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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



Prepared for

**Florida-Caribbean Cruise Association
And
Participating Destinations**

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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, 2009 and 2012. A total of 35 destinations participated in this study. These destinations were located in the Caribbean, Mexico 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	Antigua & Barbuda Tourism Authority
Aruba	Aruba Ports Authority
The Bahamas	Ministry of Tourism
Barbados	Barbados Port Inc.
Belize	Belize Tourism Board
Bonaire	Tourism Corporation of Bonaire
British Virgin Islands	BVI Ports Authority
Cabo San Lucas	Administracion Portuaria Integral de Cabo San Lucas SA de CV
Cayman Islands	Cayman Islands Department of Tourism
Colombia	Sociedad Portuaria Regional de Cartagena / Proexport Colombia
Costa Maya	Promociones Turisticas Majahual SA de CV
Costa Rica	Instituto Costarricense de Turismo
Cozumel	State Government of Quintana Roo
Curacao	Curacao Ports Authority
Dominica	Dominica Air and Sea Ports Authority
Dominican Republic	Ministry of Tourism
Ensenada	Administracion Portuaria Integral de Ensenada SA de CV
Grenada	Grenada Tourism Authority
Guadeloupe	Guadeloupe Islands Tourism Board
Guatemala	Inguat
Honduras	Port of Roatan
Jamaica	Jamaica Tourist Board
Martinique	Martinique Tourism Authority
Mazatlan	Administracion Portuaria Integral de Mazatlán SA de CV
Nicaragua	Nicaragua Tourism Board
Progreso	Administracion Portuaria Integral de Progreso SA de CV
Puerto Rico (San Juan)	Puerto Rico Tourism Company
Puerto Vallarta	Administracion Portuaria Integral de Puerto Vallarta SA de CV
St. Kitts & Nevis	St. Kitts Tourism Authority
St. Lucia	Ministry of Tourism, Heritage and Creative Industries
St. Maarten	Port St. Maarten Group of Companies
Tobago	Division of Tourism & Transportation
Trinidad	Tourism Development Company
Turks and Caicos	Ministry of Tourism
U. S. Virgin Islands	Department of Tourism

Economic Impacts

During the 2014/2015 cruise year¹ cruise tourism generated **\$3.16 billion in direct expenditures, 75,050 jobs and \$976 million in employee wages** among the 35 destinations included in the study (see **Table ES-2**).²

Table ES-2 – Total Economic Contribution of Cruise Tourism by Destination, 2014/2015 Cruise Year

Destinations	Total Cruise Tourism Expenditures (\$US Millions)	Total Employment	Total Employee Wage Income (\$US Millions)
Antigua & Barbuda	\$ 43.9	1,170	\$ 11.10
Aruba	\$ 71.9	1,716	\$ 29.20
Bahamas	\$ 373.1	7,954	\$ 138.50
Barbados	\$ 57.3	1,845	\$ 19.50
Belize	\$ 86.3	2,492	\$ 26.50
Bonaire	\$ 9.4	191	\$ 3.20
British Virgin Islands	\$ 26.2	465	\$ 8.70
Cabo San Lucas	\$ 22.4	587	\$ 3.90
Cayman Islands	\$ 207.6	4,454	\$ 87.00
Colombia	\$ 48.4	1,089	\$ 6.90
Costa Maya	\$ 27.6	726	\$ 4.50
Costa Rica	\$ 20.0	557	\$ 3.20
Cozumel	\$ 365.5	9,727	\$ 61.00
Curacao	\$ 51.0	903	\$ 16.70
Dominica	\$ 14.2	373	\$ 2.90
Dominican Republic	\$ 61.0	1,914	\$ 8.00
Ensenada	\$ 52.7	1,370	\$ 9.50
Grenada	\$ 12.2	342	\$ 2.30
Guadeloupe	\$ 38.2	724	\$ 6.10
Guatemala	\$ 5.6	183	\$ 0.80
Honduras	\$ 73.0	1,585	\$ 7.80
Jamaica	\$ 198.6	7,067	\$ 46.10
Martinique	\$ 22.7	453	\$ 3.70
Mazatlan	\$ 9.4	268	\$ 1.50
Nicaragua	\$ 2.9	141	\$ 0.40
Progreso	\$ 23.9	609	\$ 3.60
Puerto Rico (San Juan)	\$ 198.2	5,209	\$ 75.00
Puerto Vallarta	\$ 27.1	757	\$ 4.90
St. Kitts & Nevis	\$ 84.3	1,293	\$ 11.20
St. Lucia	\$ 57.2	1,422	\$ 11.70
St. Maarten	\$ 422.9	9,259	\$ 189.10
Tobago	\$ 2.7	124	\$ 1.50
Trinidad	\$ 0.6	30	\$ 0.40
Turks and Caicos	\$ 95.0	1,654	\$ 29.10
U. S. Virgin Islands	\$ 344.3	6,397	\$ 141.00
All Destinations	\$3,157.5	75,050	\$ 976.5

¹ The economic contribution of cruise tourism to the 35 destinations was estimated for the 12-month period from May, 2014 through April, 2015 which is referred to as the 2014/2015 cruise year throughout this report.

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

Seven (7) destinations had direct cruise tourism expenditures of \$100 million or more. Ten (10) destinations had direct expenditures between \$50 and \$100 million, ten (10) had direct expenditures between \$20 and \$50 and eight (8) had direct expenditures less than \$20 million.

St. Maarten led all destinations with nearly \$423 million, followed by the Bahamas with \$373 million, Cozumel with \$365 million, the U.S. Virgin Islands with \$344 million, the Cayman Islands with \$208 million, Jamaica with \$199 million and Puerto Rico with \$198 million. Combined, these seven destinations with \$2.11 billion in direct expenditures accounted for 67 percent of the total cruise tourism expenditures among the 35 destinations.

The next ten destinations with expenditures between \$50 and \$100 million accounted for 22 percent of the total cruise tourism expenditures with a combined total of \$689.7 million in direct spending. Direct spending among these ten destinations ranged from \$51.0 million in Curacao to \$95.0 million in the Turks & Caicos. In addition to the Turks & Caicos, Belize (\$86.3 million), St. Kitts & Nevis (\$84.3 million), Honduras (\$73.0 million) and Aruba (\$71.9 million) had total cruise tourism expenditures in excess of \$70 million.

The next ten destinations with expenditures between \$20 and \$50 million accounted for almost 10 percent of the total cruise tourism expenditures with a combined total of \$300.4 million in direct spending. Direct spending among these ten destinations ranged from \$20.0 million in Costa Rica to \$48.4 million in the Colombia. In addition to Colombia, Antigua & Barbuda (\$43.9 million), Guadeloupe (\$38.2 million), Costa Maya (\$27.6 million), Puerto Vallarta (\$27.1 million) and the British Virgin Islands (\$26.2 million) had total cruise tourism expenditures in excess of \$25 million.

The remaining eight destinations with less than \$20 million in direct cruise tourism expenditures had a combined total of \$57.1 million in direct cruise tourism expenditures and accounted for just under two percent of the total among the 35 destinations. Cruise tourism expenditures among these destinations ranged from \$0.7 million in Trinidad to \$14.2 million in Dominica. In addition to Dominica, only Grenada (\$12.2 million) had direct expenditures in excess of \$10 million.

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

- St. Maarten led all Caribbean destinations with \$423 million in cruise tourism expenditures. It also led ranked third in passenger and crew onshore visits with 2.23 million visits. These visits generated an average total expenditure of \$189 per visit⁴ across all passenger and crew visits, the highest average in the Caribbean. The \$423 million in direct expenditures, in turn, generated an estimated 9,259 jobs paying \$189 million in wage income during the 2014/2015 cruise year. This placed St. Maarten with the highest income impact and the second highest employment impact.
- The Bahamas, with 3.93 million passenger and crew visits, had the highest volume of visits in the Caribbean. It also had the second highest level of direct expenditures

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

⁴ The average total expenditure is calculated by dividing total direct expenditures by total passenger and crew onshore visits.

with \$373 million. Thus, each visit generated an average total expenditure of \$95 across all passenger and crew visits. As a result of the \$373 million in direct expenditures the Bahamas benefitted from the generation of 7,954 jobs paying wage income of \$138 million, the third highest totals in both categories throughout the Caribbean.

- Cozumel had the third highest level of direct cruise sector expenditures with \$366 million in spending. In addition, Cozumel had the second highest volume of onshore passenger and crew visits with 3.07 million visits. As a result of these onshore visits, Cozumel had an average total expenditure of \$119 per passenger and crew visit. The \$366 million in cruise tourism expenditures generated an estimated 9,727 jobs, the highest level among the 35 destinations, paying \$61 million in wage income during the 2014/2015 cruise year.
- The U.S. Virgin Islands had the fourth highest level of direct cruise sector expenditures with \$344 million in spending. In addition, the U.S.V.I. had the fourth highest volume of onshore passenger and crew visits with 2.19 million visits. It also had the second highest average total expenditure rate of \$157 per passenger and crew visit. The \$344 million in cruise tourism expenditures generated an estimated 6,397 jobs paying \$141 million in wage income, the second highest total in the Caribbean, during the 2014/2015 cruise year.
- The Cayman Islands had the fifth highest number of passenger and crew onshore visits with 1.67 million visits and the fifth highest volume of direct expenditures, \$208 million. The Cayman Islands also had the third highest average total expenditure of \$124 per passenger and crew visit. The \$208 million in cruise tourism spending in the Cayman Islands generated 4,454 total jobs and \$876 million in wage income during the 2014/2015 cruise year.
- Jamaica had the sixth highest level of direct expenditures with \$199 million in spending by cruise lines and their passengers and crew. Passenger and crew onshore visits totaled 1.59 million visits during the 2014/14 cruise year. On average each passenger and crew visit generated an average \$124 in total direct expenditures per visit. The \$199 million in cruise tourism spending in Jamaica generated an estimated 7,067 total jobs and \$46 million in wage income during the 2014/2015 cruise year.
- Puerto Rico benefitted from \$198 million in total cruise tourism expenditures which, in turn, generated 5,209 jobs and \$75 million in wages during the 2014/2015 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 2014/2015 cruise year with over 454,000 embarkations. The island destination ranked sixth in passenger and crew onshore visits with 1.63 million visits. On average each passenger and crew visit generated \$122 in total direct expenditures.

Comparisons with earlier studies are difficult because the number of participating destinations (35) is so much higher than in earlier studies. Nonetheless, some general comparisons with the 2012 study are possible. First, average passenger and crew visitation rates, i.e., the percentage of arriving passengers and crew that disembark and make an onshore visit, remained virtually unchanged at 88% for passengers and 39% for crew.

Total direct expenditures per passenger⁵ across all destinations increased by 7.6% from \$129.18 during the 2011/2012 cruise year to \$133.78 during the 2014/2015 cruise year. Average passenger expenditures per visit, including both transit and home port calls, rose by 8.25% to \$103.83 from \$95.92. The 8.25% increase in average expenditures is concentrated in three categories, shore excursions, food and beverages and local crafts and souvenirs. Cruise passengers purchasing shore excursions spent 30% more per passenger in 2014/2015 relative to 2011/2012. In addition they spent 20% more per passenger for local crafts and souvenirs. They also spent 2% more food and beverages. In addition, a higher percentage of passengers made purchases in each of these categories. In fact, more than half of all transit passengers that went ashore purchased a shore excursion and food and beverages. These increases were only partially offset by decline in the average expenditure per passenger for jewelry and clothing which declined by about 3% each.

Average expenditures by crew experienced a 30% decline from \$97 in 2011/2012 to \$67 in 2014/2015. This decline resulted from a drop in the percentage of crew making onshore purchases in many categories such as food and beverages, electronics and other purchases. In addition, crew spent less when they did make a purchase in such categories as transportation, jewelry, clothing and local crafts and souvenirs. The net result was the average expenditures of crew declined in all major expenditure categories, except food and beverages.

Finally expenditures by cruise for port fees and services and other goods and services on a per destination basis remained virtually unchanged at \$11.5 million per destination.

⁵ Includes transit and home port passengers.

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.⁶ A total of **44,634** passenger surveys⁷ and **18,809** crew surveys were completed and returned for tabulation.

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

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

The survey schedule was designed to generate a representative sample of cruise passengers by cruise line at each destination. Thus, each FCCA member cruise line was scheduled to have its passengers and crew surveyed at least once at each destination at which it had a port call during the survey period. The survey period commenced in the beginning of October 2014 and concluded at the end of May 2015.

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.

⁶ Surveys were conducted on the ships of the following cruise lines: Aida Cruises, Carnival Cruise Lines, Celebrity Cruises, Costa Cruises, Disney Cruise Line, Holland America Line, Norwegian Cruise Line, Princess Cruises, P&O Cruises, Royal Caribbean International and TUI Cruises.

⁷ This includes both port-of-call (transit) and port-of-embarkation (homeport) passengers.

Passenger Visits and Expenditures

As shown in **Table ES-3**, data collected from the participating destinations and cruise lines indicated that 23.6 million cruise passengers disembarked cruise ships and visited the participating destinations or embarked on their cruise at one of the six homeports. These passengers spent \$2.45 billion for shore excursions and other goods and services during the 2014/2015 cruise year. Average per passenger expenditures ranged from a low of \$42.58 in Trinidad to a high of \$191.26 in St. Maarten and averaged \$103.83 per passenger visit across the 35 destinations.

St. Maarten with \$355 million in total passenger expenditures led all destinations and accounted for 14 percent of total passenger spending among the 35 destinations. Six additional destinations had passenger expenditures in excess of \$100 million. Passengers spent \$304 million in Cozumel, \$276 million in the U.S. Virgin Islands, \$244 million in the Bahamas, \$167 million in the Cayman Islands, \$161 million in Jamaica and \$124 million in Puerto Rico. Combined, passenger onshore expenditures in these seven destinations accounted for 66 percent of the onshore passenger expenditures among the 35 destinations and totaled \$1.63 billion.

These seven destinations can be considered high volume destinations with more than one million passenger visits during the cruise year, ranging from 1.35 million in Jamaica to 2.94 million in the Bahamas. Average spending per passenger ranged from \$82.83 per passenger in the Bahamas to \$191.26 in St. Maarten. Of the seven destinations only the Bahamas and Puerto Rico had average passenger expenditures below the all destination average of \$103.83. Combined, the seven destinations had an average passenger expenditure of \$122.06, nearly 18 percent above the Caribbean average.

Another thirteen destinations had passenger expenditures between \$25 and \$100 million. These were: Turks & Caicos, St. Kitts & Nevis, Belize, Honduras, Aruba, St. Lucia, Barbados, Ensenada, Colombia, Curacao, Antigua & Barbuda, the Dominican Republic and Guadeloupe. Onshore passenger expenditures among these thirteen destinations totaled \$644 million and accounted for 26% of total passenger expenditures among the 35 participating destinations. Total passenger onshore spending in this group of destinations ranged from a low of \$27.8 million in Guadeloupe to a high of \$78 million in the Turks & Caicos and averaged nearly \$50 million among the thirteen destinations.

For the most part, these thirteen destinations are considered to be medium volume destinations with passenger onshore visits ranging from 400,000 to one million. The exceptions are Colombia and Guadeloupe which would be considered in the low volume spectrum. Among the eleven medium volume destinations passenger visits ranged from 476,700 in Curacao to 879,000 in the Turks & Caicos. Among the medium volume destinations per passenger expenditures averaged \$83.24 per visit, ranging from \$64.88 in Antigua to \$112.10 in St. Aruba. Among these eleven destinations, only Aruba and St. Kitts had average passenger expenditures above the Caribbean average. Thus, average per passenger expenditures for the medium volume group of destinations was about 20% below the all destination average.

Table ES-3 – Passengers Onshore Visits and Expenditures by Destination, 2014/2015 Cruise Year

Destinations	Passenger Onshore Visits (Thousands)	Average Expenditure per Passenger	Total Passenger Expenditures (\$US Millions)
Antigua & Barbuda	527.6	\$ 64.88	\$ 34.2
Aruba	546.6	\$ 112.10	\$ 61.3
Bahamas ^①	2,940.0	\$ 82.83	\$ 243.5
Barbados ^②	554.4	\$ 78.03	\$ 43.3
Belize	867.6	\$ 77.87	\$ 67.6
Bonaire	146.7	\$ 54.22	\$ 8.0
British Virgin Islands	307.8	\$ 69.43	\$ 21.4
Cabo San Lucas	211.4	\$ 85.98	\$ 18.2
Cayman Islands	1,446.3	\$ 115.60	\$ 167.2
Colombia ^②	306.6	\$ 120.70	\$ 37.0
Costa Maya	361.7	\$ 61.47	\$ 22.2
Costa Rica	187.7	\$ 82.84	\$ 15.6
Cozumel	2,538.1	\$ 119.89	\$ 304.3
Curacao	476.7	\$ 77.55	\$ 37.0
Dominica	226.0	\$ 50.81	\$ 11.5
Dominican Republic ^②	480.6	\$ 66.41	\$ 31.9
Ensenada	610.7	\$ 65.10	\$ 39.8
Grenada	201.5	\$ 46.55	\$ 9.4
Guadeloupe ^②	308.2	\$ 90.06	\$ 27.8
Guatemala	73.4	\$ 63.62	\$ 4.7
Honduras	738.1	\$ 86.51	\$ 63.8
Jamaica	1,349.1	\$ 119.29	\$ 160.9
Martinique ^②	263.7	\$ 68.99	\$ 18.2
Mazatlan	109.4	\$ 64.85	\$ 7.1
Nicaragua	43.0	\$ 54.94	\$ 2.4
Progreso	289.4	\$ 57.88	\$ 16.8
Puerto Rico (San Juan) ^②	1,393.9	\$ 88.95	\$ 124.0
Puerto Vallarta	223.8	\$ 95.43	\$ 21.4
St. Kitts & Nevis	676.5	\$ 111.30	\$ 75.3
St. Lucia	603.2	\$ 78.44	\$ 47.3
St. Maarten	1,854.4	\$ 191.26	\$ 354.7
Tobago	30.9	\$ 74.18	\$ 2.3
Trinidad	10.8	\$ 42.58	\$ 0.5
Turks and Caicos	879.0	\$ 88.75	\$ 78.0
U. S. Virgin Islands	1,839.7	\$ 150.21	\$ 276.3
All Destinations	23,624.5	\$103.83	\$2,452.8

① Only includes passenger visits at Nassau and Freeport.

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

Colombia and Guadeloupe have home port calls in addition to transit calls. As a result of these homeport calls, total passenger onshore expenditures came to \$37 million in Colombia and \$27.8 million in Guadeloupe. With higher spending by home port passengers, passenger spending averaged \$120.70 in Colombia (16% above the Caribbean average) and \$90.06 in Guadeloupe (8% above the medium volume destination average).

Passenger onshore expenditures in the remaining fifteen destinations totaled \$179.3 million and accounted for 7% of total passenger expenditures among the 35 participating destinations. Passenger spending in this group averaged nearly \$12 million per destination, ranging from \$0.5 million in Trinidad to \$22.2 million in Costa Maya.

Including Colombia and Guadeloupe, these seventeen destinations are considered to be low volume destinations with cruise year passenger visits of less than 400,000. Among these destinations passenger visits ranged from 10,800 in Trinidad to 361,700 in Costa Maya. Among the low volume destinations per passenger expenditures averaged \$73.92 per visit, 29 percent below the Caribbean average. Average passenger expenditures ranged from \$42.58 in Trinidad to \$120.7 in Colombia. Colombia was the only destination in this group with an average passenger expenditure above the Caribbean average.

Passenger Expenditures by Category

The passenger survey requested data on their cruise party (passengers in the same cabin) 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 (average number of passengers per cabin) to arrive at the average spend per passenger. The average size of a cruise expenditure party across all destinations was 2.02 passengers and ranged from 1.90 to 2.24 passengers among the 35 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 23.62 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 \$32.12 during a single onshore visit. Since the average party size was 2.02 passengers, the average spend for food and beverages was \$15.90 per passenger ($32.12 \div 2.02$). However, not all cruise parties made such a purchase at each destination. The survey data indicated that at any individual cruise call an average of 50.4% of the cruise parties actually purchased food and beverages. Thus, the weighted spend per passenger across all onshore passenger visits was \$8.01 ($\$15.9 \times .504$). Finally, total estimated passenger purchases of food and beverages across all 35 destinations for the entire 2014/2015 cruise year was estimated by multiplying the weighted average spend per passenger (\$8.01) by the total number of onshore visits (23.62 million). Thus, total passenger purchases of food and beverages for the 2014/2015 cruise year across all 35 destinations were estimated to be \$189.3 million. Similar calculations were made for each category.

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

- The typical cruise passenger spent an average of \$103.83 at each destination call during their cruise vacation with total passenger expenditures in the 35 destinations reaching \$2.45 billion during the 2014/2015 cruise year.
- Just over 75 percent of passenger expenditures were made in four categories: watches and jewelry (\$877 million), shore excursions (\$551 million), clothing (\$238 million), and food and beverages (\$189 million). Combined, cruise passengers spent an estimated \$1.86 billion in these four categories.
- The most popular expenditure category was shore excursions with over half (53 percent) of all passengers making such a purchase at each destination. Local tour operators received an average of \$43.99 per passenger directly from cruise passengers and cruise lines (**see Note below table**). The weighted average expenditure was \$23.33 per passenger. Total payments to tour operators in the 35 participating destinations were an estimated \$551 million.

Table ES-4 – Average Passenger Expenditures by Category – All 35 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	\$ 43.99	53.0%	\$ 23.33	\$ 551.2
F&B at Restaurants & Bars	\$ 15.90	50.4%	\$ 8.01	\$ 189.3
Clothing	\$ 23.24	43.4%	\$ 10.08	\$ 238.0
Local Crafts & Souvenirs	\$ 16.07	44.4%	\$ 7.13	\$ 168.4
Taxis/Ground Transportation	\$ 15.36	23.7%	\$ 3.64	\$ 85.9
Watches & Jewelry	\$ 187.64	19.8%	\$ 37.11	\$ 876.6
Other Purchases	\$ 41.27	20.5%	\$ 8.44	\$ 199.4
Retail Purchases of Liquor	\$ 20.78	10.8%	\$ 2.25	\$ 53.1
Perfumes & Cosmetics	\$ 30.09	3.4%	\$ 1.02	\$ 24.2
Entertainment/Night Clubs	\$ 33.92	1.5%	\$ 0.51	\$ 12.0
Lodging ^③	\$ 139.98	1.3%	\$ 1.79	\$ 42.4
Telephone & Internet	\$ 10.48	1.4%	\$ 0.15	\$ 3.4
Electronics	\$ 69.87	0.5%	\$ 0.38	\$ 9.1
Total			\$103.83	\$2,452.8

^① For the purposes of this table we have combined the expenditure data for both transit 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 - \$66.36 per passenger; travel agents/other - \$57.71; and onshore tour operators - \$28.85. The weighted average actual spend across all sources was \$60.07.

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

- Passengers who purchased watches and jewelry spent an average of \$187.64 on such purchases. Since only 19.8 percent of passengers purchased watches and jewelry the average jewelry expenditure per passenger was \$37.11. Total expenditures on watches and jewelry were an estimated \$877 million.
- On average half (50.4%) of cruise passengers purchased food and beverages. The typical passenger spent an average of \$15.90 when they purchased food resulting in a weighted average expenditure of \$8.01 per passenger. Purchases of food and beverages totaled \$189 million across all destinations.

- On average, just under half of the cruise passengers purchased clothing and local crafts and souvenirs at each destination call. Visiting passengers spent a weighted average of \$10.08 on clothing and \$7.13 for local crafts and souvenirs at each port call. Combined, passengers spent an estimated total of \$406 million in these two categories, 17 percent of total passenger expenditures.

Crew Visits and Expenditures

As shown in **Table ES-5**, the estimated 4.5 million crew members that visited the 35 participating destinations spent an estimated \$302 million for goods and services during the 2014/2015 cruise year. Average expenditures per crew ranged from a low of \$21.50 in Trinidad to a high of \$149.44 in Puerto Rico and averaged \$67.10 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 by spending for clothing and entertainment.

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 \$59.7 million, the highest level of crew expenditures among the 35 participating destinations. A total of 994,900 crew were estimated to have made an onshore visit during the 2014/2015 cruise year, the highest number of visits among the 35 participating destinations. Crew spent an average of \$60 per visit. Crew expenditures were concentrated in restaurants and bars and clothing and jewelry stores which accounted for nearly 60 percent of their spending in the Bahamas.
- Puerto Rico had the highest crew expenditure rate of \$149.44 and 234,400 crew onshore visits. As a result, the crew visits to the island generated the fourth highest level of crew onshore expenditures of \$35.0 million during the 2014/2015 cruise year. In Puerto Rico crew expenditures were concentrated on retail purchases of clothing and electronics and purchases of food and beverages, which accounted for 50% of their total expenditures in Puerto Rico. These were followed by purchases of jewelry, ground transportation and cosmetics. Combined these three categories accounted for another 20 percent of their total expenditures.
- With the second highest average expenditure of \$119.13 per crew visit and the third highest number of crew onshore visits (377,400), St. Maarten had the second highest total expenditure among the 35 participating destinations, \$45.0 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 70 percent of total crew spending in St. Maarten.
- The U.S. Virgin Islands had the third highest crew expenditure rate of \$110.27 and the fourth highest number of estimated crew onshore visits, 351,100. As a result, the crew visits to the island generated the third highest level of crew onshore expenditures of \$38.7 million during the 2014/2015 cruise year. In the U.S.V.I. crew expenditures were concentrated on retail purchases of jewelry and clothing and purchases of food and beverages which accounted for 54% of their total expenditures in the U.S. Virgin Islands.

Table ES-5 Crew Visits and Expenditures by Destination, 2014/2015 Cruise Year

Destinations	Crew Visits (Thousands)	Average Expenditure per Crew	Total Crew Expenditures (\$US Millions)
Antigua & Barbuda	84.8	\$ 54.17	\$ 4.6
Aruba	83.2	\$ 71.99	\$ 6.0
Bahamas	994.9	\$ 60.00	\$ 59.7
Barbados	110.5	\$ 40.35	\$ 4.5
Belize	88.1	\$ 52.34	\$ 4.6
Bonaire	17.5	\$ 30.40	\$ 0.5
British Virgin Islands	46.7	\$ 44.90	\$ 2.1
Cabo San Lucas	41.1	\$ 49.42	\$ 2.0
Cayman Islands	224.6	\$ 47.94	\$ 10.8
Colombia	35.6	\$ 59.36	\$ 2.1
Costa Maya	77.5	\$ 44.35	\$ 3.4
Costa Rica	40.0	\$ 36.21	\$ 1.4
Cozumel	533.4	\$ 52.02	\$ 27.7
Curacao	82.1	\$ 70.15	\$ 5.8
Dominica	31.5	\$ 34.21	\$ 1.1
Dominican Republic	49.4	\$ 42.38	\$ 2.1
Ensenada	95.1	\$ 40.37	\$ 3.8
Grenada	34.6	\$ 47.18	\$ 1.6
Guadeloupe	45.1	\$ 45.04	\$ 2.0
Guatemala	12.8	\$ 29.01	\$ 0.4
Honduras	83.3	\$ 32.37	\$ 2.7
Jamaica	244.3	\$ 50.58	\$ 12.4
Martinique	37.9	\$ 46.45	\$ 1.8
Mazatlan	17.5	\$ 42.70	\$ 0.7
Nicaragua	6.4	\$ 24.15	\$ 0.2
Progreso	40.2	\$ 44.35	\$ 1.8
Puerto Rico (San Juan)	234.4	\$ 149.44	\$ 35.0
Puerto Vallarta	31.1	\$ 51.46	\$ 1.6
St. Kitts & Nevis	94.3	\$ 41.55	\$ 3.9
St. Lucia	107.4	\$ 44.89	\$ 4.8
St. Maarten	377.4	\$ 119.13	\$ 45.0
Tobago	6.0	\$ 24.79	\$ 0.1
Trinidad	2.5	\$ 21.50	\$ 0.1
Turks and Caicos	140.9	\$ 50.41	\$ 7.1
U. S. Virgin Islands	351.1	\$ 110.27	\$ 38.7
All Destinations	4,503.3	\$67.10	\$302.2

① Only includes crew visits at Nassau and Freeport.

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

- Crew visiting Cozumel spent an average of \$52.02. With an estimated 533,400 onshore visits, the second highest total among the 35 destinations, crew spent an estimated \$27.7 million in Cozumel during the 2014/2015 cruise year. Crew spending in Cozumel was concentrated in food and beverages and ground transportation. Combined these two categories accounted for 57 percent of total crew expenditures in Cozumel.

- Crew visiting Jamaica spent an estimated \$12.4 million, the sixth highest level of crew expenditures among the 35 participating destinations. A total of 244,300 crew were estimated to have made an onshore visit during the 2014/2015 cruise year. Crew spent an average of \$50.58 per visit. Crew expenditures were in concentrated restaurants and bars and clothing and jewelry stores which accounted for 55 percent of their spending in Jamaica.
- Crew visiting the Cayman Islands spent an average of \$47.94. With an estimated 224,600 onshore visits, crew spent an estimated \$10.8 million during the 2014/2015 cruise year. Crew spending was concentrated in food and beverages, clothing, jewelry and shore excursions. Combined, these four categories accounted for 73 percent of total crew expenditures in the Cayman Islands.

Among the remaining 28 destinations total crew expenditures averaged \$2.6 million per destination. Seven destinations, Turks & Caicos, Aruba, Curacao, St. Lucia, Belize, Antigua and Barbados had crew expenditures of \$4 million or more. Aruba (\$71.99) and Curacao (\$70.15) had average crew expenditure rates above the Caribbean average of \$67.10. Other destinations with average crew spending visit above \$50 were the Turks & Caicos (\$50.41), Belize (\$52.34) and Antigua (\$54.17).

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 \$400.8 million in the 35 participating destinations during the 2014/2015 cruise year for port fees and taxes, utilities, navigation services and ship supplies.

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

- The Bahamas had the highest total of expenditures by cruise lines among the 35 participating destinations, \$69.9 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.⁸
- Puerto Rico had the second highest level of cruise line expenditures at \$39.2 million. As the major Caribbean homeport, the purchase of ship supplies is more important than in most other destinations accounting for about one-third of the total expenditures made by cruise lines.

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

Table ES-6 –Total Expenditures by Cruise Lines by Destination, 2014/2015 Cruise Year

Destinations	Estimated Expenditures (\$US Millions)
Antigua & Barbuda	\$ 5.1
Aruba	\$ 4.6
Bahamas	\$ 69.9
Barbados^①	\$ 9.6
Belize	\$ 14.1
Bonaire	\$ 0.9
British Virgin Islands	\$ 2.8
Cabo San Lucas	\$ 2.2
Cayman Islands	\$ 29.6
Colombia^①	\$ 9.3
Costa Maya	\$ 2.0
Costa Rica	\$ 3.0
Cozumel	\$ 33.5
Curacao	\$ 8.3
Dominica	\$ 1.6
Dominican Republic^①	\$ 27.0
Ensenada	\$ 9.1
Grenada	\$ 1.2
Guadeloupe^①	\$ 8.4
Guatemala	\$ 0.6
Honduras	\$ 6.4
Jamaica	\$ 25.3
Martinique^①	\$ 2.7
Mazatlán	\$ 1.6
Nicaragua	\$ 0.4
Progreso	\$ 5.4
Puerto Rico (San Juan) ^①	\$ 39.2
Puerto Vallarta	\$ 4.1
St. Kitts & Nevis	\$ 5.1
St. Lucia	\$ 5.1
St. Maarten	\$ 23.3
Tobago	\$ 0.3
Trinidad	\$ 0.1
Turks and Caicos	\$ 9.9
U. S. Virgin Islands	\$ 29.2
All Destinations	\$400.8

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

- Cozumel had the third highest level of cruise line expenditures at \$33.5 million. Over 95 percent of these expenditures were for port and navigation fees.
- The Cayman Islands were fourth with \$29.6 million in cruise line expenditures during the 2014/2015 cruise year. Port and navigation fees, including passenger-based fees, accounted for 90 percent of cruise line spending in the Cayman Islands.

- The U.S. Virgin Islands were fifth with \$29.2 million in cruise line expenditures. Even though the Virgin Islands is primarily a port-of-call, the purchase of ship supplies accounted for 30 percent of the total expenditures made by cruise lines.
- The Dominican Republic was sixth with \$27.0 million in cruise line expenditures during the 2014/2015 cruise year. Benefitting from both home port and transit calls, the purchase of ship supplies accounted for almost half of the expenditures made by cruise lines.
- Jamaica was seventh with \$25.3 million in cruise line expenditures during the 2014/2015 cruise year. Over 95 percent of these expenditures were for port and navigation fees.
- St. Maarten was eighth with \$23.3 million in cruise line expenditures during the 2014/2015 cruise year. Over 90 percent of these expenditures were for port and navigation fees.

In each of the remaining 27 destinations expenditures by cruises lines during the 2014/2015 cruise year were under \$20 million, ranging from a low of \$100,000 in Trinidad to a high of \$14.1 million in Belize. Overall, the cruise lines spent \$123.8 million in the 27 destinations for an average of \$4.6 million per destination.

Passenger Attributes and Satisfaction

A total of 43,045 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.⁹

Table ES-7 – Major Attributes of Port-of-Call Passenger Visits – All Destinations¹⁰

	Number	Percent
Total Respondents	43,045	
Number Making First Visit	27,118	63.0%
Number Ashore	40,330	93.7%
Number Making Onshore Purchases:	26,215	65.0%
Average Hours Ashore	4.38	
Average Size of Expenditure Party (Persons)	2.02	
Average Onshore Expenditure per Party^①	\$127.84	
Purchased a Shore Excursion (Tour)	22,383	55.5%
Purchased Onshore Tour from:		
Cruise Line	16,563	74.0%
Onshore from Tour Operator	3,134	14.0%
Travel Agent/Other	2,686	12.0%
Average Cost of Shore Excursion per Party^②	\$144.13	

^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.

The major attributes of passenger visits are:

- Of the 43,045 cruise parties that completed the surveys 63.0 percent stated that this had been their first visit to the destination.
- Ninety-four percent (94 percent) of the cruise parties that completed the surveys disembarked their cruise ship to visit the destination.
- Of the cruise parties that went ashore, 65 percent made at least one purchase while ashore, excluding shore excursions. The typical cruise party consisted of 2.02 passengers and spent an average of 4.38 hours ashore.
- The responding cruise parties reported spending an average of \$127.14 while ashore (excludes shore excursions).
- Fifty-five percent (55 percent) of the cruise parties that went ashore purchased a shore excursion. Seventy-four percent (74%) of passengers who purchased a tour did so through their cruise line, 14 percent purchased their tour onshore and 12 percent purchased their tour through their travel agents or other means.

⁹ 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.

¹⁰ 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 typical cruise party that purchased a shore excursion spent \$144.13 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.

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

Visit Attributes	Mean Score
Overall Visit	7.64
Visit Met Expectations	7.05
Initial Shoreside Welcome	7.82
Guided Tour	8.33
Historic Sites/Museums	7.46
Variety of Things to See and Do	6.96
Friendliness of Residents	8.07
Overall Shopping Experience	6.98
Courtesy of Employees	8.33
Variety of Shops	6.83
Overall Prices	6.77
Taxis/Local Transportation	7.46

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

Among other key conclusions concerning visit satisfaction were the following:

- Cruise passengers were very satisfied with their overall destination visit with a mean score of 7.64. While destination visits did not score as high in terms of meeting expectations, the mean score for "Visit Met Expectations" of 7.05 implied that the visit exceeded expectations.
- "Guided Tours" (or Shore Excursions) received the highest score of all visit attributes with a mean score of 8.33. 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 8.07 and 8.33.
- 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.

Comparison to the 2012 Study

The current study has significantly more destinations than the 2011/2012 study, 35 versus 21 destinations. As shown in **Table ES-9**, due to the higher number of destinations analyzed in the current study, the total value of cruise tourism expenditures and their subsequent economic impacts are generally higher than those reported in the previous study. As shown in the table, we have estimated that direct cruise tourism expenditures totaled \$3.16 billion during the 2014/2015 cruise year among the 35 participating destinations. This is nearly 60 percent higher than the \$1.99 billion in direct cruise tourism expenditures estimated for the 21 participating destinations during the 2011/2012 cruise year. Similarly, the number of passenger onshore visits and the employment impacts are also higher for the current study.

Normalizing the expenditures on a per passenger basis shows that per passenger spending across the 35 destinations included in the current study are nearly 4 percent higher than among the 21 destinations in the 2012 study. The \$3.16 billion in total expenditures among the 35 destinations of the current study equates to \$133.78 per onshore passenger visit; whereas, in the 2011/2012 study, the \$1.99 billion in total expenditures among the 21 destinations equated to \$128.99 per onshore passenger visit. The increase is primarily the net result of the 8.25 percent increase in average per passenger spending by passengers and the 30 percent decrease in average per crew expenditures.

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

	2014/2015 Cruise Year	2011/2012 Cruise Year	Percent Difference
Number of Participating Destinations	35	21	--
Total Direct Cruise Tourism Spending (US \$ Billions)	\$3.16	\$1.99	58.79%
Total Passenger Onshore Visits (Millions)	23.62	15.44	52.98%
Total Expenditures per Passenger (US \$)	\$133.78	\$128.89	3.80%
Total Employment Impact	75,050	45,225	65.95%
Total Income Impacts (US \$ Millions)	\$976.50	\$728.10	34.12%
Average per Passenger Expenditures	\$103.83	\$95.92	8.25%
Average Per Crew Expenditures	\$ 67.10	\$96.98	-30.81%

Looking at just the 20 destinations that are common to the two studies¹¹ the total direct cruise tourism expenditures increased by 15 percent from \$1.99 billion in 2011/2012 to \$2.29 billion in 2014/2015 (see **Table ES-10**). This was the combined result of a 7.2 percent increase in cruise passenger onshore visits and a 7.6 percent increase in average total spend per passenger. The normalized total expenditures per passenger in the 20 common destinations rose from \$129.18 in the 2011/2012 cruise year to \$138.94 in the 2014/2015 cruise year. As indicated in Table 18, the increase in the average total spend per passenger is the net result of a 9.2 percent increase in the average onshore spending by passengers and a 23 percent decline in the

¹¹ These destinations are Antigua, Aruba, the Bahamas, Barbados, Belize, BVI, the Cayman Islands, Colombia, Costa Rica, Curacao, Dominica, the Dominican Republic, Grenada, Honduras, Nicaragua, Puerto Rico, St. Kitts, St. Maarten, the Turks and Caicos, and the U.S.V.I.

average crew expenditures. As a result of the 15 percent increase in total direct cruise tourism expenditures among the 20 destinations, the employment and income increased by 12.6 percent and 11.9 percent respectively.

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

	2014/2015 Cruise Year	2011/2012 Cruise Year	Percent Difference
Number of Participating Destinations	20	20	--
Total Direct Cruise Tourism Spending (US \$ Billions)	\$2.29	\$1.99	15.08%
Total Passenger Onshore Visits (Millions)	16.49	15.38	7.22%
Total Expenditures per Passenger (US \$)	\$138.94	\$129.18	7.56%
Total Employment Impact	50,812	45,145	12.55%
Total Income Impacts (US \$ Millions)	\$814.10	\$727.30	11.93%
Average per Passenger Expenditures	\$109.00	\$99.81	9.21%
Average Per Crew Expenditures	\$ 74.80	\$97.17	-23.02%

The analysis of expenditures by category indicates that the increase in passenger expenditures on a per passenger basis among the common destinations in both studies was the net result of an increase in per passenger spending in most expenditure categories, primarily shore excursions, food and beverages, and retail purchases of clothing, jewelry and local crafts that was partially offset by a decrease in the percentage of passengers making purchases in many of those categories, most importantly retail purchases of clothing, jewelry and local crafts. Thus, it appears that a smaller percentage of passengers that made onshore visits made purchases in many categories during 2014/2015, but in those categories cruise passengers made higher value purchases relative to 2011/2012. This is especially true for the major retail categories of clothing and jewelry. In the case of shore excursions and purchases of food and beverages, both the percentage of passengers making purchases and their average expenditure increased relative to 2011/2012.

Finally, average crew spending declined by 30% from 2011/2012 to 2014/2015 and 23% among the common destinations. This decline was primarily the result of significant declines in the percentage of crew making retail purchases which was augmented by an equally significant decline in the value of retail purchases made by crew. This decline in retail purchases by crew was only partially offset by an increase in the value of purchases of food and beverages.

In conclusion, the increase in the economic impacts during the 2014/2015 cruise year relative to the 2011/2012 cruise year is primarily the result of the increase in the volume of participating destinations but it was augmented by an increase in the average per passenger expenditure rate.

INTRODUCTION

This study analyzes the contribution of cruise tourism on the economies of 35 destinations located in the Caribbean, Mexico and Central and South America. The study was funded by the Florida-Caribbean Cruise Association (FCCA) and the 35 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, 2014 and ending in April, 2015 utilizing economic data collected from local, regional and international sources.

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

The Caribbean, Mexico and Central and South American Cruise Market

The Caribbean is the most popular cruise destinations in the world. According to capacity data provided by Cruise Lines International Association (CLIA), the cruise industry had 55.9 million bed days deployed throughout the Caribbean in 2014 accounting for nearly 40 percent of the industry's global bed day capacity. The average cruise length remained at about 7 days. Thus, cruise ships operating in the region had sufficient capacity to carry nearly 8.0 million passengers in 2014.

In a separate report recently published by the Caribbean Tourist Organization (CTO)¹³, the group reported that about 25 million cruise passengers arrived at the 24 Caribbean destinations for which it provides data during 2014, an increase of 11 percent from 2013. 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 2014 was concentrated among the destinations in the Eastern Caribbean, i.e., the Bahamas, St. Maarten and the U.S. Virgin Islands and the Western Caribbean, including, Belize, the Cayman Islands, Cozumel and Jamaica.

Data provided by the 35 participating destinations shows that 26.8 million passengers and 11.4 million crew arrived at these cruise destinations during the 2014/2015 cruise year. Of these, just under 40 percent of the crew, 4.5 million, and 88% of the passengers, 23.6 million, disembarked and visited the destinations.

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 from our survey of cruise passengers indicated that 71 percent of the surveyed passengers were residents of the United States, 12 percent were from Canada, 6 percent were citizens of the United Kingdom and 5 percent were residents of Germany. The remaining 6 percent of passengers arrived from a broad range of countries, including Australia, Italy, Spain, Mexico, the Philippines and South Africa to name a few.

¹³ CTO, [2014 Tourist Statistics](#), June 19, 2015.

Passenger and Crew Arrivals at Participating Destinations

Based upon data collected from the participating destinations, the CTO and other sources, an estimated 26.8 million passengers were onboard cruise ships (passenger arrivals) that called at the 35 participating destinations during the 2014/2015 cruise year (see **Table 1**). Adding the 11.4 million crew arrivals, the cruise industry brought 38.2 million passenger and crew arrivals to the 35 participating destinations during the 2014/2015 cruise year.

Eleven of the participating destinations, the Bahamas, Cozumel, the U.S. Virgin Islands, St. Maarten, the Cayman Islands, Jamaica, Puerto Rico, Belize, the Turks and Caicos, Honduras and St. Kitts & Nevis, had combined passenger and crew arrivals in excess of 1 million. Combined, these eleven destinations accounted for 71 percent of all passenger and crew arrivals among the 35 destinations. An estimated 18.6 million passengers and crew arrived at the destinations of the Eastern Caribbean,¹⁴ 49 percent of the total arrivals among the 35 participating destinations. Another 4.9 million passengers and crew arrived at the Southern Caribbean¹⁵ destinations, 13 percent of the total arrivals. Finally, the destinations of the Western Caribbean¹⁶ accounted for 21 percent of total arrivals with 7.8 million passenger and crew arrivals while 7.0 million passengers and crew arrived at cruise destinations in Mexico,¹⁷ 18 percent of all arrivals among the 35 participating destinations.

¹⁴ For the purposes of this study the Eastern Caribbean includes the following ten destinations: Antigua, the Bahamas, the British Virgin Islands, the Dominican Republic, Guadeloupe, Puerto Rico, St. Kitts, St. Maarten, the Turks & Caicos and the U.S. Virgin Islands.

¹⁵ For the purposes of this report the Southern Caribbean includes the following ten destinations: Aruba, Barbados, Bonaire, Curacao, Dominica, Grenada, Martinique, St. Lucia and Trinidad & Tobago.

¹⁶ For purposes of this report the Western Caribbean includes the following eight destinations: Belize, the Cayman Islands, Colombia, Costa Rica, Guatemala, Honduras, Jamaica and Nicaragua.

¹⁷ For purposes of this report the Mexico destinations includes the following seven destinations: Cabo San Lucas, Costa Maya, Cozumel, Ensenada, Mazatlán, Progreso and Puerto Vallarta.

Table 1– Estimated Passenger and Crew Arrivals (Thousands) at the Participating Destinations, 2014/2015 Cruise Year

Destinations	Passengers	Crew	Total
Antigua & Barbuda	593.5	236.6	830.1
Aruba	614.1	239.2	853.3
Bahamas ^①	3,500.0	2,400.0	5,900.0
Barbados ^②	682.0	271.0	953.0
Belize	973.7	361.2	1,334.9
Bonaire	181.8	47.3	229.1
British Virgin Islands	346.2	133.8	480.0
Cabo San Lucas	234.9	123.7	358.6
Cayman Islands	1,611.0	609.1	2,220.1
Colombia ^②	337.4	138.3	475.7
Costa Maya	401.9	155.3	557.2
Costa Rica	216.8	111.7	328.5
Cozumel	2,972.0	1,220.6	4,192.6
Curacao	546.7	196.2	742.9
Dominica	259.4	93.1	352.5
Dominican Republic ^②	577.4	197.7	775.1
Ensenada	678.6	254.5	933.1
Grenada	235.1	100.1	335.2
Guadeloupe ^②	321.3	110.4	431.7
Guatemala	86.4	42.7	129.1
Honduras	868.3	333.1	1,201.4
Jamaica	1,494.0	597.6	2,091.6
Martinique ^②	294.9	102.0	396.9
Mazatlán	121.5	46.7	168.2
Nicaragua	43.0	6.4	49.4
Progreso	321.6	113.6	435.2
Puerto Rico (San Juan) ^②	1,491.4	599.2	2,090.6
Puerto Vallarta	248.7	87.9	336.6
St. Kitts & Nevis	758.4	290.6	1,049.0
St. Lucia	670.2	266.3	936.5
St. Maarten	2,051.3	776.3	2,827.6
Tobago	36.4	13.3	49.7
Trinidad	12.7	7.2	19.9
Turks and Caicos	976.7	352.3	1,329.0
U. S. Virgin Islands	2,039.6	790.2	2,829.8
All Destinations	26,798.9	11,425.2	38,224.1

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

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.

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 six destinations in the Caribbean: Barbados, Cartagena (Colombia), the Dominican Republic, Guadeloupe, Martinique and San Juan (Puerto Rico). 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 October 2014 and concluded at the end of May 2015.

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 450 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 February 5th on the Celebrity Eclipse following its call in Curacao and on the Eurodam following its call in the USVI would be considered two distributions. Thus, on any given day surveys might have been conducted aboard multiple ships at different destinations. A total of 44,634 passenger surveys and 18,809 crew surveys were returned for processing.

Table 2 – Completed Passenger and Crew Surveys by Destination^①

Destinations	Passengers	Crew	Total
Antigua & Barbuda	796	150	946
Aruba	1,406	394	1,800
Bahamas^①	556	1,264	1,820
Barbados^②	1,173	321	1,494
Belize	1,074	233	1,307
Bonaire	1,464	550	2,014
British Virgin Islands	470	102	572
Cabo San Lucas	1,302	769	2,071
Cayman Islands	1,321	348	1,669
Colombia^②	1,365	1,032	2,397
Costa Maya	856	151	1,007
Costa Rica	1,755	894	2,649
Cozumel	1,110	776	1,886
Curacao	1,656	786	2,442
Dominica	1,296	553	1,849
Dominican Republic^②	1,367	630	1,997
Ensenada	741	685	1,426
Grenada	1,441	531	1,972
Guadeloupe^②	1,238	228	1,466
Guatemala	1,439	177	1,616
Honduras	1,305	442	1,747
Jamaica	1,017	982	1,999
Martinique^②	1,639	409	2,048
Mazatlán	1,389	245	1,634
Nicaragua	1,346	536	1,882
Progreso	1,402	100	1,502
Puerto Rico (San Juan)^②	2,696	1,058	3,754
Puerto Vallarta	1,325	316	1,641
St. Kitts & Nevis	1,712	375	2,087
St. Lucia	1,167	289	1,456
St. Maarten	1,389	1,324	2,713
Tobago	910	358	1,268
Trinidad	751	374	1,125
Turks and Caicos	1,475	687	2,162
U. S. Virgin Islands	1,285	740	2,025
All Destinations	44,634	18,809	63,443

^① Only includes passenger arrivals at Nassau and Freeport.

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

Data Collected from Participating Destinations

Each participating destination was asked to provide the following data:

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

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

Data Collected from FCCA Member Cruise Lines

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

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

The FCCA member lines generally accounted for 90 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
- Belize: Statistical Institute of Belize
- Bonaire: Central Bureau of Statistics
- British Virgin Islands: Central Statistics Office
- Cayman Islands: Cayman Islands Compendium of Statistics 2013
- Colombia: Department of National Statistics
- Curacao: Central Bureau of Statistics
- Grenada: Ministry of Finance
- Jamaica: Government of Jamaica Information Network
- Mexico: Institute of National Statistics
- Puerto Rico: Puerto Rico Department of Planning and the U.S. Census Bureau
- St. Lucia: Central Statistics Office
- St. Maarten: Central Bureau of Statistics
- Trinidad & Tobago: National Statistics Office
- Turks & Caicos: Department of Economic Planning & Statistics
- U.S. Virgin Islands: USVI Department of Labor and the U.S. Census Bureau.

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

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

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

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

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

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

An important aspect of these models is the role of imports. Imports act as a leakage to the multiplier process. Thus, the greater the relative importance of imports to an economy the smaller are the indirect impacts relative to the direct impacts. The size of the 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 Antigua, we hope you had an enjoyable onshore experience. The Florida-Caribbean Cruise Association (FCCA) and the cruise destinations of the Caribbean, Central America and Mexico are conducting surveys of cruise passengers who have visited these destinations. The objective of this survey is to provide information to the FCCA and the cruise destinations that will allow them to enhance visitors' experiences and quantify the contribution of cruise passengers to the economies of each destination. The survey should only take a few minutes to complete and your responses will be held in strict confidence.

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

Q1. Please check the name of the cruise line you are sailing with:

- Aida Carnival Celebrity Costa Disney Holland America MSC Norwegian Princess P&O Regent Seven Seas Royal Caribbean Seabourn TUI

Q2. Including yourself, how many people are staying in your cabin/(stateroom)? 1 2 3 4 5 6+

Q3. Is this your first visit to Antigua? Yes No

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

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

- 0 1 2 3 4 5 6 7 8 9 10 11 12+ (If 0, Go to Q17 on back)

Q5. Did you purchase a tour (or tours) during your visit in Antigua? Yes (Continue) No (If No, Go to Q.10)

Q6. How did you purchase this/these tour(s)?

- Onboard the cruise ship From the cruise line over the Internet Onshore from a tour operator From a travel agent Other (Explain)

Q7. In total, how much did you pay for this/these tour(s) (in US \$)? \$ (Whole dollars only)

Number of people included in this/these purchase(s): 1 2 3 4 5 6 7 8 9 10+

Q8a. How many hours did you spend on the first tour? 1 2 3 4 5 6 7 8 9 10+

Q8b. If more than one tour, how many hours did you spend on the second tour? 1 2 3 4 5 6 7 8 9 10+

Q9. Which of the following best describes this/these tour(s): 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 Antigua today?

- Yes (Continue) No (If No, Go to Q13 on back)

Q11. How much in total (excluding shore excursions) did all persons in your cabin spend in Antigua today (in US \$)?

\$ (Whole dollars only)

Q12. Please record the value of all purchases (in US \$) that all persons in your cabin made during your on-shore visit to Antigua today.

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

Table with 2 columns for purchase categories and their values in US dollars. Categories include food/beverages, taxis, retail purchases, entertainment, and other goods.

Q13. On a scale of 1 to 10, how satisfied were you with each of the following in Antigua?

(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 Antigua:	<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

Q14. Overall, and on a scale of 1 to 10, how did your visit to Antigua meet your prior expectations?

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

Q15. Based upon your experience in Antigua today, on a scale of 1 to 10 how likely are you to return to Antigua 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

Q16. Based upon your experience in Antigua today, on a scale of 1 to 10 how likely are you recommend a land-based or resort vacation in Antigua to family and friends?

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.

Q17. How many persons in your cabin are: Male: 0 1 2 3 4 5 Female: 0 1 2 3 4 5

Q18. 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+

Q19. 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)

Q20. 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

CONFIDENTIAL CRUISE PASSENGER SURVEY

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

Please record the date of your cruise ship’s call at Puerto Rico: Day(dd)____ Month(mm)____ Year (yy)____ (Numbers please)
 Q1. Please check the name of the cruise line you are sailing with:

- Aida Carnival Celebrity Costa Disney Holland America MSC Norwegian
- Princess P&O Regent Seven Seas Royal Caribbean Seabourn TUI

Q2. Including yourself, how many people are staying in your **cabin/(stateroom)?** 1 2 3 4 5+

Q3. Did you begin your cruise vacation in Puerto Rico, or did you begin your cruise at some other port?
 Boarded in Puerto Rico (**Continue**) Began at another Port (**If you boarded at another port, Go to Q7**)

Q4. Are you a resident of Puerto Rico? Yes (**If Yes, Go to Q14**) No (**Continue**)

Q5. How many nights both prior to and following your cruise will you spend in Puerto Rico?
 Pre-cruise stay: 0 1 2 3 4 5+ nights Post-cruise stay: 0 1 2 3 4 5+ nights
(If 0 for both, Go to Q7)

Q6. In what type of accommodations are you staying while in Puerto Rico?
 Hotel Other paid accommodation With friends or relatives Other arrangements

Q7. 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+

Q8. 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 Q21 on back)**

Q9. Did you purchase a tour(s) prior to your cruise? Yes No (**If No, Go to Q14**)

Q10. How did you purchase this/these tour(s)?
 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) _____

Q11. In total, how much did you pay for this/these tour(s) (in US\$)? \$ _____
 Number of people included in this purchase: 1 2 3 4 5 6 7 8 9 10+

Q12a. How many hours did you spend on the first tour? 1 2 3 4 5 6 7 8 9 10+

Q12b. If more than one tour, how many hours did you spend on the second tour? 1 2 3 4 5 6 7 8 9 10+

Q13. 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) _____

Q14. Did you make any purchases in Puerto Rico during your onshore visit or prior to your cruise?
 Yes No (**If No, Go to Q17 on back**)

Q15. How much in total did all persons in **your cabin** spend (in US\$) in Puerto Rico during your onshore visit, or prior to your cruise?
 \$ _____ (**Whole US\$ only**)

Q16. Please record the value of all purchases (in US\$) that all persons in **your cabin** made in Puerto Rico during your **on-shore visit or** 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)	\$ _____	Telephone & Internet Communications:	\$ _____
Retail Purchases of Watches & Jewelry:	\$ _____	Local Crafts and Souvenirs:	\$ _____
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	\$ _____

Q17. 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

Q18. 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

Q19. 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

Q20. Based upon your experience in Puerto Rico today, on a scale of 1 to 10 how likely are you recommend a land-based or resort vacation in Puerto Rico to family and friends?

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.

Q21. How many persons in your cabin are: Male: 0 1 2 3 4 5 Female: 0 1 2 3 4 5

Q22. 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+

Q23. 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)

Q24. 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

**Antigua - Crew
CONFIDENTIAL CREW SURVEY**

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

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

Month(mm)___Day(dd)___ Year (yy)___ (Numbers please)

Q1. Please check the name of the cruise line you are crewing with:

- Aida Carnival Celebrity Costa Disney Holland America MSC Norwegian
 Princess P&O Regent Seven Seas Royal Caribbean Seabourn TUI

Q2. Did you leave the ship and visit Antigua today? Yes (If Yes Go to Q4) No (Continue)

Q3. Have you visited Antigua on any previous cruise calls in the past month? Yes No (If No Go to Q9)

Q4. How many hours did you spend ashore during your visit today or your most recent visit?

- 0 1 2 3 4 5 6 7 8 9 10 11 12+

Q5. How much in total did you spend (in US dollars) in Antigua today? \$ _____ (Whole dollars only)

Q6. Please record the value of all purchases (in U.S. dollars) that you made during your on-shore visit to Antigua today or for the most recent visit to Antigua 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 only).**

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

Q7. On a scale of 1 to 10, how satisfied were you with each of the following in Antigua?

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

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 Antigua:	<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

Q8. Based upon your experience in Antigua, on a scale of 1 to 10 how likely are you to recommend a land-based or resort vacation in Antigua 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.

Q9. What is your gender? Male Female

Q10. In which age group do you fall? Under 20 21 to 30 31 to 50 51 to 65 over 65

Q11. Where is your permanent place of residence? Asia Europe South America North America Other

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 2014/2015 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 28.1 million passenger and crew onshore visits during the 2014/2015 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 48 percent of all visits to the 35 destinations and totaled 13.6 million visits. Visits to the Southern Caribbean destinations totaled 3.6 million and accounted for 13 percent of total destination visits. The Western Caribbean destinations accounted for 20 percent with 5.7 million visits. Finally, Mexican destinations received a total of 5.2 million passenger and crew onshore visits, 18 percent of all visits at the 35 participating destinations.

Based upon data collected from the cruise lines, it was estimated that an average of 88 percent of cruise passengers disembarked at transit port calls across all destinations. This ranged from 85 percent or less in such destinations as the Bahamas, Barbados, Bonaire, Dominica, Guatemala, Honduras, and Trinidad & Tobago, to 90 percent or more in Cabo San Lucas, the Cayman Islands, Costa Maya, Ensenada, Guadeloupe, Jamaica, Nicaragua, Puerto Rico, Puerto Vallarta, St. Lucia, St. Maarten, 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, 2014/2015 Cruise Year

Destinations	Passengers	Crew	Total
Antigua & Barbuda	527.6	84.8	612
Aruba	546.6	83.2	630
Bahamas ^①	2,940.0	994.9	3,935
Barbados ^②	554.4	110.5	665
Belize	867.6	88.1	956
Bonaire	146.7	17.5	164
British Virgin Islands	307.8	46.7	354
Cabo San Lucas	211.4	41.1	253
Cayman Islands	1,446.3	224.6	1,671
Colombia ^②	306.6	35.6	342
Costa Maya	361.7	77.5	439
Costa Rica	187.7	40.0	228
Cozumel	2,538.1	533.4	3,071
Curacao	476.7	82.1	559
Dominica	226.0	31.5	258
Dominican Republic ^②	480.6	49.4	530
Ensenada	610.7	95.1	706
Grenada	201.5	34.6	236
Guadeloupe ^②	308.2	45.1	353
Guatemala	73.4	12.8	86
Honduras	738.1	83.3	821
Jamaica	1,349.1	244.3	1,593
Martinique ^②	263.7	37.9	302
Mazatlán	109.4	17.5	127
Nicaragua	43.0	6.4	49
Progreso	289.4	40.2	330
Puerto Rico (San Juan) ^②	1,393.9	234.4	1,628
Puerto Vallarta	223.8	31.1	255
St. Kitts & Nevis	676.5	94.3	771
St. Lucia	603.2	107.4	711
St. Maarten	1,854.4	377.4	2,232
Tobago	30.9	6.0	37
Trinidad	10.8	2.5	13
Turks and Caicos	879.0	140.9	1,020
U. S. Virgin Islands	1,839.7	351.1	2,191
All Destinations	23,625	4,503	28,128

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, Colombia, the Dominican Republic, Guatemala, and Honduras, to 40 percent or more in the larger destinations, such as the Bahamas, Cozumel, Jamaica, 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 55.5 percent of all transit cruise passengers purchased shore excursions at each destination visit.¹⁸ The vast majority, 74 percent purchased their shore excursions from the cruise lines, 14 percent purchased their tour directly from local tour operators and 12 percent purchased their tour through a travel agent or some other means. The remaining 44.5 percent of transit passengers reported that they did not purchase a tour during 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 Tobago purchased a shore excursion while only 25 percent of passengers visiting Puerto Rico did so. In terms of sales channel, 88 percent of passengers visiting the Dominican Republic purchased their tour through the cruise line while only about 59 percent of passengers visiting Curacao reported doing so.

Fewer than half of visiting passengers reported purchasing shore excursions in the following eight destinations: Puerto Vallarta (49.2%), Ensenada (47.3%), Barbados (46.1%), the Dominican Republic (45.2%), Cabo San Lucas (45.1%), the Turks and Caicos (42.9%), Costa Maya (32.5%) and Puerto Rico (24.8%). This is a diversified group of destinations that includes one of the most popular or high volume destinations (one million or more passenger arrivals), five medium volume destinations (between 400,000 and one million passenger arrivals) and two low volume destination (less than 400,000 passenger arrivals). In eleven destinations more than 60 percent of visiting passengers reported purchasing shore excursions. These included: Tobago (81.8%), St. Kitts & Nevis (79.0%), Colombia (78.9%), Costa Rica (77.6%), Nicaragua (71.7%), Belize (68.7%), Guatemala (68.5%), St. Lucia (67.1%), Guadeloupe (66.2%), Dominica (62.8%) and Trinidad (60.2%). This group consists of three medium volume and eight low volume destinations with a heavy concentration of destinations in Central and South America.

¹⁸ This is the unweighted share across all surveys. When adjusted for onshore visits in each destination, the share falls slightly to 54.1%.

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	55.4%	70.0%	19.0%	11.0%	44.6%
Aruba	54.5%	71.0%	19.0%	10.0%	45.5%
Bahamas	53.1%	81.0%	11.0%	8.0%	46.9%
Barbados ^①	46.1%	84.0%	3.0%	13.0%	53.9%
Belize	68.7%	72.0%	17.0%	11.0%	31.3%
Bonaire	56.7%	62.0%	28.0%	10.0%	43.3%
British Virgin Islands	54.6%	75.0%	17.0%	8.0%	45.4%
Cabo San Lucas	45.1%	69.0%	21.0%	10.0%	54.9%
Cayman Islands	56.6%	76.0%	16.0%	8.0%	43.4%
Colombia ^①	78.9%	76.0%	11.0%	13.0%	21.1%
Costa Maya	32.5%	80.0%	7.0%	13.0%	67.5%
Costa Rica	77.6%	84.0%	7.0%	9.0%	22.4%
Cozumel	51.0%	82.0%	7.0%	11.0%	49.0%
Curacao	50.7%	59.0%	31.0%	10.0%	49.3%
Dominica	62.8%	67.0%	21.0%	12.0%	37.2%
Dominican Republic ^①	45.2%	88.0%	3.0%	9.0%	54.8%
Ensenada	47.3%	65.0%	24.0%	11.0%	52.7%
Grenada	57.3%	69.0%	19.0%	12.0%	42.7%
Guadeloupe ^①	66.2%	76.0%	6.0%	18.0%	33.8%
Guatemala	68.5%	86.0%	6.0%	8.0%	31.5%
Honduras	59.8%	78.0%	11.0%	11.0%	40.2%
Jamaica	55.8%	70.0%	16.0%	14.0%	44.2%
Martinique ^①	50.7%	70.0%	10.0%	20.0%	49.3%
Mazatlán	53.7%	71.0%	17.0%	12.0%	46.3%
Nicaragua	71.7%	86.0%	3.0%	11.0%	28.3%
Progreso	54.4%	72.0%	21.0%	7.0%	45.6%
Puerto Rico (San Juan) ^①	24.8%	80.0%	8.0%	12.0%	75.2%
Puerto Vallarta	49.2%	78.0%	12.0%	10.0%	50.8%
St. Kitts & Nevis	79.0%	67.0%	22.0%	11.0%	21.0%
St. Lucia	67.1%	66.0%	22.0%	12.0%	32.9%
St. Maarten	52.2%	72.0%	15.0%	13.0%	47.8%
Tobago	81.8%	69.0%	9.0%	22.0%	18.2%
Trinidad	60.2%	75.0%	12.0%	13.0%	39.8%
Turks and Caicos	42.9%	82.0%	12.0%	6.0%	57.1%
U. S. Virgin Islands	58.9%	77.0%	13.0%	10.0%	41.1%
All Destinations^①	55.5%	74.0%	14.0%	12.0%	44.5%

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

As noted above the cruise lines dominated in the sale of shore excursions. More than 80 percent of shore excursions were purchased from the cruise lines in ten destinations: the Dominican Republic (88%), Nicaragua (86%), Guatemala (86%), Costa Rica (84%), Barbados (84%), Cozumel (82%), the Turks and Caicos (82%), the Bahamas (81%), Costa Maya (80%) and Puerto Rico

(80%). Again, this is a very diversified group with three high volume, four medium volume and three low volume destinations.

Finally, there were only eight destinations in which shore operators accounted for 20 percent or more of tour purchases. These were: Curacao (31%), Bonaire (28%), Ensenada (24%), St. Kitts & Nevis (22%), St. Lucia (22%), Progreso (21%), Cabo San Lucas (21%) and Dominica (21%). This group included four medium volume and four 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 is highly likely that higher value tours are purchased on a cruise ship relative to those purchased on shore.

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 60 percent and 80 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 \$43.65 for tours purchased by transit passengers. This figure is 51 percent higher than the average price paid directly to a tour operator and 34 percent lower than the average price received by the cruise lines. The effective local price for a shore excursion ranged from a low of \$30.19 in Grenada to a high of \$80.08 in Guadeloupe. In addition to Guadeloupe, seven destinations, Costa Rica (\$57.81), Tobago (\$56.32), St. Kitts & Nevis (\$53.25), Cabo San Lucas (\$53.19), Nicaragua (\$51.46), Martinique (\$50.54) and the Bahamas (\$50.29), had effective local prices in excess of \$50 per passenger while seven destinations, Costa Maya (\$34.80), Mazatlán (\$34.67), Ensenada (\$32.72), the Cayman Island (\$32.69), Progreso (\$31.65) and Bonaire (\$30.62), in addition to Grenada had effective local prices less than \$30 per passenger.

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	\$ 67.29	\$ 29.26	\$ 58.51	\$ 43.52
Aruba	\$ 61.88	\$ 26.90	\$ 53.81	\$ 38.43
Bahamas	\$ 91.25	\$ 39.67	\$ 79.35	\$ 50.29
Barbados ^②	\$ 75.32	\$ 32.75	\$ 65.49	\$ 45.35
Belize	\$ 67.98	\$ 29.55	\$ 59.11	\$ 48.90
Bonaire	\$ 54.51	\$ 23.70	\$ 47.40	\$ 30.62
British Virgin Islands	\$ 72.90	\$ 31.70	\$ 63.39	\$ 42.77
Cabo San Lucas	\$ 73.61	\$ 32.00	\$ 64.01	\$ 53.19
Cayman Islands	\$ 56.99	\$ 25.77	\$ 49.56	\$ 32.69
Colombia ^②	\$ 56.26	\$ 24.46	\$ 48.92	\$ 42.38
Costa Maya	\$ 85.21	\$ 37.05	\$ 74.09	\$ 34.80
Costa Rica	\$ 139.34	\$ 60.58	\$ 121.17	\$ 57.81
Cozumel	\$ 76.11	\$ 33.09	\$ 66.19	\$ 41.53
Curacao	\$ 59.53	\$ 26.92	\$ 51.77	\$ 40.24
Dominica	\$ 61.77	\$ 27.93	\$ 53.72	\$ 42.81
Dominican Republic ^②	\$ 87.75	\$ 39.68	\$ 76.30	\$ 48.02
Ensenada	\$ 53.64	\$ 24.26	\$ 46.65	\$ 32.72
Grenada	\$ 52.76	\$ 23.85	\$ 45.87	\$ 30.19
Guadeloupe ^②	\$ 125.52	\$ 56.75	\$ 109.14	\$ 80.08
Guatemala	\$ 85.42	\$ 38.63	\$ 74.28	\$ 46.02
Honduras	\$ 62.41	\$ 28.22	\$ 54.27	\$ 38.81
Jamaica	\$ 75.18	\$ 34.00	\$ 65.38	\$ 45.42
Martinique ^②	\$ 75.33	\$ 34.06	\$ 65.50	\$ 50.54
Mazatlán	\$ 55.85	\$ 25.25	\$ 48.57	\$ 34.67
Nicaragua	\$ 80.51	\$ 36.41	\$ 70.01	\$ 51.46
Progreso	\$ 58.65	\$ 26.52	\$ 51.00	\$ 31.65
Puerto Rico (San Juan) ^②	\$ 75.94	\$ 34.34	\$ 66.03	\$ 41.26
Puerto Vallarta	\$ 73.63	\$ 33.29	\$ 64.03	\$ 40.08
St. Kitts & Nevis	\$ 73.40	\$ 33.19	\$ 63.83	\$ 53.25
St. Lucia	\$ 76.18	\$ 34.45	\$ 66.24	\$ 44.19
St. Maarten	\$ 66.60	\$ 30.11	\$ 57.91	\$ 41.06
Tobago	\$ 76.40	\$ 34.55	\$ 66.43	\$ 56.32
Trinidad	\$ 68.31	\$ 30.89	\$ 59.40	\$ 40.57
Turks and Caicos	\$ 64.03	\$ 28.95	\$ 55.67	\$ 37.66
U. S. Virgin Islands	\$ 71.41	\$ 32.29	\$ 62.10	\$ 36.33
All Destinations^①	\$ 66.36	\$ 28.85	\$ 57.71	\$ 43.65

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

② Only includes passengers onboard cruise ships making transit calls.

Total Passenger Expenditures

As shown in **Table 7**, the 23.62 million cruise transit and home port passengers that visited the 35 participating destinations spent \$2.45 billion for shore excursions and other goods and services during the 2014/2015 cruise year. Average per passenger expenditures ranged from a low of \$42.58 in Trinidad to a high of \$191.26 in St. Maarten and averaged \$103.83 per passenger visit across the 35 destinations.

St. Maarten with \$355 million in total passenger expenditures led all destinations and accounted for 14 percent of total passenger spending among the 35 destinations. Six additional destinations had passenger expenditures in excess of \$100 million. Passengers spent \$304 million in Cozumel, \$276 million in the U.S. Virgin Islands, \$244 million in the Bahamas, \$167 million in the Cayman Islands, \$161 million in Jamaica and \$124 million in Puerto Rico. Combined, passenger onshore expenditures in these seven destinations accounted for 66 percent of the onshore passenger expenditures among the 35 destinations and totaled \$1.63 billion.

These seven destinations can be considered high volume destinations with more than one million passenger visits per cruise year, ranging from 1.35 million in Jamaica to 2.94 million in the Bahamas. Average spending per passenger ranged from \$82.83 per passenger in the Bahamas to \$191.26 in St. Maarten. Of the seven destinations only the Bahamas and Puerto Rico had average passenger expenditures below the all destination average of \$103.83. Combined the seven destinations had an average passenger expenditure of \$122.06, nearly 18 percent above the Caribbean average.

Another thirteen destinations had passenger expenditures between \$25 and \$100 million. These were: Turks & Caicos, St. Kitts & Nevis, Belize, Honduras, Aruba, St. Lucia, Barbados, Ensenada, Colombia, Curacao, Antigua & Barbuda, the Dominican Republic and Guadeloupe. Onshore passenger expenditures among these thirteen destinations totaled \$644 million and accounted for 26% of total passenger expenditures among the 35 participating destinations. Total passenger onshore spending in this group of destinations ranged from a low of \$27.8 million in Guadeloupe to a high of \$78 million in the Turks & Caicos and averaged nearly \$50 million among the thirteen destinations.

For the most part, these thirteen destinations are considered to be medium volume destinations with passenger onshore visits ranging from 400,000 to one million. The exceptions are Colombia and Guadeloupe which would be considered in the low volume spectrum. Among the eleven medium volume destinations passenger visits ranged from 476,700 in Curacao to 879,000 in the Turks & Caicos. Among the medium volume destinations per passenger expenditures averaged \$83.24 per visit, ranging from \$64.88 in Antigua to \$112.10 in St. Aruba. Among these eleven destinations, only Aruba and St. Kitts had average passenger expenditures above the Caribbean average. Thus, average per passenger expenditures for the medium volume group of destinations was about 20% below the all destination average.

Table 7 – Passenger Onshore Visits and Expenditures by Destination, 2014/2015 Cruise Year

Destinations	Passenger Onshore Visits (Thousands)	Average Expenditure per Passenger	Total Passenger Expenditures (\$US Millions)
Antigua & Barbuda	527.6	\$ 64.88	\$ 34.2
Aruba	546.6	\$ 112.10	\$ 61.3
Bahamas ^①	2,940.0	\$ 82.83	\$ 243.5
Barbados ^②	554.4	\$ 78.03	\$ 43.3
Belize	867.6	\$ 77.87	\$ 67.6
Bonaire	146.7	\$ 54.22	\$ 8.0
British Virgin Islands	307.8	\$ 69.43	\$ 21.4
Cabo San Lucas	211.4	\$ 85.98	\$ 18.2
Cayman Islands	1,446.3	\$ 115.60	\$ 167.2
Colombia ^②	306.6	\$ 120.70	\$ 37.0
Costa Maya	361.7	\$ 61.47	\$ 22.2
Costa Rica	187.7	\$ 82.84	\$ 15.6
Cozumel	2,538.1	\$ 119.89	\$ 304.3
Curacao	476.7	\$ 77.55	\$ 37.0
Dominica	226.0	\$ 50.81	\$ 11.5
Dominican Republic ^②	480.6	\$ 66.41	\$ 31.9
Ensenada	610.7	\$ 65.10	\$ 39.8
Grenada	201.5	\$ 46.55	\$ 9.4
Guadeloupe ^②	308.2	\$ 90.06	\$ 27.8
Guatemala	73.4	\$ 63.62	\$ 4.7
Honduras	738.1	\$ 86.51	\$ 63.8
Jamaica	1,349.1	\$ 119.29	\$ 160.9
Martinique ^②	263.7	\$ 68.99	\$ 18.2
Mazatlan	109.4	\$ 64.85	\$ 7.1
Nicaragua	43.0	\$ 54.94	\$ 2.4
Progreso	289.4	\$ 57.88	\$ 16.8
Puerto Rico (San Juan) ^②	1,393.9	\$ 88.95	\$ 124.0
Puerto Vallarta	223.8	\$ 95.43	\$ 21.4
St. Kitts & Nevis	676.5	\$ 111.30	\$ 75.3
St. Lucia	603.2	\$ 78.44	\$ 47.3
St. Maarten	1,854.4	\$ 191.26	\$ 354.7
Tobago	30.9	\$ 74.18	\$ 2.3
Trinidad	10.8	\$ 42.58	\$ 0.5
Turks and Caicos	879.0	\$ 88.75	\$ 78.0
U. S. Virgin Islands	1,839.7	\$ 150.21	\$ 276.3
All Destinations	23,624.5	\$103.83	\$2,452.8

① Only includes passenger visits at Nassau and Freeport.

② Includes passengers aboard both transit and homeport cruise ships.

Colombia and Guadeloupe have home port calls in addition to transit calls. As a result of these homeport calls, total passenger onshore expenditures came to \$37 million in Colombia and \$27.8 million in Guadeloupe. With higher spending by home port passengers, passenger spending averaged \$120.70 in Colombia (16% above the Caribbean average) and \$90.06 in Guadeloupe (8% above the medium volume destination average).

Passenger onshore expenditures in the remaining fifteen destinations totaled \$179.3 million and accounted for 7% of total passenger expenditures among the 35 participating destinations. Passenger spending in this group averaged \$12 million per destination, ranging from \$0.5 million in Trinidad to \$22.2 million in Costa Maya.

Transit Passenger Expenditures by Category

Of the 23.62 million passenger visits 96%, or 22.67 million, were made by transit passengers. Utilizing data from the passenger surveys total transit 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 \$15.50 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 51.4 percent of the cruise passengers actually purchased food and beverages. Thus, the weighted spend per passenger across all onshore passengers was \$7.96 ($\$15.50 \times .514$). Finally, total transit passenger purchases of food and beverages across all 35 destinations for the entire 2014/2015 cruise year was estimated by multiplying the weighted average spend per passenger (\$7.96) by the total number of onshore visits (22.67 million). Thus, total transit passenger purchases of food and beverages for the 2014/2015 cruise year across all 35 destinations were estimated to be \$180.4 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	\$ 42.76	54.1%	\$ 23.11	\$ 523.9
F&B at Restaurants & Bars	\$ 15.50	51.4%	\$ 7.96	\$ 180.4
Taxis/Ground Transportation	\$ 14.62	23.7%	\$ 3.46	\$ 78.4
Watches & Jewelry	\$ 188.70	20.4%	\$ 38.56	\$ 874.1
Clothing	\$ 23.19	44.5%	\$ 10.33	\$ 234.2
Entertainment/Night Clubs	\$ 33.84	1.5%	\$ 0.50	\$ 11.3
Other Purchases	\$ 41.22	20.8%	\$ 8.56	\$ 194.0
Perfumes & Cosmetics	\$ 30.67	3.5%	\$ 1.06	\$ 24.0
Local Crafts & Souvenirs	\$ 16.08	45.6%	\$ 7.33	\$ 166.2
Retail Purchases of Liquor	\$ 20.85	10.9%	\$ 2.28	\$ 51.7
Electronics	\$ 73.12	0.5%	\$ 0.39	\$ 8.8
Telephone & Internet	\$ 10.01	1.4%	\$ 0.14	\$ 3.2
Total			\$103.67	\$2,350.2

^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 \$103.67 at each destination call during their cruise vacation with total transit passenger expenditures in the 35 destinations reaching \$2.35 billion during the 2014/2015 cruise year, 96 percent of total passenger expenditures.
- Seventy-seven percent (77%) of transit passenger expenditures were made in four categories: watches and jewelry (\$874 million), shore excursions (\$524 million), clothing (\$234 million), and food and beverages (\$180 million). Combined, cruise passengers spent an estimated \$1.81 billion in these four categories.
- The most popular expenditure was for shore excursions with over half (54 percent) of all transit passengers making such a purchase. Local tour operators received an average of \$42.76 per passenger directly from cruise passengers and cruise lines. The weighted average expenditure was \$23.11 per passenger. Total payments to tour operators in the 35 participating destinations were an estimated \$524 million.
- Transit passengers that purchased watches and jewelry spent an average of \$188.70 on such purchases. Since only 20.4 percent of passengers purchased watches and jewelry the average jewelry expenditure per passenger was \$38.56. Total expenditures on watches and jewelry were an estimated to total \$874 million.
- Slightly less than half of the transit cruise passengers purchased local crafts and souvenirs, and clothing in each destination. On average, visiting passengers spent \$7.33 for local crafts and souvenirs and \$10.33 on clothing at each port call. Combined, passengers spent a total of \$400 million in these two categories.

Homeport Passenger Expenditures by Category

Of the total of 23.62 million passenger onshore visits in the 35 participating destinations during the 2014/2015 cruise year, 956,800 visits were made by homeport passengers embarking on their cruises from: San Juan, Barbados, Cartagena, the Dominican Republic, Guadeloupe and Martinique. Utilizing data from the passenger surveys total passenger expenditures were calculated for each category. Total expenditures per category is equal to the weighted average spend per passenger multiplied by total homeport passenger visits.

For example, those homeport cruise parties¹⁹ that reported purchasing food and beverages in a restaurant or bar spent an average of \$33.89 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 27.5 percent of the cruise passengers actually purchased food and beverages. Thus, the weighted spend per passenger across all homeport passengers was \$9.32 ($\$33.89 \times .275$). Finally, total passenger purchases of food and beverages across all six homeports for the entire 2014/2015 cruise year was estimated by multiplying the weighted average spend per passenger (\$9.32) by the total number of embarkations (956,800). Thus, total homeport passenger purchases of food and beverages for the 2014/2015 cruise year across the five destinations were estimated to be \$8.91 million. Similar calculations were made for each category.

¹⁹ The average homeport cruise party consisted of 1.9 passengers. An estimated 30 percent of the cruise parties had a pre- and/or post-cruise stay that averaged nearly 2.0 nights.

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	\$ 155.53	28.5%	\$ 44.31	\$ 42.39
Shore Excursions	\$ 98.92	28.8%	\$ 28.51	\$ 27.28
F&B at Restaurants & Bars	\$ 33.89	27.5%	\$ 9.32	\$ 8.91
Taxis/Ground Transportation	\$ 32.79	23.8%	\$ 7.80	\$ 7.46
Watches & Jewelry	\$ 65.51	4.0%	\$ 2.61	\$ 2.50
Clothing	\$ 27.22	14.9%	\$ 4.05	\$ 3.88
Entertainment/Night Clubs	\$ 35.28	1.9%	\$ 0.67	\$ 0.64
Other Purchases	\$ 43.45	13.2%	\$ 5.72	\$ 5.48
Perfumes & Cosmetics	\$ 8.89	2.2%	\$ 0.20	\$ 0.19
Local Crafts & Souvenirs	\$ 15.78	14.7%	\$ 2.33	\$ 2.23
Retail Purchases of Liquor	\$ 18.66	7.9%	\$ 1.48	\$ 1.42
Electronics	\$ 15.70	0.8%	\$ 0.12	\$ 0.12
Telephone & Internet	\$ 20.26	1.6%	\$ 0.32	\$ 0.31
Total			\$107.45	\$ 102.8

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 homeport passenger onshore spending:

- The typical homeport cruise passenger spent an average of \$107.45 at their homeport call during their cruise vacation with total passenger expenditures in the six destinations reaching \$102.8 million during the 2014/2015 cruise year, 4.2 percent of total passenger expenditures.
- Eighty-four percent (84%) of homeport passenger expenditures were made in four categories: lodging (\$42.4 million), shore excursions (\$27.3 million), food and beverages (\$8.9 million), and taxis/ground transportation (\$7.5 million). Combined, cruise passengers spent an estimated \$86.0 million in these four categories.
- Accommodations and shore excursions were purchased by nearly 30 percent of all homeport passengers. Passengers purchasing accommodations spent an average of \$155.53 for the pre- and/or post- cruise overnight stay. Those passengers who purchased shore excursions spent an average of \$98.92. The weighted average expenditure for accommodations and shore excursions was \$28.51 and \$44.31, respectively. Combined, total payments to hotels and tour operators in the six destinations were an estimated \$69.7 million, 68 percent of total expenditures by homeport passengers.
- Approximately one-third of embarking passengers made retail purchases totaling approximately \$16 million in the six destinations. On average, those passengers making retail purchases spent an average of about \$40 during the pre- and/or post cruise stay.

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 retail purchases. These were followed by spending for ground transportation and entertainment. As shown in **Table 10**, the 4.5 million crew members that visited the 35 participating destinations spent \$302 million for goods and services during the 2014/2015 cruise year.

With approximately 25 percent of crew purchasing food and beverages, ground transportation, entertainment and local crafts in each destination, they spent an estimated total of \$139.7 million in these four categories, 46 percent of total crew expenditures. Crew spent another \$59.4 million on clothing and jewelry. Crew spent 34.2 million on clothing and \$25.2 million on jewelry. Combined these two categories accounted for 20 percent of total crew spending during the 2014/2015 cruise year. Only 10.6 percent of crew purchased shore excursions and spent a total of \$17 million in the 35 destinations accounting for 6 percent of the total. By comparison, 54 percent of transit passengers purchases shore excursions spending \$524 million.

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	\$ 88.57	26.1%	\$ 23.10	\$ 104.03
Taxis/Ground Transportation	\$ 12.75	25.8%	\$ 3.29	\$ 14.81
Watches & Jewelry	\$ 45.90	12.2%	\$ 5.60	\$ 25.21
Clothing	\$ 68.63	11.1%	\$ 7.59	\$ 34.19
Entertainment/Night Clubs	\$ 11.92	22.2%	\$ 2.64	\$ 11.91
Other Purchases	\$ 54.44	20.8%	\$ 11.32	\$ 50.99
Shore Excursions	\$ 35.44	10.6%	\$ 3.77	\$ 16.97
Perfumes & Cosmetics	\$ 69.39	1.8%	\$ 1.23	\$ 5.55
Local Crafts & Souvenirs	\$ 8.66	22.9%	\$ 1.99	\$ 8.94
Retail Purchases of Liquor	\$ 11.31	6.0%	\$ 0.68	\$ 3.04
Electronics	\$ 80.63	5.3%	\$ 4.27	\$ 19.24
Telephone & Internet	\$ 237.88	0.7%	\$ 1.62	\$ 7.29
Total			\$ 67.10	\$ 302.2

Table 11 shows the distribution of the \$302.2 million in crew expenditures across the 35 participating destinations. Average expenditures per crew ranged from a low of \$21.50 in Trinidad to a high of \$149.44 in Puerto Rico and as indicated above averaged \$67.10 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 \$59.7 million, the highest level of spending among the 35 destinations. Nearly one million crew were estimated to have made an onshore visit during the 2014/2015 cruise year and spent an average of \$60 per visit. Crew expenditures were concentrated in purchases of clothing and jewelry and spending at restaurants and bars.

Table 11 – Crew Expenditures by Destination, 2014/2015 Cruise Year

Destinations	Crew Onshore Visits (Thousands)	Average Expenditure per Crew	Total Crew Expenditures (\$US Millions)
Antigua & Barbuda	84.8	\$ 54.17	\$ 4.6
Aruba	83.2	\$ 71.99	\$ 6.0
Bahamas ^①	994.9	\$ 60.00	\$ 59.7
Barbados ^②	110.5	\$ 40.35	\$ 4.5
Belize	88.1	\$ 52.34	\$ 4.6
Bonaire	17.5	\$ 30.40	\$ 0.5
British Virgin Islands	46.7	\$ 44.90	\$ 2.1
Cabo San Lucas	41.1	\$ 49.42	\$ 2.0
Cayman Islands	224.6	\$ 47.94	\$ 10.8
Colombia ^②	35.6	\$ 59.36	\$ 2.1
Costa Maya	77.5	\$ 44.35	\$ 3.4
Costa Rica	40.0	\$ 36.21	\$ 1.4
Cozumel	533.4	\$ 52.02	\$ 27.7
Curacao	82.1	\$ 70.15	\$ 5.8
Dominica	31.5	\$ 34.21	\$ 1.1
Dominican Republic ^②	49.4	\$ 42.38	\$ 2.1
Ensenada	95.1	\$ 40.37	\$ 3.8
Grenada	34.6	\$ 47.18	\$ 1.6
Guadeloupe ^②	45.1	\$ 45.04	\$ 2.0
Guatemala	12.8	\$ 29.01	\$ 0.4
Honduras	83.3	\$ 32.37	\$ 2.7
Jamaica	244.3	\$ 50.58	\$ 12.4
Martinique ^②	37.9	\$ 46.45	\$ 1.8
Mazatlan	17.5	\$ 42.70	\$ 0.7
Nicaragua	6.4	\$ 24.15	\$ 0.2
Progreso	40.2	\$ 44.35	\$ 1.8
Puerto Rico (San Juan) ^②	234.4	\$ 149.44	\$ 35.0
Puerto Vallarta	31.1	\$ 51.46	\$ 1.6
St. Kitts & Nevis	94.3	\$ 41.55	\$ 3.9
St. Lucia	107.4	\$ 44.89	\$ 4.8
St. Maarten	377.4	\$ 119.13	\$ 45.0
Tobago	6.0	\$ 24.79	\$ 0.1
Trinidad	2.5	\$ 21.50	\$ 0.1
Turks and Caicos	140.9	\$ 50.41	\$ 7.1
U. S. Virgin Islands	351.1	\$ 110.27	\$ 38.7
All Destinations	4,503.3	\$ 67.10	\$302.2

① Only includes crew visits at Nassau and Freeport.

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

- As noted above Puerto Rico had the highest crew expenditure rate (\$149.44) and the sixth highest number of estimated crew onshore visits, 234,400. As a result, the crew visits to the island generated the fourth highest level of crew onshore expenditures of \$35.0 million during the 2014/2015 cruise year. In Puerto Rico crew expenditures were concentrated on retail purchases of clothing and electronics and purchases of food and beverages. These were followed by expenditures for jewelry and cosmetics.

- With the second highest average expenditure of \$119.13 per crew member and the third highest number of crew onshore visits, St. Maarten had the second highest total expenditure among the 35 participating destinations. In St. Maarten crew expenditures were concentrated on retail purchases of electronics, food and beverages and jewelry. These were followed by expenditures for clothing, cosmetics and entertainment. The 377,400 crew members that visited St. Maarten spent an estimated \$45.0 million during the 2014/2015 cruise year.
- Crew visiting the U.S. Virgin Islands spent an average of \$110.27. With an estimated 351,100 onshore visits crew spent an estimated \$38.7 million during the 2014/2015 cruise year, the third highest total among the 35 destinations. Crew spending in the U.S.V.I. was concentrated in food and beverages, jewelry, clothing and electronics.
- Crew visiting Cozumel spent an average of \$52.02. With an estimated 533,400 onshore visits crew, the second highest total among the 35 destinations, crew spent an estimated \$27.7 million during the 2014/2015 cruise year. Crew spending was concentrated in food and beverages, ground transportation and retail purchases of clothing, jewelry and electronics.
- Jamaica benefitted from \$12.4 million in crew onshore expenditures. On average the 244,300 crew that made an onshore visit in Jamaica spent nearly \$51 per visit. Crew spending was concentrated in food and beverages and clothing.
- Crew visiting the Cayman Islands spent an average of \$47.94. With an estimated 196,100 onshore visits crew spent an estimated \$10.8 million during the 2014/2015 cruise year. Crew spending was concentrated in food and beverages and retail purchases of clothing and local crafts followed by purchases of shore excursions.

Among the remaining 28 destinations total crew expenditures averaged \$2.6 million per destination. Seven destinations, the Turks and Caicos, Aruba, Curacao, St. Lucia, Belize, Antigua and Barbados had crew expenditures of \$4 million or more. Aruba (\$71.99) and Curacao (\$70.15) had average crew expenditure rates above the all destination average of \$67.10. Other destinations with average crew spending visit above \$50 were the Turks & Caicos (\$50.41), Belize (\$52.34), Antigua (\$54.17), Colombia (\$59.36) and Puerto Vallarta (\$51.46).

Total Passenger and Crew Expenditures for a Transit Call

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**).

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	\$ 103.67	\$ 319,300
Crew	1,400	560	\$ 67.10	\$ 37,575
Total	4,900	3,640	\$ 98.04	\$ 356,875

During the typical transit call, such a cruise ship would generate approximately 3,080 passenger visits (88 percent of passenger arrivals) and 560 crew visits (40 percent of crew arrivals). Passengers are estimated to

generate \$319,300 ($\$103.67 \times 3,080$) in onshore spending while crew are expected to add an additional \$37,575 ($\67.10×560) for total onshore spending of \$340,040. Thus, a 3,500 passenger cruise ship making a transit call would generate an average 3,640 passenger and crew visits and total expenditures of nearly \$360,000 per call, or just over \$98 per visit.

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 \$400.8 million in the 35 participating destinations during the 2014/2015 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 nine destinations which had cruise line expenditures above \$10 million and combined accounted for 73 percent of cruise line spending among the 35 destinations.

- The Bahamas had the highest total expenditures by cruise lines among the 35 participating destinations, \$69.9 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.²⁰
- Puerto Rico had the second highest level of cruise line expenditures at \$39.2 million. As the major Caribbean homeport, the purchase of ship supplies is more important than in most other destinations accounting for about one-third of the total expenditures made by cruise lines.
- Cozumel has the third highest level of cruise line expenditures at \$33.5 million. Over 95 percent of these expenditures were for port and navigation fees.
- The Cayman Islands were fourth with \$29.6 million in cruise line expenditures during the 2014/2015 cruise year. Port and navigation fees, including passenger-based fees, accounted for 90 percent of cruise line spending in the Cayman Islands.
- The U.S. Virgin Islands were fifth with \$29.2 million in cruise line expenditures. Even though the Virgin Islands is primarily a port-of-call, the purchase of ship supplies accounted for 30 percent of the total expenditures made by cruise lines.

²⁰ This figure includes passenger head taxes paid for passenger arrivals at the private islands of the cruise lines.

Table 13 – Total Cruise Line Expenditures by Destination, 2014/2015 Cruise Year

Destinations	Estimated Expenditures (\$US Millions)
Antigua & Barbuda	\$ 5.1
Aruba	\$ 4.6
Bahamas	\$ 69.9
Barbados ^①	\$ 9.6
Belize	\$ 14.1
Bonaire	\$ 0.9
British Virgin Islands	\$ 2.8
Cabo San Lucas	\$ 2.2
Cayman Islands	\$ 29.6
Colombia ^①	\$ 9.3
Costa Maya	\$ 2.0
Costa Rica	\$ 3.0
Cozumel	\$ 33.5
Curacao	\$ 8.3
Dominica	\$ 1.6
Dominican Republic ^①	\$ 27.0
Ensenada	\$ 9.1
Grenada	\$ 1.2
Guadeloupe ^①	\$ 8.4
Guatemala	\$ 0.6
Honduras	\$ 6.4
Jamaica	\$ 25.3
Martinique ^①	\$ 2.7
Mazatlan	\$ 1.6
Nicaragua	\$ 0.4
Progreso	\$ 5.4
Puerto Rico (San Juan) ^①	\$ 39.2
Puerto Vallarta	\$ 4.1
St. Kitts & Nevis	\$ 5.1
St. Lucia	\$ 5.1
St. Maarten	\$ 23.3
Tobago	\$ 0.3
Trinidad	\$ 0.1
Turks and Caicos	\$ 9.9
U. S. Virgin Islands	\$ 29.2
All Destinations	\$400.8

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

- The Dominican Republic was sixth with \$27.0 million in cruise line expenditures during the 2014/2015 cruise year. Benefitting from both home port and transit calls, the purchase of ship supplies accounted for almost half of the expenditures made by cruise lines.
- Jamaica was seventh with \$25.3 million in cruise line expenditures during the 2014/2015 cruise year. Over 95 percent of these expenditures were for port and navigation fees.

- St. Maarten was eighth with \$23.3 million in cruise line expenditures during the 2014/2015 cruise year. Over 90 percent of these expenditures were for port and navigation fees.
- Belize was ninth with \$14.1 million in cruise line expenditures during the 2014/2015 cruise year. Approximately 85 percent of these expenditures were for port and navigation fees.

In each of the remaining 26 destinations expenditures by cruises lines during the 2014/2015 cruise year were under \$10 million, ranging from a low of \$100,000 in Trinidad to a high of \$9.9 million in the Turks and Caicos. Overall, the cruise lines spent just under \$110 million in the 26 destinations for an average of \$4.2 million per destination.

Direct Cruise Tourism Expenditures

As shown in **Table 14**, the 28.1 million passenger and crew visits generated an estimated \$2.76 billion in spending for local goods and services in the 35 destinations. The cruise lines added another \$400.8 million in spending for port services and other local goods and services, bringing total cruise tourism expenditures to \$3.16 billion during the 2014/2015 cruise year.

Seven (7) destinations had direct cruise tourism expenditures of \$100 million or more. Ten (10) destinations had direct expenditures between \$50 and \$100 million, ten (10) had direct expenditures between \$20 and \$50 and eight (8) had direct expenditures less than \$20 million.

St. Maarten led all destinations with nearly \$423 million, followed by the Bahamas with \$373 million, Cozumel with \$365 million, the U.S. Virgin Islands with \$344 million, the Cayman Islands with \$208 million, Jamaica with \$199 million and Puerto Rico with \$198 million. Combined, these seven destinations with \$2.11 billion in direct expenditures accounted for 67 percent of the total cruise tourism expenditures among the 35 destinations.

The next ten destinations with expenditures between \$50 and \$100 million accounted for 22 percent of the total cruise tourism expenditures with a combined total of \$689.7 million in direct spending. Direct spending among these ten destinations ranged from \$51.0 million in Curacao to \$95.0 million in the Turks & Caicos. In addition to the Turks & Caicos, Belize (\$86.3 million), St. Kitts & Nevis (\$84.3 million), Honduras (\$73.0 million) and Aruba (\$71.9 million) had total cruise tourism expenditures in excess of \$70 million.

The next ten destinations with expenditures between \$20 and \$50 million accounted for almost 10 percent of the total cruise tourism expenditures with a combined total of \$300.4 million in direct spending. Direct spending among these ten destinations ranged from \$20.0 million in Costa Rica to \$48.4 million in the Colombia. In addition to Colombia, Antigua & Barbuda (\$43.9 million), Guadeloupe (\$38.2 million), Costa Maya (\$27.6 million), Puerto Vallarta (\$27.1 million) and the British Virgin Islands (\$26.2 million) had total cruise tourism expenditures in excess of \$25 million.

The remaining eight destinations with less than \$20 million in direct cruise tourism expenditures had a combined total of \$57.1 million in direct cruise tourism expenditures and accounted for just under two percent of the total among the 35 destinations. Cruise tourism expenditures among these destinations ranged from \$0.6 million in Trinidad to \$14.2 million in Dominica. In addition to Dominica, only Grenada (\$12.2 million) had direct expenditures in excess of \$10 million.

Table 14 – Total Cruise Tourism Expenditures (\$US Millions) by Destination, 2014/2015 Cruise Year*

Destinations	Passengers	Crew	Cruise Lines	Total
Antigua & Barbuda	\$ 34.2	\$ 4.6	\$ 5.1	\$ 43.9
Aruba	\$ 61.3	\$ 6.0	\$ 4.6	\$ 71.9
Bahamas ^①	\$ 243.5	\$ 59.7	\$ 69.9	\$ 373.1
Barbados ^②	\$ 43.3	\$ 4.5	\$ 9.6	\$ 57.3
Belize	\$ 67.6	\$ 4.6	\$ 14.1	\$ 86.3
Bonaire	\$ 8.0	\$ 0.5	\$ 0.9	\$ 9.4
British Virgin Islands	\$ 21.4	\$ 2.1	\$ 2.8	\$ 26.2
Cabo San Lucas	\$ 18.2	\$ 2.0	\$ 2.2	\$ 22.4
Cayman Islands	\$ 167.2	\$ 10.8	\$ 29.6	\$ 207.6
Colombia ^②	\$ 37.0	\$ 2.1	\$ 9.3	\$ 48.4
Costa Maya	\$ 22.2	\$ 3.4	\$ 2.0	\$ 27.6
Costa Rica	\$ 15.6	\$ 1.4	\$ 3.0	\$ 20.0
Cozumel	\$ 304.3	\$ 27.7	\$ 33.5	\$ 365.5
Curacao	\$ 37.0	\$ 5.8	\$ 8.3	\$ 51.0
Dominica	\$ 11.5	\$ 1.1	\$ 1.6	\$ 14.2
Dominican Republic ^②	\$ 31.9	\$ 2.1	\$ 27.0	\$ 61.0
Ensenada	\$ 39.8	\$ 3.8	\$ 9.1	\$ 52.7
Grenada	\$ 9.4	\$ 1.6	\$ 1.2	\$ 12.2
Guadeloupe ^②	\$ 27.8	\$ 2.0	\$ 8.4	\$ 38.2
Guatemala	\$ 4.7	\$ 0.4	\$ 0.6	\$ 5.6
Honduras	\$ 63.8	\$ 2.7	\$ 6.4	\$ 73.0
Jamaica	\$ 160.9	\$ 12.4	\$ 25.3	\$ 198.6
Martinique ^②	\$ 18.2	\$ 1.8	\$ 2.7	\$ 22.7
Mazatlan	\$ 7.1	\$ 0.7	\$ 1.6	\$ 9.4
Nicaragua	\$ 2.4	\$ 0.2	\$ 0.4	\$ 2.9
Progreso	\$ 16.8	\$ 1.8	\$ 5.4	\$ 23.9
Puerto Rico (San Juan) ^②	\$ 124.0	\$ 35.0	\$ 39.2	\$ 198.2
Puerto Vallarta	\$ 21.4	\$ 1.6	\$ 4.1	\$ 27.1
St. Kitts & Nevis	\$ 75.3	\$ 3.9	\$ 5.1	\$ 84.3
St. Lucia	\$ 47.3	\$ 4.8	\$ 5.1	\$ 57.2
St. Maarten	\$ 354.7	\$ 45.0	\$ 23.3	\$ 422.9
Tobago	\$ 2.3	\$ 0.1	\$ 0.3	\$ 2.7
Trinidad	\$ 0.5	\$ 0.1	\$ 0.1	\$ 0.6
Turks and Caicos	\$ 78.0	\$ 7.1	\$ 9.9	\$ 95.0
U. S. Virgin Islands	\$ 276.3	\$ 38.7	\$ 29.2	\$ 344.3
All Destinations	\$2,454.5	\$302.2	\$400.8	\$3,157.5

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

① Only includes crew visits at Nassau and Freeport.

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

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 28.1 million passenger and crew visits to the 35 participating destinations during the 2014/2015 cruise year generated \$3.16 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 44,496 employees throughout the Caribbean and paid annual wages of \$559.7 million. While the impacts vary across destinations, on average every \$71,000 in cruise tourism expenditures generated a direct job in a destination and that 18 percent of direct cruise tourism expenditures ended up as income for the directly impacted workers.

The Bahamas led all Caribbean destinations with just over 3.93 million onshore passenger and crew visits. This was nearly 30 percent higher than the volume of the next highest destination, Cozumel. With an average passenger onshore expenditure of \$82.83, The Bahamas had the third highest total of passenger expenditures, \$243.5 million. The Bahamas also had the highest level of cruise line and crew expenditures, \$69.9 and \$59.7 million, respectively. Combining all direct expenditures, the cruise sector generated \$373.1 million in cruise tourism expenditures. These expenditures, in turn, generated an estimated 4,568 direct jobs paying \$81.0 million in direct wage income during the 2014/2015 cruise year.

Table 15 – Direct Economic Impact of Cruise Tourism by Destination, 2014/2015 Cruise Year*

Destinations	Direct Cruise Tourism Expenditures (\$US Millions)	Direct Employment	Direct Employee Wage Income (\$US Millions)
Antigua & Barbuda	\$ 43.9	740	\$ 6.9
Aruba	\$ 71.9	917	\$ 16.0
Bahamas^①	\$ 373.1	4,568	\$ 81.0
Barbados^②	\$ 57.3	985	\$ 10.9
Belize	\$ 86.3	1,666	\$ 17.7
Bonaire	\$ 9.4	116	\$ 1.9
British Virgin Islands	\$ 26.2	289	\$ 5.0
Cabo San Lucas	\$ 22.4	373	\$ 2.5
Cayman Islands	\$ 207.6	2,453	\$ 47.4
Colombia^②	\$ 48.4	686	\$ 4.5
Costa Maya	\$ 27.6	461	\$ 2.8
Costa Rica	\$ 20.0	397	\$ 2.3
Cozumel	\$ 365.5	6,114	\$ 37.9
Curacao	\$ 51.0	520	\$ 9.6
Dominica	\$ 14.2	236	\$ 1.9
Dominican Republic^②	\$ 61.0	1,211	\$ 5.4
Ensenada	\$ 52.7	855	\$ 5.8
Grenada	\$ 12.2	213	\$ 1.5
Guadeloupe^②	\$ 38.2	465	\$ 4.0
Guatemala	\$ 5.6	124	\$ 0.6
Honduras	\$ 73.0	1,101	\$ 5.4
Jamaica	\$ 198.6	4,494	\$ 29.3
Martinique^②	\$ 22.7	292	\$ 2.4
Mazatlan	\$ 9.4	181	\$ 1.0
Nicaragua	\$ 2.9	109	\$ 0.3
Progreso	\$ 23.9	438	\$ 2.6
Puerto Rico (San Juan)^②	\$ 198.2	2,814	\$ 38.7
Puerto Vallarta	\$ 27.1	471	\$ 3.0
St. Kitts & Nevis	\$ 84.3	838	\$ 7.3
St. Lucia	\$ 57.2	942	\$ 7.7
St. Maarten	\$ 422.9	4,867	\$ 101.6
Tobago	\$ 2.7	80	\$ 1.0
Trinidad	\$ 0.6	20	\$ 0.2
Turks and Caicos	\$ 95.0	1,064	\$ 18.6
U. S. Virgin Islands	\$ 344.3	3,396	\$ 75.0
All Destinations	\$3,157.5	44,496	\$559.7

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

① Only includes crew visits at Nassau and Freeport.

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

St. Maarten had the highest per passenger onshore expenditure of \$191 per passenger visit. It also had the second highest average crew expenditure of \$119 per visit. With an estimated 2.23 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 \$422.9 million in cruise tourism

expenditures in St. Maarten, the highest total among the 35 destinations. This spending then resulted in the direct employment of 4,867 residents and wage income of \$101.6 million. Thus one direct job was generated for every \$86,900 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.

Cozumel had the second highest number of passenger and crew onshore visits with 3.07 million visits. Combined with average per passenger onshore expenditure of \$119.89 per visit and an average crew expenditure of \$57.02, Cozumel ranked third in direct cruise tourism expenditures. The \$365.5 million in cruise tourism spending in Cozumel generated 6,114 direct jobs and \$37.9 million in wage income during the 2014/2015 cruise year. Thus one direct job was created for every \$59,800 in direct cruise tourism expenditures and wages accounted for 10 percent of the direct expenditures.

The U.S. Virgin Islands, with the second highest per passenger spending rate of just over \$150 per passenger visit and the fourth highest volume of onshore passenger and crew visits with 2.19 million visits, had the fourth highest level of direct cruise sector expenditures with \$344.3 million in spending. These total cruise tourism expenditures generated an estimated 3,396 direct jobs paying \$75.0 million in wage income during the 2014/2015 cruise year. Due to the large volume of high value duty free shopping at this destination, it required approximately \$101,400 in cruise tourism expenditures to create a direct job. The direct wage income accounted for 22 percent of the direct expenditures.

The Cayman Islands had the fifth highest number of passenger and crew onshore visits with 1.67 million visits. Combined with average per passenger onshore expenditure of \$115.60 per visit and an average crew expenditure of \$47.94, the Cayman Islands ranked fifth in direct cruise tourism expenditures. The \$207.6 million in cruise tourism spending in the Cayman Islands generated 2,453 direct jobs and \$47.4 million in wage income during the 2014/2015 cruise year. Thus one direct job was created for every \$84,600 in direct cruise tourism expenditures and wages accounted for 23 percent of the direct expenditures.

Jamaica had the seventh highest number of passenger and crew onshore visits with 1.59 million visits. Combined with average per passenger onshore expenditure of \$119 per visit and an average crew expenditure of \$50.58, Jamaica ranked sixth in direct cruise tourism expenditures. The \$199 million in cruise tourism spending in Jamaica generated 4,494 direct jobs and \$29.3 million in wage income during the 2014/2015 cruise year. Thus one direct job was created for every \$44,200 in direct cruise tourism expenditures and wages accounted for 15 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 2014/2015 cruise year with just over 454,000 embarkations. The island destination also ranked sixth in passenger and crew onshore visits with 1.63 million visits. The spending by the cruise

lines and their passenger and crew resulted in \$198 million in total cruise tourism expenditures which, in turn, generated 2,814 direct jobs and \$38.7 million in wages during the 2014/2015 cruise year. Thus one direct job was created for every \$70,400 in direct cruise tourism expenditures and wages accounted for 20 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 \$3.16 billion in direct cruise tourism expenditures generated total employment of 75,050 residents of the 351 destinations and \$976 million in employee wages during the 2014/2015 cruise year.

Seven (7) destinations had direct cruise tourism expenditures of \$100 million or more. Ten (10) destinations had direct expenditures between \$50 and \$100 million, ten (10) had direct expenditures between \$20 and \$50 and eight (8) had direct expenditures less than \$20 million.

St. Maarten led all destinations with nearly \$423 million, followed by the Bahamas with \$373 million, Cozumel with \$365 million, the U.S. Virgin Islands with \$344 million, the Cayman Islands with \$208 million, Jamaica with \$199 million and Puerto Rico with \$198 million. Combined, these seven destinations with \$2.11 billion in direct expenditures accounted for 67 percent of the total cruise tourism expenditures among the 35 destinations.

Table 16 – Total Economic Impact of Cruise Tourism by Destination, 2014/2015 Cruise Year*

Destinations	Direct Cruise Tourism Expenditures (\$US Millions)	Total Employment	Total Employee Wage Income (\$US Millions)
Antigua & Barbuda	\$ 43.9	1,170	\$ 11.10
Aruba	\$ 71.9	1,716	\$ 29.20
Bahamas ^①	\$ 373.1	7,954	\$ 138.50
Barbados ^②	\$ 57.3	1,845	\$ 19.50
Belize	\$ 86.3	2,492	\$ 26.50
Bonaire	\$ 9.4	191	\$ 3.20
British Virgin Islands	\$ 26.2	465	\$ 8.70
Cabo San Lucas	\$ 22.4	587	\$ 3.90
Cayman Islands	\$ 207.6	4,454	\$ 87.00
Colombia ^②	\$ 48.4	1,089	\$ 6.90
Costa Maya	\$ 27.6	726	\$ 4.50
Costa Rica	\$ 20.0	557	\$ 3.20
Cozumel	\$ 365.5	9,727	\$ 61.00
Curacao	\$ 51.0	903	\$ 16.70
Dominica	\$ 14.2	373	\$ 2.90
Dominican Republic ^②	\$ 61.0	1,914	\$ 8.00
Ensenada	\$ 52.7	1,370	\$ 9.50
Grenada	\$ 12.2	342	\$ 2.30
Guadeloupe ^②	\$ 38.2	724	\$ 6.10
Guatemala	\$ 5.6	183	\$ 0.80
Honduras	\$ 73.0	1,585	\$ 7.80
Jamaica	\$ 198.6	7,067	\$ 46.10
Martinique ^②	\$ 22.7	453	\$ 3.70
Mazatlan	\$ 9.4	268	\$ 1.50
Nicaragua	\$ 2.9	141	\$ 0.40
Progreso	\$ 23.9	609	\$ 3.60
Puerto Rico (San Juan) ^②	\$ 198.2	5,209	\$ 75.00
Puerto Vallarta	\$ 27.1	757	\$ 4.90
St. Kitts & Nevis	\$ 84.3	1,293	\$ 11.20
St. Lucia	\$ 57.2	1,422	\$ 11.70
St. Maarten	\$ 422.9	9,259	\$ 189.10
Tobago	\$ 2.7	124	\$ 1.50
Trinidad	\$ 0.6	30	\$ 0.40
Turks and Caicos	\$ 95.0	1,654	\$ 29.10
U. S. Virgin Islands	\$ 344.3	6,397	\$ 141.00
All Destinations	\$3,157.5	75,050	\$ 976.5

*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.

St. Maarten led all Caribbean destinations with \$423 million in cruise tourism expenditures. It also led ranked third in passenger and crew onshore visits with 2.23 million visits. These visits generated an average expenditure of \$163 per visit across all passenger and crew visits, the highest average in the Caribbean. The \$423 million in direct expenditures, in turn, generated an estimated

9,259 jobs paying \$189 million in wage income during the 2014/2015 cruise year. This placed St. Maarten with the highest income impact and the second highest employment impact. Thus, in St. Maarten every \$1 million in direct cruise tourism expenditures generated 22 jobs throughout the island's economy which paid an average annual wage of about US\$20,400.

The Bahamas, with 3.93 million passenger and crew visits, had the highest volume of visits in the Caribbean. It also had the second highest level of direct expenditures with \$373 million. Thus, each visit generated an average total expenditure of \$95 across all passenger and crew visits. As a result of the \$373 million in direct expenditures the Bahamas benefitted from the generation of 7,954 jobs paying wage income of \$138 million, the third highest totals in both categories throughout the Caribbean. Thus, in the Bahamas every \$1 million in direct cruise tourism expenditures generated 21 jobs throughout the island's economy which paid an average annual wage of about US\$17,400.

Cozumel had the third highest level of direct cruise sector expenditures with \$366 million in spending. In addition, Cozumel had the second highest volume of onshore passenger and crew visits with 3.07 million visits. As a result of these onshore visits, Cozumel had an average total expenditure of nearly \$119 per passenger and crew visit. The \$366 million in cruise tourism expenditures generated an estimated 9,727 jobs, the highest level among the 35 destinations, paying nearly \$61 million in wage income during the 2014/2015 cruise year. Thus, in Cozumel every \$1 million in direct cruise tourism expenditures generated 26 jobs throughout the local economy which paid an average annual wage of about US\$6,300.

The U.S. Virgin Islands had the fourth highest level of direct cruise sector expenditures with \$344 million in spending. In addition, the U.S.V.I. had the fourth highest volume of onshore passenger and crew visits with 2.19 million visits. It also had the second highest average total expenditure rate of \$157 per passenger and crew visit. The \$344 million in cruise tourism expenditures generated an estimated 6,397 jobs paying \$141 million in wage income, the second highest total in the Caribbean, during the 2014/2015 cruise year. These direct expenditures generated nearly 19 jobs throughout the economy of the U.S.V.I. for every \$1 million in spending. These jobs, in turn, paid an average annual wage of nearly US\$22,000.

The Cayman Islands had the fifth highest number of passenger and crew onshore visits with 1.67 million visits and the fifth highest volume of direct expenditures, \$208 million. The Cayman Islands also had the third highest average total expenditure of nearly \$125 per passenger and crew visit. The \$208 million in cruise tourism spending in the Cayman Islands generated 4,454 total jobs and \$876 million in wage income during the 2014/2015 cruise year. Thus, in the Cayman Islands every \$1 million in direct cruise tourism expenditures generated 21 jobs throughout the economy which paid an average annual wage of about US\$19,500.

Jamaica had the sixth highest level of direct expenditures with \$199 million in spending by cruise lines and their passengers and crew. Passenger and crew onshore visits totaled 1.59 million visits during the 2014/14 cruise year. On average each passenger and crew visit generated \$125 in total

onshore spending. The \$199 million in cruise tourism spending in Jamaica generated an estimated 7,067 total jobs, the fourth highest total among the 35 destinations, and \$46 million in wage income during the 2014/2015 cruise year. Thus, in Jamaica every \$1 million in direct cruise tourism expenditures generated 35 jobs throughout the island's economy which paid an average annual wage of about US\$6,500.

Puerto Rico benefitted from \$198 million in total cruise tourism expenditures which, in turn, generated 5,209 jobs and \$75 million in wages during the 2014/2015 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 2014/2015 cruise year with over 454,000 embarkations. The island destination ranked sixth in passenger and crew onshore visits with 1.63 million visits. On average each passenger and crew visit generated \$122 in onshore expenditures. These direct expenditures generated approximately 26 jobs throughout the island's economy for every \$1 million in expenditures. These jobs also paid an average annual wage of about US\$14,400

The next ten destinations with expenditures between \$50 and \$100 million accounted for 22 percent of the total cruise tourism expenditures with a combined total of \$689.7 million in direct spending. Direct spending among these ten destinations ranged from \$51.0 million in Curacao to \$95.0 million in the Turks & Caicos. In addition to the Turks & Caicos, Belize (\$86.3 million), St. Kitts & Nevis (\$84.3 million), Honduras (\$73.0 million) and Aruba (\$71.9 million) had total cruise tourism expenditures in excess of \$70 million.

Among these ten destinations, the total employment impacts exceeded one thousand jobs in all but one, ranging from 903 total jobs in Curacao to 2,492 jobs in Belize. Of these four had employment impacts in excess of 1,700 full- and part-time jobs. In Belize every \$1 million in direct spending generated nearly 29 jobs with an average annual wage of US\$10,600. In the Dominican Republic \$1 million of direct spending generated 31 jobs for a total employment impact of 1,914 jobs paying US\$4,200 in annual wage income. Barbados, with both transit and homeport calls, benefitted from 1,845 total jobs generated by cruise tourism spending. Thus, 32 jobs were generated for every \$1 million in direct spending. These jobs paid an average of US\$10,600 in annual wage income. In Aruba \$1 million of direct spending generated 24 jobs for a total employment impact of 1,716 jobs paying US\$17,000 in annual wage income.

Another three had income impacts above \$10 million. In St. Kitts & Nevis \$1 million of direct spending generated 15 jobs for a total employment impact of 1,293 jobs paying over US\$8,700 in annual wage income. St. Lucia benefitted from 1,422 total jobs generated by cruise tourism spending. Thus, 25 jobs were generated for every \$1 million in direct spending. These jobs paid an average of US\$8,200 in annual wage income. Finally, Curacao benefitted from 903 total jobs generated by cruise tourism spending. Thus, nearly 18 jobs were generated for every \$1 million in direct spending. These jobs paid an average of US\$18,500 in annual wage income.

The next ten destinations with expenditures between \$20 and \$50 million accounted for almost 10 percent of the total cruise tourism expenditures with a combined total of \$300.4 million in direct spending. Direct spending among these ten destinations ranged from \$20.0 million in Costa Rica to \$48.4 million in the Colombia. In addition to Colombia, Antigua & Barbuda (\$43.9 million), Guadeloupe (\$38.2 million), Costa Maya (\$27.6 million), Puerto Vallarta (\$27.1 million) and the British Virgin Islands (\$26.2 million) had total cruise tourism expenditures in excess of \$25 million.

Among these ten destinations, the total employment impacts exceeded 500 full- and part-time jobs in all but one, ranging from 465 total jobs in the British Virgin Islands to 1,170 jobs in Antigua & Barbuda. Of these two had employment impacts in excess of 1,000 full- and part-time jobs. In Antigua every \$1 million in direct spending generated nearly 27 jobs with an average annual wage of US\$9,500. Colombia, with both transit and homeport calls, benefitted from 1,089 jobs. Thus, 23 jobs were generated for every \$1 million of direct spending. These jobs paid an average of US\$6,300 in annual wage income.

Another three had income impacts at or above \$5 million. In the British Virgin Islands \$1 million of direct spending generated 18 jobs for a total employment impact of 465 jobs paying over US\$18,700 in annual wage income. Guadeloupe, with both transit and homeport calls, benefitted from 724 total jobs generated by cruise tourism spending. Thus, 19 jobs were generated for every \$1 million in direct spending. These jobs paid an average of US\$8,400 in annual wage income. Finally, Puerto Vallarta benefitted from 757 total jobs generated by cruise tourism spending. Thus, nearly 28 jobs were generated for every \$1 million in direct spending. These jobs paid an average of US\$6,500 in annual wage income.

The remaining eight destinations with less than \$20 million in direct cruise tourism expenditures had a combined total of \$57.1 million in direct cruise tourism expenditures and accounted for just under two percent of the total among the 35 destinations. Cruise tourism expenditures among these destinations ranged from \$0.6 million in Trinidad to \$14.2 million in Dominica. In addition to Dominica, only Grenada (\$12.2 million had direct expenditures in excess of \$10 million).

Among these eight destinations, the total employment impacts ranged from 30 total jobs in Trinidad to 373 jobs in Dominica. Of these two had employment impacts in excess of 300 full- and part-time jobs. In Dominica every \$1 million in direct spending generated 26 jobs with an average annual wage of US\$7,800. In Grenada \$1 million of direct spending generated about 28 jobs for a total employment impact of 342 jobs paying US\$6,700 in annual wage income.

Another two had income impacts at or above \$1 million. In Bonaire \$1 million of direct spending generated 20 jobs for a total employment impact of 191 jobs paying over US\$16,700 in annual wage income. Mazatlan benefitted from 268 total jobs generated by cruise tourism spending. Thus, 28 jobs were generated for every \$1 million in direct spending. These jobs paid an average of US\$5,600 in annual wage income.

Comparison to 2012 Study

The current study has significantly more destinations than the 2011/2012 study, 35 versus 21 destinations. As shown in **Table 17**, due to the higher number of destinations analyzed in the current study, the total value of cruise tourism expenditures and their subsequent economic impacts are generally higher than those reported in the previous study. As shown in the table, we have estimated that direct cruise tourism expenditures totaled \$3.16 billion during the 2014/2015 cruise year among the 35 participating destinations. This is nearly 60 percent higher than the \$1.99 billion in direct cruise tourism expenditures estimated for the 21 participating destinations during the 2011/2012 cruise year. Similarly, the number of passenger onshore visits and the employment impacts are also higher for the current study.

Normalizing the expenditures on a per passenger basis shows that per passenger total spending across the 35 destinations included in the current study are nearly 4 percent higher than among the 21 destinations in the 2012 study. The \$3.16 billion in total expenditures among the 35 destinations of the current study equates to \$133.78 per onshore passenger visit; whereas, in the 2011/2012 study, the \$1.99 billion in total expenditures among the 21 destinations equated to \$128.99 per onshore passenger visit. The increase is primarily the net result of the 8.25 percent increase in average per passenger spending by passengers and the 30 percent decrease in average per crew expenditures.

Table 17 – Comparison of Cruise Tourism Expenditures – All Destinations

	2014/2015 Cruise Year	2011/2012 Cruise Year	Percent Difference
Number of Participating Destinations	35	21	--
Total Direct Cruise Tourism Spending (US \$ Billions)	\$3.16	\$1.99	58.79%
Total Passenger Onshore Visits (Millions)	23.62	15.44	52.98%
Total Expenditures per Passenger (US \$)	\$133.78	\$128.89	3.80%
Total Employment Impact	75,050	45,225	65.95%
Total Income Impacts (US \$ Millions)	\$976.50	\$728.10	34.12%
Average per Passenger Expenditures	\$103.83	\$95.92	8.25%
Average Per Crew Expenditures	\$ 67.10	\$96.98	-30.81%

Looking at just the 20 destinations that are common to the two studies²¹ the total direct cruise tourism expenditures increased by 15 percent from \$1.99 billion in 2011/2012 to \$2.29 billion in 2014/2015 (see **Table 18**). This was the combined result of a 7.2 percent increase in cruise passenger onshore visits and a 7.6 percent increase in average total spend per passenger. The normalized total expenditures per passenger in the 20 common destinations rose from \$129.18 in the 2011/2012 cruise year to \$138.94 in the 2014/2015 cruise year. As indicated in Table 18, the increase in the average total spend per passenger is the net result of a 9.2 percent increase in the average onshore spending by passengers and a 23 percent decline in the

²¹ These destinations are Antigua, Aruba, the Bahamas, Barbados, Belize, BVI, the Cayman Islands, Colombia, Costa Rica, Curacao, Dominica, the Dominican Republic, Grenada, Honduras, Nicaragua, Puerto Rico, St. Kitts, St. Maarten, the Turks and Caicos, and the U.S.V.I.

average crew expenditures. As a result of the 15 percent increase in total direct cruise tourism expenditures among the 20 destinations, the employment and income increased by 12.6 percent and 11.9 percent respectively.

Table 18 – Comparison of Cruise Tourism Expenditures – Common Destinations

	2014/2015 Cruise Year	2011/2012 Cruise Year	Percent Difference
Number of Participating Destinations	20	20	--
Total Direct Cruise Tourism Spending (US \$ Billions)	\$2.29	\$1.99	15.08%
Total Passenger Onshore Visits (Millions)	16.49	15.38	7.22%
Total Expenditures per Passenger (US \$)	\$138.94	\$129.18	7.56%
Total Employment Impact	50,812	45,145	12.55%
Total Income Impacts (US \$ Millions)	\$814.10	\$727.30	11.93%
Average per Passenger Expenditures	\$109.00	\$99.81	9.21%
Average Per Crew Expenditures	\$ 74.80	\$97.17	-23.02%

The analysis of expenditures by category indicates that the increase in passenger expenditures on a per passenger basis among the common destinations in both studies was the net result of an increase in per passenger spending in most expenditure categories, primarily shore excursions, food and beverages, and retail purchases of clothing, jewelry and local crafts that was partially offset by a decrease in the percentage of passengers making purchases in many of those categories, most importantly retail purchases of clothing, jewelry and local crafts. Thus, it appears that a smaller percentage of passengers that made onshore visits made purchases in many categories during 2014/2015, but in those categories cruise passengers made higher value purchases relative to 2011/2012. This is especially true for the major retail categories of clothing and jewelry. In the case of shore excursions and purchases of food and beverages, both the percentage of passengers making purchases and their average expenditure increased relative to 2011/2012.

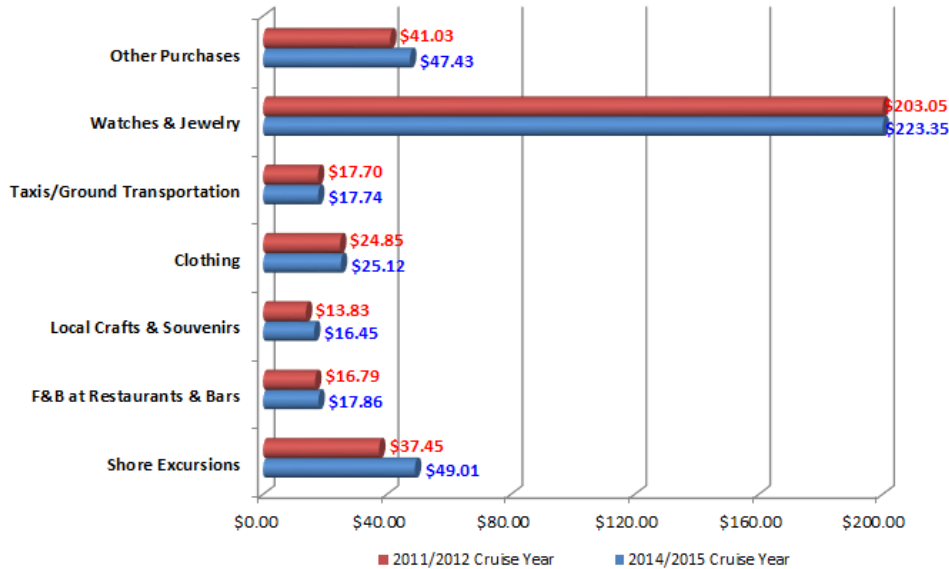
Finally, average crew spending declined by 30% from 2011/2012 to 2014/2015 and 23% among the common destinations. This decline was primarily the result of significant declines in the percentage of crew making retail purchases which was augmented by an equally significant decline in the value of retail purchases made by crew. This decline in retail purchases by crew was only partially offset by an increase in the value of purchases of food and beverages.

Thus, the increase in the economic impacts during the 2014/2015 cruise year relative to the 2011/2012 cruise year is primarily the result of the increase in the volume of participating destinations but it was augmented by an increase in the average per passenger expenditure rate. The increase in the economic impacts during the 2014/2015 cruise year relative to the 2011/2012 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 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 2012 study. The increase in unweighted 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 2011/2012 cruise year passengers that purchased jewelry in the 20 common Caribbean destinations spent an average of \$203.05 while in the 2014/2015 cruise year, passengers purchasing jewelry spent \$223.395. For ease of illustration we have not shown the five smallest categories which account for 6% of passenger expenditures.

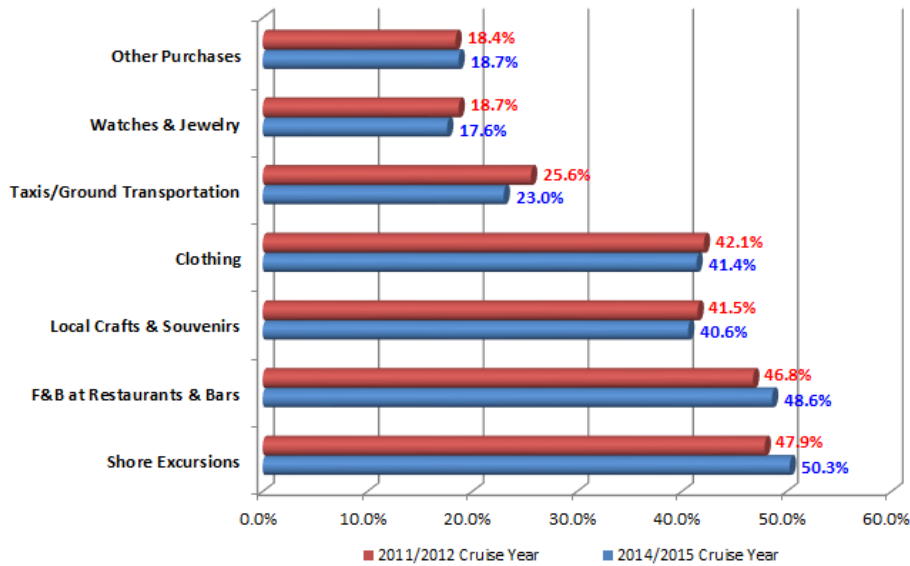
As shown in the figure, the average value of passenger purchases was higher in the 2014/2015 cruise year in all seven categories shown in Figure 1. The highest percentage increases occurred in shore excursions (31%), local crafts and souvenirs (19%) other purchases (16%) and watches and jewelry (10%).

Figure 1 – Unweighted Average Passenger Expenditures by Category



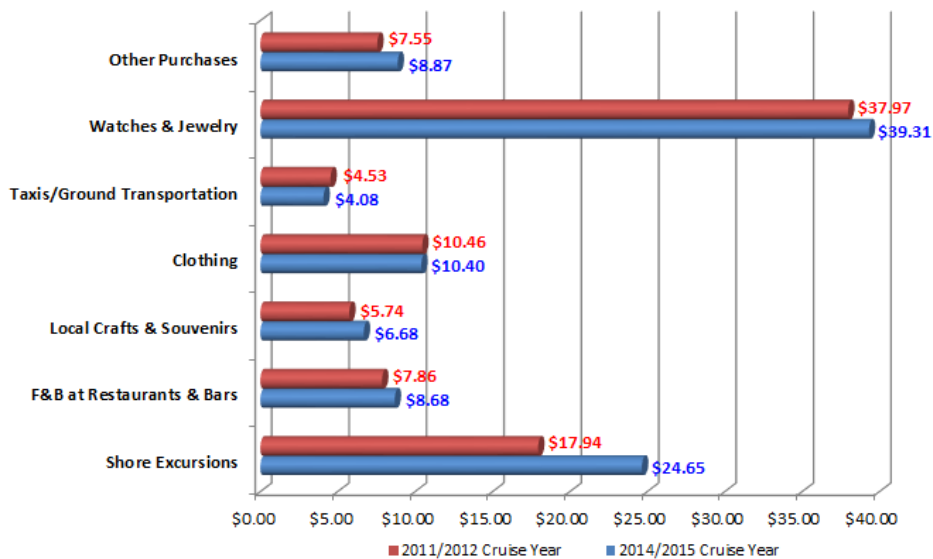
However, as stated above this increase in the average expenditure was offset by a decrease in the percentage of passengers making onshore purchases. As shown in **Figure 2** a smaller percentage of passengers made an onshore purchase during the 2014/2015 cruise year in four of the seven major categories. For example, during the 2011/2012 cruise year, 18.7% of passengers reported purchasing jewelry. This percentage declined to 17.9% during the 2014/2015 cruise year. Similar declines were recorded for ground transportation, clothing and local crafts. These declines were offset by an increase in the percentage of passengers purchasing shore excursions, food and beverages and other purchases. Thus, it appears that cruise passengers were more selective in making purchases during the most recent period; but, when they did make a purchase they were willing to spend more.

Figure 2 – Average Percentage of Passengers Making Purchases



Thus, when the unweighted average per passenger expenditures were weighted by the share of onshore purchasers, the weighted expenditure increased in five of the seven categories (see **Figure 3**). The weighted average expenditure rose for shore excursions by 37 percent as the increase in unweighted spending for tours was augmented by an increase in the percentage of passengers purchasing tours. The percentage increase in the other four categories were: other purchases (17%), local crafts (16%), food and beverages (10%) and watches and jewelry (4%).

Figure 3 – Average Weighted Expenditure by Category



The weighted average expenditure fell for ground transportation (-10%) and clothing (-1%). Thus, the increase in unweighted spending for ground transportation and clothing was offset by the decrease in the

share of passengers purchasing these goods. The net result was a 9 percent increase in the average weighted expenditure of cruise passengers during the 2014/2015 year to \$109 per passenger visit from \$99.81 per passenger visit in the 2011/2012 cruise year among those 20 destinations common to both studies.

On a destination basis, there was considerable variability in the change in estimated passenger and crew expenditures from the 2012 study (see **Table 19**). The change in per passenger expenditures ranged from a decrease of 25 percent in Puerto Rico to an increase of 39 percent in Honduras and the Turks & Caicos. Among the 20 destinations common to both studies, 17 showed an increase in per passenger expenditures and three showed a decrease. The 25 percent decline in Puerto Rico is attributable to lower spending by embarking passengers which resulted from lower value non-lodging expenditures..

Table 19 – Passenger and Crew Expenditures – Average per Visit – 2015 and 2012 Cruise Tourism Studies – Common Destinations

Destinations	2015		2012		Ratio: 2015/2012	
	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	\$ 64.88	\$ 54.17	\$ 65.27	\$ 74.30	-0.6%	-27.1%
Aruba	\$ 112.10	\$ 71.99	\$ 95.44	\$ 101.10	17.5%	-28.8%
Bahamas	\$ 82.83	\$ 60.00	\$ 64.81	\$ 111.00	27.8%	-45.9%
Barbados ⓪	\$ 78.03	\$ 40.35	\$ 65.64	\$ 48.90	18.9%	-17.5%
Belize	\$ 77.87	\$ 52.34	\$ 73.00	\$ 102.30	6.7%	-48.8%
British Virgin Islands	\$ 69.43	\$ 44.90	\$ 65.50	\$ 47.00	6.0%	-4.5%
Cayman Islands	\$ 115.60	\$ 47.94	\$ 93.75	\$ 57.50	23.3%	-16.6%
Colombia ⓪	\$ 120.70	\$ 59.36	\$ 98.79	\$ 42.40	22.2%	40.0%
Costa Rica	\$ 82.84	\$ 36.21	\$ 71.45	\$ 44.40	15.9%	-18.4%
Curacao	\$ 77.55	\$ 70.15	\$ 71.70	\$ 72.80	8.2%	-3.6%
Dominica	\$ 50.81	\$ 34.21	\$ 47.78	\$ 46.80	6.3%	-26.9%
Dominican Republic ⓪	\$ 66.41	\$ 42.38	\$ 69.47	\$ 40.00	-4.4%	5.9%
Grenada	\$ 46.55	\$ 47.18	\$ 40.82	\$ 44.70	14.0%	5.5%
Honduras	\$ 86.51	\$ 32.37	\$ 62.24	\$ 38.50	39.0%	-15.9%
Nicaragua	\$ 54.94	\$ 24.15	\$ 45.64	\$ 43.50	20.4%	-44.5%
Puerto Rico (San Juan) ⓪	\$ 88.95	\$ 149.44	\$ 118.11	\$ 122.20	-24.7%	22.3%
St. Kitts	\$ 111.30	\$ 41.55	\$ 108.90	\$ 65.00	2.2%	-36.1%
St. Maarten	\$ 191.26	\$ 119.13	\$ 185.40	\$ 135.50	3.2%	-12.1%
Turks & Caicos	\$ 88.75	\$ 50.41	\$ 63.88	\$ 41.20	38.9%	22.4%
U. S. Virgin Islands	\$ 150.21	\$ 110.27	\$ 146.70	\$ 138.30	2.4%	-20.3%

⓪ Includes transit and homeport cruise ships.

The change in per crew expenditures is more uniformly negative with 15 destinations showing a decrease and only five 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 20 shows estimated total expenditures for the 2014/2015 and 2011/2012 cruise years for those twenty destinations common to both studies. As indicated in the table 15 destinations had an increase in total passenger expenditures, four had a decrease and one (Antigua) had no change. Of the 15 destinations with an increase in total passenger expenditures one, the Dominican Republic experienced a decline in average passenger expenditures as shown in Table 19. However, this decline in average expenditures was more than offset by an increase in total visits. In Antigua, the small percentage decline in the average expenditure of passengers was exactly offset by an increase in visits.

Among the four destinations with a decline in total passenger expenditures only Puerto Rico experienced a decrease in average expenditures as shown in Table 19. Thus, the increase in passenger visits in Puerto Rico was not sufficient to offset the decline in average expenditures. In three destinations (the BVI, Dominica and Grenada), the decline in onshore passenger visits offset the increase in average passenger spending.

Table 20 – Passenger and Crew Expenditures – Total Spend During Cruise Year – 2015 and 2012 Cruise Tourism Studies – Millions US \$ - Common Destinations

Destinations	2015 Study		2012 Study		Ratio: 2015/2012	
	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	\$ 4.60	\$ 34.20	\$ 6.20	0.0%	-25.8%
Aruba	\$ 61.30	\$ 6.00	\$ 50.90	\$ 8.80	20.4%	-31.8%
Bahamas	\$ 243.50	\$ 59.70	\$ 241.50	\$ 79.30	0.8%	-24.7%
Barbados ^⓪	\$ 43.30	\$ 4.50	\$ 39.80	\$ 5.90	8.8%	-23.7%
Belize	\$ 67.60	\$ 4.60	\$ 44.40	\$ 7.50	52.3%	-38.7%
British Virgin Islands	\$ 21.40	\$ 2.10	\$ 23.70	\$ 3.10	-9.7%	-32.3%
Cayman Islands	\$ 167.20	\$ 10.80	\$ 121.50	\$ 11.30	37.6%	-4.4%
Colombia ^⓪	\$ 37.00	\$ 2.10	\$ 25.80	\$ 1.50	43.4%	40.0%
Costa Rica	\$ 15.60	\$ 1.40	\$ 12.50	\$ 2.00	24.8%	-30.0%
Curacao	\$ 37.00	\$ 5.80	\$ 29.20	\$ 5.00	26.7%	16.0%
Dominica	\$ 11.50	\$ 1.10	\$ 14.10	\$ 1.90	-18.4%	-42.1%
Dominican Republic ^⓪	\$ 31.90	\$ 2.10	\$ 16.50	\$ 1.00	93.3%	110.0%
Grenada	\$ 9.40	\$ 1.60	\$ 11.20	\$ 2.00	-16.1%	-20.0%
Honduras	\$ 63.80	\$ 2.70	\$ 16.50	\$ 1.20	286.7%	125.0%
Nicaragua	\$ 2.40	\$ 0.20	\$ 1.40	\$ 0.20	71.4%	0.0%
Puerto Rico (San Juan) ^⓪	\$ 124.00	\$ 35.00	\$ 131.40	\$ 22.60	-5.6%	54.9%
St. Kitts	\$ 75.30	\$ 3.90	\$ 61.10	\$ 4.60	23.2%	-15.2%
St. Maarten	\$ 354.70	\$ 45.00	\$ 294.10	\$ 45.20	20.6%	-0.4%
Turks & Caicos	\$ 78.00	\$ 7.10	\$ 46.30	\$ 5.00	68.5%	42.0%
U. S. Virgin Islands	\$ 276.30	\$ 38.70	\$ 263.50	\$ 47.30	4.9%	-18.2%

^⓪ Includes transit and homeport cruise ships.

With respect to the change in crew expenditures 13 destinations experienced a decline in total crew spending, six showed an increase and one (Nicaragua) showed no change in the 2014/2015 cruise year from the 2011/2012 cruise year. Among the 13 destinations with a decline in total crew expenditures twelve also ex-

perienced a decline in average expenditures per crew visit. In Grenada, the increase average crew expenditures was more than offset by a decline in crew visits. In Nicaragua, the decline in the average crew expenditure was exactly offset by an increase in crew visits.

Among the six destinations with an increase in total crew expenditures four (Colombia, the Dominican Republic, Puerto Rico and the Turks and Caicos) also experienced an increase in average expenditures per crew visit. The remaining two destinations, the Turks and Caicos and Honduras, 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. The scale for the satisfaction and related questions is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows:

>8.5: Extremely Satisfied; Greatly Exceeded Expectations; Extremely Likely

6.5 – 8.5: Very Satisfied; Exceeded Expectations; Very Likely

4.5 – 6.5: Somewhat Satisfied; Met Expectations; Somewhat Likely

2.5 – 4.5: Not Too Satisfied; Fell Short of Expectations; Not Too Likely

< 2.5: Not At All Satisfied; Fell Far Short of Expectations; Not At All Likely

Table B-1 - Total Economic Contribution of Cruise Tourism by Destination, 2014/2015 Cruise Year

Destinations	Total Cruise Tourism Expenditures (\$US Millions)	Rank	Total Employment	Rank	Total Employee Wage Income (\$US Millions)	Rank
St. Maarten	\$422.9	1	9,259	2	\$189.10	1
Bahamas	\$373.1	2	7,954	3	\$138.50	3
Cozumel	\$365.5	3	9,727	1	\$ 61.00	6
U. S. Virgin Islands	\$344.3	4	6,397	5	\$141.00	2
Cayman Islands	\$207.6	5	4,454	7	\$ 87.00	4
Jamaica	\$198.6	6	7,067	4	\$ 46.10	7
Puerto Rico (San Juan)	\$198.2	7	5,209	6	\$ 75.00	5
Turks and Caicos	\$ 95.0	8	1,654	12	\$ 29.10	9
Belize	\$ 86.3	9	2,492	8	\$ 26.50	10
St. Kitts and Nevis	\$ 84.3	10	1,293	16	\$ 11.20	14
Honduras	\$ 73.0	11	1,585	13	\$ 7.80	19
Aruba	\$ 71.9	12	1,716	11	\$ 29.20	8
Dominican Republic	\$ 61.0	13	1,914	9	\$ 8.00	18
Barbados	\$ 57.3	14	1,845	10	\$ 19.50	11
St. Lucia	\$ 57.2	15	1,422	14	\$ 11.70	13
Ensenada	\$ 52.7	16	1,370	15	\$ 9.50	16
Curacao	\$ 51.0	17	903	19	\$ 16.70	12
Colombia	\$ 48.4	18	1,089	18	\$ 6.90	20
Antigua & Barbuda	\$ 43.9	19	1,170	17	\$ 11.10	15
Guadeloupe	\$ 38.2	20	724	22	\$ 6.10	21
Costa Maya	\$ 27.6	21	726	21	\$ 4.50	23
Puerto Vallarta	\$ 27.1	22	757	20	\$ 4.90	22
British Virgin Islands	\$ 26.2	23	465	26	\$ 8.70	17
Progreso	\$ 23.9	24	609	23	\$ 3.60	26
Martinique	\$ 22.7	25	453	27	\$ 3.70	25
Cabo San Lucas	\$ 22.4	26	587	24	\$ 3.90	24
Costa Rica	\$ 20.0	27	557	25	\$ 3.20	27
Dominica	\$ 14.2	28	373	28	\$ 2.90	29
Grenada	\$ 12.2	29	342	29	\$ 2.30	30
Mazatlán	\$ 9.4	30	268	30	\$ 1.50	31
Bonaire	\$ 9.4	31	191	31	\$ 3.20	28
Guatemala	\$ 5.6	32	183	32	\$ 0.80	33
Nicaragua	\$ 2.9	33	141	33	\$ 0.40	34
Tobago	\$ 2.7	34	124	34	\$ 1.50	32
Trinidad	\$ 0.6	35	30	35	\$ 0.40	35
All Destinations	\$3,157.5		75,050		\$976.50	
Eastern Caribbean	\$1,687	1	36,039	1	\$617.8	1
Western Caribbean	\$ 642	2	17,568	2	\$178.7	2
Southern Caribbean	\$ 299	4	7,399	4	\$ 91.1	3
Mexico	\$ 529	3	14,044	3	\$ 88.9	4

Table B-2 - Passengers Onshore Visits and Expenditures by Destination, 2014/2015 Cruise Year

Destinations	Passenger Onshore Visits (Thousands)	Rank	Average Expenditure per Passenger (\$ US)	Rank	Total Passenger Expenditures (\$US Millions)	Rank
Bahamas	2,940.0	1	\$ 82.83	16	\$243.5	4
Cozumel	2,538.1	2	\$119.89	4	\$304.3	2
St. Maarten	1,854.4	3	\$191.26	1	\$354.7	1
U. S. Virgin Islands	1,839.7	4	\$150.21	2	\$276.3	3
Cayman Islands	1,446.3	5	\$115.60	6	\$167.2	5
Puerto Rico (San Juan)	1,393.9	6	\$ 88.95	11	\$124.0	7
Jamaica	1,349.1	7	\$119.29	5	\$160.9	6
Turks and Caicos	879.0	8	\$ 88.75	12	\$ 78.0	8
Belize	867.6	9	\$ 77.87	19	\$ 67.6	10
Honduras	738.1	10	\$ 86.51	13	\$ 63.8	11
St. Kitts and Nevis	676.5	11	\$111.30	8	\$ 75.3	9
Ensenada	610.7	12	\$ 65.10	25	\$ 39.8	15
St. Lucia	603.2	13	\$ 78.44	17	\$ 47.3	13
Barbados	554.4	14	\$ 78.03	18	\$ 43.3	14
Aruba	546.6	15	\$112.10	7	\$ 61.3	12
Antigua & Barbuda	527.6	16	\$ 64.88	26	\$ 34.2	18
Dominican Republic	480.6	17	\$ 66.41	24	\$ 31.9	19
Curacao	476.7	18	\$ 77.55	20	\$ 37.0	17
Costa Maya	361.7	19	\$ 61.47	29	\$ 22.2	21
Guadeloupe	308.2	20	\$ 90.06	10	\$ 27.8	20
British Virgin Islands	307.8	21	\$ 69.43	22	\$ 21.4	22
Colombia	306.6	22	\$120.70	3	\$ 37.0	16
Progreso	289.4	23	\$ 57.88	30	\$ 16.8	26
Martinique	263.7	24	\$ 68.99	23	\$ 18.2	24
Dominica	226.0	25	\$ 50.81	33	\$ 11.5	28
Puerto Vallarta	223.8	26	\$ 95.43	9	\$ 21.4	23
Cabo San Lucas	211.4	27	\$ 85.98	14	\$ 18.2	25
Grenada	201.5	28	\$ 46.55	34	\$ 9.4	29
Costa Rica	187.7	29	\$ 82.84	15	\$ 15.6	27
Bonaire	146.7	30	\$ 54.22	32	\$ 8.0	30
Mazatlán	109.4	31	\$ 64.85	27	\$ 7.1	31
Guatemala	73.4	32	\$ 63.62	28	\$ 4.7	32
Nicaragua	43.0	33	\$ 54.94	31	\$ 2.4	33
Tobago	30.9	34	\$ 74.18	21	\$ 2.3	34
Trinidad	10.8	35	\$ 42.58	35	\$ 0.5	35
All Destinations	23,624.5		\$103.89		\$2,454.5	
Eastern Caribbean	11,208	1	\$113.06	1	\$1,267.1	1
Western Caribbean	5,012	2	\$103.58	2	\$ 519.1	2
Southern Caribbean	3,060	4	\$ 77.95	4	\$ 238.6	4
Mexico	4,345	3	\$ 98.90	3	\$ 429.7	3

Table B-3 - Crew Visits and Expenditures by Destination, 2014/2015 Cruise Year

Destinations	Crew Onshore Visits (Thousands)	Rank	Average Expenditure per Crew (\$ US)	Rank	Total Crew Expenditures (\$US Millions)	Rank
Bahamas	994.9	1	\$ 60.00	6	\$59.7	1
Cozumel	533.4	2	\$ 52.02	10	\$27.7	5
St. Maarten	377.4	3	\$119.13	2	\$45.0	2
U. S. Virgin Islands	351.1	4	\$110.27	3	\$38.7	3
Jamaica	244.3	5	\$ 50.58	12	\$12.4	6
Puerto Rico (San Juan)	234.4	6	\$149.44	1	\$35.0	4
Cayman Islands	224.6	7	\$ 47.94	15	\$10.8	7
Turks and Caicos	140.9	8	\$ 50.41	13	\$ 7.1	8
Barbados	110.5	9	\$ 40.35	27	\$ 4.5	14
St. Lucia	107.4	10	\$ 44.89	20	\$ 4.8	11
Ensenada	95.1	11	\$ 40.37	26	\$ 3.8	16
St. Kitts and Nevis	94.3	12	\$ 41.55	25	\$ 3.9	15
Belize	88.1	13	\$ 52.34	9	\$ 4.6	12
Antigua & Barbuda	84.8	14	\$ 54.17	8	\$ 4.6	13
Honduras	83.3	15	\$ 32.37	30	\$ 2.7	18
Aruba	83.2	16	\$ 71.99	4	\$ 6.0	9
Curacao	82.1	17	\$ 70.15	5	\$ 5.8	10
Costa Maya	77.5	18	\$ 44.35	21	\$ 3.4	17
Dominican Republic	49.4	19	\$ 42.38	24	\$ 2.1	21
British Virgin Islands	46.7	20	\$ 44.90	19	\$ 2.1	20
Guadeloupe	45.1	21	\$ 45.04	18	\$ 2.0	23
Cabo San Lucas	41.1	22	\$ 49.42	14	\$ 2.0	22
Progreso	40.2	23	\$ 44.35	22	\$ 1.8	24
Costa Rica	40.0	24	\$ 36.21	28	\$ 1.4	28
Martinique	37.9	25	\$ 46.45	17	\$ 1.8	25
Colombia	35.6	26	\$ 59.36	7	\$ 2.1	19
Grenada	34.6	27	\$ 47.18	16	\$ 1.6	26
Dominica	31.5	28	\$ 34.21	29	\$ 1.1	29
Puerto Vallarta	31.1	29	\$ 51.46	11	\$ 1.6	27
Bonaire	17.5	30	\$ 30.40	31	\$ 0.5	31
Mazatlán	17.5	31	\$ 42.70	23	\$ 0.7	30
Guatemala	12.8	32	\$ 29.01	32	\$ 0.4	32
Nicaragua	6.4	33	\$ 24.15	34	\$ 0.2	33
Tobago	6.0	34	\$ 24.79	33	\$ 0.1	34
Trinidad	2.5	35	\$ 21.50	35	\$ 0.1	35
All Destinations	4,503.3		\$ 67.10		\$302.2	
Eastern Caribbean	2,419.0	1	\$ 82.78	1	\$200.2	1
Western Caribbean	735.1	3	\$ 46.96	4	\$ 34.5	3
Southern Caribbean	513.3	4	\$ 51.11	2	\$ 26.2	4
Mexico	835.9	2	\$ 49.27	3	\$ 41.2	2

Table B-4 - Total Expenditures by Cruise Lines by Destination, 2014/2015 Cruise Year

Destinations	Estimated Expenditures (\$US Millions)	Rank
Bahamas	\$69.9	1
Puerto Rico (San Juan)⓪	\$39.2	2
Cozumel	\$33.5	3
Cayman Islands	\$29.6	4
U. S. Virgin Islands	\$29.2	5
Dominican Republic⓪	\$27.0	6
Jamaica	\$25.3	7
St. Maarten	\$23.3	8
Belize	\$14.1	9
Turks and Caicos	\$ 9.9	10
Barbados⓪	\$ 9.6	11
Colombia⓪	\$ 9.3	12
Ensenada	\$ 9.1	13
Guadeloupe⓪	\$ 8.4	14
Curacao	\$ 8.3	15
Honduras	\$ 6.4	16
Progreso	\$ 5.4	17
St. Lucia	\$ 5.1	18
St. Kitts and Nevis	\$ 5.1	19
Antigua & Barbuda	\$ 5.1	20
Aruba	\$ 4.6	21
Puerto Vallarta	\$ 4.1	22
Costa Rica	\$ 3.0	23
British Virgin Islands	\$ 2.8	24
Martinique⓪	\$ 2.7	25
Cabo San Lucas	\$ 2.2	26
Costa Maya	\$ 2.0	27
Dominica	\$ 1.6	28
Mazatlán	\$ 1.6	29
Grenada	\$ 1.2	30
Bonaire	\$ 0.9	31
Guatemala	\$ 0.6	32
Nicaragua	\$ 0.4	33
Tobago	\$ 0.3	34
Trinidad	\$ 0.1	35
All Destinations	400.8	
Eastern Caribbean	\$219.8	1
Western Caribbean	\$ 88.6	2
Southern Caribbean	\$ 34.5	4
Mexico	\$ 57.8	3

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

Destinations	First Visit	Rank	Number of Previous Visits				
			1	2	3	4	5+
Tobago	95.0%	1	2.6%	2.2%	0.1%	0.0%	0.2%
Nicaragua	90.0%	2	5.4%	2.2%	1.0%	0.9%	0.5%
Colombia	84.0%	3	8.5%	4.2%	1.3%	0.8%	1.3%
Trinidad	82.0%	4	12.1%	3.6%	1.8%	0.4%	0.2%
Martinique	79.0%	5	9.9%	5.5%	2.5%	1.5%	1.7%
Guadeloupe	78.0%	6	9.7%	6.6%	3.7%	0.7%	1.3%
Guatemala	77.0%	7	13.1%	5.5%	2.3%	0.7%	1.4%
Costa Maya	76.0%	8	10.8%	7.0%	2.9%	1.7%	1.7%
Bonaire	74.0%	9	11.7%	6.8%	4.4%	1.8%	1.3%
Turks and Caicos	71.0%	10	14.5%	5.5%	3.8%	2.9%	2.3%
Belize	71.0%	11	12.2%	7.8%	3.8%	1.7%	3.5%
Honduras	70.0%	12	14.4%	7.8%	3.9%	1.8%	2.1%
Dominican Republic	68.0%	13	16.3%	8.0%	3.5%	1.3%	2.9%
St. Kitts and Nevis	68.0%	14	12.5%	8.3%	5.1%	2.9%	3.2%
Grenada	67.0%	15	14.2%	7.6%	5.3%	2.0%	4.0%
Progreso	67.0%	16	10.6%	7.9%	5.0%	4.3%	5.3%
Costa Rica	66.0%	17	20.7%	8.2%	2.7%	1.0%	1.4%
Curacao	64.0%	18	16.2%	8.3%	5.0%	3.2%	3.2%
St. Lucia	64.0%	19	13.3%	9.0%	6.1%	3.2%	4.3%
British Virgin Islands	64.0%	20	11.2%	7.2%	5.8%	5.4%	6.5%
Dominica	63.0%	21	14.1%	9.3%	6.7%	3.3%	3.7%
Aruba	63.0%	22	13.7%	8.5%	5.6%	3.3%	5.9%
Antigua	62.0%	23	15.2%	10.6%	5.7%	3.4%	3.0%
Mazatlán	56.0%	24	12.3%	9.7%	7.0%	4.8%	10.1%
Ensenada	54.0%	25	10.1%	9.7%	7.4%	5.1%	13.8%
Jamaica	53.0%	26	18.3%	10.3%	7.1%	4.2%	7.1%
Puerto Rico (San Juan)	51.0%	27	17.2%	11.8%	7.8%	3.9%	8.3%
Cayman Islands	50.0%	28	18.0%	10.5%	7.5%	5.5%	8.5%
Barbados	50.0%	29	16.5%	12.0%	7.5%	6.0%	8.0%
Bahamas	49.0%	30	14.3%	12.2%	7.7%	5.1%	11.7%
St. Maarten	42.0%	31	16.8%	10.4%	9.3%	6.4%	15.1%
Cozumel	40.0%	32	19.8%	12.0%	9.6%	6.6%	12.0%
Puerto Vallarta	40.0%	33	14.4%	10.2%	9.6%	7.2%	18.6%
U.S. Virgin Islands	37.0%	34	14.5%	12.6%	9.5%	7.6%	18.9%
Cabo San Lucas	34.0%	35	11.9%	11.2%	11.9%	7.3%	23.8%
All Destinations	63.0%		13.7%	8.5%	5.6%	3.3%	5.9%
Eastern Caribbean	58.0%	3	14.7%	9.7%	6.3%	3.8%	7.6%
Western Caribbean	70.0%	1	14.1%	6.9%	3.6%	2.1%	3.3%
Southern Caribbean	69.0%	2	13.0%	7.4%	4.7%	2.5%	3.4%
Mexico	52.0%	4	13.0%	9.6%	7.7%	5.8%	12.0%

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	5.56	1	10%	20%	36%	34%
Guadeloupe	5.23	2	8%	25%	42%	25%
Puerto Vallarta	4.98	3	13%	28%	39%	20%
Nicaragua	4.90	4	15%	29%	33%	23%
Cozumel	4.77	5	13%	33%	34%	20%
Tobago	4.77	6	12%	31%	41%	16%
Guatemala	4.72	7	27%	18%	29%	26%
Bahamas	4.72	8	13%	36%	36%	15%
St. Maarten	4.68	9	11%	37%	37%	15%
Belize	4.60	10	17%	32%	34%	17%
Aruba	4.57	11	12%	38%	37%	13%
Progreso	4.51	12	20%	27%	36%	17%
Mazatlán	4.47	13	12%	39%	38%	11%
St. Lucia	4.46	14	19%	34%	31%	16%
St. Kitts and Nevis	4.46	15	13%	38%	40%	9%
Honduras	4.40	16	16%	36%	38%	10%
Puerto Rico (San Juan)	4.33	17	16%	44%	28%	12%
Jamaica	4.32	18	21%	34%	31%	14%
Barbados	4.32	19	14%	42%	37%	7%
U.S. Virgin Islands	4.31	20	14%	43%	33%	10%
Martinique	4.27	21	20%	37%	28%	15%
Curacao	4.27	22	11%	49%	32%	8%
Antigua	4.11	23	20%	38%	33%	9%
British Virgin Islands	4.08	24	16%	45%	34%	5%
Grenada	4.07	25	20%	41%	31%	8%
Turks and Caicos	4.00	26	16%	50%	29%	5%
Cayman Islands	4.00	27	16%	49%	31%	4%
Colombia	3.99	28	11%	61%	25%	3%
Trinidad	3.99	29	18%	45%	34%	3%
Bonaire	3.84	30	22%	45%	27%	6%
Costa Maya	3.75	31	27%	40%	26%	7%
Ensenada	3.75	32	28%	39%	28%	5%
Dominican Republic	3.75	33	26%	43%	27%	4%
Dominica	3.73	34	27%	40%	27%	6%
Cabo San Lucas	3.67	35	22%	53%	24%	1%
All Destinations	4.38		17%	39%	33%	11%
Eastern Caribbean	4.37		16%	41%	33%	10%
Western Caribbean	4.62		16%	34%	32%	18%
Southern Caribbean	4.22		17%	41%	32%	10%
Mexico	4.34		18%	37%	33%	12%

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	8.24	1	60%	25%	9%	4%	2%	94%	6%
Puerto Vallarta	8.24	2	57%	28%	11%	3%	1%	96%	4%
St. Kitts and Nevis	8.20	3	55%	30%	11%	3%	1%	96%	4%
Curacao	8.18	4	55%	31%	9%	3%	2%	95%	5%
St. Maarten	8.12	5	55%	30%	9%	3%	3%	94%	6%
Aruba	8.10	6	53%	31%	10%	5%	1%	94%	6%
Mazatlán	8.06	7	53%	30%	11%	4%	2%	94%	6%
Cozumel	7.94	8	53%	27%	12%	5%	3%	92%	8%
Turks and Caicos	7.90	9	51%	28%	13%	6%	2%	92%	8%
Guadeloupe	7.90	10	51%	28%	13%	6%	2%	92%	8%
U.S. Virgin Islands	7.82	11	47%	31%	15%	5%	2%	93%	7%
Puerto Rico (San Juan)	7.78	12	49%	28%	15%	4%	4%	92%	8%
Honduras	7.78	13	50%	28%	13%	4%	5%	91%	9%
Cabo San Lucas	7.72	14	45%	31%	17%	4%	3%	93%	7%
Bahamas	7.68	15	46%	31%	13%	6%	4%	90%	10%
Barbados	7.68	16	47%	29%	15%	4%	5%	91%	9%
Antigua	7.68	17	46%	31%	13%	6%	4%	90%	10%
Guatemala	7.68	18	50%	27%	12%	4%	7%	89%	11%
Cayman Islands	7.66	19	47%	28%	15%	6%	4%	90%	10%
Bonaire	7.64	20	47%	29%	13%	6%	5%	89%	11%
Ensenada	7.60	21	40%	35%	17%	6%	2%	92%	8%
St. Lucia	7.56	22	44%	30%	15%	7%	4%	89%	11%
Belize	7.50	23	48%	25%	13%	7%	7%	86%	14%
British Virgin Islands	7.36	24	42%	31%	12%	8%	7%	85%	15%
Grenada	7.34	25	42%	30%	14%	6%	8%	86%	14%
Trinidad	7.26	26	38%	31%	18%	7%	6%	87%	13%
Tobago	7.24	27	34%	36%	18%	7%	5%	88%	12%
Colombia	7.22	28	38%	31%	17%	7%	7%	86%	14%
Nicaragua	7.12	29	38%	29%	17%	8%	8%	84%	16%
Progreso	7.04	30	41%	25%	15%	8%	11%	81%	19%
Costa Maya	7.00	31	38%	26%	17%	11%	8%	81%	19%
Jamaica	6.98	32	38%	26%	18%	8%	10%	82%	18%
Martinique	6.78	33	31%	33%	16%	9%	11%	80%	20%
Dominica	6.70	34	35%	26%	16%	10%	13%	77%	23%
Dominican Republic	6.12	35	26%	27%	18%	10%	19%	71%	29%
All Destinations	6.92		35%	29%	18%	8%	10%	82%	18%
Eastern Caribbean	7.72	1	47%	30%	14%	5%	4%	91%	9%
Western Caribbean	7.62	3	47%	28%	14%	6%	5%	89%	11%
Southern Caribbean	7.56	4	44%	31%	14%	6%	5%	89%	11%
Mexico	7.66	2	48%	28%	13%	6%	5%	89%	11%

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

Destinations	Mean Score	Rank	Greatly Exceeded	Exceeded	Met	Fell Short	Fell Far Short	Met or Exceeded	Did Not Meet
Puerto Vallarta	7.72	1	44%	32%	17%	5%	2%	93%	7%
Curacao	7.64	2	42%	35%	15%	4%	4%	92%	8%
Costa Rica	7.60	3	43%	33%	14%	6%	4%	90%	10%
St. Maarten	7.60	4	41%	35%	15%	6%	3%	91%	9%
St. Kitts and Nevis	7.54	5	40%	36%	15%	4%	5%	91%	9%
Aruba	7.52	6	38%	37%	16%	6%	3%	91%	9%
Mazatlán	7.48	7	40%	35%	14%	6%	5%	89%	11%
Cozumel	7.48	8	38%	35%	18%	6%	3%	91%	9%
Turks and Caicos	7.36	9	40%	30%	18%	7%	5%	88%	12%
Honduras	7.32	10	38%	33%	17%	6%	6%	88%	12%
U.S. Virgin Islands	7.30	11	34%	37%	19%	5%	5%	90%	10%
Bahamas	7.26	12	34%	37%	17%	7%	5%	88%	12%
Puerto Rico (San Juan)	7.24	13	35%	33%	21%	6%	5%	89%	11%
Antigua	7.20	14	33%	36%	19%	7%	5%	88%	12%
Barbados	7.16	15	34%	34%	19%	7%	6%	87%	13%
Guatemala	7.16	16	36%	32%	18%	7%	7%	86%	14%
Ensenada	7.14	17	30%	36%	24%	6%	4%	90%	10%
Cayman Islands	7.08	18	34%	31%	21%	8%	6%	86%	14%
Cabo San Lucas	7.06	19	32%	32%	23%	8%	5%	87%	13%
Bonaire	7.00	20	33%	33%	18%	8%	8%	84%	16%
St. Lucia	6.88	21	31%	33%	19%	8%	9%	83%	17%
Belize	6.88	22	35%	28%	19%	7%	11%	82%	18%
Colombia	6.84	23	29%	34%	20%	9%	8%	83%	17%
Grenada	6.82	24	28%	35%	20%	9%	8%	83%	17%
British Virgin Islands	6.68	25	28%	33%	20%	8%	11%	81%	19%
Trinidad	6.62	26	27%	32%	22%	8%	11%	81%	19%
Nicaragua	6.58	27	29%	29%	21%	9%	12%	79%	21%
Progreso	6.56	28	33%	25%	19%	8%	15%	77%	23%
Tobago	6.52	29	20%	39%	22%	10%	9%	81%	19%
Martinique	6.50	30	24%	35%	20%	9%	12%	79%	21%
Guadeloupe	6.48	31	21%	34%	28%	7%	10%	83%	17%
Costa Maya	6.48	32	28%	28%	21%	11%	12%	77%	23%
Jamaica	6.32	33	27%	28%	20%	9%	16%	75%	25%
Dominica	6.28	34	26%	27%	22%	10%	15%	75%	25%
Dominican Republic	5.52	35	18%	25%	21%	12%	24%	64%	36%
All Destinations	7.04		34%	32%	19%	7%	8%	85%	15%
Eastern Caribbean	7.10	2	34%	33%	19%	7%	7%	86%	14%
Western Caribbean	7.04	3	35%	31%	18%	8%	8%	84%	16%
Southern Caribbean	6.94	4	31%	34%	19%	8%	8%	84%	16%
Mexico	7.18	1	36%	32%	19%	6%	7%	87%	13%

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
Bahamas	5.62	1	23%	21%	19%	13%	24%	63%	37%
St. Maarten	5.60	2	25%	20%	17%	11%	27%	62%	38%
U.S. Virgin Islands	5.46	3	23%	20%	17%	12%	28%	60%	40%
Cozumel	5.32	4	22%	19%	18%	10%	31%	59%	41%
Turks and Caicos	5.30	5	24%	17%	17%	9%	33%	58%	42%
Cabo San Lucas	5.30	6	24%	16%	16%	14%	30%	56%	44%
Puerto Rico (San Juan)	5.28	7	22%	20%	15%	11%	32%	57%	43%
St. Kitts and Nevis	5.16	8	20%	18%	19%	11%	32%	57%	43%
Ensenada	5.14	9	17%	22%	19%	10%	32%	58%	42%
Aruba	5.08	10	20%	17%	18%	12%	33%	55%	45%
Cayman Islands	5.06	11	21%	17%	16%	11%	35%	54%	46%
Mazatlán	5.00	12	19%	18%	17%	11%	35%	54%	46%
Belize	4.98	13	19%	17%	18%	11%	35%	54%	46%
Costa Rica	4.94	14	17%	18%	19%	12%	34%	54%	46%
British Virgin Islands	4.86	15	19%	17%	16%	9%	39%	52%	48%
Honduras	4.80	16	17%	16%	18%	13%	36%	51%	49%
Barbados	4.80	17	18%	17%	16%	10%	39%	51%	49%
Curacao	4.76	18	18%	16%	16%	11%	39%	50%	50%
Puerto Vallarta	4.76	19	17%	18%	16%	9%	40%	51%	49%
Antigua	4.70	20	16%	17%	17%	11%	39%	50%	50%
Progreso	4.66	21	19%	13%	16%	11%	41%	48%	52%
St. Lucia	4.62	22	15%	16%	18%	12%	39%	49%	51%
Jamaica	4.58	23	16%	15%	16%	13%	40%	47%	53%
Martinique	4.52	24	13%	16%	19%	13%	39%	48%	52%
Costa Maya	4.24	25	14%	13%	15%	12%	46%	42%	58%
Bonaire	4.12	26	12%	14%	15%	11%	48%	41%	59%
Grenada	4.06	27	11%	14%	15%	12%	48%	40%	60%
Dominican Republic	4.00	28	10%	13%	17%	12%	48%	40%	60%
Colombia	3.86	29	10%	12%	15%	12%	51%	37%	63%
Trinidad	3.72	30	8%	12%	17%	9%	54%	37%	63%
Guatemala	3.72	31	9%	10%	17%	11%	53%	36%	64%
Dominica	3.52	32	9%	10%	13%	9%	59%	32%	68%
Tobago	3.46	33	4%	10%	17%	18%	51%	31%	69%
Guadeloupe	3.34	34	4%	10%	15%	16%	55%	29%	71%
Nicaragua	3.34	35	5%	10%	16%	10%	59%	31%	69%
All Destinations	4.68		17%	16%	16%	11%	40%	49%	51%
Eastern Caribbean	4.98	2	20%	17%	16%	11%	36%	53%	47%
Western Caribbean	4.42	3	14%	15%	17%	11%	43%	46%	54%
Southern Caribbean	4.24	4	13%	14%	16%	11%	46%	43%	57%
Mexico	5.06	1	21%	17%	16%	11%	35%	54%	46%

Table B-10 – How likely are you to recommend a land-based or resort vacation in the “destination” to family or friends?

Destinations	Mean Score	Rank	Extremely Likely	Very Likely	Somewhat Likely	Not Too Likely	Not At All Likely	Likely	Not Likely
Puerto Vallarta	6.48	1	34%	24%	17%	7%	18%	75%	25%
St. Maarten	6.26	2	30%	25%	17%	9%	19%	72%	28%
Bahamas	6.20	3	28%	25%	19%	10%	18%	72%	28%
Aruba	6.18	4	30%	23%	18%	9%	20%	71%	29%
Costa Rica	6.18	5	30%	23%	18%	9%	20%	71%	29%
Puerto Rico (San Juan)	6.00	6	29%	21%	15%	16%	19%	65%	35%
U.S. Virgin Islands	5.94	7	25%	25%	18%	11%	21%	68%	32%
Cozumel	5.94	8	26%	24%	19%	8%	23%	69%	31%
St. Kitts and Nevis	5.94	9	26%	24%	18%	10%	22%	68%	32%
Cabo San Lucas	5.90	10	27%	21%	19%	11%	22%	67%	33%
Curacao	5.86	11	26%	22%	19%	10%	23%	67%	33%
Turks and Caicos	5.84	12	29%	19%	17%	10%	25%	65%	35%
Cayman Islands	5.80	13	26%	22%	18%	9%	25%	66%	34%
Antigua	5.66	14	23%	24%	17%	10%	26%	64%	36%
British Virgin Islands	5.50	15	25%	21%	14%	9%	31%	60%	40%
St. Lucia	5.46	16	21%	21%	20%	11%	27%	62%	38%
Mazatlán	5.44	17	22%	21%	18%	10%	29%	61%	39%
Barbados	5.44	18	22%	20%	20%	9%	29%	62%	38%
Belize	5.44	19	25%	19%	15%	10%	31%	59%	41%
Ensenada	5.42	20	18%	23%	24%	7%	28%	65%	35%
Honduras	5.36	21	21%	20%	19%	11%	29%	60%	40%
Tobago	5.10	22	14%	21%	23%	15%	27%	58%	42%
Jamaica	5.06	23	20%	18%	16%	12%	34%	54%	46%
Guadeloupe	5.06	24	16%	20%	21%	12%	31%	57%	43%
Bonaire	4.96	25	19%	17%	18%	10%	36%	54%	46%
Progreso	4.92	26	21%	15%	16%	10%	38%	52%	48%
Grenada	4.90	27	17%	18%	19%	10%	36%	54%	46%
Guatemala	4.82	28	16%	17%	20%	11%	36%	53%	47%
Colombia	4.74	29	15%	18%	19%	10%	38%	52%	48%
Costa Maya	4.70	30	19%	14%	14%	14%	39%	47%	53%
Trinidad	4.66	31	13%	21%	17%	9%	40%	51%	49%
Dominican Republic	4.54	32	15%	15%	18%	11%	41%	48%	52%
Martinique	4.44	33	13%	17%	16%	12%	42%	46%	54%
Nicaragua	4.40	34	13%	16%	17%	11%	43%	46%	54%
Dominica	3.98	35	12%	12%	14%	12%	50%	38%	62%
All Destinations	5.44		22%	21%	18%	10%	29%	61%	39%
Eastern Caribbean	5.76	1	25%	22%	18%	11%	24%	65%	35%
Western Caribbean	5.38	3	22%	20%	18%	10%	30%	60%	40%
Southern Caribbean	5.08	4	19%	19%	18%	10%	34%	56%	44%
Mexico	5.58	2	24%	21%	18%	9%	28%	63%	37%

Table B-11 – 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
Puerto Vallarta	8.30	1	60%	25%	11%	3%	1%	96%	4%
Trinidad	8.30	2	63%	22%	10%	2%	3%	95%	5%
Mazatlán	8.26	3	60%	25%	10%	3%	2%	95%	5%
Martinique	8.14	4	58%	26%	9%	4%	3%	93%	7%
Honduras	8.10	5	58%	24%	12%	2%	4%	94%	6%
Nicaragua	8.06	6	55%	25%	15%	3%	2%	95%	5%
Costa Rica	8.04	7	55%	25%	14%	4%	2%	94%	6%
St. Maarten	7.98	8	53%	26%	15%	4%	2%	94%	6%
Guatemala	7.92	9	55%	25%	11%	4%	5%	91%	9%
Curacao	7.90	10	51%	27%	16%	3%	3%	94%	6%
Cabo San Lucas	7.90	11	51%	27%	15%	5%	2%	93%	7%
Ensenada	7.90	12	49%	31%	14%	3%	3%	94%	6%
Belize	7.88	13	52%	26%	13%	7%	2%	91%	9%
Aruba	7.82	14	50%	28%	14%	4%	4%	92%	8%
St. Kitts and Nevis	7.78	15	48%	29%	15%	5%	3%	92%	8%
Cozumel	7.78	16	50%	28%	13%	4%	5%	91%	9%
Turks and Caicos	7.72	17	52%	23%	15%	4%	6%	90%	10%
British Virgin Islands	7.64	18	45%	30%	15%	7%	3%	90%	10%
Bahamas	7.60	19	48%	25%	17%	4%	6%	90%	10%
Barbados	7.58	20	46%	27%	17%	5%	5%	90%	10%
Costa Maya	7.56	21	46%	28%	15%	5%	6%	89%	11%
Puerto Rico (San Juan)	7.56	22	46%	27%	17%	4%	6%	90%	10%
Colombia	7.52	23	45%	27%	17%	6%	5%	89%	11%
Grenada	7.50	24	43%	29%	18%	5%	5%	90%	10%
Bonaire	7.48	25	45%	27%	16%	6%	6%	88%	12%
Progreso	7.46	26	49%	22%	15%	6%	8%	86%	14%
U.S. Virgin Islands	7.42	27	42%	29%	18%	5%	6%	89%	11%
Antigua	7.40	28	40%	30%	20%	5%	5%	90%	10%
Cayman Islands	7.34	29	42%	27%	18%	7%	6%	87%	13%
St. Lucia	7.28	30	41%	27%	19%	6%	7%	87%	13%
Dominican Republic	7.22	31	43%	25%	17%	5%	10%	85%	15%
Tobago	7.20	32	36%	34%	16%	7%	7%	86%	14%
Jamaica	7.00	33	41%	24%	16%	7%	12%	81%	19%
Guadeloupe	6.88	34	31%	31%	23%	6%	9%	85%	15%
Dominica	6.76	35	32%	29%	20%	8%	11%	81%	19%
All Destinations	7.72		49%	27%	15%	4%	5%	91%	9%
Eastern Caribbean	7.56	3	46%	27%	17%	4%	6%	90%	10%
Western Caribbean	7.84	1	51%	26%	15%	5%	3%	92%	8%
Southern Caribbean	7.54	4	46%	27%	16%	5%	6%	89%	11%
Mexico	7.76	2	52%	25%	13%	4%	6%	90%	10%

Table B-12 – 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	8.80	1	76%	17%	4%	2%	1%	97%	3%
Aruba	8.62	2	72%	18%	6%	2%	2%	96%	4%
Cozumel	8.62	3	73%	17%	5%	3%	2%	95%	5%
Puerto Vallarta	8.52	4	71%	17%	7%	2%	3%	95%	5%
Belize	8.52	5	73%	16%	5%	1%	5%	94%	6%
Guatemala	8.48	6	70%	17%	8%	2%	3%	95%	5%
Bahamas	8.46	7	70%	17%	7%	3%	3%	94%	6%
Dominica	8.46	8	69%	19%	6%	3%	3%	94%	6%
Progreso	8.44	9	70%	17%	6%	4%	3%	93%	7%
Curacao	8.42	10	65%	24%	6%	2%	3%	95%	5%
Costa Maya	8.38	11	70%	17%	5%	3%	5%	92%	8%
Turks and Caicos	8.34	12	69%	17%	7%	1%	6%	93%	7%
Antigua	8.34	13	65%	22%	7%	2%	4%	94%	6%
Mazatlán	8.32	14	68%	19%	5%	2%	6%	92%	8%
Ensenada	8.30	15	63%	23%	8%	3%	3%	94%	6%
St. Kitts and Nevis	8.30	16	62%	24%	9%	2%	3%	95%	5%
Honduras	8.24	17	65%	20%	8%	1%	6%	93%	7%
Puerto Rico (San Juan)	8.24	18	62%	24%	7%	3%	4%	93%	7%
Bonaire	8.22	19	65%	19%	8%	3%	5%	92%	8%
St. Maarten	8.16	20	60%	25%	8%	2%	5%	93%	7%
Cayman Islands	8.12	21	60%	23%	9%	4%	4%	92%	8%
Cabo San Lucas	8.10	22	62%	19%	11%	3%	5%	92%	8%
St. Lucia	8.10	23	58%	25%	9%	5%	3%	92%	8%
Barbados	8.06	24	57%	25%	11%	3%	4%	93%	7%
Nicaragua	8.00	25	57%	25%	8%	6%	4%	90%	10%
Grenada	8.00	26	57%	25%	9%	4%	5%	91%	9%
British Virgin Islands	7.86	27	55%	24%	10%	6%	5%	89%	11%
Jamaica	7.86	28	58%	20%	11%	4%	7%	89%	11%
U.S. Virgin Islands	7.84	29	54%	24%	12%	5%	5%	90%	10%
Colombia	7.80	30	52%	26%	12%	5%	5%	90%	10%
Martinique	7.72	31	49%	30%	10%	5%	6%	89%	11%
Guadeloupe	7.56	32	50%	24%	13%	5%	8%	87%	13%
Dominican Republic	7.40	33	46%	25%	16%	4%	9%	87%	13%
Tobago	7.32	34	39%	35%	11%	8%	7%	85%	15%
Trinidad	7.18	35	42%	27%	14%	7%	10%	83%	17%
All Destinations	8.18		62%	22%	8%	4%	4%	92%	8%
Eastern Caribbean	8.02	4	59%	23%	9%	3%	6%	91%	9%
Western Caribbean	8.30	2	65%	20%	8%	4%	3%	93%	7%
Southern Caribbean	8.10	3	59%	24%	9%	4%	4%	92%	8%
Mexico	8.36	1	68%	18%	7%	3%	4%	93%	7%

Table B-13 – 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)	8.36	1	61%	25%	11%	2%	1%	97%	3%
Progreso	8.14	2	69%	14%	6%	2%	9%	89%	11%
Cozumel	8.02	3	60%	21%	10%	3%	6%	91%	9%
St. Kitts and Nevis	7.94	4	54%	28%	9%	4%	5%	91%	9%
Mazatlán	7.94	5	51%	32%	10%	2%	5%	93%	7%
Barbados	7.92	6	50%	30%	14%	3%	3%	94%	6%
Guatemala	7.90	7	56%	24%	11%	2%	7%	91%	9%
Puerto Vallarta	7.80	8	52%	27%	11%	4%	6%	90%	10%
Curacao	7.80	9	48%	31%	13%	4%	4%	92%	8%
Belize	7.76	10	60%	18%	8%	3%	11%	86%	14%
Costa Maya	7.74	11	62%	15%	8%	3%	12%	85%	15%
Aruba	7.72	12	48%	30%	13%	3%	6%	91%	9%
Colombia	7.60	13	45%	31%	13%	6%	5%	89%	11%
Costa Rica	7.50	14	53%	22%	9%	4%	12%	84%	16%
Antigua	7.42	15	48%	25%	12%	5%	10%	85%	15%
Bahamas	7.34	16	46%	25%	14%	5%	10%	85%	15%
Ensenada	7.26	17	40%	31%	14%	7%	8%	85%	15%
St. Lucia	7.18	18	42%	28%	13%	6%	11%	83%	17%
St. Maarten	7.10	19	42%	26%	14%	6%	12%	82%	18%
Turks and Caicos	7.04	20	43%	24%	13%	7%	13%	80%	20%
U.S. Virgin Islands	7.02	21	38%	28%	17%	6%	11%	83%	17%
Honduras	6.96	22	41%	24%	16%	5%	14%	81%	19%
Cayman Islands	6.90	23	38%	25%	18%	7%	12%	81%	19%
Bonaire	6.80	24	34%	28%	19%	7%	12%	81%	19%
Grenada	6.72	25	33%	28%	17%	11%	11%	78%	22%
Trinidad	6.70	26	31%	28%	22%	8%	11%	81%	19%
Dominica	6.66	27	37%	23%	16%	9%	15%	76%	24%
Jamaica	6.64	28	41%	19%	14%	8%	18%	74%	26%
Tobago	6.64	29	25%	37%	18%	10%	10%	80%	20%
Nicaragua	6.50	30	26%	32%	21%	8%	13%	79%	21%
Martinique	6.50	31	26%	32%	21%	8%	13%	79%	21%
Guadeloupe	6.44	32	24%	30%	24%	13%	9%	78%	22%
Cabo San Lucas	6.38	33	30%	26%	19%	8%	17%	75%	25%
British Virgin Islands	6.30	34	37%	18%	13%	12%	20%	68%	32%
Dominican Republic	6.18	35	31%	23%	16%	9%	21%	70%	30%
All Destinations	7.44		46%	27%	13%	6%	8%	86%	14%
Eastern Caribbean	7.28	3	45%	25%	14%	6%	10%	84%	16%
Western Caribbean	7.32	2	46%	25%	13%	6%	10%	84%	16%
Southern Caribbean	7.16	4	38%	30%	17%	7%	8%	85%	15%
Mexico	7.66	1	53%	24%	10%	4%	9%	87%	13%

Table B-14 – 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
Puerto Vallarta	7.84	1	49%	28%	16%	5%	2%	93%	7%
Costa Rica	7.64	2	48%	26%	16%	5%	5%	90%	10%
Puerto Rico (San Juan)	7.58	3	44%	29%	18%	5%	4%	91%	9%
Cozumel	7.54	4	42%	32%	16%	6%	4%	90%	10%
Aruba	7.54	5	43%	30%	17%	6%	4%	90%	10%
Mazatlán	7.52	6	42%	31%	17%	6%	4%	90%	10%
Curacao	7.48	7	39%	34%	18%	5%	4%	91%	9%
St. Maarten	7.46	8	41%	31%	17%	7%	4%	89%	11%
St. Kitts and Nevis	7.38	9	35%	36%	20%	6%	3%	91%	9%
U.S. Virgin Islands	7.32	10	37%	33%	19%	6%	5%	89%	11%
Barbados	7.18	11	34%	34%	20%	6%	6%	88%	12%
Colombia	7.08	12	34%	32%	19%	9%	6%	85%	15%
Cayman Islands	7.04	13	36%	27%	21%	10%	6%	84%	16%
Honduras	7.04	14	35%	30%	20%	7%	8%	85%	15%
Cabo San Lucas	7.02	15	31%	32%	24%	8%	5%	87%	13%
Antigua	6.96	16	32%	33%	18%	10%	7%	83%	17%
St. Lucia	6.90	17	34%	29%	19%	9%	9%	82%	18%
Guatemala	6.84	18	35%	27%	19%	8%	11%	81%	19%
Bahamas	6.82	19	32%	29%	20%	11%	8%	81%	19%
Grenada	6.76	20	30%	28%	24%	11%	7%	82%	18%
Ensenada	6.70	21	28%	30%	24%	10%	8%	82%	18%
Tobago	6.68	22	25%	34%	22%	13%	6%	81%	19%
Belize	6.60	23	34%	24%	18%	11%	13%	76%	24%
Turks and Caicos	6.60	24	30%	28%	20%	11%	11%	78%	22%
Jamaica	6.58	25	34%	24%	18%	10%	14%	76%	24%
Trinidad	6.42	26	24%	30%	25%	10%	11%	79%	21%
Guadeloupe	6.40	27	21%	33%	24%	14%	8%	78%	22%
Nicaragua	6.34	28	27%	27%	20%	13%	13%	74%	26%
Bonaire	6.34	29	23%	30%	24%	12%	11%	77%	23%
Martinique	6.14	30	22%	29%	23%	11%	15%	74%	26%
Progreso	6.12	31	32%	18%	18%	13%	19%	68%	32%
Dominica	6.06	32	25%	25%	20%	13%	17%	70%	30%
Costa Maya	6.02	33	25%	22%	21%	18%	14%	68%	32%
British Virgin Islands	5.82	34	24%	16%	29%	14%	17%	69%	31%
Dominican Republic	5.12	35	15%	21%	20%	18%	26%	56%	44%
All Destinations	6.94		34%	29%	20%	9%	8%	83%	17%
Eastern Caribbean	6.90	3	33%	30%	20%	8%	9%	83%	17%
Western Caribbean	6.94	2	36%	27%	19%	9%	9%	82%	18%
Southern Caribbean	6.74	4	30%	30%	21%	10%	9%	81%	19%
Mexico	7.02	1	37%	27%	19%	9%	8%	83%	17%

Table B-15 –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	8.42	1	67%	20%	8%	2%	3%	95%	5%
Mazatlán	8.42	2	64%	24%	8%	2%	2%	96%	4%
Puerto Vallarta	8.40	3	63%	25%	8%	2%	2%	96%	4%
St. Kitts and Nevis	8.28	4	59%	29%	6%	4%	2%	94%	6%
Guatemala	8.28	5	63%	22%	9%	3%	3%	94%	6%
Cozumel	8.26	6	60%	25%	10%	3%	2%	95%	5%
Belize	8.26	7	62%	23%	8%	5%	2%	93%	7%
Trinidad	8.26	8	59%	27%	9%	3%	2%	95%	5%
Aruba	8.24	9	61%	24%	9%	3%	3%	94%	6%
Bonaire	8.24	10	59%	26%	10%	3%	2%	95%	5%
Honduras	8.22	11	60%	25%	9%	3%	3%	94%	6%
Curacao	8.18	12	57%	27%	11%	3%	2%	95%	5%
Turks and Caicos	8.14	13	61%	21%	10%	5%	3%	92%	8%
St. Maarten	8.08	14	55%	28%	11%	3%	3%	94%	6%
Barbados	8.08	15	56%	27%	10%	4%	3%	93%	7%
U.S. Virgin Islands	8.06	16	55%	26%	13%	4%	2%	94%	6%
Bahamas	8.04	17	55%	26%	13%	3%	3%	94%	6%
Cayman Islands	8.04	18	56%	26%	10%	5%	3%	92%	8%
British Virgin Islands	8.04	19	53%	30%	10%	5%	2%	93%	7%
Antigua	8.00	20	55%	26%	11%	5%	3%	92%	8%
Puerto Rico (San Juan)	7.92	21	52%	26%	15%	5%	2%	93%	7%
Nicaragua	7.90	22	53%	27%	11%	5%	4%	91%	9%
Tobago	7.90	23	50%	30%	13%	4%	3%	93%	7%
Cabo San Lucas	7.88	24	49%	31%	13%	4%	3%	93%	7%
Ensenada	7.86	25	46%	35%	12%	5%	2%	93%	7%
Costa Maya	7.82	26	53%	24%	13%	6%	4%	90%	10%
St. Lucia	7.74	27	52%	25%	11%	7%	5%	88%	12%
Grenada	7.72	28	52%	26%	10%	5%	7%	88%	12%
Colombia	7.64	29	45%	31%	14%	6%	4%	90%	10%
Dominica	7.64	30	52%	24%	10%	7%	7%	86%	14%
Progreso	7.62	31	53%	20%	13%	8%	6%	86%	14%
Jamaica	7.42	32	47%	25%	13%	7%	8%	85%	15%
Guadeloupe	7.26	33	39%	30%	16%	10%	5%	85%	15%
Martinique	7.22	34	44%	25%	14%	7%	10%	83%	17%
Dominican Republic	7.10	35	41%	26%	16%	6%	11%	83%	17%
All Destinations	8.06		56%	26%	11%	4%	3%	93%	7%
Eastern Caribbean	7.88	4	53%	26%	12%	5%	4%	91%	9%
Western Caribbean	8.04	1	57%	25%	10%	4%	4%	92%	8%
Southern Caribbean	7.90	3	54%	26%	11%	4%	5%	91%	9%
Mexico	8.00	2	56%	25%	11%	4%	4%	92%	8%

Table B-16 – How satisfied were you with your overall shopping experience in “destination”?

Destinations	Mean Score	Rank	Extremely Satisfied	Very Satisfied	Somewhat Satisfied	Not Too Satisfied	Not At All Satisfied	Satisfied	Not Satisfied
St. Maarten	7.80	1	46%	33%	13%	6%	2%	92%	8%
Curacao	7.66	2	45%	32%	14%	4%	5%	91%	9%
St. Kitts and Nevis	7.62	3	44%	33%	13%	5%	5%	90%	10%
Puerto Vallarta	7.56	4	45%	29%	15%	6%	5%	89%	11%
Aruba	7.56	5	42%	33%	15%	6%	4%	90%	10%
Mazatlán	7.46	6	44%	29%	15%	5%	7%	88%	12%
U.S. Virgin Islands	7.42	7	39%	32%	19%	6%	4%	90%	10%
Cozumel	7.32	8	41%	30%	15%	7%	7%	86%	14%
Ensenada	7.30	9	37%	34%	16%	8%	5%	87%	13%
Costa Rica	7.28	10	41%	28%	17%	7%	7%	86%	14%
Turks and Caicos	7.26	11	40%	27%	20%	7%	6%	87%	13%
Honduras	7.26	12	41%	28%	17%	6%	8%	86%	14%
Cayman Islands	7.24	13	40%	28%	18%	7%	7%	86%	14%
Puerto Rico (San Juan)	7.24	14	37%	32%	18%	7%	6%	87%	13%
Bahamas	7.10	15	35%	34%	14%	10%	7%	83%	17%
Cabo San Lucas	7.04	16	36%	28%	21%	7%	8%	85%	15%
Guatemala	7.02	17	37%	29%	17%	7%	10%	83%	17%
Barbados	7.02	18	33%	33%	18%	9%	7%	84%	16%
Antigua	6.98	19	31%	34%	20%	8%	7%	85%	15%
Bonaire	6.90	20	34%	29%	20%	7%	10%	83%	17%
Belize	6.70	21	33%	27%	19%	9%	12%	79%	21%
Progreso	6.66	22	34%	24%	20%	10%	12%	78%	22%
Trinidad	6.64	23	32%	28%	18%	9%	13%	78%	22%
Jamaica	6.64	24	32%	29%	17%	8%	14%	78%	22%
Grenada	6.60	25	29%	30%	20%	9%	12%	79%	21%
Costa Maya	6.52	26	31%	26%	19%	11%	13%	76%	24%
Colombia	6.48	27	29%	28%	19%	11%	13%	76%	24%
St. Lucia	6.48	28	29%	26%	22%	11%	12%	77%	23%
Guadeloupe	6.40	29	21%	30%	31%	9%	9%	82%	18%
Nicaragua	6.00	30	25%	24%	21%	11%	19%	70%	30%
British Virgin Islands	5.90	31	23%	22%	24%	14%	17%	69%	31%
Martinique	5.80	32	22%	26%	20%	9%	23%	68%	32%
Dominica	5.52	33	21%	21%	20%	14%	24%	62%	38%
Tobago	5.46	34	14%	27%	23%	15%	21%	64%	36%
Dominican Republic	4.52	35	14%	14%	19%	15%	38%	47%	53%
All Destinations	6.92		35%	29%	18%	8%	10%	82%	18%
Eastern Caribbean	7.06	2	36%	30%	18%	8%	8%	84%	16%
Western Caribbean	6.90	3	35%	28%	19%	8%	10%	82%	18%
Southern Caribbean	6.72	4	32%	29%	19%	8%	12%	80%	20%
Mexico	7.20	1	39%	29%	17%	8%	7%	85%	15%

Table B-17 – 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	8.58	1	68%	21%	7%	2%	2%	96%	4%
Aruba	8.41	2	58%	29%	9%	3%	1%	96%	4%
Puerto Vallarta	8.39	3	62%	22%	10%	3%	3%	94%	6%
Mazatlán	8.37	4	60%	24%	10%	4%	2%	94%	6%
Trinidad	8.37	5	59%	27%	9%	1%	4%	95%	5%
Honduras	8.33	6	61%	22%	11%	4%	2%	94%	6%
Curacao	8.25	7	57%	26%	11%	3%	3%	94%	6%
U.S. Virgin Islands	8.22	8	55%	26%	13%	4%	2%	94%	6%
Guatemala	8.21	9	61%	21%	9%	4%	5%	91%	9%
St. Maarten	8.21	10	56%	27%	10%	3%	4%	93%	7%
Cozumel	8.20	11	57%	26%	10%	4%	3%	93%	7%
St. Kitts and Nevis	8.19	12	56%	28%	10%	4%	2%	94%	6%
Cabo San Lucas	8.13	13	53%	27%	13%	4%	3%	93%	7%
Ensenada	8.12	14	52%	30%	12%	3%	3%	94%	6%
Belize	8.11	15	57%	23%	11%	5%	4%	91%	9%
Bonaire	8.11	16	55%	26%	12%	3%	4%	93%	7%
Turks and Caicos	8.10	17	57%	22%	12%	5%	4%	91%	9%
Bahamas	8.10	18	55%	25%	12%	4%	4%	92%	8%
Cayman Islands	8.07	19	56%	24%	10%	6%	4%	90%	10%
Antigua	8.07	20	56%	26%	11%	5%	2%	93%	7%
Puerto Rico (San Juan)	8.05	21	54%	25%	14%	5%	2%	93%	7%
Colombia	8.03	22	52%	29%	11%	4%	4%	92%	8%
Nicaragua	8.00	23	55%	24%	11%	4%	6%	90%	10%
British Virgin Islands	7.98	24	52%	29%	9%	4%	6%	90%	10%
Barbados	7.93	25	52%	25%	13%	6%	4%	90%	10%
Grenada	7.91	26	50%	27%	14%	5%	4%	91%	9%
St. Lucia	7.81	27	52%	24%	12%	5%	7%	88%	12%
Tobago	7.78	28	48%	30%	12%	4%	6%	90%	10%
Jamaica	7.70	29	50%	25%	13%	5%	7%	88%	12%
Dominica	7.60	30	48%	26%	12%	6%	8%	86%	14%
Progreso	7.58	31	51%	20%	14%	7%	8%	85%	15%
Costa Maya	7.52	32	48%	23%	13%	8%	8%	84%	16%
Guadeloupe	7.30	33	41%	29%	16%	7%	7%	86%	14%
Martinique	7.15	34	44%	24%	14%	6%	12%	82%	18%
Dominican Republic	6.79	35	38%	26%	13%	9%	14%	77%	23%
All Destinations	8.03		55%	25%	11%	4%	5%	91%	9%
Eastern Caribbean	7.82	4	52%	26%	12%	5%	5%	90%	10%
Western Caribbean	8.02	1	58%	24%	10%	4%	4%	92%	9%
Southern Caribbean	7.82	3	52%	26%	12%	4%	5%	91%	9%
Mexico	7.91	2	55%	25%	12%	5%	4%	91%	9%

Table B-18 – 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
Curacao	7.72	1	46%	31%	14%	6%	3%	91%	9%
St. Maarten	7.62	2	46%	29%	14%	7%	4%	89%	11%
St. Kitts and Nevis	7.58	3	42%	34%	13%	8%	3%	89%	11%
Aruba	7.58	4	44%	32%	13%	6%	5%	89%	11%
Mazatlán	7.46	5	43%	28%	18%	6%	5%	89%	11%
Puerto Vallarta	7.46	6	45%	26%	17%	6%	6%	88%	12%
Puerto Rico (San Juan)	7.40	7	41%	28%	20%	7%	4%	89%	11%
Cozumel	7.38	8	42%	29%	16%	7%	6%	87%	13%
U.S. Virgin Islands	7.30	9	41%	27%	18%	9%	5%	86%	14%
Cayman Islands	7.24	10	40%	29%	15%	10%	6%	84%	16%
Ensenada	7.20	11	37%	30%	19%	9%	5%	86%	14%
Cabo San Lucas	7.10	12	36%	29%	21%	7%	7%	86%	14%
Honduras	7.06	13	38%	27%	18%	9%	8%	83%	17%
Antigua	7.06	14	33%	32%	19%	12%	4%	84%	16%
Turks and Caicos	6.96	15	35%	26%	22%	11%	6%	83%	17%
Barbados	6.94	16	33%	30%	19%	12%	6%	82%	18%
Bahamas	6.88	17	32%	31%	18%	12%	7%	81%	19%
Guatemala	6.82	18	35%	27%	18%	9%	11%	80%	20%
Costa Rica	6.76	19	33%	27%	20%	10%	10%	80%	20%
Jamaica	6.68	20	35%	23%	20%	10%	12%	78%	22%
Belize	6.64	21	33%	25%	19%	12%	11%	77%	23%
Costa Maya	6.58	22	34%	23%	18%	13%	12%	75%	25%
St. Lucia	6.54	23	28%	27%	23%	13%	9%	78%	22%
Progreso	6.54	24	34%	22%	20%	10%	14%	76%	24%
Colombia	6.52	25	28%	29%	20%	12%	11%	77%	23%
Bonaire	6.44	26	26%	28%	24%	11%	11%	78%	22%
Grenada	6.40	27	25%	29%	23%	12%	11%	77%	23%
Guadeloupe	6.28	28	20%	30%	27%	15%	8%	77%	23%
Trinidad	6.24	29	25%	28%	22%	9%	16%	75%	25%
Martinique	5.82	30	20%	28%	21%	10%	21%	69%	31%
Nicaragua	5.60	31	21%	20%	24%	13%	22%	65%	35%
British Virgin Islands	5.34	32	19%	17%	23%	19%	22%	59%	41%
Dominica	5.02	33	15%	16%	25%	18%	26%	56%	44%
Tobago	4.68	34	9%	18%	24%	21%	28%	51%	49%
Dominican Republic	4.32	35	11%	14%	19%	17%	39%	44%	56%
All Destinations	6.78		34%	26%	20%	10%	10%	80%	20%
Eastern Caribbean	6.94	2	35%	28%	19%	10%	8%	82%	18%
Western Caribbean	6.66	3	33%	26%	19%	10%	12%	78%	22%
Southern Caribbean	6.58	4	30%	28%	20%	10%	12%	78%	22%
Mexico	7.06	1	39%	26%	18%	8%	9%	83%	17%

Table B-19 – 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
Mazatlán	7.60	1	42%	32%	18%	5%	3%	92%	8%
St. Kitts and Nevis	7.30	2	34%	37%	18%	7%	4%	89%	11%
Puerto Vallarta	7.28	3	37%	32%	19%	7%	5%	88%	12%
Guatemala	7.24	4	38%	31%	18%	6%	7%	87%	13%
Aruba	7.24	5	34%	35%	19%	8%	4%	88%	12%
Ensenada	7.24	6	36%	31%	22%	6%	5%	89%	11%
St. Maarten	7.22	7	36%	32%	19%	8%	5%	87%	13%
Puerto Rico (San Juan)	7.16	8	34%	30%	24%	9%	3%	88%	12%
Curacao	7.08	9	31%	35%	21%	8%	5%	87%	13%
Trinidad	7.04	10	31%	34%	21%	9%	5%	86%	14%
Cozumel	6.98	11	30%	35%	20%	9%	6%	85%	15%
Costa Rica	6.96	12	33%	31%	19%	10%	7%	83%	17%
U.S. Virgin Islands	6.94	13	31%	33%	20%	9%	7%	84%	16%
Bahamas	6.92	14	25%	39%	23%	8%	5%	87%	13%
Nicaragua	6.82	15	33%	28%	21%	8%	10%	82%	18%
Progreso	6.78	16	32%	28%	21%	10%	9%	81%	19%
Honduras	6.74	17	29%	31%	22%	9%	9%	82%	18%
Cabo San Lucas	6.72	18	28%	29%	26%	10%	7%	83%	17%
Antigua	6.70	19	24%	36%	21%	14%	5%	81%	19%
Bonaire	6.70	20	27%	32%	23%	10%	8%	82%	18%
Barbados	6.60	21	27%	31%	21%	12%	9%	79%	21%
Belize	6.58	22	27%	31%	20%	13%	9%	78%	22%
Colombia	6.52	23	25%	32%	22%	11%	10%	79%	21%
Grenada	6.52	24	25%	31%	24%	10%	10%	80%	20%
Turks and Caicos	6.46	25	26%	28%	23%	14%	9%	77%	23%
Dominica	6.44	26	25%	28%	27%	9%	11%	80%	20%
Cayman Islands	6.40	27	26%	29%	21%	12%	12%	76%	24%
St. Lucia	6.34	28	23%	30%	24%	12%	11%	77%	23%
British Virgin Islands	6.34	29	20%	33%	27%	9%	11%	80%	20%
Jamaica	6.26	30	23%	30%	23%	10%	14%	76%	24%
Tobago	6.10	31	16%	31%	30%	13%	10%	77%	23%
Costa Maya	6.04	32	23%	25%	23%	14%	15%	71%	29%
Martinique	5.72	33	15%	30%	24%	13%	18%	69%	31%
Guadeloupe	5.68	34	12%	27%	32%	16%	13%	71%	29%
Dominican Republic	5.12	35	14%	21%	25%	12%	28%	60%	40%
All Destinations	6.76		29%	31%	22%	10%	8%	82%	18%
Eastern Caribbean	6.74	2	28%	32%	22%	10%	8%	82%	18%
Western Caribbean	6.74	3	30%	30%	21%	10%	9%	81%	19%
Southern Caribbean	6.62	4	26%	32%	23%	10%	9%	81%	19%
Mexico	6.92	1	33%	30%	20%	9%	8%	83%	17%

Table B-20 – 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
Mazatlán	8.12	1	60%	23%	9%	4%	4%	92%	8%
St. Maarten	8.06	2	58%	25%	9%	3%	5%	92%	8%
Puerto Vallarta	7.90	3	56%	25%	9%	3%	7%	90%	10%
Ensenada	7.86	4	50%	30%	12%	4%	4%	92%	8%
Puerto Rico (San Juan)	7.76	5	55%	23%	11%	2%	9%	89%	11%
Cozumel	7.76	6	53%	24%	12%	5%	6%	89%	11%
Aruba	7.76	7	57%	23%	7%	2%	11%	87%	13%
British Virgin Islands	7.72	8	53%	28%	7%	1%	11%	88%	12%
Tobago	7.66	9	47%	32%	9%	6%	6%	88%	12%
Barbados	7.62	10	48%	28%	13%	4%	7%	89%	11%
Curacao	7.60	11	52%	24%	11%	3%	10%	87%	13%
Costa Rica	7.58	12	61%	16%	5%	2%	16%	82%	18%
St. Kitts and Nevis	7.56	13	50%	28%	8%	3%	11%	86%	14%
Bahamas	7.52	14	48%	26%	13%	5%	8%	87%	13%
Progreso	7.46	15	52%	19%	14%	5%	10%	85%	15%
Belize	7.46	16	52%	24%	7%	4%	13%	83%	17%
Cayman Islands	7.46	17	50%	24%	11%	4%	11%	85%	15%
U.S. Virgin Islands	7.44	18	45%	28%	13%	7%	7%	86%	14%
Bonaire	7.42	19	53%	19%	12%	3%	13%	84%	16%
Costa Maya	7.42	20	53%	20%	10%	4%	13%	83%	17%
Grenada	7.34	21	46%	25%	14%	5%	10%	85%	15%
Colombia	7.34	22	48%	25%	9%	7%	11%	82%	18%
Antigua	7.30	23	44%	31%	9%	3%	13%	84%	16%
Honduras	7.20	24	49%	21%	10%	6%	14%	80%	20%
Turks and Caicos	7.20	25	49%	22%	10%	3%	16%	81%	19%
Guatemala	7.16	26	50%	19%	11%	4%	16%	80%	20%
Trinidad	7.04	27	43%	24%	13%	7%	13%	80%	20%
Cabo San Lucas	7.00	28	41%	26%	14%	5%	14%	81%	19%
St. Lucia	7.00	29	42%	26%	12%	5%	15%	80%	20%
Nicaragua	6.86	30	44%	23%	9%	5%	19%	76%	24%
Dominica	6.78	31	39%	26%	12%	6%	17%	77%	23%
Dominican Republic	6.58	32	33%	25%	19%	9%	14%	77%	23%
Jamaica	6.54	33	40%	19%	15%	5%	21%	74%	26%
Guadeloupe	6.34	34	30%	24%	19%	12%	15%	73%	27%
Martinique	6.06	35	28%	27%	14%	7%	24%	69%	31%
All Destinations	7.36		48%	25%	11%	4%	12%	84%	16%
Eastern Caribbean	7.46	2	48%	26%	12%	4%	10%	86%	14%
Western Caribbean	7.26	3	50%	21%	10%	5%	14%	81%	19%
Southern Caribbean	7.26	4	46%	25%	12%	5%	12%	83%	17%
Mexico	7.78	1	54%	24%	11%	4%	7%	89%	11%



BREA specializes in custom market analyses for clients throughout the private and public sectors. These unique market analyses integrate economic, financial, and demographic trends with primary market research, proprietary client data, and advanced statistical and modeling techniques. This approach results in comprehensive and actionable analysis, databases and models, designed to support planning, sales and marketing, and education within client organizations.

Dr. Moody, President of BREA, has more than twenty-five years of experience in consulting and forecasting with a wide range of international product and service companies, including consumer products, leisure, retailing, gaming, business services, telecommunications, and utility and financial services. Typical consulting assignments provide critical analysis and insight into market dynamics, product demand, economic trends, consumer behavior and public policy.

BREA has provided specialized consulting support, including market research, economic impact studies and demand analyses, to the cruise lines, port service providers and industry associations. Among BREA's recent clients are: Port of Philadelphia and Camden, Tampa Port Authority, Port of San Diego, Royal Caribbean Cruises Ltd., Carnival Corp., P&O Ports of North America, and the International Council of Cruise Lines. Since studies are designed to meet the specific needs of each client, they can incorporate many dimensions of the market and include a variety of ancillary services.

BREA provides the following services:

Market Research: design and implementation of primary market research instruments using telephone, mail, and intercept surveys. Test instruments are designed to collect information on product demand, attributes of consumers and users, perceived product attributes, and customer satisfaction.

Economic Impact Studies: thorough analysis of industries and consumption behavior and their contribution to or impact on national and regional (state, metropolitan areas, counties, etc.) economies.

Statistical and Econometric Modeling: developing quantitative models relating market and product demand to key economic factors and demographic market/consumer attributes. Models can be used for forecasting, trend analysis and divergence/convergence analysis.

Market Studies and Trend Analyses: detailed descriptions of markets (defined as products, regions, industries, consumer segments, etc.) and comprehensive analyses of underlying market forces (such as economic and financial conditions, competitive environment, technology, etc.).