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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, 2012, 2015 and 2018. A total of 33 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/Aruba Tourism Authority
The Bahamas	Bahamas Tourism Authority
Barbados	Barbados Port Inc.
Belize	Belize Tourism Board
Bonaire	Tourism Corporation of Bonaire
British Virgin Islands	BVI Ports Authority
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	Café Azul, Mexico
Curacao	Curacao Ports Authority
Dominica	Discover Dominica Authority
Dominican Republic	Ministry of Tourism
Ensenada	Administracion Portuaria Integral de Ensenada SA de CV
Grenada	Grenada Tourism Authority
Guadeloupe	Guadeloupe Islands Tourism Board
Honduras	Instituto Hondureño de Turismo
Jamaica	Jamaica Vacations Limited
Key West	Pier B Development
Martinique	Martinique Tourism Authority
Mazatlán	Administracion Portuaria Integral de Mazatlán SA de CV
Panama	Panama and its Ports
Progreso	Gobierno del Estado de Yucatán
Puerto Rico	Puerto Rico Tourism Company
St. Kitts & Nevis	St. Kitts Tourism Authority
St. Lucia	St. Lucia Tourism Authority
St. Maarten	Port St. Maarten Group of Companies
St. Vincent and the Grenadines	St. Vincent and the Grenadines Port Authority
Trinidad	Tourism Trinidad Limited
Turks and Caicos	Ministry of Tourism
U. S. Virgin Islands	Department of Tourism

Economic Impacts

During the 2023/2024 cruise year¹ **cruise tourism generated over \$4.2 billion in direct expenditures, more than 94,000 jobs and \$1.28 million in employee wages** among the 33 destinations included in the study (see **Table ES-2**).²

Table ES-2 – Total Economic Contribution of Cruise Tourism by Destination, 2023/2024 Cruise Year

Destinations	Direct Expenditures (\$US Millions)	Total Employment	Total Employee Wages (\$US Millions)
Antigua & Barbuda	\$88.95	1,521	\$16.33
Aruba	\$133.22	2,462	\$61.54
Bahamas	\$654.78	13,846	\$250.16
Barbados ^②	\$83.48	2,211	\$32.91
Belize	\$88.57	2,293	\$23.32
Bonaire	\$33.45	627	\$12.20
British Virgin Islands	\$85.66	1,666	\$18.33
Colombia ^②	\$49.93	1,223	\$10.12
Cayman Islands	\$161.51	2,988	\$67.13
Costa Maya	\$187.91	3,466	\$35.99
Costa Rica	\$32.24	852	\$7.86
Cozumel	\$483.10	11,998	\$95.58
Curacao	\$93.26	1,557	\$36.53
Dominica	\$20.87	497	\$4.20
Dominican Republic ^②	\$251.41	6,469	\$35.25
Ensenada	\$74.86	1,654	\$13.66
Grenada	\$22.43	604	\$5.14
Guadeloupe ^②	\$46.12	814	\$9.40
Honduras	\$180.42	3,386	\$30.59
Jamaica ^②	\$197.85	6,322	\$53.26
Key West	\$55.38	981	\$33.01
Martinique ^②	\$42.25	901	\$8.10
Mazatlán	\$34.11	757	\$6.31
Panama ^②	\$114.02	2,972	\$27.40
Progreso	\$25.80	555	\$4.80
Puerto Rico ^②	\$201.92	5,019	\$70.49
St. Kitts & Nevis	\$113.12	1,679	\$19.57
St. Lucia	\$72.71	1,754	\$15.78
St. Maarten	\$237.80	5,213	\$104.46
St. Vincent	\$19.28	477	\$4.31
Trinidad	\$5.40	196	\$2.54
Turks and Caicos	\$116.12	1,965	\$35.01
U. S. Virgin Islands	\$258.09	5,095	\$123.71
All Destinations	\$4,266.00	94,027	\$1,275.0

¹ The economic contribution of cruise tourism to the 33 destinations was estimated for the 12-month period from May 2023 through April 2024 which is referred to as the 2023/2024 cruise year throughout this report.

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

^② Includes both transit and homeport passengers

Fourteen (14) destinations had direct cruise tourism expenditures of \$100 million or more, up from 13 in the 2019 study. Nine (9) destinations had direct expenditures between \$50m and \$100m million, Eight (8) had direct expenditures between \$20m and \$50m and two (2) had direct expenditures less than \$20 million.

Bahamas led all destinations with \$655 million, followed by Cozumel with \$483 million. The U.S. Virgin Islands (\$258m), Dominican Republic (\$251m), and St. Maarten (\$238m) round out the Top 5 destinations. Combined, these five with a collective \$1.9 billion in direct expenditures accounted for 44 percent of the total cruise tourism expenditures among the 33 destinations.

The next 9 destinations, each with \$100 million or more, accounted for an additional \$1.4 billion in cruise tourism expenditures, or 33 percent of the total. Among these were Puerto Rico (\$202 million), Jamaica (\$198 million), Costa Maya (\$188 million), Honduras (\$180 million), The Cayman Islands (\$162 million), Aruba (\$133 million), Turks & Caicos (\$116 million), Panama (\$114 million) and St. Kitts & Nevis (\$113 million).

The next 8 destinations with expenditures between \$50 and \$100 million accounted for 15 percent of the total cruise tourism expenditures with a combined total of \$643 million in direct spending. Direct spending among these destinations ranged from \$55 million in Key West to \$93 million in Curacao.

The next 9 destinations with expenditures between \$20 and \$50 million accounted for 7 percent of the total cruise tourism expenditures and a combined total of \$307 million in direct spending. Direct spending among these six destinations ranged from \$20.9 million in Dominica to \$49.9 million in Colombia.

The remaining 2 destinations each had less than \$20 million in direct cruise tourism expenditures and had a combined total of nearly \$25 million in direct cruise tourism expenditures, or less than 1 percent of the total among the 33 destinations.

Direct comparisons with earlier studies are not exact, as the number and mix of participating destinations (33) differs from the last study (36). Nonetheless, some general comparisons with the 2017/2018 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, has seen a continued decrease in the current study, Transit passenger disembark rates have decreased from 85 percent in 2018 to 83 percent in this current study. Crew disembark rates also have decreased substantially, from 39 percent in 2018 to 30 percent in the current study.

Total direct expenditures per passenger³ (total expenditures/passenger visits) across all destinations has increased by 8.9 percent from \$133.25 during the 2017/2018 cruise year to \$145.10 during the 2023/2024 cruise year. The average per passenger spend⁴, including both transit and home port calls, increased by 2.8 percent from \$101.52 in the last study to \$104.36 this year. The small increase in the average per passenger spend is largely due to a decrease in the watches and jewelry category. Overall, there was a \$8.52 reduction in average weighted spend per passenger for jewelry and watches. This represents a decrease of about 26 percent from the 2018 study.

³ Includes the total cruise industry expenditures divided by the total transit visits and home port passengers.

⁴ Includes the total passenger spend divided by the total transit visits and home port passengers.

Similarly, spending on local crafts and souvenirs was down by about 25 percent, while spending in the 'Other' category was down by about 20 percent. Both of these categories represented a much smaller weighted spend per person decrease (\$2.00; \$1.70, respectively) These decreases were offset by increases in the average expenditure per passenger for shore excursions, food and beverages, which added just under \$17 per person combined.

Crew spending faced a multifaceted decline. In addition to the 9-point decrease in disembark rates, the average expenditures by crew continued its multi-study drop, experiencing a 3 percent decline from \$60.44 in 2017/2018 to \$58.78 in 2023/2024. Crew expenditures decreased from \$271.7 in the 2018 study to \$229.5m in this 2024 study.

Finally, expenditures by cruise lines for port fees and services and other goods and services increased from \$533.8 million to \$954.0 million. This equates to an average expenditure of about \$28.9 million per destination.

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, retail purchases of jewelry & watches and food & beverage purchases.
- onshore spending by crew which are concentrated in purchases of food and beverages, local transportation and retail purchases of clothing.
- expenditures by the cruise lines for supplies, such as food and beverages, bunker fuel, port services such as navigation and utility services, and port fees, such as wharfage and dockage fees, and taxes.

To develop estimates of the typical or average expenditures of cruise passengers and crew during their onshore visit, surveys were conducted onboard ships of the FCCA member cruise lines.⁵ More than **43,000** passenger surveys⁶ and **10,000** 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 and age group.

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 at the beginning of October 2023 and concluded at the end of April 2024.

On any given cruise itinerary, passengers and crew were surveyed. Cards with a QR code were placed in passenger cabins and crew living quarters during the day of a designated survey. These online surveys were accessible with the ship's wi-fi, thus a guest did not need to be connected to the internet to access it.

⁵ 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.

⁶ 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 29.4 million cruise passengers disembarked cruise ships and visited the participating destinations or embarked on their cruise at one of the 8 homeports. In total, these passengers spent \$3.07 billion on shore excursions, food & beverages, and other goods and services during the 2023/2024 cruise year. The average per passenger spending ranged from a low of \$58.68 in Trinidad to a high of \$190.61 in Panama. It should be noted that the average spending includes both transit and homeport passengers. The USVI (166.22) and St. Maarten (\$163.45) had the second and third highest average passenger spending in this 2023/24 study, respectively. The average per passenger spend was \$104.36 across all 33 destinations, up about 3 percent from \$101.52 in the last study.

The Bahamas, with \$473.3 million in total passenger expenditures led all destinations and accounted for 15 percent of total passenger spending among the 33 destinations. Nine additional destinations had passenger expenditures in excess of \$100 million. Passengers spent \$392 million in Cozumel, \$221 million in the USVI, \$180 million in St. Maarten, \$162 million in the Dominican Republic, \$145 million in Costa Maya, \$143 million in Puerto Rico. \$140 million in Jamaica, \$139 million in Honduras, and \$119 million in the Cayman Islands. Combined, passenger onshore expenditures in these top 10 destinations accounted for 69 percent of the onshore passenger expenditures among the 36 destinations and totaled over \$2.1 billion.

All these top 10 destinations can be considered high volume destinations with more than one million passenger visits during the cruise year.

The average per passenger spending across these top 10 ranged from \$166.22 per passenger in the USVI to \$78.17 in Costa Maya. Combined, these top 10 destinations had an average per passenger spend of \$114.51, about 10 percent above the average of the 33 destinations.

Seventeen destinations had passenger expenditures between \$25 and \$100 million. Onshore passenger expenditures among these 17 destinations totaled \$872 million and accounted for 28 percent of total passenger expenditure among the 33 participating destinations. Total passenger onshore spending in this group of destinations ranged from a low of \$26 million in Bonaire to a high of \$94 million in Aruba. The average among these 16 destinations was just over \$51 million.

Eleven, these 17 destinations are considered to be medium volume destinations with passenger onshore visits ranging from 425k to 797k. Six would be considered low volume destinations with volumes under 400,000 passenger visits. Among this group of 17 destinations the per passenger spending averaged \$97.93 per visit, ranging from \$190.61 in Panama to \$63.68 in Ensenada.

Table ES-3 – Passengers Onshore Visits and Expenditures by Destination, 2023/2024 Cruise Year

Destinations	Passenger Onshore Visits (Thousands)	Average Spend per Passenger*	Total Passenger Expenditures (\$US Millions)
Antigua & Barbuda	712.4	\$82.39	\$58.70
Aruba	715.2	\$131.05	\$93.73
Bahamas	3,914.0	\$120.93	\$473.32
Barbados ^②	611.4	\$81.97	\$50.12
Belize	738.0	\$87.42	\$64.51
Bonaire	351.8	\$73.97	\$26.02
British Virgin Islands	685.5	\$72.49	\$49.69
Colombia ^②	290.6	\$122.50	\$35.60
Cayman Islands	1,026.3	\$115.68	\$118.73
Costa Maya	1,853.9	\$78.17	\$144.91
Costa Rica	228.2	\$72.74	\$16.60
Cozumel	3,561.9	\$110.01	\$391.84
Curacao	641.6	\$78.01	\$50.05
Dominica	254.2	\$63.17	\$16.06
Dominican Republic ^②	2,036.1	\$79.78	\$162.45
Ensenada	662.7	\$63.68	\$42.20
Grenada	257.4	\$62.83	\$16.17
Guadeloupe ^②	323.2	\$105.13	\$33.98
Honduras	1,404.5	\$99.20	\$139.32
Jamaica ^②	1,196.0	\$117.09	\$140.04
Key West	424.7	\$91.15	\$38.71
Martinique ^②	396.9	\$76.23	\$30.25
Mazatlán	348.2	\$75.94	\$26.44
Panama ^②	283.8	\$190.61	\$54.09
Progreso	267.5	\$62.87	\$16.82
Puerto Rico ^②	1,516.3	\$94.57	\$143.40
St. Kitts & Nevis	562.1	\$145.08	\$81.55
St. Lucia	646.4	\$84.95	\$54.91
St. Maarten	1,099.8	\$163.45	\$179.77
St. Vincent	195.2	\$59.39	\$11.59
Trinidad	65.9	\$58.68	\$3.87
Turks and Caicos	796.7	\$102.22	\$81.43
U. S. Virgin Islands	1,331.6	\$166.22	\$221.34
All Destinations	29,400.0	\$104.36	\$3,068.19

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

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 per passenger spend. The average size of a cruise expenditure party across all destinations was 2.12 passengers and ranged from 1.96 to 2.20 passengers among the 33 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 29.40 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 \$54.65 during a single onshore visit. Since the average party size was 2.12 passengers, the average spend for food and beverages was \$25.78 per passenger ($\$54.65 \div 2.12$). 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 37.7 percent of the cruise parties actually purchased food and beverages. Thus, the weighted spend per passenger across all onshore passenger visits was \$9.72 ($\$25.78 \times .377$). Finally, total estimated passenger purchases of food and beverages across all 33 destinations for the entire 2023/2024 cruise year was estimated by multiplying the weighted average spend per passenger (\$9.72) by the total number of onshore visits (29.4 million). Thus, total passenger purchases of food and beverages for the 2023/24 cruise year across all 33 destinations were estimated to be \$285.83 million. Similar calculations were made for each category.

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

- Accounting for both transit and embarking passengers, the typical cruise passenger spent an average of \$104.36 at each destination call during their cruise vacation with total passenger expenditures in the 33 destinations reaching nearly \$3.07 billion during the 2023/2024 cruise year.
- Just over 80 percent of passenger expenditures were made in four categories: shore excursions (\$1.19 billion), watches and jewelry (\$718.4 million), food & beverages (\$285.8 million) and clothing (\$267.7 million). Combined, cruise passengers spent an estimated \$2.4 billion in these four categories.
- The most popular expenditure category was shore excursions with over half (55 percent) of all passengers making such a purchase at each destination. The economic value to local tour operators averaged \$40.44 per passenger.

Table ES-4 – Average Passenger Expenditures by Category – All 33 Participating Destinations^①

Purchase Categories	Average Spend per Passenger (\$US)	Share of All On-shore Visits	Weighted Average Spend per Passenger	Total Passenger Expenditures (\$US Millions)
Shore Excursions ^②	\$74.07	54.6%	\$40.44	\$1,189.03
Watches & Jewelry	\$239.61	10.2%	\$24.44	\$718.43
F&B at Restaurants & Bars	\$25.78	37.7%	\$9.72	\$285.83
Clothing	\$28.45	32.0%	\$9.10	\$267.65
Other Purchases	\$39.12	17.8%	\$6.96	\$204.71
Local Crafts & Souvenirs	\$18.95	31.4%	\$5.95	\$175.17
Taxis/Ground Transportation	\$24.11	14.9%	\$3.59	\$105.55
Retail Purchases of Liquor	\$31.75	6.5%	\$2.06	\$60.62
Lodging ^③	\$256.75	0.8%	\$2.05	\$60.34
Chocolates & Spices	\$15.00	0.2%	\$0.03	\$0.87
Total			\$104.36	\$3,068.19

① For the purposes of this table, we have combined the expenditure data for both transit and homeport passengers.

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.

③ Lodging expenditures only apply to those passengers who embarked on cruises in Puerto Rico, Barbados, the Dominican Republic, Guadeloupe, Martinique, Panama, Jamaica, 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 \$239.61 on such purchases. Since only 10.2 percent of passengers purchased watches and jewelry the average jewelry expenditure per passenger was \$24.44. Total expenditures on watches and jewelry were an estimated \$718.4 million.
- On average, just over a third (37.7%) of cruise passengers purchased food and beverages. The typical passenger spent an average of \$25.78 when they purchased food resulting in a weighted average expenditure of \$9.72 per passenger. Purchases of food and beverages totaled \$285.8 million across all destinations.
- On average, about 1 in 3 (32%) of the cruise passengers purchased clothing or purchased local crafts and souvenirs (31.4%) at each destination call. Visiting passengers spent a weighted average of \$9.10 on clothing and \$5.95 for local crafts and souvenirs at each port call. Combined, passengers spent an estimated total of \$442.8 million in these two categories, about 14 percent of total passenger expenditures.

Crew Visits and Expenditures

As shown in **Table ES-5**, the estimated 3.9 million crew members that visited the 33 participating destinations spent an estimated \$229.5 million for goods and services during the 2023/2024 cruise year. Average spend per crew ranged from a low of \$33.23 in Costa Rica to a high of \$117.97 in St. Maarten and averaged \$58.78 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, clothing, and 'other'. These were followed by spending for watches & jewelry, taxi & transportation, local crafts and souvenirs, and personal products.

The analysis of the crew surveys showed the following major attributes of crew onshore spending for the top five destinations:

- Crew visiting Cozumel spent an estimated \$33.0 million, the highest level of crew expenditures among the 33 participating destinations. Crew spent an average of \$67.90 per visit. Crew expenditures were concentrated in restaurants and bars, Taxis/transportation, and personal products, which accounted for nearly three-quarters (72%) of their spending in Cozumel. A total of 485.6k crew were estimated to have made an onshore visit in Cozumel during the 2023/2024 cruise year, the second most among the 33 participating destinations.
- With the highest number of onshore crew visits (491.0k), the Bahamas had the second highest total expenditure among the 33 participating destinations, \$21.2 million. Crew spent an average of \$43.26 during their onshore visit in the Bahamas. Crew expenditures in the Bahamas were concentrated on food and beverages, followed by clothing, and personal products. These three categories accounted for 76 percent of total crew spending in the Bahamas.
- Crew visiting Puerto Rico spent an average of \$79.14 while onshore. With an estimated 196.3k onshore visits, crew spent an estimated \$15.5 million during the 2023/2024 cruise year. Crew spending was concentrated in food and beverages, clothing, and personal products. Combined, these three categories accounted for 78 percent of total crew expenditures in Puerto Rico.
- St. Maarten had the highest average per crew spend rate of \$117.97 and the ninth highest number of estimated crew onshore visits, 149,9k. As a result, the crew visits to the island

generated the third highest level of crew onshore expenditures of \$17.7 million during the 2017/2018 cruise year. In St. Maarten crew expenditures were concentrated on food and beverages, "other purchases" and clothing. These three categories accounted for 69 percent of the total crew expenditures in St. Maarten.

- Costa Maya rounds out the top five in terms of total crew spending, with \$10.2 million. The 233.5k crew who visited spent an average of \$43.88. As a result, the crew visits to the island generated the fifth highest level of crew spending. Crew expenditures in Costa Maya were concentrated on food & beverages, local crafts and souvenirs, and purchases of food and beverages. These three categories accounted for 74% of the total crew expenditures in Costa Maya.

Among the remaining 27 destinations the total crew expenditures averaged \$4.7 million per destination. Seven destinations, USVI (\$10.2m), Cayman Islands (\$9.8m), St. Lucia (\$9.5m), Honduras (\$8.8m), Dominican Republic (\$8.6m), Aruba (\$8.5m) and Jamaica (8.1m) each had total crew expenditures of \$8 million or more.

Table ES-5 Crew Visits and Expenditures by Destination, 2023/2024 Cruise Year

Destinations	Crew Visits (Thousands)	Average Spend per Crew	Total Crew Expenditures (\$US Millions)
Antigua & Barbuda	103.9	\$48.94	\$5.08
Aruba	98.4	\$86.43	\$8.50
Bahamas	491.0	\$43.26	\$21.24
Barbados ^②	88.2	\$63.46	\$5.60
Belize	95.7	\$48.90	\$4.68
Bonaire	47.2	\$44.40	\$2.10
British Virgin Islands	100.6	\$45.06	\$4.53
Colombia ^②	44.5	\$71.22	\$3.17
Cayman Islands	129.2	\$76.10	\$9.83
Costa Maya	233.5	\$43.88	\$10.24
Costa Rica	50.2	\$33.23	\$1.67
Cozumel	485.6	\$67.90	\$32.97
Curacao	90.9	\$73.24	\$6.65
Dominica	39.1	\$57.49	\$2.25
Dominican Republic ^②	237.4	\$36.07	\$8.56
Ensenada	94.5	\$47.84	\$4.52
Grenada	36.1	\$49.46	\$1.79
Guadeloupe ^②	33.6	\$42.09	\$1.41
Honduras	172.4	\$51.18	\$8.82
Jamaica ^②	166.8	\$48.48	\$8.09
Key West	60.1	\$81.81	\$4.92
Martinique ^②	37.6	\$44.31	\$1.66
Mazatlán	43.2	\$54.14	\$2.34
Panama	37.8	\$81.23	\$3.07
Progreso	32.2	\$38.69	\$1.24
Puerto Rico Juan) ^②	196.3	\$79.14	\$15.53
St. Kitts & Nevis	78.5	\$69.64	\$5.47
St. Lucia	137.0	\$69.31	\$9.50
St. Maarten	149.9	\$117.97	\$17.68
St. Vincent	27.7	\$50.07	\$1.39
Trinidad	8.9	\$38.36	\$0.34
Turks and Caicos	87.7	\$51.23	\$4.49
U. S. Virgin Islands	169.6	\$60.13	\$10.20
All Destinations	3,905.0	\$58.78	\$229.54

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

Cruise Line Expenditures

In addition to net payments to local tour operators, cruise lines also provided data for 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. In addition, many destinations have employees dedicated to the cruise industry. These employees and their respective wages have also been incorporated into this category.

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 type (e.g., transit only vs transit and homeporting), and the availability of and need for ship supplies in each destination. In total, an estimated \$968.3 million was spend across the 33 participating destinations during the 2023/2024 cruise year for these fees and services.

The analysis of cruise line expenditures revealed the following impacts for the top 5 destinations:

- The Bahamas had the highest total of expenditures by cruise lines among the 33 participating destinations, \$160.2 million. The expenditures by cruise lines in the Bahamas were concentrated in port fees, taxes and services.
- The Dominican Republic had the second highest level of cruise line expenditures at \$80.4 million. As a major Caribbean homeport, the purchase of ship supplies is more important than in most other destinations accounting for 47 percent of the total expenditures.

Table ES-6 –Total Expenditures by Cruise Lines by Destination, 2023/2024 Cruise Year

Destinations	Estimated Expenditures (\$US Millions)
Antigua & Barbuda	\$25.17
Aruba	\$30.99
Bahamas ^①	\$160.22
Barbados ^②	\$27.77
Belize	\$19.38
Bonaire	\$5.33
British Virgin Islands	\$31.44
Colombia ^②	\$11.16
Cayman Islands	\$32.95
Costa Maya	\$32.75
Costa Rica	\$13.97
Cozumel	\$58.29
Curacao	\$36.56
Dominica	\$2.57
Dominican Republic ^②	\$80.40
Ensenada	\$28.13
Grenada	\$4.47
Guadeloupe ^②	\$10.73
Honduras	\$32.28
Jamaica ^②	\$49.72
Key West	\$11.75
Martinique ^②	\$10.33
Mazatlán	\$5.34
Panama ^②	\$56.86
Progreso	\$7.74
Puerto Rico ^②	\$42.99
St. Kitts & Nevis	\$26.10
St. Lucia	\$8.30
St. Maarten	\$40.35
St. Vincent	\$6.30
Trinidad	\$1.19
Turks and Caicos	\$30.20
U. S. Virgin Islands	\$26.55
All Destinations	\$968.28

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

- Cozumel was third with \$58.3 million in expenditures during the 2023/2024 cruise year.
- Panama had the fourth highest level of cruise line expenditures at \$56.9 million.
- Jamaica was fifth with \$49.7 million in cruise line expenditures during the 2023/2024 cruise year.

The next 14 destinations had more than \$25 million in total expenditures and ranged from \$25.2 million in Antigua to \$43 million in Puerto Rico. The remaining 14 destinations ranged from a low of \$1.2m in Trinidad to a high of \$19.4 in Belize.

Passenger Attributes and Satisfaction

A total of 41,375 transit passenger surveys were completed and returned for tabulation. While the characteristics of passenger visits varied by destination, **Table ES-7** shows the major attributes of the transit passenger visits across all destinations as derived from the passenger surveys.⁷

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

	Number	Percent
Total Respondents	41,375	
Number Making First Visit	28,549	69.0%
Number Ashore	34,507	83.4%
Number Making Onshore Purchases:	28,301	68.4%
Average Hours Ashore	4.54	
Average Size of Expenditure Party (Persons)	2.12	
Average Onshore Spend per Party^①	\$215.96	
Purchased a Shore Excursion (Tour)	24,163	58.4%
Purchased Onshore Tour from:		
Cruise Line	17,953	74.3%
Onshore from Tour Operator	1,740	7.2%
Travel Agent/Other	4,470	18.5%
Average Cost of Shore Excursion per Party^②	\$189.32	

①This figure includes the purchases of shore excursions.

②This figure includes the value of all shore excursions purchased and is not adjusted for fees retained by the cruise lines or 3rd party travel sites.

The major attributes of passenger visits are:

- Of the 40,783 cruise parties that completed the surveys almost 64 percent stated that this had been their first visit to the destination.
- Ninety-five percent (95 percent) of the cruise parties that completed the surveys disembarked their cruise ship to visit the destination.
- Of the cruise parties that went ashore, 67 percent made at least one purchase while ashore, excluding shore excursions. The typical cruise party consisted of 2.04 passengers and spent an average of 4.4 hours ashore.
- The responding cruise parties reported spending an average of \$130.42 while ashore (excludes shore excursions).
- Fifty-seven percent (57 percent) of the cruise parties that went ashore purchased a shore excursion. Seventy-seven percent (77%) of passengers who purchased a tour did so through their cruise line, 17 percent purchased their tour onshore and 6 percent purchased their tour through their travel agents or other means.
- The typical cruise party that purchased a shore excursion spent \$148.73 for their tour.

⁷ Homeport surveys were conducted on cruise ships embarking on their cruises from the respective homeport destinations. The attributes of these homeport passengers are discussed in the destination analyses.

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

The 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**. These attributes have been expanded for the 2017/18 study. 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.

The passenger survey asked the passengers to rate their satisfaction with their destination visit for a set of 15 attributes, 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. For comparison's sake, the 2018 satisfaction scores are to the right of the 2024 data.

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

Visit Attributes	2024	2018
Overall Visit	7.79	7.74
Visit Met Expectations	7.46	7.11
Likelihood of Return for Resort Vacation	5.11	4.59
Likelihood of Recommending Destination	5.72	5.41
Initial Shoreside Welcome	8.03	7.85
Guided Tour	8.33	8.47
Knowledge of Guide	8.77	8.85
Value of Tour	7.94	8.02
Historic Sites/Museums	7.70	7.71
Variety of Things to See and Do	7.36	7.08
Friendliness of Residents	8.29	8.12
Overall Shopping Experience	7.38	7.40
Courtesy of Employees	8.44	8.13
Overall Prices	7.16	7.16
Taxis/Local Transportation	7.83	8.08

* 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 7.79. While destination visits did not score as high in terms of meeting expectations, the mean score for "Visit Met Expectations" of 7.46 still implies that the visit exceeded expectations. Both ratings were up slightly from the 2018 study.
- "Guided Tours" (or Shore Excursions) received the highest score of all major visit attributes with a mean score of 8.33. "Knowledge of Guide" (8.77) and "Value of Tour" (7.94) all received 'very satisfied' ratings. 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 8.29 and 8.44. Both up slightly from the 2018 study.
- "Taxis and Local Transportation" received a rating of 7.83, indicating passengers are very satisfied with the local transportation.
- The "Overall Shopping Experience" (7.38), and "Overall Prices" (7.16) each scored in the 'very satisfied' range.

- Other categories with scores above 7.0 (very satisfied range) were: Initial Shoreside Welcome (8.03), Historic Sites/Museums (7.70) and Variety to See and Do (7.36).
- "Likelihood of Returning for a Resort Vacation" (5.11) and Likelihood of Recommending" (5.72) received the lowest scores. This was true across virtually all destinations.

Comparison to the 2018 Study

While the current study has a similar number of destinations as the 2017/2018 study, 36 versus 33 destinations, the mix of destinations has changed somewhat. There were five destinations from the 2018 study that were not included in the 2024 study and two new destinations were included in the 2024 study that were not in 2018. In all, there are 31 common destinations which participated in both studies. As shown in **Table ES-9**, despite the reduced destinations, the total value of cruise tourism expenditures and their subsequent economic impacts have positive results when compared to the previous study. As shown in the table, we have estimated that direct cruise tourism expenditures totaled \$4.27 billion during the 2023/2024 cruise year among the 33 participating destinations. This is about 17 percent higher than the \$3.36 billion in direct cruise tourism expenditures estimated for the 36 participating destinations during the 2017/2018 cruise year. Similarly, the number of passenger onshore visits and the number of jobs created are also significantly higher for the current study.

Normalizing the expenditures on a per passenger basis shows that total expenditures per passenger spending across the 33 destinations included in the current study are about 9 percent higher than the 36 destinations in the 2017/2018 study. The \$3.36 billion in total expenditures among the 36 destinations of the previous study equates to \$133.25 per onshore passenger visit; whereas, in the current study, the \$4.27 billion in total expenditures among the 33 destinations equated to \$145.10 per onshore passenger visit.

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

	2023/2024 Cruise Year	2017/2018 Cruise Year	Percent Difference
Number of Participating Destinations	33	36	--
Total Direct Cruise Tourism Spending (US \$ Billions)	\$4.27	\$3.36	27%
Total Passenger Onshore Visits (Millions)	29.40	25.19	17%
Total Expenditures per Passenger (US \$)⁹	\$145.10	\$133.25	8.9%
Total Employment Impact	94,027	78,954	19%
Total Income Impacts (US \$ Millions)	\$1,275.0	\$902.68	41%
Average per Passenger Spend¹⁰	\$104.36	\$101.52	2.8%
Average Per Crew Spend	\$58.78	\$60.44	-2.7%

⁹ Includes the total cruise industry expenditures divided by the total transit and home port passenger visits.

¹⁰ Includes the total passenger spend divided by the total transit and home port passenger visits.

Comparing the 31 destinations that are common to the two studies¹¹, the total direct cruise tourism expenditures increased by about 27 percent from \$3.29 billion in 2017/2018 to \$4.19 billion in 2023/2024 (see **Table ES-10**). This was the combined result of a 17 percent increase in cruise passenger onshore visits coupled with a 3 percent increase in the average spend per passenger¹⁰. The normalized total expenditure per passenger in the 31 common destinations increased from \$133.71 in the 2017/2018 cruise year to \$145.88 in the 2023/2024 cruise year.

The average per passenger spend increased by 3 percent across the 31 common destinations from \$101.75 in the last study to \$104.92 in this study.

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

	2023/2024 Cruise Year	2017/2018 Cruise Year	Percent Difference
Number of Participating Destinations	31	31	--
Total Direct Cruise Tourism Spending (US \$ Billions)	\$4.19	\$3.29	27%
Total Passenger Onshore Visits (Millions)	28.72	24.65	17%
Total Expenditures per Passenger (US \$)¹²	\$145.88	\$133.71	9.1%
Total Employment Impact	92,549	77,163	20%
Total Income Impacts (US \$ Millions)	\$1,237.7	\$892.1	39%
Average per Passenger Spend¹³	\$104.92	\$101.75	3.1%
Average Per Crew Spend	\$58.43	\$60.83	-3.9%

Additionally, the average per passenger spend among the common destinations increased in 28 locations, decreased in 4 locations and remained effectively unchanged in one locations.

The overall average crew spend declined by 2.7 percent from the 2017/2018 study from \$60.44 in the last study to \$58.78 in this current study. In addition, fewer crew disembarked and visited a given destination in this year's study (30% vs 39%).

In conclusion, the change in the economic impacts during the 2023/2024 cruise year relative to the 2017/2018 cruise year is primarily the result of the increase in the overall passenger volume of participating destinations, increased passenger crew appending and an increase in spending by the cruise lines. These gains were slightly offset by decreases in crew visits and spending.

¹¹ These 31 destinations are: Antigua, Aruba, Bahamas, Barbados, Belize, Bonaire, BVI, Cayman Islands, Colombia, Costa Maya, Costa Rica, Cozumel, Curacao, Dominican Republic, Ensenada, Grenada, Guadeloupe, Honduras, Jamaica, Martinique, Mazatlán, Panama, Progreso, Puerto Rico, St. Kitts, St. Lucia, St. Maarten, St Vincent, Trinidad, Turks and Caicos, and the USVI.

¹² Includes the total cruise industry expenditures divided by the total transit and home port passenger visits

¹³ Includes the total passenger spend divided by the total transit and home port passenger visits

INTRODUCTION

This study analyzes the contribution of cruise tourism on the economies of 33 destinations located in the Caribbean, Mexico and Central and South America. The study was funded, in part, by the Florida-Caribbean Cruise Association (FCCA) and in part by each of the participating destinations. Utilizing onshore expenditure data collected from passenger and crew surveys, port service and navigation fees collected from the destinations and FCCA member cruise lines, 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. In addition, many destinations have employees dedicated, at least partially to the cruise industry. These employees and their respective wages were also factored into this analysis. The economic contribution of these expenditures for each destination was then estimated for the 12-month period beginning in May, 2023 and ending in April, 2024 utilizing economic data collected from local, regional and international sources.

The Caribbean, Mexico and Central and South American Cruise Market

The Caribbean is the most popular cruise destinations in the world. According to data provided by Cruise Lines International Association (CLIA), the cruise industry had 31.5 million global cruise passengers, of which, 11.98 million (38%) cruised throughout the Caribbean.

Data provided by the 33 participating destinations shows that 34.3 million passengers, 852.5 thousand homeport passengers, and 12.8 million crew arrived at these cruise destinations during the 2023/2024 cruise year. Of these, about 30 percent of the crew, 3.9 million, and 83% of the transit passengers, 28.5 million, disembarked and visited the destinations. Thus, there were a total of 34.2 million passenger and crew visits across the 33 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.

Passenger and Crew Arrivals at Participating Destinations

Based upon data collected from the participating destinations, and other sources, an estimated 35.1 million passengers were onboard cruise ships (passenger arrivals) that called at the 33 participating destinations during the 2023/2024 cruise year (see **Table 1**). Factoring in the 12.8 million crew arrivals, the cruise industry brought 47.9 million passengers and crew to the 33 participating destinations during the 2023/2024 cruise year.

Eighteen of the participating destinations, Antigua & Barbuda, Aruba, the Bahamas, Belize, BVI, Colombia, Costa Maya, Cozumel, Curacao, Dominican Republic, Ensenada, Honduras, Jamaica, Puerto Rico, St. Lucia, St. Maarten, Turks & Caicos and the USVI each had combined passenger and crew arrivals in excess of 1 million. Combined, these 18 destinations accounted for 84 percent of all passenger and crew arrivals among the 33 destinations. An estimated 21.7 million passengers and crew arrived at the 11 destinations comprising the Eastern Caribbean,¹⁴ 45 percent of the total arrivals among the 33 participating destinations. Another 6.9 million passengers and crew arrived at the 10 Southern Caribbean¹⁵ destinations, 14 percent of the total arrivals. The 7 destinations of the Western Caribbean¹⁶ accounted for 18 percent of total arrivals with 8.5 million passenger and crew arrivals, while 10.5 million passengers and crew arrived at the five cruise destinations in Mexico,¹⁷ 23 percent of all arrivals among the 33 participating destinations.

¹⁴ For the purposes of this study:

1. the Eastern Caribbean includes the following 10 destinations: Antigua, Bahamas, BVI, Dominican Republic, Guadeloupe, Key West, Puerto Rico, St. Kitts, St. Maarten, Turks & Caicos and the USVI.
2. the Southern Caribbean includes the following 10 destinations: Aruba, Barbados, Bonaire, Curacao, Dominica, Grenada, Martinique, St. Lucia, St. Vincent, and Trinidad.
3. the Western Caribbean includes the following 7 destinations: Belize, the Cayman Islands, Colombia, Costa Rica, Honduras, Jamaica, and Panama.
4. the Mexico destinations include the following 5 destinations: Costa Maya, Cozumel, Ensenada, Mazatlán, and Progreso.

Table 1– Estimated Passenger and Crew Arrivals (Thousands) at the Participating Destinations, 2023/2024 Cruise Year

Destinations	Passengers	Crew	Total
Antigua & Barbuda	854.2	341.7	1,195.92
Aruba	857.6	323.6	1,181.14
Bahamas	4,808.3	1,615.1	6,423.43
Barbados ^②	693.2	290.1	983.37
Belize	864.1	314.9	1,179.07
Bonaire	426.9	155.2	582.13
British Virgin Islands	822.0	330.8	1,152.78
Colombia ^②	348.9	425.0	495.13
Cayman Islands	1,216.0	146.2	1,641.03
Costa Maya	2,196.5	767.9	2,964.45
Costa Rica	280.4	165.3	445.67
Cozumel	4,170.9	1,597.5	5,768.35
Curacao	769.3	298.9	1,068.24
Dominica	308.9	128.6	437.47
Dominican Republic ^②	2,517.5	781.0	3,298.51
Ensenada	902.9	311.0	1,213.86
Grenada	298.2	118.8	417.09
Guadeloupe ^②	355.0	110.4	465.42
Honduras	1,684.0	566.9	2,250.96
Jamaica ^②	1,426.5	548.6	1,975.13
Key West	480.4	197.7	678.11
Martinique ^②	445.8	123.6	569.37
Mazatlán	417.5	141.9	559.38
Panama ^②	336.7	124.2	460.9
Progreso	317.3	105.8	423.08
Puerto Rico ^②	1,717.9	645.7	2,363.58
St. Kitts & Nevis	673.9	258.3	932.20
St. Lucia	757.8	450.7	1,208.53
St. Maarten	1,303.1	493.1	1,796.19
St. Vincent	228.8	91.2	319.98
Trinidad	78.1	29.2	107.38
Turks and Caicos	945.0	288.5	1,233.56
U. S. Virgin Islands	1,577.7	557.7	2,135.45
All Destinations	35,081.6	12,845.3	47,927.4

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

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.

A slightly different survey was given to passengers who were embarking on their cruise from eight destinations in the Caribbean: Barbados, Cartagena (Colombia), the Dominican Republic, Guadeloupe, Jamaica, Martinique, Panama 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 2023 and concluded at the end of May 2024.

On any given cruise itinerary, passengers and crew were surveyed following a single call. Note with a QR code was placed in passenger cabins and crew living quarters during the day of a designated survey. Passengers and crew members were asked to complete the survey. For these online surveys, passengers did not need to be connected to the internet. Any passenger who was connected to the ship's wi-fi could take and complete the survey.

Table 2 – Completed Passenger and Crew Surveys by Destination

Destinations	Passengers	Crew	Total
Antigua	1,048	233	1,281
Aruba	2,447	474	2,921
Bahamas	1,724	498	2,222
Barbados	687	235	922
Belize	1,954	217	2,171
Bonaire	927	410	1,337
BVI	647	290	937
Cayman	1,370	157	1,527
Colombia	1,085	292	1,377
Costa Maya	1,818	367	2,185
Costa Rica	1,409	218	1,627
Cozumel	3,291	506	3,797
Curacao	2,259	361	2,620
Dom Rep	2,313	360	2,673
Dominica	438	155	593
Ensenada	583	506	1,089
Grenada	615	342	957
Guadeloupe	1,410	358	1,768
Honduras	1,506	459	1,965
Jamaica	1,672	245	1,917
Key West	765	228	993
Martinique	656	111	767
Mazatlán	997	115	1,112
Panama	506	287	793
Progreso	504	289	793
Puerto Rico	1,865	535	2,400
St. Kitts	1,101	263	1,364
St. Lucia	490	172	662
St. Vincent	305	275	580
SXM	1,609	154	1,763
Trinidad	785	241	1,026
Turks & Caicos	2,083	273	2,356
USVI	2,325	500	2,825
All Destinations	43,194	10,126	53,320

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;

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 provided insight to 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 percentage of payments to local tour operators and the number of passengers who purchased tours directly from the cruise lines, or internet tour operators and websites were aggregated and an average net payment per onboard purchase was calculated for each channel. 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 Central Bureau of Statistics Aruba
- 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 (CBS)
- British Virgin Islands: Central Statistics Office
- Cayman Islands: Cayman Islands Compendium of Statistics 2022
- Colombia: National Administrative Department of Statistics (DANE)
- Costa Rica: National Institute of Statistics and Census (INEC)
- Curacao: Central Bureau of Statistics
- Dominica: Central Statistics Office of Dominica
- Dominican Republic: The National Statistics Office (ONE)
- Honduras: Instituto Nacional de Estadistics Honduras (INE)
- Grenada: Ministry of Finance
- Guadeloupe Institut national de la statistique et des etudes economiques (INESEE)
- Jamaica: Jamaica Information Service (JIS)
- Martinique: Institut national de la statistique et des etudes economiques (INESEE)
- Mexico: National Institute of Statistics and Geography (INEGI)
- Panama: Instituto Nacional de Estadistica y Censo
- Puerto Rico: Puerto Rico Department of Planning and the U.S. Census Bureau
- St. Kitts: Department of Statistics
- St. Lucia: The Central Statistical Office of St. Lucia
- St. Maarten: The Department of Statistics (STAT)
- St. Vincent & the Grenadines: Statistical Office
- Trinidad: Central Statistical Office (CSO)
- Turks & Caicos: Statistics Authority
- 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 BREA's recent analysis of the economic impact of the cruise industry in the United States, the indirect employment impacts were 46 percent higher than the direct impacts, resulting in an implicit employment multiplier of nearly 2.5. With the exception of one location (Aruba), each of the destinations analyzed for this study had indirect impacts that were 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.

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 2023/2024 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, the average per passenger and per crew spend figures for the 10 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
Retail Purchases of Liquor
Chocolates & Spices
Lodging*

* Only applicable for homeport passengers.

It should be noted that the expenditure component of the survey generated the actual per passenger spend 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 those tours purchased onboard cruise ships was estimated based on data obtained from the cruise lines.

As shown in **Table 4**, the cruise industry generated an estimated 33.3 million passenger and crew onshore visits during the 2023/2024 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 45 percent of all visits to the 33 destinations and totaled 15.1 million visits. Visits to the Southern Caribbean destinations totaled 4.7 million and accounted for 14 percent of total destination visits. The Western Caribbean destinations accounted for 18 percent with 5.9 million visits. Finally, Mexican destinations received a total of 7.6 million passenger and crew onshore visits, 23 percent of all visits at the 33 participating destinations.

Based upon data collected from the cruise lines, it was estimated that an average of 83 percent of cruise passengers disembarked at transit port calls across all destinations, down from 85 percent in the 2018 study. It is also estimated that only 30 percent of crew members disembarked in this study, down from 39 percent in the 2018 report.

Table 4 – Estimated Passenger and Crew Onshore Visits (Thousands) at the Participating Destinations, 2023/2024 Cruise Year

Destinations	Passengers	Crew	Total
Antigua & Barbuda	712.4	103.9	816.3
Aruba	715.2	98.4	813.6
Bahamas	3,914.0	491.0	4,405.0
Barbados ^②	611.4	88.2	699.6
Belize	738.0	95.7	833.7
Bonaire	351.8	47.2	399.0
British Virgin Islands	685.5	100.6	786.1
Colombia ^②	1,026.3	44.5	1,155.5
Cayman Islands	290.6	129.2	335.1
Costa Maya	1,853.9	233.5	2,087.4
Costa Rica	228.2	50.2	278.4
Cozumel	3,561.9	485.6	4,047.5
Curacao	641.6	90.9	732.5
Dominica	254.2	39.1	293.3
Dominican Republic ^②	2,036.1	237.4	2,273.5
Ensenada	662.7	94.5	757.2
Grenada	257.4	36.1	293.5
Guadeloupe ^②	323.2	33.6	356.8
Honduras	1,404.5	172.4	1,576.9
Jamaica ^②	1,195.9	166.8	1,362.7
Key West	424.7	60.1	484.7
Martinique ^②	396.9	37.6	434.5
Mazatlán	348.2	43.2	391.4
Panama ^②	283.8	37.8	321.6
Progreso	267.5	32.2	299.7
Puerto Rico ^②	1,516.3	196.3	1,712.6
St. Kitts & Nevis	562.1	78.5	640.6
St. Lucia	646.4	137.0	783.4
St. Maarten	1,099.8	149.9	1,249.7
St. Vincent	195.2	27.7	222.9
Trinidad	65.9	8.9	74.8
Turks and Caicos	796.7	87.7	884.4
U. S. Virgin Islands	1,331.6	169.6	1,501.2
All Destinations	29,400.0	3,905.0	33,305.1

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

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 directly from the cruise lines. The cruise line then retained a portion of the price charged as a management fee or sales commission. Similarly, tours purchased from online sites such as Travelocity also retain a fee. 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 58 percent of all transit cruise passengers purchased shore excursions at each destination visit. The vast majority, 74 percent purchased their shore excursions from the cruise lines, 7 percent purchased their tour on shore, directly from local tour operators, and 19 percent purchased their tour through a travel agent or some other means. The remaining 42 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, 80 percent of passengers visiting Costa Rica purchased a shore excursion while only 34 percent of passengers visiting Key West did so. In terms of sales channel, 89 percent of passengers visiting Panama purchased their tour through the cruise line while only about 64 percent of passengers visiting Key West reported doing so.

Fewer than half of visiting passengers reported purchasing shore excursions 7 of the 33 destinations. This is down from 11 of the 36 destinations in the 2018 study. Destinations in this current study with fewer than 50 percent of transit passengers purchasing shore excursions include: Costa Maya (49%); Martinique (48%), Bahamas (47%) Ensenada (46%), Turks & Caicos (38%), Puerto Rico (34%), and Key West (34%).

Table 5 – Percentage of Transit Passengers Purchasing Shore Excursions by Destination^①

Destinations	Purchased a Tour	Purchased a Tour from			Did Not Purchase a Tour
		Cruise Line	Onshore	Travel Agent/Other	
Antigua	56%	76%	5%	18%	44%
Aruba	60%	72%	8%	20%	40%
Bahamas	47%	75%	4%	21%	53%
Barbados	57%	73%	8%	19%	43%
Belize	67%	74%	7%	19%	33%
Bonaire	66%	69%	12%	19%	34%
BVI	56%	70%	5%	24%	44%
Cayman	59%	77%	5%	19%	41%
Colombia	78%	85%	3%	12%	22%
Costa Maya	49%	71%	9%	20%	51%
Costa Rica	80%	85%	4%	10%	20%
Cozumel	57%	69%	12%	20%	43%
Curacao	58%	75%	9%	16%	42%
Dom Rep	56%	77%	7%	16%	44%
Dominica	58%	78%	8%	15%	42%
Ensenada	46%	70%	3%	27%	54%
Grenada	55%	69%	4%	28%	45%
Guadeloupe	63%	82%	11%	6%	37%
Honduras	74%	69%	13%	17%	26%
Jamaica	62%	81%	9%	10%	38%
Key West	34%	64%	4%	32%	66%
Martinique	48%	77%	4%	19%	52%
Mazatlán	52%	66%	10%	25%	48%
Panama	69%	89%	2%	9%	31%
Progreso	60%	67%	5%	28%	40%
Puerto Rico	34%	67%	5%	28%	66%
St. Kitts	67%	72%	8%	20%	33%
St. Lucia	71%	74%	10%	16%	29%
St. Vincent	57%	66%	4%	30%	43%
SXM	53%	71%	9%	19%	47%
Trinidad	67%	76%	10%	15%	33%
Turks & Caicos	38%	74%	5%	21%	62%
USVI	54%	76%	5%	19%	46%
All Destinations	58%	74%	7%	19%	42%

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 5 destinations: Panama (89%), Costa Rica (85%), Colombia (85%), Guadeloupe (82%) and Jamaica (81%).

Finally, there were only 7 destinations in which shore operators accounted for 10 percent or more of tour purchases. Purchased from onshore tour operators would lead to 100% of the revenue benefiting the local economy. These destinations were: Honduras (13%), Bonaire (12%), Cozumel (12%), Guadeloupe (11%), St. Lucia (10%), Mazatlán (10%) and Trinidad (10%).

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

Table 6 shows the weighted average per passenger price of a shore excursion. To estimate the effective local price of a shore excursion, the average price paid by passengers for shore excursions purchased from cruise lines and travel agents was discounted by approximately 25 percent and 20 percent, respectively. As noted above, purchases made directly from onshore operators were not discounted at all.

Thus, on average local tour operators received an average of \$85.86 per cruise party for tours purchased by transit passengers. The effective local price for a shore excursion ranged from a low of \$42.29 in Puerto Chiapas to a high of \$128.81 in Panama.

Table 6 – Average Transit Per Party Purchase Price of a Shore Excursion by Destination

Destinations	Purchased a Tour	Percentage Purchased from			Weighted Avg Price of Tour
		Cruise Line	On-shore TO	Other	
Antigua	56%	76%	5%	18%	\$81.88
Aruba	60%	72%	8%	20%	\$77.78
Bahamas	47%	75%	4%	21%	\$84.73
Barbados	57%	73%	8%	19%	\$71.88
Belize	67%	74%	7%	19%	\$115.00
Bonaire	66%	69%	12%	19%	\$89.17
BVI	56%	70%	5%	24%	\$70.09
Cayman	59%	77%	5%	19%	\$102.06
Colombia	78%	85%	3%	12%	\$103.30
Costa Maya	49%	71%	9%	20%	\$99.15
Costa Rica	80%	85%	4%	10%	\$101.76
Cozumel	57%	69%	12%	20%	\$100.75
Curacao	58%	75%	9%	16%	\$67.45
Dom Rep	56%	77%	7%	16%	\$81.21
Dominica	58%	78%	8%	15%	\$82.03
Ensenada	46%	70%	3%	27%	\$50.68
Grenada	55%	69%	4%	28%	\$58.67
Guadeloupe	63%	82%	11%	6%	\$97.51
Honduras	74%	69%	13%	17%	\$119.11
Jamaica	62%	81%	9%	10%	\$101.67
Key West	34%	64%	4%	32%	\$47.21
Martinique	48%	77%	4%	19%	\$64.19
Mazatlán	52%	66%	10%	25%	\$58.95
Panama	69%	89%	2%	9%	\$128.81
Progreso	60%	67%	5%	28%	\$69.31
Puerto Rico	34%	67%	5%	28%	\$42.29
St. Kitts	67%	72%	8%	20%	\$100.90
St. Lucia	71%	74%	10%	16%	\$115.08
St. Vincent	57%	66%	4%	30%	\$83.75
SXM	53%	71%	9%	19%	\$69.55
Trinidad	67%	76%	10%	15%	\$82.35
Turks & Caicos	38%	74%	5%	21%	\$57.01
USVI	54%	76%	5%	19%	\$80.64
All Destinations	58%	74%	7%	19%	\$85.86

Total Passenger Expenditures

As shown in **Table 7**, the 29.4 million cruise transit and home port passengers that visited the 33 participating destinations spent a total of \$3.04 billion for shore excursions, food & beverages and other goods and services during the 2023/2024 cruise year. The average blended (transit & homeport) per passenger spend ranged from a low of \$58.68 in Trinidad to a high of \$190.61 in the Panama and averaged \$104.36 per passenger visit across the 33 destinations.

The Bahamas, with \$473.3 million in total passenger spending led all destinations and accounted for 15 percent of total passenger spending among the 33 destinations. Nine additional destinations had total passenger spending more than \$100 million. Passengers spent \$392 million in Cozumel, \$221 million in USVI, \$180 million in St. Maarten, \$162 million in the Dominican Republic, \$145 million in Costa Maya, \$143 million in Puerto Rico, \$140 million in Jamaica, \$139 million in Honduras, and \$119 million in the Cayman Islands. Combined, these top 10 destinations accounted for 69 percent of the total onshore passenger spending among the 33 destinations and totaled \$2.12 billion.

Each of these Top 10 destinations can be considered high volume destinations with more than one million passenger visits per cruise year. Visits ranged from 1.0 million in the Cayman Islands to 3.9 million in the Bahamas. The average combined (transit and homeport) spending per passenger in these 10 locations ranged from \$78.17 per passenger in Costa Maya to \$166.22 in USVI. Four of these Top 10 destinations (Dom. Rep., Costa Maya, Puerto Rico, and Honduras) had an average per passenger spend below the all destination average of \$104.36. Combined the Top 10 destinations had an average per passenger spend of \$114.51, about 10 percent above the Caribbean average.

Another 9 destinations had total passenger spending between \$50 and \$100 million. These were: Aruba, St. Kitts, Turks & Caicos, Belize, Antigua, St. Lucia, Panama, Barbados, and Curacao. Total onshore passenger spending among these 9 destinations was \$589 million and accounted for 19% across the 33 participating destinations. Total passenger onshore spending in this group of destinations ranged from a low of \$50.1 million in Curacao to a high of \$93.7 million in Aruba.

The total passenger onshore spending in the remaining 14 destinations totaled \$364.0 million and accounted for 12% of total passenger expenditures among the 33 participating destinations. Passenger spending in this group averaged \$26.0 million per destination.

Table 7 – Passenger Onshore Visits and Expenditures by Destination, 2023/2024 Cruise Year

Destinations	Passenger On-shore Visits (Thousands)	Average Spend per Passenger	Total Passenger Expenditures (\$US Millions)
Antigua & Barbuda	712.43	\$82.39	\$58.70
Aruba	715.22	\$131.05	\$93.73
Bahamas	3,913.97	\$120.93	\$473.32
Barbados ^②	611.43	\$81.97	\$50.12
Belize	737.96	\$87.42	\$64.51
Bonaire	351.77	\$73.97	\$26.02
British Virgin Islands	685.54	\$72.49	\$49.69
Colombia ^②	290.60	\$122.50	\$35.60
Cayman Islands	1,026.33	\$115.68	\$118.73
Costa Maya	1,853.86	\$78.17	\$144.91
Costa Rica	228.24	\$72.74	\$16.60
Cozumel	3,561.93	\$110.01	\$391.84
Curacao	641.63	\$78.01	\$50.05
Dominica	254.21	\$63.17	\$16.06
Dominican Republic ^②	2,036.14	\$79.78	\$162.45
Ensenada	662.73	\$63.68	\$42.20
Grenada	257.39	\$62.83	\$16.17
Guadeloupe ^②	323.20	\$105.13	\$33.98
Honduras	1,404.47	\$99.20	\$139.32
Jamaica ^②	1,195.95	\$117.09	\$140.04
Key West	424.68	\$91.15	\$38.71
Martinique ^②	396.91	\$76.23	\$30.25
Mazatlán	348.16	\$75.94	\$26.44
Panama ^②	283.8	\$190.61	\$54.09
Progreso	267.49	\$62.87	\$16.82
Puerto Rico ^②	1,516.34	\$94.57	\$143.40
St. Kitts & Nevis	562.07	\$145.08	\$81.55
St. Lucia	646.40	\$84.95	\$54.91
St. Maarten	1,099.80	\$163.45	\$179.77
St. Vincent	195.18	\$59.39	\$11.59
Trinidad	65.88	\$58.68	\$3.87
Turks and Caicos	796.67	\$102.22	\$81.43
U. S. Virgin Islands	1,331.61	\$166.22	\$221.34
All Destinations	29,400.0	\$104.36	\$3,068.19

② Includes passengers aboard both transit and homeport cruise ships.

Transit Passenger Expenditures by Category

Of the 29.4 million passenger visits 97%, or 28.5 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 \$24.99 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 37.6 percent of the cruise passengers actually purchased food and beverages. The weighted spend per passenger across all onshore passengers was \$9.39 ($\$24.99 \times 37.6\%$). Finally, the total transit passenger expenditures for food and beverages across all 33 destinations for the entire 2023/2024 cruise year was estimated by multiplying the weighted average spend per passenger (\$9.39) by the total number of transit onshore visits (28.5 million). Thus, total transit passenger purchases of food and beverages for the 2023/2024 cruise year across all 336 destinations were estimated to be \$267.2 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 Avg Spend per Passenger	Total Passenger Expenditures (\$US Millions)
Shore Excursions ^①	\$69.41	58.4%	\$40.50	\$1,156.03
Watches & Jewelry	\$240.76	10.4%	\$24.98	\$713.26
F&B at Restaurants & Bars	\$24.99	37.6%	\$9.39	\$267.24
Clothing	\$28.02	32.3%	\$9.06	\$258.92
Other Purchases	\$37.33	17.7%	\$6.62	\$189.34
Local Crafts & Souvenirs	\$18.93	31.8%	\$6.02	\$171.50
Taxis/Ground Transportation	\$22.68	14.3%	\$3.25	\$93.02
Retail Purchases of Liquor	\$32.48	6.3%	\$2.03	\$57.96
Chocolates & Spices	\$17.47	0.2%	\$0.03	\$0.87
Total			\$101.87	\$2,908.1

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 \$101.87 at each destination call during their cruise vacation with total transit passenger expenditures in the 33 destinations reaching \$2.9 billion during the 2023/2024 cruise year, 95 percent of total passenger expenditures.
- Eighty-two percent (82%) of transit passenger expenditures were made in four categories: shore excursions (\$1.16 billion), watches and jewelry (\$713 million), food & beverages (\$267 million) and clothing (\$259 million), and local crafts & souvenirs (\$196 million). Combined, transit passengers spent an estimated \$2.40 billion in these four categories.
- The most popular expenditure was for shore excursions with over half (58 percent) of all transit passengers making such a purchase. Local tour operators received an average of \$40.50 per passenger for those passengers who purchased a shore excursion.
- Transit passengers that purchased watches and jewelry spent an average of \$240.76 on such purchases. Since only 10.4 percent of passengers purchased watches and jewelry the weighted average per passenger spend for such purchases was \$24.98. Total spending on watches and jewelry were estimated to total \$713 million.
- About a third of all the transit cruise passengers purchased local crafts and souvenirs (32%), and clothing (32%) in each destination. On average, visiting passengers spent \$18.93 on local crafts and souvenirs and \$28.02 on clothing at each port call. The weighted averages for these two categories were \$6.02 and \$9.06, respectively. Combined, passengers spent a total of \$430 million in these two categories.

Homeport Passenger Expenditures by Category

Of the total of 29.4 million passenger onshore visits in the 33 participating destinations during the 2023/2024 cruise year, 852.5k visits were made by homeport passengers embarking on their cruises from: San Juan, Barbados, Cartagena, the Dominican Republic, Guadeloupe, Jamaica, Panama, and Martinique. The total passenger spending was calculated for each category utilizing data from the passenger surveys. Total expenditures per category is equal to the weighted average spend per passenger multiplied by total homeport passenger visits.

For example, those homeport cruise parties that reported purchasing food and beverages in a restaurant or bar spent an average of \$48.49 per passenger. The survey data indicated that at any individual embarkation 45.5 percent of the cruise passengers actually purchased food and beverages. Using the same calculations as shown in the transit section, the weighted spend per passenger across all homeport passengers was \$22.04 ($\$48.49 \times .455$). Finally, total passenger spending for food and beverages across the 8 homeports for the entire 2023/2024 cruise year was estimated by multiplying the weighted average spend per passenger (\$22.04) by the total number of embarking passengers (852.5k). Thus, total homeport passenger spending for food and beverages for the 2023/2024 cruise year across the 8 destinations were estimated to be \$18.8 million. Similar calculations were made for each category.

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

Purchase Categories	Average Spend per Passenger (\$US)	Share of All Onshore Visits	Weighted Average Spend per Passenger	Total Passenger Expenditures (\$US Millions)
F&B at Restaurants & Bars	\$48.49	45.5%	\$22.04	\$18.79
Taxis/Ground Transportation	\$27.82	35.7%	\$9.94	\$8.48
Shore Excursions ^①	\$98.83	39.1%	\$38.62	\$32.92
Local Crafts & Souvenirs	\$21.71	18.2%	\$3.95	\$3.37
Lodging	\$268.75	33.4%	\$89.79	\$76.55
Clothing	\$38.64	21.7%	\$8.39	\$7.15
Retail Purchases of Liquor	\$18.34	14.3%	\$2.62	\$2.24
Other Purchases	\$46.32	20.4%	\$9.43	\$8.04
Watches & Jewelry	\$96.15	3.1%	\$3.00	\$2.56
Total			\$187.78	\$160.09

^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 \$187.78 at their homeport call during their cruise vacation with total passenger expenditures across the 8 destinations reaching \$160.1 million during the 2023/2024 cruise year. While homeport passengers made up only 3 percent of all passenger visits to the 33 destinations, they accounted for 5 percent of total passenger spending.
- Eighty-two percent (82%) of homeport passenger expenditures were made in four categories: lodging (\$76.6 million), shore excursions (\$32.9 million), food and beverages (\$18.8 million), and taxis/ground transportation (\$8.5 million). Combined, cruise passengers spent an estimated \$136.7 million in these four categories.
- More than 46 percent of all homeport passengers reported purchasing food & beverages, while 36 percent used a taxi or other paid transportation. A third (33%) of the passengers purchased accommodations and spent an average of \$268.75 for their pre-and/or post- cruise overnight stay. Those passengers who purchased shore excursions spent an average of \$98.83. The weighted average spending for accommodations and shore excursions was \$89.79 and \$38.62, respectively. Combined, total payments to hotels and tour operators in the 8 destinations were estimated at nearly \$110 million, 68 percent of total expenditures by homeport passengers.

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 of clothing. As shown in **Table 10**, the 3.9 million crew members that visited the 33 participating destinations spent nearly \$230 million for goods and services during the 2023/2024 cruise year.

Crew purchasing focused on food and beverages, clothing, watches & jewelry, and “other”. Crew spent an estimated total of \$177.8 million in these four categories, 77 percent of total crew expenditures. Crew spent another \$15.8 million on taxis/local transportation, and \$12.1 million on local crafts & souvenirs. Only 4.1 percent of crew purchased shore excursions in the 33 destinations; by comparison, 58 percent of transit passengers purchased shore excursions.

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

Purchase Categories	Average Spend per Crew (\$US)	Share of All Onshore Visits	Weighted Avg Spend per Crew	Total Crew Expenditures (\$US Millions)
F&B at Restaurants & Bars	\$31.16	68.0%	\$21.19	\$82.77
Other	\$61.86	20.2%	\$12.50	\$48.82
Clothing	\$51.93	14.8%	\$7.71	\$30.09
Watches & Jewelry	\$110.40	3.7%	\$4.12	\$16.07
Taxi/Transportation	\$18.66	21.6%	\$4.04	\$15.76
Local Crafts & Souvenirs	\$19.13	16.2%	\$3.11	\$12.14
Personal Products	\$35.11	8.1%	\$2.84	\$11.07
Shore Excursions	\$58.20	4.1%	\$2.39	\$9.35
Retail Purchases of Liquor	\$30.28	2.9%	\$0.89	\$3.48
TOTALS			\$58.78	\$229.54

Table 11 shows the distribution of the \$229.5 million in crew spending across the 33 participating destinations. The weighted average spend per crew ranged from a low of \$33.23 in Costa Rica to a high of \$117.97 in St. Maarten. The average crew spend was \$57.78 across all destinations.

Table 11 – Crew Expenditures by Destination, 2023/2024 Cruise Year

Destinations	Crew Onshore Visits (Thousands)	Average Spend per Crew	Total Crew Expenditures (\$US Millions)
Antigua & Barbuda	103.9	\$48.94	\$5.08
Aruba	98.4	\$86.43	\$8.50
Bahamas	491.0	\$43.26	\$21.24
Barbados	88.2	\$63.46	\$5.60
Belize	95.7	\$48.90	\$4.68
Bonaire	47.2	\$44.40	\$2.10
British Virgin Islands	100.6	\$45.06	\$4.53
Colombia	44.5	\$71.22	\$3.17
Cayman Islands	129.2	\$76.10	\$9.83
Costa Maya	233.5	\$43.88	\$10.24
Costa Rica	50.2	\$33.23	\$1.67
Cozumel	485.6	\$67.90	\$32.97
Curacao	90.9	\$73.24	\$6.65
Dominica	39.1	\$57.49	\$2.25
Dominican Republic	237.4	\$36.07	\$8.56
Ensenada	94.5	\$47.84	\$4.52
Grenada	36.1	\$49.46	\$1.79
Guadeloupe	33.6	\$42.09	\$1.41
Honduras	172.4	\$51.18	\$8.82
Jamaica	166.8	\$48.48	\$8.09
Key West	60.1	\$81.81	\$4.92
Martinique	37.6	\$44.31	\$1.66
Mazatlán	43.2	\$54.14	\$2.34
Panama	37.8	\$81.23	\$3.07
Progreso	32.2	\$38.69	\$1.24
Puerto Rico	196.3	\$79.14	\$15.53
St. Kitts & Nevis	78.5	\$69.64	\$5.47
St. Lucia	137.0	\$69.31	\$9.50
St. Maarten	149.9	\$117.97	\$17.68
St. Vincent	27.7	\$50.07	\$1.39
Trinidad	8.9	\$38.36	\$0.34
Turks and Caicos	87.7	\$51.23	\$4.49
U. S. Virgin Islands	169.6	\$60.13	\$10.20
All Destinations	3,905.0	\$58.78	\$229.54

- As seen in Table 11, above, visiting Cozumel spent nearly \$33 million, the highest level of spending among the 33 destinations. Over 485.6k crew were estimated to have made an onshore visit during the 2023/2024 cruise year and spent an average of \$67.90 per visit to Cozumel.
- The Bahamas had the second highest total spend by crew, with \$21.2 million in purchases. The typical crew member spent an average of \$43.26 while in the Bahamas.
- St. Maarten had the highest average per crew spend rate (\$117.97). The nearly 150k crew visits to the island generated the third total crew spending of \$17.7 million during the 2023/2024 cruise year.
- Visiting crew members to Puerto Rico spent an average of \$79.14. With an estimated 196,300 onshore visits, crew spent an estimated \$15.5 million during the 2023/2024 cruise year, fourth most among the 33 destinations.
- Costa Maya benefitted from \$10.2 million in crew onshore expenditures, fifth highest among the 33 destinations. On average, the 233,500 crew that made an onshore visit in Costa Maya spent \$43.88 per visit.

Among the remaining 28 destinations total crew expenditures averaged \$4.7 million per destination and \$55.80 per crew member.

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 spending 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 4,000 Passenger Cruise Ship

	Arrivals	On-shore Visits	Avg. Spend	Total Spend
Passengers	4,000	3,336	\$101.87	\$339,838
Crew	1,640	499	\$58.78	\$29,305
Total	5,640	3,835	161	\$369,144

During the typical transit call, such a cruise ship would generate approximately 3,336 passenger visits (83 percent of passenger arrivals) and 499 crew visits (30 percent of crew arrivals). Passengers are estimated to generate \$339,838 ($\$101.87 \times 3,336$) in onshore spending while crew are expected to add an additional \$29,305 ($\58.78×499) for total onshore spending of \$369,144. Thus, a 4,000-passenger cruise ship making a transit call would generate an average of 3,835 passenger and crew visits and total expenditures of over \$369,000 per call, or just over \$96 per visit.

Expenditures by Cruise Lines

As discussed in the **Data and Methods** section of this report, the participating destinations and the FCCA member cruise lines provided expenditure data on items such as port fees and taxes, utilities, navigation services and ship supplies paid by the cruise lines. Supplies include payments cruise lines made to local businesses for supplies and services such as:

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

In addition, destinations often had employees supporting the cruise industry. These employees and their wages were captured in this cruise line category. As shown in **Table 13**, total spending 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 \$968.3 million across the 33 participating destinations during the 2023/2024 cruise year.

The analysis of cruise line expenditures revealed the following impacts for the top 5 destinations which combined, accounted for \$405.5 million, or 42 percent of cruise line spending among the 33 destinations.

- The Bahamas had the highest total expenditures by cruise lines among the 36 participating destinations, \$160.2 million.
- The Dominican Republic was second with \$80.4 million in cruise line expenditures during the 2023/2024 cruise year. The Dominican Republic benefitting from both home port and transit calls, and thus the purchase of ship supplies.
- Cozumel has the third highest level of cruise line expenditures at \$58.3 million. Virtually all of these expenditures were for port and navigation fees.
- Panama was fourth with \$56.9 million in cruise line expenditures during the 2023/2024 cruise year. The expenditures by cruise lines in Panama were concentrated in port fees and taxes. Panama also benefited from being a homeport destination.
- Jamaica rounds out the top 5 destinations, with \$49.7 million in cruise line expenditures. As with Panama and the Dominican Republic, Jamaica benefited from being a homeporting destination.
- For the remaining 28 destinations, expenditures by cruises lines during the 2023/2024 cruise year ranged between \$1.1 million to \$43 million and averaged \$20.1 million per port.

Table 13 – Total Cruise Line Expenditures by Destination, 2023/2024 Cruise Year

Destinations	Estimated Expenditures (\$US Millions)
Antigua & Barbuda	\$25.17
Aruba	\$30.99
Bahamas	\$160.22
Barbados ^②	\$27.77
Belize	\$19.38
Bonaire	\$5.33
British Virgin Islands	\$31.44
Colombia ^②	\$11.16
Cayman Islands	\$32.95
Costa Maya	\$32.75
Costa Rica	\$13.97
Cozumel	\$58.29
Curacao	\$36.56
Dominica	\$2.57
Dominican Republic ^②	\$80.40
Ensenada	\$28.13
Grenada	\$4.47
Guadeloupe ^②	\$10.73
Honduras	\$32.28
Jamaica ^②	\$49.72
Key West	\$11.75
Martinique ^②	\$10.33
Mazatlán	\$5.34
Panama ^②	\$56.86
Progreso	\$7.74
Puerto Rico ^②	\$42.99
St. Kitts & Nevis	\$26.10
St. Lucia	\$8.30
St. Maarten	\$40.35
St. Vincent	\$6.30
Trinidad	\$1.19
Turks and Caicos	\$30.20
U. S. Virgin Islands	\$26.55
All Destinations	\$968.28

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

Direct Cruise Tourism Expenditures

As shown in **Table 14**, the 33.3 million passenger and crew visits generated an estimated \$3.3 billion in spending for local goods and services in the 33 destinations. The cruise lines added another \$968.3 million in spending for port services, taxes and other local goods and services, bringing total cruise tourism expenditures to nearly \$4.3 billion during the 2023/2024 cruise year.

Fourteen (14) of the 33 destinations had total direct cruise tourism expenditures of \$100 million or more. Eight (8) destinations had direct expenditures between \$50 and \$100 million, 9 had direct expenditures between \$20 and \$50 and 2 had direct expenditures less than \$20 million.

The Bahamas led all destinations with \$655 million, followed by the Cozumel with \$483 million, USVI with \$258 million, the Dominican Republic with \$251 million, St. Maarten with \$238 million, Puerto Rico with \$202 million, Jamaica with \$198 million, Costa Maya with \$188 million, Honduras with \$180 million, the Cayman Islands with \$162 million, Aruba with \$133 million, Turks & Caicos with \$116 million, Panama with \$114 million and St. Kitts with \$113 million. Combined, these 14 destinations with \$3.3 billion in direct expenditures accounted for 77 percent of the total cruise tourism expenditures among the 33 destinations.

The next 8 destinations have expenditures between \$50 and \$100 million account for 15 percent of the total cruise tourism expenditures with a combined total of \$644 million in direct spending. Direct spending among these 8 destinations ranged from \$55 million in Key West to \$93 million in Curacao.

There were 8 destinations with expenditures between \$20 and \$50 million, which account for about 7 percent of the total cruise tourism expenditures and have a combined total of \$307 million in direct spending. Direct spending among these 8 destinations ranged from \$21 million in Dominica to just under \$50 million in Colombia.

The remaining two destinations each had less than \$20 million in direct cruise tourism expenditures had a combined total of nearly \$25 million in direct cruise tourism expenditures and accounted for about one percent of the total among the 33 destinations.

Table 14 – Total Cruise Tourism Expenditures (\$US Millions) by Destination, 2023/2024 Cruise Year*

Destinations	Passengers	Crew	Cruise Lines	Total
Antigua & Barbuda	\$58.70	\$5.08	\$25.17	\$88.95
Aruba	\$93.73	\$8.50	\$30.99	\$133.22
Bahamas	\$473.32	\$21.24	\$160.22	\$654.78
Barbados ^②	\$50.12	\$5.60	\$27.77	\$83.48
Belize	\$64.51	\$4.68	\$19.38	\$88.57
Bonaire	\$26.02	\$2.10	\$5.33	\$33.45
British Virgin Islands	\$49.69	\$4.53	\$31.44	\$85.66
Colombia ^②	\$35.60	\$3.17	\$11.16	\$49.93
Cayman Islands	\$118.73	\$9.83	\$32.95	\$161.51
Costa Maya	\$144.91	\$10.24	\$32.75	\$187.91
Costa Rica	\$16.60	\$1.67	\$13.97	\$32.24
Cozumel	\$391.84	\$32.97	\$58.29	\$483.10
Curacao	\$50.05	\$6.65	\$36.56	\$93.26
Dominica	\$16.06	\$2.25	\$2.57	\$20.87
Dominican Republic ^②	\$162.45	\$8.56	\$80.40	\$251.41
Ensenada	\$42.20	\$4.52	\$28.13	\$74.86
Grenada	\$16.17	\$1.79	\$4.47	\$22.43
Guadeloupe ^②	\$33.97	\$1.41	\$10.73	\$46.12
Honduras	\$139.32	\$8.82	\$32.28	\$180.42
Jamaica ^②	\$140.04	\$8.09	\$49.72	\$197.85
Key West	\$38.71	\$4.92	\$11.75	\$55.38
Martinique ^②	\$30.25	\$1.66	\$10.33	\$42.25
Mazatlán	\$26.44	\$2.34	\$5.34	\$34.11
Panama ^②	\$54.09	\$3.07	\$56.86	\$114.02
Progreso	\$16.82	\$1.24	\$7.74	\$25.80
Puerto Rico ^②	\$143.40	\$15.53	\$42.99	\$201.92
St. Kitts & Nevis	\$81.55	\$5.47	\$26.10	\$113.12
St. Lucia	\$54.91	\$9.50	\$8.30	\$72.71
St. Maarten	\$179.77	\$17.68	\$40.35	\$237.80
St. Vincent	\$11.59	\$1.39	\$6.30	\$19.28
Trinidad	\$3.87	\$0.34	\$1.19	\$5.40
Turks and Caicos	\$81.43	\$4.49	\$30.20	\$116.12
U. S. Virgin Islands	\$221.34	\$10.20	\$26.55	\$258.09
All Destinations	\$3,068.19	\$229.54	\$968.28	\$4,266.00

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

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 33.3 million passenger and crew visits to the 33 participating destinations during the 2023/2024 cruise year generated nearly \$4.3 billion in direct spending by the cruise lines and their passengers and crew. As shown in **Table 15** the businesses that directly supplied shore excursions, food & beverages, and other goods and services employed an estimated 56.5 thousand employees throughout the Caribbean and paid annual wages of \$720.0 million. The 5 destinations with the highest direct employment impacts are discussed below:

Cozumel's \$483 million in cruise tourism spending helped support 7,441 direct jobs and \$59.5 million in wages during the 2023/2024 cruise year. Effectively, one direct job is supported for every \$65,000 in direct cruise tourism expenditures. Wages account for 12 percent of the direct expenditures.

The Bahamas had the second highest level of direct jobs supported by the cruise industry. The Bahamas \$655 million in direct expenditures supported an estimated 7,400 direct jobs paying \$134 million in direct wage income during the 2023/2024 cruise year. One direct job was supported for every \$88,000 in direct cruise tourism expenditures. The \$134 million in wages represent approximately 20 percent of the direct spending.

The \$251 million in cruise tourism spending in the Dominican Republic helped support 4,375 direct jobs and \$23.5 million in wage income during the 2023/2024 cruise year. One direct job was supported for every \$57,000 in direct cruise tourism expenditures. The \$23.5 million in wages represents approximately 9 percent of the direct spending.

Jamaica had the fourth highest number direct jobs supported. Jamaica's 198 million in direct expenditures helped support 3,920 jobs paying in excess of \$36.0 million in wages. One direct job was supported for every \$50,000 in direct cruise tourism expenditures. The \$36 million in wages represents approximately 18 percent of the direct spending.

Finally, rounding out the Top 5 was St. Maarten. St. Maarten's \$238 million in direct cruise expenditures supported 2,904 direct jobs. These jobs, in turn, resulted in just over \$59 million in wages. In St. Maarten, one direct job was supported for every \$82,000 in direct cruise tourism expenditures. The \$59 million in wages represents approximately 25 percent of the direct cruise spending in St. Maarten.

Table 15 – Direct Economic Impact of Cruise Tourism by Destination, 2023/2024 Cruise Year*

Destinations	Direct Cruise Tourism Expenditures (\$US Millions)	Direct Employment	Direct Employee Wage Income (\$US Millions)
Antigua & Barbuda	\$88.95	948	\$10.03
Aruba	\$133.22	1,266	\$30.13
Bahamas	\$654.78	7,400	\$134.16
Barbados ^②	\$83.48	1,250	\$18.26
Belize	\$88.57	1,675	\$14.90
Bonaire	\$33.45	352	\$6.63
British Virgin Islands	\$85.66	872	\$9.64
Colombia ^②	\$49.93	723	\$5.80
Cayman Islands	\$161.51	1,717	\$34.85
Costa Maya	\$187.91	2,688	\$25.74
Costa Rica	\$32.24	502	\$4.33
Cozumel	\$483.10	7,441	\$59.52
Curacao	\$93.26	785	\$17.47
Dominica	\$20.87	336	\$2.83
Dominican Republic ^②	\$251.41	4,375	\$23.47
Ensenada	\$74.86	1,114	\$9.08
Grenada	\$22.43	392	\$3.26
Guadeloupe ^②	\$46.12	572	\$6.40
Honduras	\$180.42	2,133	\$18.13
Jamaica ^②	\$197.85	3,920	\$36.10
Key West	\$55.38	584	\$16.13
Martinique ^②	\$42.25	583	\$5.28
Mazatlán	\$34.11	551	\$4.52
Panama ^②	\$114.02	1,954	\$16.11
Progreso	\$25.80	368	\$3.45
Puerto Rico ^②	\$201.92	2,681	\$37.63
St. Kitts & Nevis	\$113.12	894	\$10.69
St. Lucia	\$72.71	1,183	\$10.52
St. Maarten	\$237.80	2,904	\$59.28
St. Vincent	\$19.28	318	\$2.74
Trinidad	\$5.40	115	\$1.46
Turks and Caicos	\$116.12	1,197	\$21.85
U. S. Virgin Islands	\$258.09	2,721	\$59.67
All Destinations	\$4,266.00	56,514	\$720.04

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

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

Total Economic Contribution of Cruise Tourism Expenditures

The total 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 BREAA's 2018 analysis of the economic impact of the cruise industry in the United States, the indirect employment impacts were 46 percent higher than the direct impacts, resulting in an implicit employment multiplier of nearly 2.5. With the exception of one location (Aruba), each of the destinations analyzed for this study had indirect impacts that were 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 the respective destinations were less than 2.0.

As shown in **Table 16**, the nearly \$4.3 billion in direct cruise tourism expenditures supported total employment of 94,027 residents across the 33 destinations and \$1.28 billion in employee wages during the 2023/2024 cruise year. The top 10 destinations, all with \$100 million or more in direct cruise industry expenditures accounted for \$2.8 billion in expenditures, or 66 percent of the total, and 63.8 thousand jobs or 68 percent of the total across the 33 destinations.

The Bahamas had the highest level of total jobs supported by the cruise industry. The Bahamas \$655 million in direct expenditures supported an estimated 13,846 total jobs paying \$250 million in direct wage income during the 2023/2024 cruise year. As a total, one job was supported for every \$47,000 of direct cruise tourism expenditures in the Bahamas.

Cozumel's \$483 million in cruise tourism spending helped support 11,998 total jobs and \$96 million in wages during the 2023/2024 cruise year. Effectively, one total job is supported for every \$40,000 in direct cruise tourism expenditures in Cozumel.

The \$258 million in direct spending in the USVI helped support 5,095 total jobs paying nearly \$124 million in wages. One total job was supported by every \$50,000 of direct cruise tourism spent in the USVI.

The \$251 million in cruise tourism spending in the Dominican Republic helped support 6,469 total jobs and \$35 million in total wages during the 2023/2024 cruise year. One total job was supported for every \$39,000 in direct cruise tourism expenditures in the Dominican Republic. The \$23.5 million in wages represents approximately 9 percent of the direct spending.

Once again, St. Maarten rounds out the Top 5 destinations for employment. St. Maarten's \$238 million in direct cruise expenditures supported 5,213 total jobs. These jobs, in turn, resulted in just

over \$104 million in wages. In St. Maarten, one total job was supported by every \$46,000 in direct cruise tourism expenditures.

Table 16 – Total Economic Impact of Cruise Tourism by Destination, 2023/2024 Cruise Year*

Destinations	Direct Cruise Tourism Expenditures (\$US Millions)	Total Employment	Total Employee Wage Income (\$US Millions)
Antigua & Barbuda	\$88.95	1,521	\$16.3
Aruba	\$133.22	2,462	\$61.5
Bahamas	\$654.78	13,846	\$250.2
Barbados ^②	\$83.48	2,211	\$32.9
Belize	\$88.57	2,293	\$23.3
Bonaire	\$33.45	627	\$12.2
British Virgin Islands	\$85.66	1,666	\$18.3
Colombia ^②	\$49.93	1,227	\$10.1
Cayman Islands	\$161.51	2,988	\$67.1
Costa Maya	\$187.91	3,466	\$36.0
Costa Rica	\$32.24	852	\$7.9
Cozumel	\$483.10	11,998	\$95.6
Curacao	\$93.26	1,557	\$36.5
Dominica	\$20.87	497	\$4.2
Dominican Republic ^②	\$251.41	6,469	\$35.2
Ensenada	\$74.86	1,654	\$13.7
Grenada	\$22.43	604	\$5.1
Guadeloupe ^②	\$46.12	814	\$9.4
Honduras	\$180.42	3,386	\$30.6
Jamaica ^②	\$197.85	6,322	\$53.3
Key West	\$55.38	981	\$33.0
Martinique ^②	\$42.25	901	\$8.1
Mazatlán	\$34.11	758	\$6.3
Panama ^②	\$114.02	2,972	\$27.4
Progreso	\$25.80	555	\$4.8
Puerto Rico ^②	\$201.92	5,019	\$70.5
St. Kitts & Nevis	\$113.12	1,679	\$19.6
St. Lucia	\$72.71	1,754	\$15.8
St. Maarten	\$237.80	5,213	\$104.5
St. Vincent	\$19.28	478	\$4.3
Trinidad	\$5.40	197	\$2.5
Turks and Caicos	\$116.12	1,965	\$35.0
U. S. Virgin Islands	\$258.09	5,095	\$123.7
All Destinations	\$4,266.00	94,027	\$1,275.0

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

② Includes both transit and homeport cruise ships.

Comparison to 2018 Study

While the overall number of participating destinations has only changed by three (36 vs. 33), the current study also has a slightly different mix of destinations compared with the 2017/2018 study. As shown in **Table 17**, we have estimated that direct cruise tourism expenditures totaled \$4.24 billion during the 2023/2024 cruise year among the 36 participating destinations. This is about 27 percent higher than the \$3.36 billion in direct cruise tourism expenditures estimated for the 36 participating destinations during the 2017/2018 cruise year. Similarly, the number of passenger onshore visits (+17%) and the employment impacts (+19%) are also higher for the current study.

Normalizing the total expenditures on a per passenger basis shows that total expenditures per passenger (direct cruise tourism expenditures/total passenger onshore visits) across the 33 destinations in the current study are up nearly 9 percent when compared to the 36 destinations in the 2018 study. The \$4.24 billion in total expenditures among the 33 destinations of the current study equates to \$145.10 per onshore passenger visit whereas, in the 2017/2018 study, the \$3.36 billion in total expenditures among the 36 destinations equated to \$133.25 per onshore passenger visit.

Table 17 – Comparison of Cruise Tourism Expenditures – All Destinations

	2023/2024 Cruise Year	2017/2018 Cruise Year	Percent Differ- ence
Number of Participating Destinations	33	36	--
Direct Cruise Tourism Spending (US \$ Billions)	\$4.27	\$3.36	27%
Total Passenger Onshore Visits^① (Millions)	29.40	25.19	17%
Total Expenditures per Passenger^② (US \$)	\$145.10	\$133.25	8.9%
Total Employment Impact	94,027	78,950	19%
Total Income Impacts (US \$ Millions)	1,274.97	\$902.68	41%
Average per Passenger Spend (Inc. Home Port)	\$104.36	\$101.52	2.8%
Average Per Crew Spend	\$58.78	\$60.44	-2.7%

^① Onshore Visits include both Transit visits and Embarking passengers

^② Total expenditures per passenger is the Direct Cruise Tourism Spending/Total Passenger Onshore Visits.

Looking at just the 31 destinations that are common to the two studies¹⁸ the total direct cruise tourism expenditures increased by 27 percent from \$3.29 billion in 2017/2018 to \$4.16 billion in 2023/2024 (see **Table 18**). This was the combined result of a 16 percent increase in cruise passenger onshore visits and an almost 9 percent increase in average the total direct expenditure per passenger. The normalized total direct expenditures per passenger in the 31 common destinations increased from \$133.66 in the 2017/2018 cruise year to \$145.88 in the 2023/2024 cruise year. The net result was a 27 percent increase in direct cruise tourism expenditures among the 31 destinations. This led to a significant increase in employment (21%), and an even greater increase of 39 percent in wages.

Table 18 – Comparison of Cruise Tourism Expenditures – Common Destinations

	2023/2024 Cruise Year	2017/2018 Cruise Year	Percent Differ- ence
Number of Participating Destinations	31	31	--
Direct Cruise Tourism Spending (US \$ Billions)	\$4.19	\$3.29	27%
Total Passenger Onshore Visits^① (Millions)	28.72	24.63	17%
Total Expenditures per Passenger^② (US \$)	\$145.88	\$133.66	9.1%
Total Employment Impact	92,549	77,160	21%
Total Income Impacts (US \$ Millions)	1,237.7	\$882.1	39%
Average per Passenger Spend (Inc. Home Port)	\$104.92	\$101.75	3.1%
Average Per Crew Spend	\$58.43	\$60.83	-3.9%

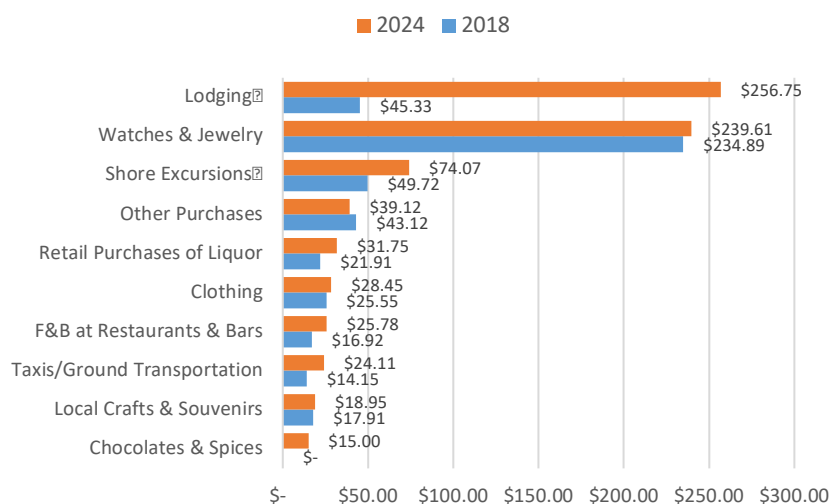
^① Onshore Visits include both Transit visits and Embarking passengers

^② Total expenditures per passenger is the Direct Cruise Tourism Spending/Total Passenger Onshore Visits.

¹⁸ These 31 destinations are Antigua, Aruba, Bahamas, Barbados, Belize, Bonaire, British Virgin Islands, Cayman Islands, Colombia, Costa Maya, Costa Rica, Cozumel, Curacao, Dominican Republic, Ensenada, Grenada, Guadeloupe, Honduras, Jamaica, Martinique, Mazatlán, Panama, Progreso, Puerto Rico, St. Kitts, St. Lucia, St. Maarten, St. Vincent & the Grenadines, Trinidad, Turks & Caicos, U. S. Virgin Islands.

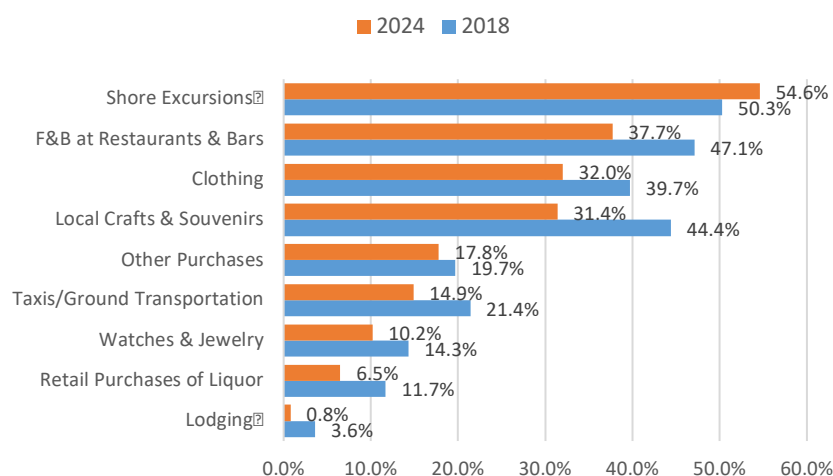
Since passenger expenditures (transit and homeport) account for more than 75 percent of total direct cruise tourism expenditures we have provided a more detailed analysis of the change in passenger spending between the current and previous study. As shown in the **Figure 1**, the unweighted average of what passengers spent in all categories has seen an increase over the 2017/18 study. As described earlier, the unweighted spend is the average amount spent by those passengers who actually made a purchase in the respective category. For example, in the current study, those who actually purchased watches & jewelry spent an average of \$239.61, while in the 2017/18 study the average spent was \$234.89.

Figure 1 – Unweighted Average Passenger Expenditures by Category



The second factor which leads to the total weighted average expenditure – the figure used to calculate the total spending – is the percent of onshore passengers who made a purchase in that category. As shown in **Figure 2** a smaller percentage of passengers made an onshore purchase in all categories other than shore excursions.

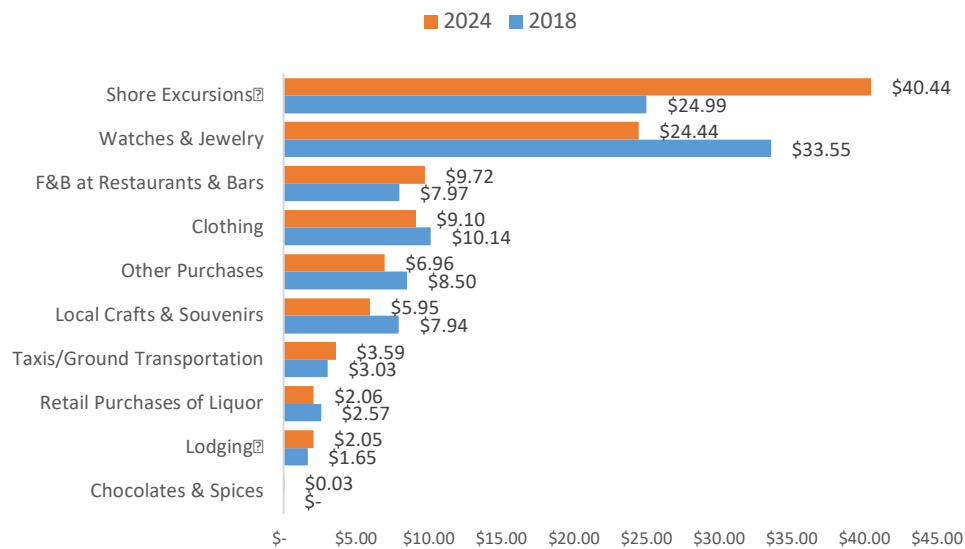
Figure 2 – Average Percentage of Passengers Making Purchases



Thus, when the unweighted average per passenger expenditures were weighted by the share of onshore purchasers, the weighted average expenditure decreased in 5 of the 10 categories (see **Figure 3**). The weighted

average expenditure rose for shore excursions by 62 percent as the increase in unweighted spending for tours was augmented by the increase in the percentage of passengers purchasing tours.

Figure 3 – Average Weighted Expenditure by Category



On a destination basis, there was considerable variability in the change in the average per passenger and crew spend from the 2017/2018 study (see **Table 19**). The change in the average per passenger spend was led by an increase of 148 percent in Panama – which heavily driven by the addition of a high percentage of homeporting passengers. Among the 31 destinations common to both studies, 26 showed an increase or no change in the weighted average per passenger spend while 5 showed a decrease.

Table 19 – Passenger and Crew Expenditures – Average per Visit – 2024 and 2018 Cruise Tourism Studies – 31 Common Destinations

Destinations	2024		2018		Change	
	Average Spend per Visit (Pax) ①	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 & Barbuda	\$82.39	\$48.94	\$73.55	\$39.76	12%	23%
Aruba	\$131.05	\$86.43	\$121.94	\$87.94	7%	-2%
Bahamas	\$120.93	\$43.26	\$131.95	\$54.90	-8%	-21%
Barbados②	\$81.97	\$63.46	\$83.12	\$54.26	-1%	17%
Belize	\$87.42	\$48.90	\$77.88	\$46.17	12%	6%
Bonaire	\$73.97	\$44.40	\$67.19	\$44.61	10%	0%
British Virgin Islands	\$72.49	\$45.06	\$78.11	\$34.12	-7%	32%
Colombia②	\$122.50	\$71.22	\$122.43	\$70.10	0%	2%
Cayman Islands	\$115.68	\$76.10	\$105.17	\$70.30	10%	8%
Costa Maya	\$78.17	\$43.88	\$69.58	\$41.72	12%	5%
Costa Rica	\$72.74	\$33.23	\$70.06	\$31.65	4%	5%
Cozumel	\$110.01	\$67.90	\$108.37	\$67.24	2%	1%
Curacao	\$78.01	\$73.24	\$70.00	\$66.47	11%	10%
Dominican Republic②	\$79.78	\$36.07	\$88.26	\$47.08	-10%	-23%
Ensenada	\$63.68	\$47.84	\$54.69	\$46.41	16%	3%
Grenada	\$62.83	\$49.46	\$51.57	\$47.78	22%	4%
Guadeloupe②	\$105.13	\$42.09	\$100.29	\$36.60	5%	15%
Honduras	\$99.20	\$51.18	\$101.65	\$50.36	-2%	2%
Jamaica②	\$117.09	\$48.48	\$115.98	\$46.57	1%	4%
Martinique②	\$76.23	\$44.31	\$54.99	\$39.41	39%	12%
Mazatlán	\$75.94	\$54.14	\$68.57	\$49.16	11%	10%
Panama②	\$190.61	\$81.23	\$76.76	\$65.71	148%	24%
Progreso	\$62.87	\$38.69	\$57.31	\$42.19	10%	-8%
Puerto Rico②	\$94.57	\$79.14	\$90.78	\$130.63	4%	-39%
St. Kitts	\$145.08	\$69.64	\$135.94	\$53.72	7%	30%
St. Lucia	\$84.95	\$69.31	\$81.12	\$68.92	5%	1%
St. Maarten	\$163.45	\$117.97	\$142.23	\$119.02	15%	-1%
St. Vincent	\$59.39	\$50.07	\$52.67	\$43.50	13%	15%
Trinidad	\$58.68	\$38.36	\$54.17	\$33.99	8%	13%
Turks and Caicos	\$102.22	\$51.23	\$95.51	\$54.98	7%	-7%
U. S. Virgin Islands	\$166.22	\$60.13	\$165.42	\$60.12	0%	0%

① Includes transit and homeport cruise passengers.

Note: Panama did not include homeporting passengers in 2018.

The change in the weighted average per crew spend is somewhat more negative than the passengers, with 24 of the 31 common destinations showing an increase and 7 showing a decrease. 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.

Table 20 shows estimated total expenditures for the 2023/2024 and 2017/2018 cruise years for the 31 destinations common to both studies. As indicated in the table, 21 destinations had a decrease in total crew expenditures and 10 had an increase. Despite the increase in the weighted average spending per crew across most destinations, the relatively negative impacts were driven by the significant reduction in crew disembark rates (30% vs 39%). Overall, there were 11 percent fewer crew onshore visits in this study when compared with the 2018 study.

**Table 20 – Passenger and Crew Expenditures – Total Spend During Cruise Year – 2024 and 20185
Cruise Tourism Studies – Millions US \$ - 31 Common Destinations**

Destinations	2024 Study		2018 Study		Change: 2024/2018	
	Total Spend (Pax)	Total Spend (Crew)	Total Spend (Pax)	Total Spend (Crew)	Total Spend (Pax)	Total Spend (Crew)
Antigua	\$58.70	\$5.08	\$48.76	\$5.12	20%	-1%
Aruba	\$93.73	\$8.50	\$82.55	\$9.08	14%	-6%
Bahamas	\$473.32	\$21.24	\$322.57	\$28.94	47%	-27%
Barbados^①	\$50.12	\$5.60	\$52.43	\$6.94	-4%	-19%
Belize	\$64.51	\$4.68	\$68.33	\$5.05	-6%	-7%
Bonaire	\$26.02	\$2.10	\$25.44	\$2.99	2%	-30%
British Virgin Islands	\$49.69	\$4.53	\$9.75	\$0.65	410%	596%
Colombia^①	\$35.60	\$3.17	\$43.02	\$3.54	-17%	-10%
Cayman Islands	\$118.73	\$9.83	\$172.12	\$17.48	-31%	-44%
Costa Maya	\$144.91	\$10.24	\$71.70	\$8.26	102%	24%
Costa Rica	\$16.60	\$1.67	\$21.11	\$1.65	-21%	1%
Cozumel	\$391.84	\$32.97	\$377.96	\$45.47	4%	-27%
Curacao	\$50.05	\$6.65	\$42.16	\$6.99	19%	-5%
Dominican Republic^①	\$162.45	\$8.56	\$77.84	\$3.99	109%	114%
Ensenada	\$42.20	\$4.52	\$25.60	\$4.33	65%	4%
Grenada	\$16.17	\$1.79	\$15.38	\$1.90	5%	-6%
Guadeloupe^①	\$33.98	\$1.41	\$39.73	\$3.09	-14%	-54%
Honduras	\$139.32	\$8.82	\$92.06	\$5.62	51%	57%
Jamaica^①	\$140.04	\$8.09	\$205.66	\$12.76	-32%	-37%
Martinique^①	\$30.25	\$1.66	\$28.38	\$3.90	7%	-57%
Mazatlán	\$26.44	\$2.34	\$11.44	\$1.76	131%	33%
Panama^①	\$54.09	\$3.07	\$21.30	\$3.72	154%	-18%
Progreso	\$16.82	\$1.24	\$23.36	\$2.83	-28%	-56%
Puerto Rico^①	\$143.40	\$15.53	\$100.32	\$22.57	43%	-31%
St. Kitts	\$81.55	\$5.47	\$133.02	\$8.72	-39%	-37%
St. Lucia	\$54.91	\$9.50	\$47.47	\$6.77	16%	40%
St. Maarten	\$179.77	\$17.68	\$111.54	\$17.82	61%	-1%
St. Vincent	\$11.59	\$1.39	\$10.70	\$2.35	8%	-41%
Trinidad	\$3.87	\$0.34	\$2.21	\$0.27	75%	26%
Turks & Caicos	\$81.43	\$4.49	\$66.82	\$7.36	22%	-39%
U. S. Virgin Islands	\$221.34	\$10.20	\$156.14	\$10.51	41.8%	-3.0%

① Includes transit and homeport passengers.

Appendix A – 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:

9.0 -10 Extremely Satisfied; Greatly Exceeded Expectations; Extremely Likely

7.0 - 8.9: Very Satisfied; Exceeded Expectations; Very Likely

5.0 - 6.9: Somewhat Satisfied; Met Expectations; Somewhat Likely

3.0 – 4.9: Not Too Satisfied; Fell Short of Expectations; Not Too Likely

<3.0: Not At All Satisfied; Fell Far Short of Expectations; Not At All Likely

Table B-1 - Total Economic Contribution of Cruise Tourism by Destination, 2023/2024 Cruise Year

Destinations	Cruise Tourism Expenditures (\$US Millions)	Rank	Total Employment	Rank	Total Employee Wage Income (\$US Millions)	Rank
Bahamas	\$654.78	1	13,846	1	\$250.16	1
Cozumel	\$483.10	2	11,998	2	\$95.58	4
USVI	\$258.09	3	5,095	6	\$123.71	2
Dominican Republic [Ⓢ]	\$251.41	4	6,469	3	\$35.25	11
St. Maarten	\$237.80	5	5,213	5	\$104.46	3
Puerto Rico [Ⓢ]	\$201.92	6	5,019	7	\$70.49	5
Jamaica [Ⓢ]	\$197.85	7	6,322	4	\$53.26	8
Costa Maya	\$187.91	8	3,466	8	\$35.99	10
Honduras	\$180.42	9	3,386	9	\$30.59	15
Cayman Islands	\$161.51	10	2,988	10	\$67.13	6
Aruba	\$133.22	11	2,462	12	\$61.54	7
Turks & Caicos	\$116.12	12	1,965	15	\$35.01	12
Panama [Ⓢ]	\$114.02	13	2,972	11	\$27.38	16
St. Kitts	\$113.12	14	1,679	17	\$19.57	18
Curacao	\$93.26	15	1,557	20	\$36.53	9
Antigua & Barbuda	\$88.95	16	1,521	21	\$16.33	20
Belize	\$88.57	17	2,293	13	\$23.32	17
BVI	\$85.66	18	1,666	18	\$18.33	19
Barbados [Ⓢ]	\$83.48	19	2,211	14	\$32.91	14
Ensenada	\$74.86	20	1,654	19	\$13.66	22
St. Lucia	\$72.71	21	1,754	16	\$15.78	21
Key West	\$55.38	22	981	23	\$33.01	13
Cartagena [Ⓢ]	\$49.93	23	1,227	22	\$10.12	24
Guadeloupe [Ⓢ]	\$46.12	24	814	26	\$9.40	25
Martinique [Ⓢ]	\$42.25	25	901	24	\$8.10	26
Mazatlán	\$34.11	26	758	27	\$6.31	28
Bonaire	\$33.45	27	627	28	\$12.20	23
Costa Rica	\$32.24	28	852	25	\$7.86	27
Progreso	\$25.80	29	555	30	\$4.80	30
Grenada	\$22.43	30	604	29	\$5.14	29
Dominica	\$20.87	31	497	31	\$4.20	32
St. Vincent	\$19.28	32	478	32	\$4.31	31
Trinidad	\$5.40	33	197	33	\$2.54	33
All Destinations	\$4,266.00		94,027		\$1,274.97	

[Ⓢ] Includes both transit and homeport passengers

Table B-2 - Passengers Onshore Visits and Expenditures by Destination, 2023/2024 Cruise Year

Destinations	Passenger Onshore Visits (Thousands)	Rank	Average Expenditure per Passenger	Rank	Total Passenger Expenditures (\$US Millions)	Rank
Bahamas	3,914.0	1	\$120.93	7	\$473.3	1
Cozumel	3,561.9	2	\$110.01	10	\$391.8	2
Dominican Republic [Ⓢ]	2,036.1	3	\$79.78	20	\$162.5	5
Costa Maya	1,853.9	4	\$78.17	21	\$144.9	6
Puerto Rico [Ⓢ]	1,516.3	5	\$94.57	14	\$143.4	7
Honduras	1,404.5	6	\$99.20	13	\$139.3	9
USVI	1,331.6	7	\$166.22	2	\$221.3	3
Jamaica [Ⓢ]	1,196.0	8	\$117.09	8	\$140.0	8
St. Maarten	1,099.8	9	\$163.45	3	\$179.8	4
Cayman Islands	1,026.3	10	\$115.68	9	\$118.7	10
Turks & Caicos	796.7	11	\$102.22	12	\$81.4	13
Belize	738.0	12	\$87.42	16	\$64.5	14
Aruba	715.2	13	\$131.05	5	\$93.7	11
Antigua & Barbuda	712.4	14	\$82.39	18	\$58.7	15
BVI	685.5	15	\$72.49	27	\$49.7	20
Ensenada	662.7	16	\$63.68	28	\$42.2	21
St. Lucia	646.4	17	\$84.95	17	\$54.9	16
Curacao	641.6	18	\$78.01	22	\$50.1	19
Barbados [Ⓢ]	611.4	19	\$81.97	19	\$50.1	18
St. Kitts	562.1	20	\$145.08	4	\$81.5	12
Key West	424.7	21	\$91.15	15	\$38.7	22
Martinique [Ⓢ]	396.9	22	\$76.23	23	\$30.3	25
Bonaire	351.8	23	\$73.97	25	\$26.0	27
Mazatlán	348.2	24	\$75.94	24	\$26.4	26
Guadeloupe [Ⓢ]	323.2	25	\$105.13	11	\$34.0	24
Cartagena [Ⓢ]	290.6	26	\$122.50	6	\$35.6	23
Panama [Ⓢ]	283.8	27	\$190.61	1	\$54.1	17
Progreso	267.5	28	\$62.87	30	\$16.8	28
Grenada	257.4	29	\$62.83	31	\$16.2	30
Dominica	254.2	30	\$63.17	29	\$16.1	31
Costa Rica	228.2	31	\$72.74	26	\$16.6	29
St. Vincent	195.2	32	\$59.39	32	\$11.6	32
Trinidad	65.9	33	\$58.68	33	\$3.9	33
All Destinations	29,400.0		\$104.36		\$3,068.2	

[Ⓢ] Includes both transit and homeport passengers

Table B-3 - Crew Visits and Expenditures by Destination, 2023/2024 Cruise Year

Destinations	Crew Visits (Thousands)	Rank	Average Expenditure per Crew	Rank	Total Crew Expenditures (\$US Millions)	Rank
Bahamas	491.0	1	\$43.26	28	\$21.24	2
Cozumel	485.6	2	\$67.90	11	\$32.97	1
Dominican Republic ^①	237.4	3	\$36.07	32	\$8.56	10
Costa Maya	233.5	4	\$43.88	27	\$10.24	5
Puerto Rico ^①	196.3	5	\$79.14	5	\$15.53	4
Honduras	172.4	6	\$51.18	17	\$8.82	9
USVI	169.6	7	\$60.13	13	\$10.20	6
Jamaica ^①	166.8	8	\$48.48	22	\$8.09	12
St. Maarten	149.9	9	\$117.97	1	\$17.68	3
St. Lucia	137.0	10	\$69.31	10	\$9.50	8
Cayman Islands	129.2	11	\$76.10	6	\$9.83	7
Antigua & Barbuda	103.9	12	\$48.94	20	\$5.08	16
BVI	100.6	13	\$45.06	24	\$4.53	19
Aruba	98.4	14	\$86.43	2	\$8.50	11
Belize	95.7	15	\$48.90	21	\$4.68	18
Ensenada	94.5	16	\$47.84	23	\$4.52	20
Curacao	90.9	17	\$73.24	7	\$6.65	13
Barbados ^①	88.2	18	\$63.46	12	\$5.60	14
Turks & Caicos	87.7	19	\$51.23	16	\$4.49	21
St. Kitts	78.5	20	\$69.64	9	\$5.47	15
Key West	60.1	21	\$81.81	3	\$4.92	17
Costa Rica	50.2	22	\$33.23	33	\$1.67	28
Bonaire	47.2	23	\$44.40	25	\$2.10	26
Cartagena ^①	44.5	24	\$71.22	8	\$3.17	22
Mazatlán	43.2	25	\$54.14	15	\$2.34	24
Dominica	39.1	26	\$57.49	14	\$2.25	25
Panama ^①	37.8	27	\$81.23	4	\$3.07	23
Martinique ^①	37.6	28	\$44.31	26	\$1.66	29
Grenada	36.1	29	\$49.46	19	\$1.79	27
Guadeloupe ^①	33.6	30	\$42.09	29	\$1.41	30
Progreso	32.2	31	\$38.69	30	\$1.24	32
St. Vincent	27.7	32	\$50.07	18	\$1.39	31
Trinidad	8.9	33	\$38.36	31	\$0.34	33
All Destinations	3,905.0		\$58.78		\$229.54	

① Includes both transit and homeport passengers

Table B-4 - Total Expenditures by Cruise Lines by Destination, 2023/2024 Cruise Year

Destinations	Estimated Expenditures (\$US Millions)	Rank
Bahamas	\$160.22	1
Dominican Republic ^①	\$80.40	2
Cozumel	\$58.29	3
Panama ^①	\$56.86	4
Jamaica ^①	\$49.72	5
Puerto Rico ^①	\$42.99	6
St. Maarten	\$40.35	7
Curacao	\$36.56	8
Cayman Islands	\$32.95	9
Costa Maya	\$32.75	10
Honduras	\$32.28	11
BVI	\$31.44	12
Aruba	\$30.99	13
Turks & Caicos	\$30.20	14
Ensenada	\$28.13	15
Barbados ^①	\$27.77	16
USVI	\$26.55	17
St. Kitts	\$26.10	18
Antigua & Barbuda	\$25.17	19
Belize	\$19.38	20
Costa Rica	\$13.97	21
Key West	\$11.75	22
Cartagena ^①	\$11.16	23
Guadeloupe ^①	\$10.73	24
Martinique ^①	\$10.33	25
St. Lucia	\$8.30	26
Progreso	\$7.74	27
St. Vincent	\$6.30	28
Mazatlán	\$5.34	29
Bonaire	\$5.33	30
Grenada	\$4.47	31
Dominica	\$2.57	32
Trinidad	\$1.19	33
All Destinations	\$968.28	

① Includes both transit and homeport passengers

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

Destinations	First Visit	Rank
St. Vincent	88.4%	1
Panama	87.5%	2
Trinidad	86.5%	3
Dominican Republic	85.5%	4
Cartagena	81.9%	5
Costa Rica	81.6%	6
Guadeloupe	81.3%	7
Bonaire	79.3%	8
Costa Maya	77.3%	9
Grenada	74.5%	10
Belize	74.3%	11
BVI	73.5%	12
Dominica	73.5%	13
Jamaica	72.7%	14
Curacao	72.4%	15
Honduras	71.8%	16
Progreso	70.3%	17
Antigua & Barbuda	69.5%	18
St. Kitts	69.2%	19
Aruba	65.4%	20
Barbados	65.1%	21
Martinique	64.9%	22
Mazatlán	64.5%	23
St. Lucia	62.8%	24
Turks & Caicos	59.7%	25
St. Maarten	59.3%	26
USVI	56.7%	27
Ensenada	56.2%	28
Cayman Islands	54.8%	29
Puerto Rico	53.3%	30
Key West	53.2%	31
Bahamas	51.6%	32
Cozumel	41.5%	33
Western	75.0%	1
Southern	70.4%	2
Eastern	67.4%	3
Mexico	62.0%	4

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

Destinations	Avg. Hours Ashore	Rank
Aruba	5.3	1
Guadeloupe	5.3	2
Costa Rica	5.1	3
Curacao	5.1	4
St. Lucia	5.0	5
Panama	5.0	6
St. Maarten	4.8	7
Bonaire	4.7	8
Mazatlán	4.7	9
Cartagena	4.7	10
Honduras	4.7	11
Cozumel	4.7	12
Belize	4.6	13
St. Kitts	4.6	14
Barbados	4.6	15
Dominica	4.6	16
Dominican Republic	4.6	17
Martinique	4.5	18
USVI	4.4	19
Antigua & Barbuda	4.4	20
Progreso	4.4	21
Key West	4.3	22
Jamaica	4.3	23
Ensenada	4.3	24
Puerto Rico	4.3	25
Grenada	4.3	26
Turks & Caicos	4.3	27
Bahamas	4.2	28
Costa Maya	4.2	29
Cayman Islands	4.0	30
BVI	4.0	31
St. Vincent	3.9	32
Trinidad	3.8	33
Southern	4.7	1
Western	4.6	2
Mexico	4.4	3
Eastern	4.4	4

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

Destinations	Mean Score	Rank
Key West	8.74	1
Turks	8.63	2
Curacao	8.38	3
Aruba	8.23	4
SXM	8.23	5
Cozumel	8.23	6
St. Kitts	8.22	7
Bonaire	8.18	8
Puerto Rico	8.17	9
Barbados	8.15	10
Honduras	8.14	11
Dom Rep	8.01	12
USVI	7.97	13
Progreso	7.93	14
Mazatlán	7.89	15
Costa Rica	7.83	16
Costa Maya	7.77	17
Cayman	7.74	18
Antigua	7.64	19
Grenada	7.61	20
Ensenada	7.58	21
Belize	7.56	22
Bahamas	7.52	23
Dominica	7.51	24
St. Lucia	7.50	25
BVI	7.46	26
Martinique	7.39	27
Colombia	7.38	28
Jamaica	7.30	29
Guadeloupe	7.20	30
St. Vincent	7.16	31
Panama	6.91	32
Trinidad	6.90	33
All Destinations	7.79	
Western	7.97	
Eastern	7.81	
Southern	7.70	
Mexico	7.69	

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

Destinations	Mean Score	Rank
Turks	8.44	1
Key West	8.37	2
Curacao	8.02	3
SXM	7.92	4
Honduras	7.91	5
Cozumel	7.91	6
Puerto Rico	7.89	7
Bonaire	7.89	8
St. Kitts	7.87	9
Aruba	7.83	10
Dom Rep	7.78	11
Mazatlán	7.74	12
Barbados	7.71	13
USVI	7.63	14
Costa Maya	7.57	15
Costa Rica	7.50	16
Cayman	7.42	17
Progreso	7.40	18
Ensenada	7.38	19
Grenada	7.37	20
Dominica	7.31	21
Bahamas	7.22	22
Belize	7.21	23
St. Lucia	7.21	24
Antigua	7.21	25
Colombia	7.16	26
BVI	7.14	27
Martinique	7.05	28
Jamaica	6.98	29
St. Vincent	6.90	30
Panama	6.76	31
Guadeloupe	6.40	32
Trinidad	6.19	33
All Destinations	7.46	
Western	7.69	
Eastern	7.46	
Mexico	7.42	
Southern	7.33	

Table B-9 – How likely are you to return to “destination” for a land-based or resort vacation?

Destinations	Mean Score	Rank
Key West	7.03	1
Turks	6.71	2
Cozumel	6.02	3
SXM	5.73	4
Aruba	5.72	5
Puerto Rico	5.67	6
Honduras	5.66	7
Ensenada	5.61	8
Curacao	5.57	9
Cayman	5.57	10
USVI	5.56	11
Progreso	5.56	12
Bahamas	5.55	13
Mazatlán	5.53	14
Belize	5.46	15
Dom Rep	5.42	16
Jamaica	5.36	17
Barbados	5.33	18
Costa Maya	5.28	19
St. Kitts	5.26	20
Grenada	5.05	21
St. Lucia	4.95	22
Bonaire	4.91	23
Martinique	4.76	24
Antigua	4.60	25
Costa Rica	4.54	26
BVI	4.43	27
Colombia	3.95	28
St. Vincent	3.73	29
Dominica	3.72	30
Trinidad	3.53	31
Guadeloupe	3.50	32
Panama	3.45	33
All Destinations	5.11	
Western	5.30	
Eastern	5.27	
Southern	4.95	
Mexico	4.84	

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
Key West	7.47	1
Turks	7.16	2
Aruba	6.65	3
SXM	6.55	4
Curacao	6.51	5
Cozumel	6.41	6
Puerto Rico	6.33	7
USVI	6.28	8
Cayman	6.23	9
St. Kitts	6.18	10
Bonaire	6.12	11
Barbados	6.04	12
Honduras	5.98	13
Dom Rep	5.96	14
St. Lucia	5.89	15
Mazatlán	5.84	16
Bahamas	5.82	17
Belize	5.66	18
Costa Maya	5.55	19
Ensenada	5.53	20
Grenada	5.53	21
Jamaica	5.49	22
Antigua	5.39	23
Costa Rica	5.30	24
Martinique	5.29	25
BVI	5.09	26
Progreso	5.08	27
Dominica	4.84	28
Guadeloupe	4.80	29
St. Vincent	4.78	30
Colombia	4.77	31
Panama	4.13	32
Trinidad	4.01	33
All Destinations	5.72	
Western	5.96	
Eastern	5.75	
Southern	5.62	
Mexico	5.51	

Table B-11 – How satisfied were you with your initial shoreside welcome?

Destinations	Mean Score	Rank
Turks	8.84	1
Key West	8.73	2
Curacao	8.44	3
Dom Rep	8.39	4
Honduras	8.39	5
Cozumel	8.33	6
Costa Maya	8.29	7
Progreso	8.29	8
Costa Rica	8.27	9
SXM	8.25	10
Barbados	8.18	11
Bonaire	8.15	12
Aruba	8.11	13
Puerto Rico	8.09	14
Colombia	8.09	15
Ensenada	8.01	16
USVI	8.00	17
Mazatlán	7.97	18
Belize	7.97	19
Grenada	7.94	20
St. Kitts	7.92	21
Bahamas	7.85	22
St. Lucia	7.84	23
Trinidad	7.82	24
St. Vincent	7.77	25
Jamaica	7.77	26
Cayman	7.76	27
BVI	7.75	28
Antigua	7.75	29
Martinique	7.64	30
Dominica	7.62	31
Panama	7.36	32
Guadeloupe	7.30	33
All Destinations	8.03	
Western	8.17	
Eastern	8.09	
Mexico	8.06	
Southern	7.84	

Table B-12 – How satisfied were you with your purchased tour?

Destinations	Mean Score	Rank
Progreso	9.22	1
Key West	9.16	2
Turks	9.14	3
Cozumel	8.84	4
Bonaire	8.78	5
Honduras	8.70	6
Grenada	8.62	7
Ensenada	8.58	8
Costa Maya	8.57	9
Barbados	8.57	10
Mazatlán	8.55	11
Dom Rep	8.53	12
Belize	8.50	13
Aruba	8.50	14
Costa Rica	8.46	15
St. Kitts	8.43	16
Curacao	8.33	17
SXM	8.33	18
Jamaica	8.32	19
Bahamas	8.29	20
Puerto Rico	8.18	21
St. Vincent	8.13	22
Antigua	8.13	23
Dominica	8.10	24
Cayman	8.09	25
BVI	7.98	26
USVI	7.88	27
Martinique	7.86	28
Panama	7.70	29
St. Lucia	7.68	30
Colombia	7.63	31
Trinidad	7.55	32
Guadeloupe	7.50	33
All Destinations	8.33	
Western	8.47	
Eastern	8.41	
Mexico	8.29	
Southern	8.15	

Table B-13 – How satisfied were you with knowledge of the guide?

Destinations	Mean Score	Rank
Turks	9.45	1
Key West	9.41	2
Progreso	9.39	3
Cozumel	9.19	4
Honduras	9.06	5
Costa Rica	9.05	6
Bonaire	9.02	7
Curacao	9.01	8
Mazatlán	9.01	9
Belize	9.01	10
Ensenada	9.00	11
Barbados	8.98	12
Aruba	8.95	13
Puerto Rico	8.90	14
Costa Maya	8.89	15
St. Kitts	8.86	16
Dom Rep	8.83	17
Cayman	8.80	18
Bahamas	8.79	19
Jamaica	8.70	20
Grenada	8.66	21
SXM	8.65	22
St. Vincent	8.50	23
Colombia	8.46	24
St. Lucia	8.44	25
Panama	8.42	26
Antigua	8.41	27
Martinique	8.39	28
BVI	8.35	29
USVI	8.30	30
Dominica	8.27	31
Guadeloupe	8.20	32
Trinidad	7.97	33
All Destinations	8.77	
Western	8.92	
Mexico	8.79	
Eastern	8.79	
Southern	8.62	

Table B-14 – How satisfied were you with the value of your tour?

Destinations	Mean Score	Rank
Turks	9.02	1
Progreso	8.90	2
Key West	8.80	3
Cozumel	8.39	4
Mazatlán	8.38	5
Honduras	8.38	6
Ensenada	8.33	7
Bonaire	8.24	8
Aruba	8.16	9
St. Kitts	8.14	10
Grenada	8.14	11
Belize	8.14	12
Barbados	8.09	13
Puerto Rico	8.08	14
Costa Rica	8.08	15
SXM	8.07	16
Costa Maya	8.06	17
Dom Rep	8.05	18
Curacao	8.03	19
Cayman	7.78	20
St. Vincent	7.74	21
Jamaica	7.74	22
BVI	7.63	23
Antigua	7.63	24
Bahamas	7.62	25
Dominica	7.51	26
USVI	7.51	27
St. Lucia	7.45	28
Colombia	7.38	29
Panama	7.37	30
Trinidad	7.21	31
Martinique	7.19	32
Guadeloupe	6.80	33
All Destinations	7.94	
Western	8.07	
Eastern	8.03	
Mexico	7.94	
Southern	7.75	

Table B-13 – How satisfied were you with historic sites/museums that you visited?

Destinations	Mean Score	Rank
Progreso	8.93	1
Key West	8.67	2
Puerto Rico	8.46	3
Turks	8.32	4
Cozumel	8.09	5
Curacao	8.04	6
Mazatlán	7.99	7
Honduras	7.96	8
Costa Maya	7.96	9
St. Kitts	7.95	10
Belize	7.92	11
Colombia	7.84	12
Aruba	7.84	13
Barbados	7.74	14
Bonaire	7.73	15
Dom Rep	7.70	16
Costa Rica	7.70	17
SXM	7.64	18
Ensenada	7.62	19
USVI	7.57	20
Panama	7.53	21
Martinique	7.53	22
Bahamas	7.51	23
Grenada	7.45	24
St. Lucia	7.42	25
Trinidad	7.42	26
Cayman	7.38	27
Antigua	7.30	28
Dominica	7.26	29
Jamaica	7.16	30
St. Vincent	7.01	31
BVI	6.95	32
Guadeloupe	6.60	33
All Destinations	7.70	
Mexico	7.83	
Western	7.79	
Eastern	7.79	
Southern	7.48	

Table B-16 – How satisfied were you with the variety of things to see and do in “destination”?

Destinations	Mean Score	Rank
Key West	8.53	1
Turks	8.00	2
Cozumel	7.97	3
Puerto Rico	7.96	4
Curacao	7.92	5
Aruba	7.77	6
SXM	7.72	7
Honduras	7.72	8
Barbados	7.66	9
Grenada	7.57	10
Colombia	7.56	11
Dom Rep	7.55	12
Mazatlán	7.55	13
Costa Rica	7.54	14
St. Kitts	7.53	15
USVI	7.45	16
Bonaire	7.41	17
Costa Maya	7.37	18
Cayman	7.30	19
Progreso	7.29	20
St. Lucia	7.28	21
Dominica	7.20	22
Antigua	7.15	23
Bahamas	7.10	24
Ensenada	7.08	25
Belize	7.07	26
Martinique	7.05	27
Jamaica	6.85	28
Panama	6.79	29
St. Vincent	6.67	30
BVI	6.60	31
Guadeloupe	6.40	32
Trinidad	6.32	33
All Destinations	7.36	
Western	7.52	
Mexico	7.50	
Eastern	7.36	
Southern	7.19	

Table B-17 –you with the friendliness of the residents of “destination”?

Destinations	Mean Score	Rank
Turks	8.91	1
Key West	8.76	2
Curacao	8.71	3
Aruba	8.68	4
Bonaire	8.68	5
Honduras	8.64	6
Costa Rica	8.59	7
Puerto Rico	8.56	8
St. Kitts	8.53	9
Dom Rep	8.52	10
Cozumel	8.52	11
SXM	8.51	12
Cayman	8.51	13
Mazatlán	8.48	14
Costa Maya	8.42	15
Belize	8.38	16
USVI	8.34	17
Progreso	8.34	18
Barbados	8.26	19
Dominica	8.21	20
St. Lucia	8.20	21
BVI	8.20	22
Antigua	8.10	23
Ensenada	8.08	24
Bahamas	8.04	25
Grenada	8.04	26
Jamaica	7.93	27
St. Vincent	7.87	28
Martinique	7.76	29
Panama	7.73	30
Trinidad	7.68	31
Colombia	7.65	32
Guadeloupe	7.60	33
All Destinations	8.29	
Western	8.49	
Eastern	8.29	
Southern	8.22	
Mexico	8.11	

Table B-18 – How satisfied were you with your overall shopping experience in “destination”?

Destinations	Mean Score	Rank
Key West	8.63	1
Turks	8.36	2
Curacao	7.98	3
Puerto Rico	7.96	4
SXM	7.92	5
St. Kitts	7.85	6
Aruba	7.80	7
Barbados	7.80	8
Cozumel	7.77	9
Honduras	7.72	10
USVI	7.67	11
Dom Rep	7.66	12
Mazatlán	7.54	13
Belize	7.52	14
Cayman	7.52	15
Progreso	7.51	16
Bahamas	7.50	17
Bonaire	7.50	18
Costa Maya	7.47	19
Grenada	7.42	20
Ensenada	7.31	21
Costa Rica	7.29	22
St. Lucia	7.25	23
Antigua	7.18	24
Jamaica	6.91	25
Martinique	6.80	26
Colombia	6.72	27
Panama	6.65	28
Dominica	6.62	29
BVI	6.59	30
Trinidad	6.49	31
Guadeloupe	6.40	32
St. Vincent	6.06	33
All Destinations	7.83	
Western	7.60	
Eastern	7.43	
Southern	7.26	
Mexico	7.17	

Table B-19 – How satisfied were you with the courtesy of store employees in “destination”

Destinations	Mean Score	Rank
Turks	9.06	1
Key West	8.99	2
Costa Rica	8.88	3
Honduras	8.79	4
Bonaire	8.76	5
Curacao	8.74	6
Puerto Rico	8.69	7
SXM	8.68	8
Cozumel	8.67	9
Mazatlán	8.67	10
Aruba	8.66	11
Dom Rep	8.64	12
Ensenada	8.62	13
Belize	8.60	14
St. Kitts	8.59	15
USVI	8.51	16
Cayman	8.50	17
Barbados	8.48	18
Costa Maya	8.46	19
Bahamas	8.42	20
St. Lucia	8.41	21
Colombia	8.33	22
Jamaica	8.31	23
Antigua	8.24	24
Dominica	8.22	25
BVI	8.20	26
Progreso	8.12	27
Grenada	8.09	28
Panama	8.08	29
Martinique	7.94	30
Trinidad	7.91	31
Guadeloupe	7.80	32
St. Vincent	7.52	33
All Destinations	8.44	
Western	8.66	
Eastern	8.41	
Southern	8.39	
Mexico	8.32	

Table B-20 – How satisfied were you with overall prices in “destination”?

Destinations	Mean Score	Rank
Turks	7.86	1
Key West	7.77	2
Progreso	7.67	3
Puerto Rico	7.66	4
Curacao	7.56	5
Mazatlán	7.56	6
St. Kitts	7.55	7
SXM	7.55	8
Honduras	7.50	9
Cozumel	7.37	10
Costa Rica	7.37	11
Aruba	7.35	12
Belize	7.33	13
Barbados	7.29	14
Ensenada	7.28	15
Colombia	7.26	16
Bonaire	7.23	17
Dom Rep	7.22	18
Grenada	7.08	19
USVI	7.07	20
Cayman	7.00	21
Costa Maya	7.00	22
Bahamas	6.92	23
Dominica	6.91	24
St. Lucia	6.86	25
Antigua	6.83	26
Trinidad	6.79	27
Panama	6.78	28
Jamaica	6.76	29
BVI	6.68	30
Martinique	6.55	31
St. Vincent	6.27	32
Guadeloupe	6.20	33
All Destinations	7.16	
Western	7.31	
Eastern	7.20	
Mexico	7.09	
Southern	7.03	

Table B-21 – How satisfied were you with taxis and/or local transportation in “destination”?

Destinations	Mean Score	Rank
Turks	8.82	1
Key West	8.60	2
Progreso	8.58	3
Cozumel	8.47	4
St. Kitts	8.43	5
Puerto Rico	8.26	6
SXM	8.23	7
Aruba	8.20	8
Mazatlán	8.17	9
Cayman	8.10	10
Belize	8.05	11
Barbados	8.04	12
Costa Maya	8.03	13
Honduras	8.02	14
Grenada	7.97	15
Dom Rep	7.91	16
Ensenada	7.85	17
Costa Rica	7.85	18
Curacao	7.81	19
Bahamas	7.76	20
USVI	7.74	21
Antigua	7.58	22
BVI	7.54	23
Jamaica	7.54	24
Colombia	7.53	25
Dominica	7.48	26
Trinidad	7.47	27
Bonaire	7.40	28
St. Lucia	7.27	29
Panama	7.09	30
Martinique	6.96	31
Guadeloupe	6.90	32
St. Vincent	6.67	33
All Destinations	7.83	
Eastern	7.92	
Western	7.89	
Southern	7.75	
Mexico	7.67	

Appendix B – Passenger & Crew Surveys

Samples of the passenger (Transit and Homeport) and crew surveys follow.

Jamaica - Transit

CONFIDENTIAL CRUISE PASSENGER SURVEY

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

☐ A ☐ B ☐ C ☐ D

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 Jamaica? ☐ Yes ☐ No

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

☐ 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10 ☐ 11 ☐ 12+ (If 0, Go to Q19 on back)

Q5. Did you purchase any tours for your visit in Jamaica? ☐ No (If 0, Continue to Q6) ☐ Yes (Go to Q7)

Q6. What are the main reasons you did not purchase a tour? ☐ Too similar to tours at other destinations ☐ I didn't like any

☐ Not a good value ☐ Too similar to other destinations ☐ Prefer to tour on own ☐ Prefer to Stay on ship ☐ Bad Weather

☐ I didn't like any ☐ Other (Go To Q10)

Q7. How did you purchase this tour(s)?

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

☐ From a tour operator over the Internet ☐ From a travel agent ☐ Other (Explain) _____

Q8. In total, how much did you pay for this/ tour (in US \$)?\$ _____ (Whole dollars only)

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

Q9. Which of the following best describes this/these tour(s): ☐ Historical/Cultural sites

☐ Beach Day ☐ Land based Tour (Jeep/ATV, Zip Line, Hiking, etc.)

☐ Water based tour (Kayak, Catamaran, Snorkeling, Power Boat, etc.) ☐ Other

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

☐ Yes (Continue)

☐ No (If No, Go to Q12 on back)

Q11. Please record the value of all purchases (in US \$) that all persons in **your cabin** made during your **on-shore visit** to Jamaica today.

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

Food and beverages at restaurants and bars:	\$ _____	Local Crafts and Souvenirs:	\$ _____
Taxis/Ground Transportation: (Do not include cost of sightseeing tours)	\$ _____	Retail Purchases of Liquor:	\$ _____
Retail Purchases of Watches & Jewelry:	\$ _____	Any Other Purchases:	\$ _____
Retail Purchases of Clothing (incl. T-shirts):	\$ _____		
Retail Purchases of Perfumes & Cosmetics:	\$ _____		

Please Go to Q12 on Back

Q12. On a scale of 1 to 10, how satisfied were you with each of the following in Jamaica?

(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
Overall 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
Tour - Knowledge of guide:	<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
Tour - Value for the money:	<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
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
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
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
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
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
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
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
Overall Visit in Jamaica:	<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

Q13. Overall, and on a scale of 1 to 10, how did your visit to Jamaica meet your prior expectations?

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

Q14. Based upon your experience in Jamaica today, on a scale of 1 to 10 how likely are you to return to Jamaica 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

Q15. Based upon your experience in Jamaica today, on a scale of 1 to 10 how likely are you recommend a land-based or resort vacation in Jamaica to family and friends?

Extremely likely ☐ 10 ☐ 9 ☐ 8 ☐ 7 ☐ 6 ☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1 ☐ 0 Not at all likely

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

Q16. How many **persons in your cabin** are: Male: ☐ 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 Female: ☐ 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Q17. How many persons in your cabin are in each age group? (Leave Blank if "0")

Under 18: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5+ **18 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+

Q18. Where is your permanent place of residence? ☐ US ☐ Canada ☐ UK ☐ Germany ☐ Australia ☐ France ☐ Other _____ (specify)

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

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

Comments:

Barbados – Homeport

CONFIDENTIAL CRUISE PASSENGER SURVEY

Q1. Please check the name of the ship you are sailing on:

☐ A ☐ B ☐ C ☐ D

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 Barbados, or did you begin your cruise at some other port?

☐ Boarded in Barbados (**Continue**) ☐ Began at another Port (**If you boarded at another port, Go to Q6**)

Q4. Are you a resident of Barbados? ☐ Yes (**STOP**) ☐ No

Q5. How many nights both prior to and following your cruise will you spend in Barbados?

Pre-cruise stay: ☐ 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5+ nights Post-cruise stay: ☐ 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5+ nights

Q6. Is this your first visit to Barbados? ☐ Yes ☐ No

Q7. Did you purchase a tour for your visit in Barbados?

☐ No (**If No SKIP TO Q14**) ☐ Yes (**Continue to Q10**)

Q8. How did you purchase this tour?

☐ Directly from the Cruise Line ☐ Onshore from a tour operator ☐ From a tour operator over the Internet

☐ From a travel agent ☐ Other _____

Q9. In total, how much did you pay for this tour(s) (in US\$)? \$ _____ (**Whole dollars only**)

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

Q10. How many hours did you spend on the tour? ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10+ ☐

Q11. Which of the following best describes this/these tour(s): ☐ Island Tour/Shopping ☐ Historical/Cultural Sites

☐ Beach Day Experience ☐ Land Based Tour (Jeep/ATV, Zip Line, Hiking, etc.)

☐ Water Based Tour (Kayak, Catamaran, Snorkeling, Power Boat, etc.) ☐ Other

Q12. Did you make any purchases in Barbados during your onshore visit or prior to your cruise?

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

Q13. How much in total did all persons in **your cabin** spend (in US\$) in Barbados during your onshore visit, or prior to your cruise?

\$ _____ (**Whole US\$ only**)

Q14. Please record the value of all purchases (in US\$) that all persons in **your cabin** made in Barbados 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. (Whole \$USD).**

Food and beverages at restaurants and bars:	\$ _____	Accommodations:	\$ _____
Taxis/Ground Transportation:			
(Do not include cost of sightseeing tours)	\$ _____	: Retail Purchases of Liquor	\$ _____
Retail Purchases of Watches & Jewelry:	\$ _____	: Any Other Purchases	\$ _____
Retail Purchases of Clothing (incl. T-shirts):	\$ _____	: Local Crafts and Souvenirs	\$ _____

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

(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
Overall 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
Tour: Knowledge of guide:	<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
Tour: Value for the money:	<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
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
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
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
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
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
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
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
Overall Visit in Barbados:	<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

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

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

Q17. Based upon your experience in Barbados today, on a scale of 1 to 10 how likely are you to return to Barbados 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

Q18. Based upon your experience in Barbados today, on a scale of 1 to 10 how likely are you recommend a land-based or resort vacation in Barbados to family and friends?

Extremely likely ☐ 10 ☐ 9 ☐ 8 ☐ 7 ☐ 6 ☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1 ☐ 0 Not at all likely

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

Q19. How many **persons in your cabin** are: Male: ☐ 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 Female: ☐ 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

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

Under 18: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5+ **18 to 24:** ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5+ **25 to 44:** ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5+

45 to 64: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5+ **65+:** ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5+

Q21. Where is your permanent place of residence? ☐ US ☐ Canada ☐ UK ☐ Germany ☐ Australia ☐ France ☐ Other _____(specify)

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

CONFIDENTIAL CREW SURVEY**ST. MAARTEN**

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

☐ A ☐ B ☐ C ☐ D

Q2. Did you leave the ship and visit St. Maarten today?

☐ Yes

☐ No (STOP)

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

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10+

Q5. How much in total did you spend (in US dollars) in St. Maarten 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 St. Maarten today or for the most recent visit to St. Maarten in the past month. * **Do not include the cost of tours or goods and services that were purchased onboard the cruise ship. (Enter whole dollars).**

Food and Beverages at bars and restaurants:	\$ _____	Tours purchased on shore 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):	\$ _____	Personal Products (Soap, Shampoo, etc.):	\$ _____
	\$ _____	: All other purchases:	\$ _____

Q7. On a scale of 1 to 5, how satisfied were you with each of the following in St. Maarten?

(Extremely satisfied = 5 1 = Not at all satisfied)

Guided Tour:	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0
Variety of things to see and do:	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0
Friendliness of the residents:	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0
Overall shopping experience:	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0
Taxis/Local Transportation:	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0
Overall experience in terminal:	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0
Overall visit in St. Maarten:	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0

Q8. Based upon your experience in St. Maarten, on a scale of 1 to 5, how likely are you to recommend a land-based or resort vacation in St. Maarten to a friend?

Extremely likely ☐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

Thank you for your time and assistance.



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.

Rich Higginson, Principal of BREA, has over thirty-five years of marketing and market research experience. Throughout his career, Rich has led a wide variety of qualitative and quantitative research projects on topics including: forecasting, economic impact, employee and customer satisfaction, and new product development. For the past 12 years Rich's focus has been on the travel and cruise tourism industry. Prior to joining BREA, Rich ran his own marketing research firm, The Princeton Research Group, Inc.

Dr. Moody, Principal of BREA, has more than forty 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 New York, Port of New Orleans, Tampa Port Authority, Port of San Diego, Royal Caribbean Cruises Ltd., Carnival Corp., and the Cruise Lines international Association (CLIA). 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.).