11.0%	14.0%	14.0%	50.0%	36.0%	64.0%
Dominica	3.5	18	10.0%	11.0%	12.0%	12.0%	55.0%	33.0%	67.0%
St. Vincent and the Grenadines	3.4	19	9.0%	12.0%	13.0%	12.0%	54.0%	34.0%	66.0%
Colombia	3.2	20	6.0%	12.0%	16.0%	11.0%	55.0%	34.0%	66.0%
Nicaragua	2.6	21	3.0%	8.0%	12.0%	12.0%	65.0%	23.0%	77.0%
All Destinations	4.5		17.0%	15.0%	17.0%	11.0%	40.0%	49.0%	51.0%

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
Costa Rica	8.2	1	57.0%	23.0%	13.0%	4.0%	3.0%	93.0%	7.0%
Colombia	8.1	2	52.0%	28.0%	15.0%	3.0%	2.0%	95.0%	5.0%
Honduras	8.1	3	54.0%	27.0%	12.0%	4.0%	3.0%	93.0%	7.0%
Turks and Caicos	7.8	4	49.0%	26.0%	17.0%	4.0%	4.0%	92.0%	8.0%
Curacao	7.7	5	45.0%	28.0%	18.0%	5.0%	4.0%	91.0%	9.0%
St. Kitts and Nevis	7.7	6	46.0%	29.0%	15.0%	5.0%	5.0%	90.0%	10.0%
St. Maarten	7.7	7	46.0%	27.0%	17.0%	5.0%	5.0%	90.0%	10.0%
Grenada	7.6	8	39.0%	35.0%	17.0%	5.0%	4.0%	91.0%	9.0%
Barbados	7.6	9	42.0%	30.0%	18.0%	4.0%	6.0%	90.0%	10.0%
Belize	7.6	10	44.0%	28.0%	18.0%	5.0%	5.0%	90.0%	10.0%
U. S. Virgin Islands	7.6	11	39.0%	27.0%	18.0%	8.0%	8.0%	84.0%	16.0%
Aruba	7.5	12	41.0%	29.0%	19.0%	6.0%	5.0%	89.0%	11.0%
Cayman Islands	7.5	13	42.0%	26.0%	20.0%	7.0%	5.0%	88.0%	12.0%
Puerto Rico (San Juan)	7.4	14	41.0%	28.0%	19.0%	6.0%	6.0%	88.0%	12.0%
Bahamas	7.4	15	43.0%	25.0%	19.0%	8.0%	5.0%	87.0%	13.0%
Dominican Republic	7.4	16	43.0%	26.0%	15.0%	6.0%	10.0%	84.0%	16.0%
British Virgin Islands	7.3	17	41.0%	27.0%	17.0%	7.0%	8.0%	85.0%	15.0%
St. Vincent and the Grenadines	7.2	18	34.0%	33.0%	19.0%	7.0%	7.0%	86.0%	14.0%
Nicaragua	7.1	19	35.0%	32.0%	19.0%	8.0%	6.0%	86.0%	14.0%
Antigua & Barbuda	7.1	20	39.0%	27.0%	17.0%	7.0%	10.0%	83.0%	17.0%
Dominica	6.8	21	34.0%	27.0%	17.0%	10.0%	12.0%	78.0%	22.0%
All Destinations	7.6		44.0%	28.0%	17.0%	6.0%	5.0%	89.0%	11.0%

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
Costa Rica	9.1	1	79.0%	13.0%	5.0%	1.0%	2.0%	97.0%	3.0%
Belize	8.9	2	75.0%	16.0%	5.0%	2.0%	2.0%	96.0%	4.0%
St. Kitts and Nevis	8.7	3	72.0%	17.0%	5.0%	3.0%	3.0%	94.0%	6.0%
Barbados	8.5	4	67.0%	19.0%	8.0%	2.0%	4.0%	94.0%	6.0%
Cayman Islands	8.5	5	65.0%	19.0%	10.0%	3.0%	3.0%	94.0%	6.0%
Aruba	8.4	6	61.0%	25.0%	8.0%	3.0%	3.0%	94.0%	6.0%
Dominican Republic	8.4	7	71.0%	12.0%	8.0%	4.0%	5.0%	91.0%	9.0%
Colombia	8.3	8	57.0%	26.0%	11.0%	4.0%	2.0%	94.0%	6.0%
Grenada	8.3	9	57.0%	25.0%	11.0%	3.0%	4.0%	93.0%	7.0%
Puerto Rico (San Juan)	8.3	10	63.0%	21.0%	8.0%	4.0%	4.0%	92.0%	8.0%
Antigua & Barbuda	8.3	11	64.0%	21.0%	6.0%	3.0%	6.0%	91.0%	9.0%
Nicaragua	8.2	12	57.0%	26.0%	11.0%	2.0%	4.0%	94.0%	6.0%
St. Vincent and the Grenadines	8.2	13	59.0%	25.0%	8.0%	3.0%	5.0%	92.0%	8.0%
Turks and Caicos	8.2	14	62.0%	19.0%	10.0%	3.0%	6.0%	91.0%	9.0%
Honduras	8.2	15	63.0%	20.0%	7.0%	5.0%	5.0%	90.0%	10.0%
Curacao	8.1	16	57.0%	24.0%	10.0%	4.0%	5.0%	91.0%	9.0%
Dominica	8.1	17	58.0%	23.0%	8.0%	4.0%	7.0%	89.0%	11.0%
St. Maarten	8.0	18	58.0%	23.0%	9.0%	4.0%	6.0%	90.0%	10.0%
Bahamas	7.9	19	53.0%	22.0%	15.0%	5.0%	5.0%	90.0%	10.0%
U. S. Virgin Islands	7.9	20	55.0%	24.0%	10.0%	5.0%	6.0%	89.0%	11.0%
British Virgin Islands	7.9	21	53.0%	27.0%	8.0%	5.0%	7.0%	88.0%	12.0%
All Destinations	8.4		63.0%	21.0%	8.0%	4.0%	4.0%	92.0%	8.0%

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
Puerto Rico (San Juan)	8.4	1	59.0%	27.0%	8.0%	3.0%	3.0%	94.0%	6.0%
Belize	8.0	2	59.0%	20.0%	7.0%	5.0%	9.0%	86.0%	14.0%
Colombia	7.9	3	47.0%	32.0%	15.0%	4.0%	2.0%	94.0%	6.0%
St. Kitts and Nevis	7.9	4	56.0%	24.0%	9.0%	4.0%	7.0%	89.0%	11.0%
Barbados	7.8	5	50.0%	29.0%	11.0%	3.0%	7.0%	90.0%	10.0%
Curacao	7.6	6	47.0%	27.0%	14.0%	5.0%	7.0%	88.0%	12.0%
Costa Rica	7.6	7	51.0%	23.0%	12.0%	3.0%	11.0%	86.0%	14.0%
Dominican Republic	7.4	8	47.0%	23.0%	13.0%	8.0%	9.0%	83.0%	17.0%
Grenada	7.3	9	38.0%	31.0%	19.0%	7.0%	5.0%	88.0%	12.0%
Aruba	7.3	10	38.0%	30.0%	19.0%	6.0%	7.0%	87.0%	13.0%
Cayman Islands	7.3	11	45.0%	24.0%	15.0%	5.0%	11.0%	84.0%	16.0%
Antigua & Barbuda	7.2	12	44.0%	24.0%	16.0%	5.0%	11.0%	84.0%	16.0%
Bahamas	7.2	13	41.0%	25.0%	18.0%	7.0%	9.0%	84.0%	16.0%
U. S. Virgin Islands	7.0	14	40.0%	27.0%	16.0%	5.0%	12.0%	83.0%	17.0%
Nicaragua	6.9	15	33.0%	31.0%	20.0%	7.0%	9.0%	84.0%	16.0%
Turks and Caicos	6.8	16	37.0%	24.0%	16.0%	9.0%	14.0%	77.0%	23.0%
Honduras	6.8	17	40.0%	22.0%	12.0%	10.0%	16.0%	74.0%	26.0%
St. Maarten	6.7	18	37.0%	23.0%	16.0%	8.0%	16.0%	76.0%	24.0%
Dominica	6.6	19	35.0%	24.0%	19.0%	7.0%	15.0%	78.0%	22.0%
British Virgin Islands	6.6	20	39.0%	20.0%	13.0%	9.0%	19.0%	72.0%	28.0%
St. Vincent and the Grenadines	6.5	21	28.0%	34.0%	13.0%	10.0%	15.0%	75.0%	25.0%
All Destinations	7.4		45.0%	27.0%	13.0%	6.0%	9.0%	85.0%	15.0%

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
Costa Rica	7.7	1	49.0%	26.0%	13.0%	7.0%	5.0%	88.0%	12.0%
Colombia	7.5	2	38.0%	34.0%	17.0%	8.0%	3.0%	89.0%	11.0%
Barbados	7.4	3	36.0%	34.0%	19.0%	5.0%	6.0%	89.0%	11.0%
Puerto Rico (San Juan)	7.4	4	38.0%	32.0%	19.0%	7.0%	4.0%	89.0%	11.0%
Cayman Islands	7.3	5	38.0%	30.0%	20.0%	7.0%	5.0%	88.0%	12.0%
U. S. Virgin Islands	7.2	6	35.0%	31.0%	21.0%	8.0%	5.0%	87.0%	13.0%
St. Maarten	7.2	7	34.0%	32.0%	20.0%	9.0%	5.0%	86.0%	14.0%
Curacao	7.1	8	32.0%	33.0%	21.0%	9.0%	5.0%	86.0%	14.0%
St. Kitts and Nevis	7.1	9	34.0%	33.0%	19.0%	8.0%	6.0%	86.0%	14.0%
Bahamas	6.9	10	32.0%	28.0%	24.0%	11.0%	5.0%	84.0%	16.0%
Aruba	6.8	11	29.0%	30.0%	23.0%	11.0%	7.0%	82.0%	18.0%
Grenada	6.7	12	26.0%	32.0%	23.0%	11.0%	8.0%	81.0%	19.0%
Honduras	6.7	13	32.0%	26.0%	19.0%	12.0%	11.0%	77.0%	23.0%
Antigua & Barbuda	6.6	14	31.0%	28.0%	19.0%	11.0%	11.0%	78.0%	22.0%
Belize	6.6	15	33.0%	24.0%	18.0%	11.0%	14.0%	75.0%	25.0%
British Virgin Islands	6.3	16	29.0%	22.0%	23.0%	13.0%	13.0%	74.0%	26.0%
Turks and Caicos	6.2	17	23.0%	25.0%	25.0%	15.0%	12.0%	73.0%	27.0%
Dominica	6.1	18	27.0%	25.0%	19.0%	12.0%	17.0%	71.0%	29.0%
Dominican Republic	6.0	19	30.0%	21.0%	17.0%	12.0%	20.0%	68.0%	32.0%
Nicaragua	5.7	20	18.0%	26.0%	23.0%	15.0%	18.0%	67.0%	33.0%
St. Vincent and the Grenadines	5.3	21	16.0%	24.0%	20.0%	16.0%	24.0%	60.0%	40.0%
All Destinations	6.9		32.0%	29.0%	20.0%	10.0%	9.0%	81.0%	19.0%

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
Costa Rica	8.7	1	66.0%	23.0%	7.0%	2.0%	2.0%	96.0%	4.0%
St. Kitts and Nevis	8.4	2	61.0%	25.0%	9.0%	3.0%	2.0%	95.0%	5.0%
Cayman Islands	8.2	3	56.0%	27.0%	11.0%	3.0%	3.0%	94.0%	6.0%
Barbados	8.2	4	57.0%	25.0%	11.0%	4.0%	3.0%	93.0%	7.0%
Honduras	8.2	5	58.0%	23.0%	12.0%	4.0%	3.0%	93.0%	7.0%
U. S. Virgin Islands	8.1	6	52.0%	29.0%	12.0%	5.0%	2.0%	93.0%	7.0%
Turks and Caicos	8.1	7	54.0%	25.0%	13.0%	6.0%	2.0%	92.0%	8.0%
Belize	8.1	8	58.0%	21.0%	11.0%	5.0%	5.0%	90.0%	10.0%
Aruba	8.0	9	51.0%	28.0%	14.0%	4.0%	3.0%	93.0%	7.0%
Curacao	8.0	10	53.0%	26.0%	13.0%	5.0%	3.0%	92.0%	8.0%
St. Maarten	8.0	11	51.0%	28.0%	13.0%	5.0%	3.0%	92.0%	8.0%
Bahamas	7.9	12	51.0%	26.0%	13.0%	7.0%	3.0%	90.0%	10.0%
Grenada	7.8	13	49.0%	26.0%	16.0%	5.0%	4.0%	91.0%	9.0%
Puerto Rico (San Juan)	7.8	14	48.0%	29.0%	13.0%	6.0%	4.0%	90.0%	10.0%
British Virgin Islands	7.8	15	50.0%	26.0%	12.0%	6.0%	6.0%	88.0%	12.0%
Colombia	7.7	16	45.0%	30.0%	15.0%	6.0%	4.0%	90.0%	10.0%
Antigua & Barbuda	7.6	17	47.0%	26.0%	14.0%	6.0%	7.0%	87.0%	13.0%
Dominica	7.6	18	49.0%	24.0%	13.0%	6.0%	8.0%	86.0%	14.0%
St. Vincent and the Grenadines	7.4	19	42.0%	28.0%	14.0%	9.0%	7.0%	84.0%	16.0%
Nicaragua	7.3	20	42.0%	28.0%	15.0%	7.0%	8.0%	85.0%	15.0%
Dominican Republic	7.3	21	47.0%	23.0%	14.0%	6.0%	10.0%	84.0%	16.0%
All Destinations	8.0		53.0%	27.0%	11.0%	5.0%	4.0%	91.0%	9.0%

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
U. S. Virgin Islands	7.5	1	40.0%	33.0%	17.0%	6.0%	4.0%	90.0%	10.0%
St. Kitts and Nevis	7.5	2	41.0%	33.0%	14.0%	6.0%	6.0%	88.0%	12.0%
Costa Rica	7.4	3	41.0%	30.0%	17.0%	6.0%	6.0%	88.0%	12.0%
St. Maarten	7.4	4	39.0%	32.0%	16.0%	7.0%	6.0%	87.0%	13.0%
Puerto Rico (San Juan)	7.3	5	38.0%	32.0%	17.0%	7.0%	6.0%	87.0%	13.0%
Cayman Islands	7.3	6	37.0%	30.0%	19.0%	7.0%	7.0%	86.0%	14.0%
Barbados	7.2	7	36.0%	32.0%	17.0%	8.0%	7.0%	85.0%	15.0%
Curacao	7.1	8	35.0%	32.0%	19.0%	7.0%	7.0%	86.0%	14.0%
Aruba	7.0	9	34.0%	30.0%	20.0%	8.0%	8.0%	84.0%	16.0%
Bahamas	7.0	10	34.0%	28.0%	21.0%	9.0%	8.0%	83.0%	17.0%
Honduras	7.0	11	35.0%	31.0%	17.0%	9.0%	8.0%	83.0%	17.0%
Turks and Caicos	6.8	12	32.0%	31.0%	18.0%	10.0%	9.0%	81.0%	19.0%
Grenada	6.7	13	25.0%	35.0%	23.0%	9.0%	8.0%	83.0%	17.0%
British Virgin Islands	6.6	14	34.0%	26.0%	18.0%	9.0%	13.0%	78.0%	22.0%
Antigua & Barbuda	6.6	15	30.0%	27.0%	20.0%	11.0%	12.0%	77.0%	23.0%
Belize	6.6	16	30.0%	28.0%	19.0%	11.0%	12.0%	77.0%	23.0%
Colombia	6.2	17	23.0%	28.0%	22.0%	13.0%	14.0%	73.0%	27.0%
Nicaragua	5.8	18	19.0%	29.0%	21.0%	11.0%	20.0%	69.0%	31.0%
Dominica	5.6	19	23.0%	22.0%	18.0%	12.0%	25.0%	63.0%	37.0%
Dominican Republic	5.5	20	24.0%	21.0%	17.0%	12.0%	26.0%	62.0%	38.0%
St. Vincent and the Grenadines	4.9	21	15.0%	21.0%	20.0%	11.0%	33.0%	56.0%	44.0%
All Destinations	6.8		33.0%	30.0%	18.0%	9.0%	10.0%	81.0%	19.0%

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
Costa Rica	8.7	1	67.0%	22.0%	7.0%	2.0%	2.0%	96.0%	4.0%
U. S. Virgin Islands	8.2	2	56.0%	27.0%	11.0%	4.0%	2.0%	94.0%	6.0%
St. Kitts and Nevis	8.2	3	57.0%	27.0%	9.0%	4.0%	3.0%	93.0%	7.0%
Cayman Islands	8.1	4	54.0%	28.0%	12.0%	3.0%	3.0%	94.0%	6.0%
Barbados	8.1	5	54.0%	28.0%	10.0%	5.0%	3.0%	92.0%	8.0%
Aruba	8.0	6	52.0%	29.0%	12.0%	4.0%	3.0%	93.0%	7.0%
Curacao	8.0	7	53.0%	27.0%	13.0%	3.0%	4.0%	93.0%	7.0%
Colombia	8.0	8	50.0%	29.0%	13.0%	4.0%	4.0%	92.0%	8.0%
Honduras	8.0	9	55.0%	25.0%	11.0%	5.0%	4.0%	91.0%	9.0%
Puerto Rico (San Juan)	8.0	10	51.0%	29.0%	11.0%	5.0%	4.0%	91.0%	9.0%
St. Maarten	8.0	11	53.0%	28.0%	10.0%	5.0%	4.0%	91.0%	9.0%
Belize	8.0	12	53.0%	26.0%	11.0%	6.0%	4.0%	90.0%	10.0%
Grenada	7.9	13	47.0%	31.0%	14.0%	5.0%	3.0%	92.0%	8.0%
Bahamas	7.9	14	52.0%	24.0%	13.0%	7.0%	4.0%	89.0%	11.0%
Turks and Caicos	7.9	15	51.0%	26.0%	12.0%	7.0%	4.0%	89.0%	11.0%
British Virgin Islands	7.8	16	51.0%	25.0%	12.0%	5.0%	7.0%	88.0%	12.0%
Nicaragua	7.6	17	46.0%	30.0%	12.0%	5.0%	7.0%	88.0%	12.0%
Antigua & Barbuda	7.6	18	47.0%	27.0%	13.0%	6.0%	7.0%	87.0%	13.0%
Dominica	7.4	19	47.0%	24.0%	11.0%	8.0%	10.0%	82.0%	18.0%
St. Vincent and the Grenadines	7.2	20	39.0%	29.0%	15.0%	7.0%	10.0%	83.0%	17.0%
Dominican Republic	7.0	21	45.0%	21.0%	13.0%	7.0%	14.0%	79.0%	21.0%
All Destinations	7.9		52.0%	26.0%	12.0%	5.0%	5.0%	90.0%	10.0%

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
Puerto Rico (San Juan)	7.4	1	41.0%	28.0%	18.0%	7.0%	6.0%	87.0%	13.0%
St. Maarten	7.4	2	42.0%	28.0%	15.0%	9.0%	6.0%	85.0%	15.0%
Barbados	7.3	3	35.0%	34.0%	18.0%	8.0%	5.0%	87.0%	13.0%
Cayman Islands	7.3	4	39.0%	29.0%	17.0%	9.0%	6.0%	85.0%	15.0%
Curacao	7.2	5	39.0%	27.0%	18.0%	9.0%	7.0%	84.0%	16.0%
St. Kitts and Nevis	7.2	6	37.0%	31.0%	16.0%	10.0%	6.0%	84.0%	16.0%
U. S. Virgin Islands	7.2	7	40.0%	26.0%	18.0%	10.0%	6.0%	84.0%	16.0%
Bahamas	7.0	8	35.0%	27.0%	20.0%	11.0%	7.0%	82.0%	18.0%
Aruba	6.9	9	35.0%	27.0%	19.0%	10.0%	9.0%	81.0%	19.0%
Costa Rica	6.8	10	33.0%	29.0%	17.0%	10.0%	11.0%	79.0%	21.0%
Antigua & Barbuda	6.6	11	29.0%	28.0%	21.0%	12.0%	10.0%	78.0%	22.0%
Turks and Caicos	6.6	12	30.0%	24.0%	24.0%	12.0%	10.0%	78.0%	22.0%
Honduras	6.6	13	30.0%	25.0%	22.0%	13.0%	10.0%	77.0%	23.0%
Grenada	6.4	14	22.0%	32.0%	23.0%	13.0%	10.0%	77.0%	23.0%
Belize	6.4	15	30.0%	23.0%	20.0%	14.0%	13.0%	73.0%	27.0%
Colombia	6.3	16	25.0%	27.0%	24.0%	13.0%	11.0%	76.0%	24.0%
British Virgin Islands	6.0	17	27.0%	21.0%	19.0%	16.0%	17.0%	67.0%	33.0%
Nicaragua	5.4	18	17.0%	22.0%	23.0%	16.0%	22.0%	62.0%	38.0%
Dominican Republic	5.1	19	19.0%	18.0%	18.0%	15.0%	30.0%	55.0%	45.0%
Dominica	5.0	20	18.0%	17.0%	20.0%	16.0%	29.0%	55.0%	45.0%
St. Vincent and the Grenadines	4.7	21	12.0%	19.0%	22.0%	16.0%	31.0%	53.0%	47.0%
All Destinations	6.7		32.0%	26.0%	19.0%	12.0%	11.0%	77.0%	23.0%

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
Costa Rica	7.4	1	38.0%	33.0%	17.0%	7.0%	5.0%	88.0%	12.0%
St. Kitts and Nevis	7.2	2	34.0%	35.0%	21.0%	5.0%	5.0%	90.0%	10.0%
U. S. Virgin Islands	7.0	3	30.0%	35.0%	21.0%	10.0%	4.0%	86.0%	14.0%
St. Maarten	7.0	4	31.0%	34.0%	20.0%	8.0%	7.0%	85.0%	15.0%
Puerto Rico (San Juan)	7.0	5	32.0%	33.0%	20.0%	9.0%	6.0%	85.0%	15.0%
Aruba	6.8	6	28.0%	32.0%	24.0%	9.0%	7.0%	84.0%	16.0%
Honduras	6.8	7	29.0%	31.0%	24.0%	9.0%	7.0%	84.0%	16.0%
Curacao	6.8	8	29.0%	30.0%	23.0%	10.0%	8.0%	82.0%	18.0%
Nicaragua	6.8	9	30.0%	33.0%	17.0%	10.0%	10.0%	80.0%	20.0%
Barbados	6.7	10	24.0%	34.0%	24.0%	10.0%	8.0%	82.0%	18.0%
Bahamas	6.6	11	27.0%	30.0%	23.0%	11.0%	9.0%	80.0%	20.0%
Grenada	6.5	12	20.0%	36.0%	24.0%	9.0%	11.0%	80.0%	20.0%
Belize	6.5	13	27.0%	29.0%	23.0%	12.0%	9.0%	79.0%	21.0%
Dominican Republic	6.4	14	27.0%	29.0%	22.0%	7.0%	15.0%	78.0%	22.0%
Antigua & Barbuda	6.4	15	24.0%	30.0%	23.0%	12.0%	11.0%	77.0%	23.0%
Colombia	6.3	16	22.0%	30.0%	27.0%	12.0%	9.0%	79.0%	21.0%
British Virgin Islands	6.3	17	28.0%	25.0%	24.0%	10.0%	13.0%	77.0%	23.0%
Dominica	6.3	18	28.0%	24.0%	22.0%	12.0%	14.0%	74.0%	26.0%
Cayman Islands	6.2	19	24.0%	27.0%	23.0%	14.0%	12.0%	74.0%	26.0%
Turks and Caicos	6.2	20	21.0%	28.0%	25.0%	14.0%	12.0%	74.0%	26.0%
St. Vincent and the Grenadines	5.8	21	16.0%	30.0%	23.0%	16.0%	15.0%	69.0%	31.0%
All Destinations	6.7		27.0%	31.0%	22.0%	11.0%	9.0%	80.0%	20.0%

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
Costa Rica	8.1	1	63.0%	18.0%	7.0%	3.0%	9.0%	88.0%	12.0%
St. Kitts and Nevis	7.8	2	55.0%	23.0%	7.0%	4.0%	11.0%	85.0%	15.0%
St. Maarten	7.8	3	53.0%	26.0%	9.0%	5.0%	7.0%	88.0%	12.0%
Aruba	7.7	4	51.0%	27.0%	9.0%	3.0%	10.0%	87.0%	13.0%
Barbados	7.7	5	50.0%	26.0%	12.0%	4.0%	8.0%	88.0%	12.0%
U. S. Virgin Islands	7.6	6	44.2%	16.9%	18.9%	6.0%	14.0%	80.0%	20.0%
Colombia	7.6	7	48.0%	30.0%	9.0%	4.0%	9.0%	87.0%	13.0%
Cayman Islands	7.6	8	49.0%	26.0%	12.0%	5.0%	8.0%	87.0%	13.0%
Bahamas	7.6	9	48.0%	27.0%	12.0%	6.0%	7.0%	87.0%	13.0%
Antigua & Barbuda	7.5	10	48.0%	26.0%	10.0%	6.0%	10.0%	84.0%	16.0%
Puerto Rico (San Juan)	7.3	11	46.0%	26.0%	11.0%	4.0%	13.0%	83.0%	17.0%
British Virgin Islands	7.3	12	46.0%	25.0%	12.0%	6.0%	11.0%	83.0%	17.0%
Dominican Republic	7.3	13	49.0%	21.0%	11.0%	8.0%	11.0%	81.0%	19.0%
Turks and Caicos	7.2	14	48.0%	21.0%	12.0%	6.0%	13.0%	81.0%	19.0%
Honduras	7.2	15	47.0%	22.0%	13.0%	6.0%	12.0%	82.0%	18.0%
Grenada	7.2	16	44.0%	27.0%	12.0%	5.0%	12.0%	83.0%	17.0%
Belize	7.1	17	46.0%	22.0%	12.0%	6.0%	14.0%	80.0%	20.0%
St. Vincent and the Grenadines	7.1	18	38.0%	29.0%	19.0%	4.0%	10.0%	86.0%	14.0%
Curacao	7.0	19	41.0%	25.0%	15.0%	6.0%	13.0%	81.0%	19.0%
Dominica	6.8	20	39.0%	23.0%	15.0%	7.0%	16.0%	77.0%	23.0%
Nicaragua	6.3	21	34.0%	21.0%	16.0%	5.0%	24.0%	71.0%	29.0%
All Destinations	7.4		47.0%	25.0%	12.0%	6.0%	10.0%	84.0%	16.0%

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
Costa Rica	8.3	1	58.0%	27.0%	10.0%	4.0%	1.0%	95.0%	5.0%
Cayman Islands	8.0	2	51.0%	29.0%	13.0%	4.0%	3.0%	93.0%	7.0%
Aruba	8.0	3	51.0%	29.0%	13.0%	4.0%	3.0%	93.0%	7.0%
St. Kitts and Nevis	8.0	4	48.0%	34.0%	11.0%	4.0%	3.0%	93.0%	7.0%
U. S. Virgin Islands	8.0	5	49.0%	31.0%	12.0%	5.0%	3.0%	92.0%	8.0%
Colombia	7.9	6	47.0%	32.0%	14.0%	4.0%	3.0%	93.0%	7.0%
Barbados	7.9	7	50.0%	29.0%	13.0%	4.0%	4.0%	92.0%	8.0%
Curacao	7.9	8	48.0%	30.0%	14.0%	4.0%	4.0%	92.0%	8.0%
Turks and Caicos	7.9	9	49.0%	30.0%	12.0%	5.0%	4.0%	91.0%	9.0%
St. Maarten	7.8	10	47.0%	29.0%	16.0%	5.0%	3.0%	92.0%	8.0%
Belize	7.8	11	47.0%	29.0%	14.0%	6.0%	4.0%	90.0%	10.0%
Grenada	7.7	12	42.0%	34.0%	15.0%	6.0%	3.0%	91.0%	9.0%
Puerto Rico (San Juan)	7.7	13	44.0%	31.0%	16.0%	5.0%	4.0%	91.0%	9.0%
Dominican Republic	7.7	14	49.0%	26.0%	15.0%	4.0%	6.0%	90.0%	10.0%
Honduras	7.7	15	45.0%	29.0%	16.0%	6.0%	4.0%	90.0%	10.0%
Antigua & Barbuda	7.7	16	47.0%	27.0%	15.0%	6.0%	5.0%	89.0%	11.0%
Bahamas	7.7	17	45.0%	29.0%	15.0%	6.0%	5.0%	89.0%	11.0%
Nicaragua	7.6	18	41.0%	33.0%	16.0%	5.0%	5.0%	90.0%	10.0%
Dominica	7.5	19	41.0%	31.0%	17.0%	6.0%	5.0%	89.0%	11.0%
British Virgin Islands	7.4	20	43.0%	28.0%	16.0%	6.0%	7.0%	87.0%	13.0%
St. Vincent and the Grenadines	7.3	21	36.0%	31.0%	22.0%	7.0%	4.0%	89.0%	11.0%
All Destinations	7.8		47.0%	30.0%	15.0%	4.0%	4.0%	92.0%	8.0%

Table B-21 – Likely are you to return for a land-based vacation to the “destination”?

Destinations	Mean Score	Rank	Extremely Likely	Very Likely	Somewhat Likely	Not Too Likely	Not At All Likely	Likely	Not Likely
U. S. Virgin Islands	5.8	1	30.0%	17.0%	18.0%	10.0%	25.0%	65.0%	35.0%
Cayman Islands	5.5	2	24.0%	20.0%	19.0%	9.0%	28.0%	63.0%	37.0%
Bahamas	5.4	3	22.0%	20.0%	21.0%	12.0%	25.0%	63.0%	37.0%
British Virgin Islands	5.4	4	26.0%	19.0%	15.0%	11.0%	29.0%	60.0%	40.0%
St. Kitts and Nevis	5.0	5	19.0%	19.0%	20.0%	10.0%	32.0%	58.0%	42.0%
St. Maarten	5.0	6	20.0%	18.0%	18.0%	10.0%	34.0%	56.0%	44.0%
Puerto Rico (San Juan)	5.0	7	19.0%	18.0%	18.0%	13.0%	32.0%	55.0%	45.0%
Honduras	4.8	8	21.0%	16.0%	18.0%	9.0%	36.0%	55.0%	45.0%
Barbados	4.8	9	19.0%	17.0%	16.0%	9.0%	39.0%	52.0%	48.0%
Belize	4.7	10	19.0%	17.0%	17.0%	13.0%	34.0%	53.0%	47.0%
Costa Rica	4.6	11	15.0%	18.0%	19.0%	11.0%	37.0%	52.0%	48.0%
Aruba	4.5	12	14.0%	17.0%	19.0%	12.0%	38.0%	50.0%	50.0%
Antigua & Barbuda	4.5	13	17.0%	16.0%	16.0%	10.0%	41.0%	49.0%	51.0%
Turks and Caicos	4.4	14	16.0%	15.0%	16.0%	11.0%	42.0%	47.0%	53.0%
Curacao	4.2	15	13.0%	15.0%	18.0%	12.0%	42.0%	46.0%	54.0%
Dominican Republic	3.8	16	14.0%	13.0%	13.0%	9.0%	51.0%	40.0%	60.0%
Grenada	3.7	17	11.0%	11.0%	14.0%	14.0%	50.0%	36.0%	64.0%
Dominica	3.5	18	10.0%	11.0%	12.0%	12.0%	55.0%	33.0%	67.0%
St. Vincent and the Grenadines	3.4	19	9.0%	12.0%	13.0%	12.0%	54.0%	34.0%	66.0%
Colombia	3.2	20	6.0%	12.0%	16.0%	11.0%	55.0%	34.0%	66.0%
Nicaragua	2.6	21	3.0%	8.0%	12.0%	12.0%	65.0%	23.0%	77.0%
All Destinations	4.5		17.0%	15.0%	17.0%	11.0%	40.0%	49.0%	51.0%



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.

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