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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 II DESTINATION REPORTS



PREPARED FOR
Florida-Caribbean Cruise Association
and
Participating Destinations

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TABLE OF CONTENTS

CRUISE DESTINATIONS OF THE EASTERN CARIBBEAN	3
ANTIGUA AND BARBUDA	4
BAHAMAS	13
BRITISH VIRGIN ISLANDS	22
DOMINICAN REPUBLIC	31
KEY WEST.....	41
GUADELOUPE	50
PUERTO RICO	60
ST. KITTS AND NEVIS	70
ST. MAARTEN	79
TURKS AND CAICOS	88
U.S. VIRGIN ISLANDS.....	97
CRUISE DESTINATIONS OF THE WESTERN CARIBBEAN	106
BELIZE	107
CAYMAN ISLANDS.....	117
COLOMBIA	125
COSTA RICA	135
HONDURAS.....	144
JAMAICA	153
PANAMA.....	163
CRUISE DESTINATIONS OF THE SOUTHERN CARIBBEAN.....	173
ARUBA	174
BARBADOS.....	183
BONAIRE	193
CURACAO.....	202
DOMINICA	211
GRENADA.....	220
MARTINIQUE	229
ST. LUCIA.....	239
ST. VINCENT AND THE GRENADINES	248
TRINIDAD.....	257
CRUISE DESTINATIONS OF MEXICO	266
COSTA MAYA.....	267
COZUMEL	276
ENSENADA	285
MAZATLÁN	294
PROGRESO.....	303

CRUISE DESTINATIONS OF THE EASTERN CARIBBEAN

Antigua and Barbuda

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.¹ The surveys were undertaken during the eight-month period beginning in October 2023 and ending in May 2024. The surveys were distributed onboard the ships via QR codes, and the guests and crew completed the surveys online. Passengers and crew were only surveyed once during a cruise itinerary.

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 excursions, food & beverages, clothing, etc.;
- visit satisfaction, including excursions, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation (passengers only); and
- demographic characteristics, including country of residence, age group, etc.

Combining the expenditure data collected from the passenger and crew surveys with revenue and wage data received directly from the destinations, and destination specific expenditure data by the cruise lines for items such as port fees, provisions and services leads to estimates of the total cruise tourism expenditures for each participating destination.

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

¹ Surveys were conducted on the ships of the following cruise lines: Aida, 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.

Cruise Tourism Expenditures

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

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

Based on data collected from industry sources and available statistics, 854,225 cruise passengers arrived aboard cruise ships during the 2023/2024 cruise year.² Of these, an estimated 712,425 passengers (83%) disembarked and visited Antigua. Utilizing additional industry data and visiting cruise lines, 341,690 crew were aboard the cruise ships and 30 percent, or 103,875 crew, disembarked and visited the destination. Passenger arrivals are up approximately 8 percent from the last study in 2017/18.

These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **\$89.0** million (\$US) in cruise tourism expenditures in Antigua during the 2023/2024 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Passenger Spending

Per passenger spending estimates were derived from more than 1,000 surveys completed by passengers during the survey period. As shown in **Antigua Chart 1**, each passenger cruise party spent an average of \$165.74. The average spend per cruise party is the sum of the weighted spending in each of the 8 purchase categories. For example, 37 percent of the survey respondents reported spending an average of \$49.00 for food and beverages. Spread across all cruise parties that visited Antigua, this represented an average of \$17.93 per cruise party ($\$49.00 \times 37\% = \17.93). On a per passenger basis, the average total expenditure was \$82.39. This represents the sum of the per cruise party expenditures, \$165.74, divided by the average size of a cruise party in Antigua, 2.0 passengers.

Shore excursions, watches & jewelry, and food & beverages account for 75 percent of cruise passenger expenditures in Antigua.

² The 2023/2024 cruise year includes the twelve months beginning in May, 2023 and ending in April, 2024.

Just over half (57%) of the passengers reported that their cruise party purchased a shore excursion. The effective price of the shore excursion was about \$82 per party to the local economy.

Antigua Chart 1 – Estimated Passenger Spending (\$US), 2023/2024 cruise year³

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	\$145.00	56.5%	\$81.88
F&B at Restaurants & Bars	\$49.00	36.6%	\$17.93
Taxis/Ground Transportation	\$47.80	16.5%	\$7.87
Watches & Jewelry	\$316.30	7.5%	\$23.82
Clothing	\$66.10	23.2%	\$15.35
Other Purchases	\$60.40	14.3%	\$8.64
Local Crafts & Souvenirs	\$32.40	27.7%	\$8.97
Retail Purchases of Liquor	\$44.60	2.9%	\$1.28
Avg. Spend per Cruise Party			\$165.74
Average Size of Cruise Party			2.0
Avg. Spend per Passenger Visit			\$82.39
Passenger Onshore Visits			712,425
Total Passenger Expenditures			\$58,699,657

For the entire 2023/2024 cruise year, the estimated 712,425 cruise passengers who disembarked and visited Antigua spent a total of **\$58.7 million** (\$US) in Antigua.

Crew Spending

Crew spending estimates were derived from more than 450 surveys completed by crew members during the survey period. As shown in **Antigua Chart 2**, each crew member who disembarked the ship and visited Antigua spent an average of \$48.94. Like the passenger spending, the average expenditure per crew member is the sum of the weighted spending in each of the purchase categories.

Expenditures on food and beverages, clothing, and taxis & ground transportation account for 72 percent of the crew members’ onshore spending.

³ The average shore excursion expenditure is a weighted average of the onshore and travel agent/other purchases and the portion of the onboard purchases paid to local tour operators.

For the entire 2023/2024 cruise year, the estimated 103,875 crew who went ashore and visited Antigua spent an estimated total of **\$5.1 million** (\$US).

Antigua Chart 2 – Estimated Crew Spending (\$US), 2023/2024 cruise year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	\$31.50	68.0%	\$21.42
Taxis/Ground Transportation	\$32.80	24.2%	\$7.91
Watches & Jewelry	\$80.70	2.6%	\$2.10
Clothing	\$36.40	16.7%	\$6.08
Other Purchases	\$48.10	13.0%	\$6.26
Shore Excursions	\$56.70	1.5%	\$0.84
Personal Products	\$26.30	1.5%	\$0.39
Local Crafts & Souvenirs	\$16.00	19.7%	\$3.16
Retail Purchases of Liquor	\$30.00	2.6%	\$0.78
Avg. Spend per Crew Ashore			\$48.94
Number of Crew Onshore Visits			103,875
Total Crew Expenditures			\$5,084,096

Cruise Line & Destination Spending

Cruise lines made payments to local businesses for a variety of goods and services, including payments for port fees and taxes, navigation services, utilities and other supplies. Based upon data provided by the FCCA member cruise lines, we estimate that cruise lines were responsible for approximately **\$25.2 million** (\$US) in direct spending in Antigua during the 2023/2024 cruise year.

Economic Contribution of Cruise Tourism Expenditures

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

As shown in **Antigua Chart 3**, the **\$89.0** million in total cruise tourism expenditures in Antigua supported direct employment of 948 residents of Antigua paying \$10.0 million in annual wages. Adding the indirect contribution that results from the spending by those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures supported a total employment contribution of 1,521 jobs and \$16.3 million in wage income in Antigua during the 2023/2024 cruise year.

Antigua Chart 3 –Total Economic Contribution of Cruise Tourism, 2023/2024 cruise year

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	948	\$10.0
Total Economic Contribution	1,521	\$16.3

The Manufacturing, Wholesale & Retail Trade, and Transportation & Warehousing sectors account for about 78% of the total job impacts.

Passenger Surveys

Antigua Chart 4 shows the major attributes of passenger visits to Antigua as derived from the passenger surveys. Of those who completed the survey:

- 70 percent stated this was their first visit to Antigua.
- two-thirds (65%) of those who went ashore made at least one purchase while ashore other than a tour.
- the typical cruise party consisted of two passengers (Average: 2.0) and spent an average of 4.4 hours ashore.

Antigua Chart 4 – Major Attributes of Passenger Surveys

	Percent
Number Making First Visit	70%
Number Making Any Onshore Purchases:	65%
Average Hours Ashore	4.4
Purchased a Shore Excursion (Tour)	56%
How Purchased Tour:	
Cruise Line	76%
Onshore Tour Operator	5%
Other	18%
Tour Type:	
Historical/Cultural	25%
Beach Day	34%
Land-Based	15%
Water-Based	25%
Other	12%
Reason for No Tour	
Prefer to Tour on Own	61%
Poor Value	19%
Didn't Like Any	9%
Too Similar to Other Dest	6%
Weather	3%
Prefer to Stay on Ship	1%
Other	20%

- More than half (56%) of the passengers that went ashore purchased a shore excursion. Seventy-six percent of passengers who purchased a tour did so through their cruise line, 5 percent purchased their tour on shore and 18 percent purchased their tour through some other means (travel agent, travel site, etc.).
- A third (34%) of the tours purchased were "beach day activities". An equal percent said their tours were to "historical or cultural sites" (25%) or were "water-based activities" (25%).
- The key reasons why some did not purchase a tour include they prefer to tour on their own (61%), or they thought the excursions were a poor value (19%).

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Antigua Chart 5**. 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 purposes, the satisfaction data from the prior study is also shown in the chart below.

- Cruise passengers were very satisfied with their “overall visit” to Antigua (7.6) and the visit “meeting expectations” (7.2).
- “Guided Tours” (or Shore Excursions) received a ‘very satisfied’ mean score of 8.1; Additionally, the high ratings in “knowledge of guide” (8.4), and “value of tours” (7.6) indicates visitors to Antigua were very satisfied with their onshore excursions.

Antigua Chart 5 – Passenger Visit Satisfaction*

Visit Attributes	2024 Mean Score	2018 Mean Score
Overall Visit	7.6	6.9
Visit Met Expectations	7.2	6.2
Likelihood of a Return Visit	4.6	3.6
Likelihood of Recommending	5.4	4.3
Initial Shoreside Welcome	7.7	7.1
Overall Guided Tour	8.1	8.1
Knowledge of Guide	8.4	8.4
Value of Tour	7.6	7.7
Historic Sites/Museums	7.3	6.7
Variety of Things to See and Do	7.2	6.0
Friendliness of Residents	8.1	7.6
Overall Shopping Experience	7.2	6.5
Courtesy of Employees	8.2	7.7
Overall Prices	6.8	6.4
Taxis/Local Transportation	7.6	7.2

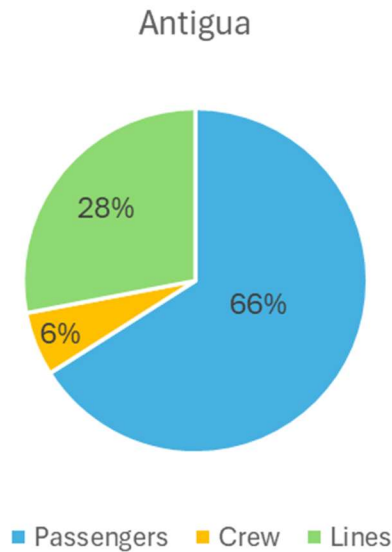
* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows:
 Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3;
 Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Passenger interactions with residents and store employees were very positive as the mean scores for “friendliness of residents” (8.1) and “courtesy of employees” (8.2) were high.
- Passengers were also very satisfied with the “historic sites” (7.3), a “variety of things to see and do” (7.2) and the “overall shopping experience” (7.2).
- As observed across all destinations, Antigua scored lowest passengers saying they are “likely to return for a land-based visit” (4.6), and their “likelihood of recommending to a friend” (5.4).

Antigua Chart 6 – Overall Spending

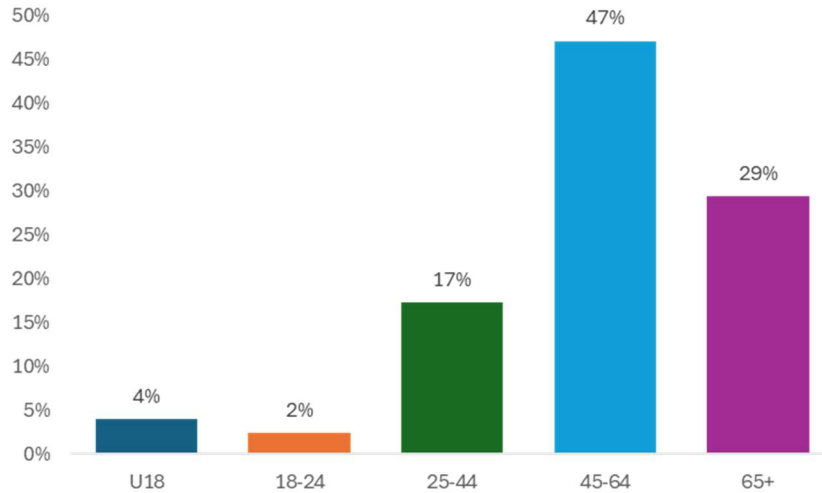
Overall, two-thirds (66%) of the cruise related spending in Antigua was made by passengers, 28 percent was made by the cruise lines and the port itself, and the remaining 6 percent was spending made by crew members.



Passenger Demographics

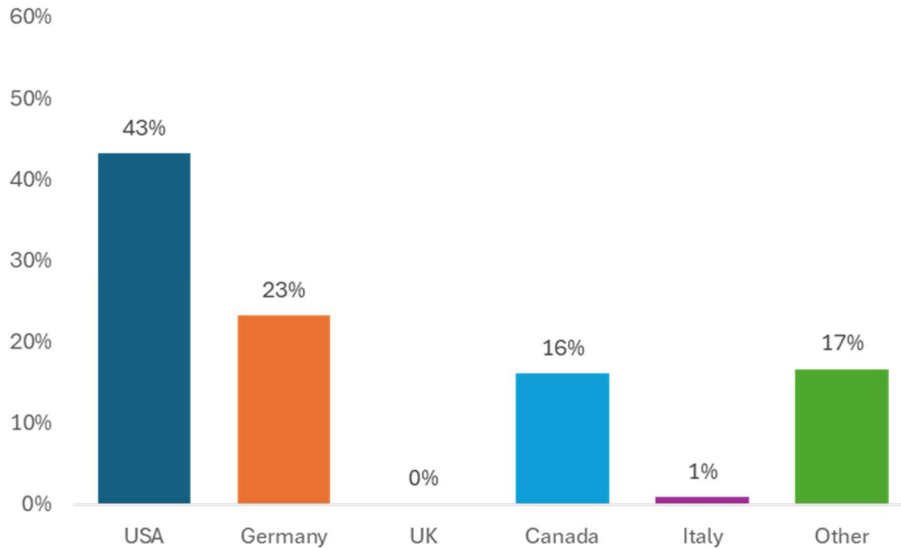
Consistent with the overall industry trends, the average age is down from 60 years old in the last study to 52 years old in this study. About 64 percent of the respondents are between the ages of 25 and 64.

Antigua Chart 7 – Passenger Age Cohorts



Antigua Chart 8 – Passenger Residence

Forty-three percent of the responding passengers to Antigua are residents of the US, 23 percent are residents of Germany, and 16 percent are from Canada.



Bahamas

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.⁴ The surveys were undertaken during the eight-month period beginning in October 2023 and ending in May 2024. The surveys were distributed onboard the ships via QR codes, and the guests and crew completed the surveys online. Passengers and crew were only surveyed once during a cruise itinerary.

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 excursions, food & beverages, clothing, etc.;
- visit satisfaction, including excursions, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation (passengers only); and
- demographic characteristics, including country of residence, age group, etc.

Combining the expenditure data collected from the passenger and crew surveys with revenue and wage data received directly from the destinations, and destination specific expenditure data by the cruise lines for items such as port fees, provisions and services leads to estimates of the total cruise tourism expenditures for each participating destination.

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

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

Cruise Tourism Expenditures

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

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

Based on data collected from the Bahamas Ministry of Tourism, 4,808,320 cruise passengers arrived aboard cruise ships during the 2023/2024 cruise year.⁵ Of these, an estimated 3,913,970 passengers (81%) disembarked and visited the Bahamas. Utilizing additional data provided by the Bahamas Ministry of Tourism and visiting cruise lines, 1,615,115 crew were aboard the cruise ships and an estimated 30 percent, or 490,995 crew, disembarked and visited the destination. Passenger arrivals are up about 60 percent from the last study in 2017/18.

These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **\$654.8** million (\$US) in cruise tourism expenditures in the Bahamas during the 2023/2024 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Passenger Spending

Per passenger spending estimates were derived from more than 1,000 surveys completed by passengers during the survey period. As shown in **Bahamas Chart 1**, each passenger cruise party spent an average of \$265.54. The average spend per cruise party is the sum of the weighted spending in each of the 8 purchase categories. For example, 34 percent of the survey respondents reported spending an average of \$65.80 for food and beverages. Spread across all cruise parties that visited the Bahamas, this represented an average of \$22.35 per cruise party ($\$65.80 \times 34\% = \22.35). On a per passenger basis, the average total expenditure was \$120.93. This represents the sum of the per cruise party expenditures, \$265.54, divided by the average size of a cruise party in the Bahamas, 2.2 passengers.

Shore excursions, clothing and watches & jewelry account for 75 percent of cruise passenger expenditures in the Bahamas.

About half (48%) of the passengers reported that their cruise party purchased a shore excursion. The effective price of the shore excursion was about \$85 per party to the local economy.

⁵ The 2023/2024 cruise year includes the twelve months beginning in May, 2023 and ending in April, 2024.

Bahamas Chart 1 – Estimated Passenger Spending (\$US), 2023/2024 cruise year⁶

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	\$178.50	47.5%	\$84.73
F&B at Restaurants & Bars	\$65.80	34.0%	\$22.35
Taxis/Ground Transportation	\$54.30	12.7%	\$6.90
Watches & Jewelry	\$813.80	11.3%	\$92.05
Clothing	\$64.60	32.9%	\$21.25
Other Purchases	\$125.20	17.2%	\$21.48
Local Crafts & Souvenirs	\$48.40	29.7%	\$14.39
Retail Purchases of Liquor	\$59.40	4.0%	\$2.40
Avg. Spend per Cruise Party			\$265.54
Average Size of Cruise Party			2.2
Avg. Spend per Passenger Visit			\$120.93
Passenger Onshore Visits			3,913,970
Total Passenger Expenditures			\$473,318,020

For the entire 2023/2024 cruise year, the estimated 3,913,970 cruise passengers who disembarked and visited the Bahamas spent a total of **\$473.3 million** (\$US) in the Bahamas.

Crew Spending

Crew spending estimates were derived from more than 520 surveys completed by crew members during the survey period. As shown in **Bahamas Chart 2**, each crew member who disembarked the ship and visited the Bahamas spent an average of \$43.26. Like the passenger spending, the average expenditure per crew member is the sum of the weighted spending in each of the purchase categories.

Expenditures on food and beverages, clothing, and personal products account for 76 percent of the crew members’ onshore spending.

For the entire 2023/2024 cruise year, the estimated 490,995 crew who went ashore and visited the Bahamas spent an estimated total of **\$21.2 million** (\$US).

⁶ The average shore excursion expenditure is a weighted average of the onshore and travel agent/other purchases and the portion of the onboard purchases paid to local tour operators.

Bahamas Chart 2 – Estimated Crew Spending (\$US), 2023/2024 cruise year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	\$38.20	64.6%	\$24.65
Taxis/Ground Transportation	\$16.20	13.1%	\$2.12
Watches & Jewelry	\$62.30	1.9%	\$1.20
Clothing	\$52.10	7.9%	\$4.11
Other Purchases	\$72.90	4.6%	\$3.37
Shore Excursions	\$35.10	1.7%	\$0.61
Personal Products	\$37.70	10.8%	\$4.06
Local Crafts & Souvenirs	\$21.60	12.7%	\$2.74
Retail Purchases of Liquor	\$29.60	1.3%	\$0.40
Avg. Spend per Crew Ashore			\$43.26
Number of Crew Onshore Visits			490,995
Total Crew Expenditures			\$21,238,055

Cruise Line & Destination Spending

Cruise lines made payments to local businesses for a variety of goods and services, including payments for port fees and taxes, navigation services, utilities and other supplies. The destination itself had employees and employee wages related to its cruise operations. Based upon data provided by the FCCA member cruise lines and the destination, we estimate that cruise lines and the Bahamas were responsible for approximately **\$160.2 million** (\$US) in direct spending in the Bahamas during the 2023/2024 cruise year.

Economic Contribution of Cruise Tourism Expenditures

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

As shown in **Bahamas Chart 3**, the \$654.8 million in total cruise tourism expenditures in the Bahamas supported direct employment of 7,400 residents of the Bahamas paying \$134.2 million in annual wages. Adding the indirect contribution that results from the spending by those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures supported a total employment contribution of 13,846 jobs and \$250.2 million in wage income in the Bahamas during the 2023/2024 cruise year.

Bahamas Chart 3 –Total Economic Contribution of Cruise Tourism, 2023/2024 cruise year

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	7,400	\$134.2
Total Economic Contribution	13,846	\$250.2

The Wholesale & Retail Trade, Lodging & Food Services, and Transportation & Warehousing sectors account for about 71% of the total job impacts.

Passenger Surveys

Bahamas Chart 4 shows the major attributes of passenger visits to the Bahamas as derived from the passenger surveys. Of those who completed the survey:

- 52 percent stated this was their first visit to the Bahamas.
- 65 percent of those who went ashore made at least one purchase while ashore other than a tour.
- the typical cruise party consisted of two passengers (Average: 2.2) and spent an average of 4.2 hours ashore.

Bahamas Chart 4 – Major Attributes of Passenger Surveys

	Percent
Number Making First Visit	52%
Number Making Any Onshore Purchases:	65%
Average Hours Ashore	4.2
Purchased a Shore Excursion (Tour)	47%
How Purchased Tour:	
Cruise Line	75%
Onshore Tour Operator	4%
Other	21%
Tour Type:	
Historical/Cultural	19%
Beach Day	32%
Land-Based	12%
Water-Based	17%
Other	30%
Reason for No Tour	
Prefer to Tour on Own	48%
Poor Value	19%
Didn't Like Any	13%
Too Similar to Other Dest	6%
Weather	6%
Prefer to Stay on Ship	2%
Other	25%

- About half (47%) of the passengers that went ashore purchased a shore excursion. Seventy-five percent of passengers who purchased a tour did so through their cruise line, 4 percent purchased their tour onshore, and 21 percent purchased their tour through some other means (travel agent, travel site, etc.).
- Nineteen percent of the tours purchased were visits to “historical or cultural sites”, while 1 in 3 were “beach day activities” (32%).
- Key reasons why some did not purchase a tour include they prefer to tour on their own (48%) and they thought they were a poor value (19%).

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Bahamas Chart 5**. 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 purposes, the satisfaction data from the prior study is also shown in the chart below.

- Cruise passengers were very satisfied with their “overall visit” to the Bahamas (7.5) and the visit “meeting expectations” (7.2).
- “Guided Tours” (or Shore Excursions) received a ‘very satisfied’ mean score of 8.3; Additionally, the high ratings in “knowledge of guide” (8.8), and “value of tours” (7.6) indicates visitors to the Bahamas were very satisfied with their onshore excursions.

Bahamas Chart 5 – Passenger Visit Satisfaction*

Visit Attributes	2024 Mean Score	2018 Mean Score
Overall Visit	7.5	7.5
Visit Met Expectations	7.2	6.9
Likelihood of a Return Visit	5.6	5.4
Likelihood of Recommending	5.8	5.9
Initial Shoreside Welcome	7.8	7.2
Overall Guided Tour	8.3	8.3
Knowledge of Guide	8.8	8.6
Value of Tour	7.6	7.9
Historic Sites/Museums	7.5	7.6
Variety of Things to See and Do	7.1	7.0
Friendliness of Residents	8.0	7.7
Overall Shopping Experience	7.5	7.5
Courtesy of Employees	8.4	7.9
Overall Prices	6.9	7.0
Taxis/Local Transportation	7.8	7.8

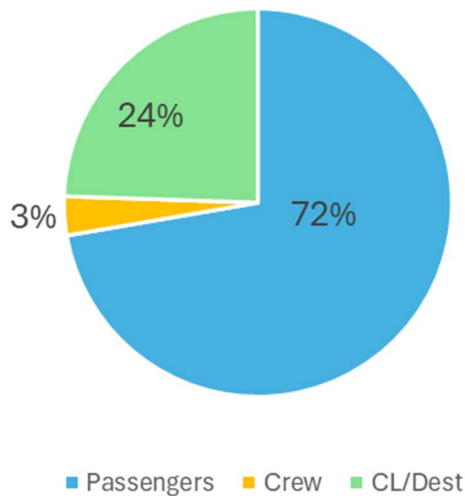
* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows:
 Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3;
 Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Passenger interactions with residents and store employees were very positive as the mean scores for “friendliness of residents” (8.0) and “courtesy of employees” (8.4) were high.
- Passengers were also very satisfied with the “Historic sights” (7.5), a “variety of things to see and do” (7.1) and the “overall shopping experience” (7.5).
- The Bahamas scored lowest passengers saying they are “likely to return for a land-based visit” (5.6), and their “likelihood of recommending to a friend” (5.8), however, both ratings are similar to the ratings of other destinations.

Bahamas Chart 6 – Overall Spending

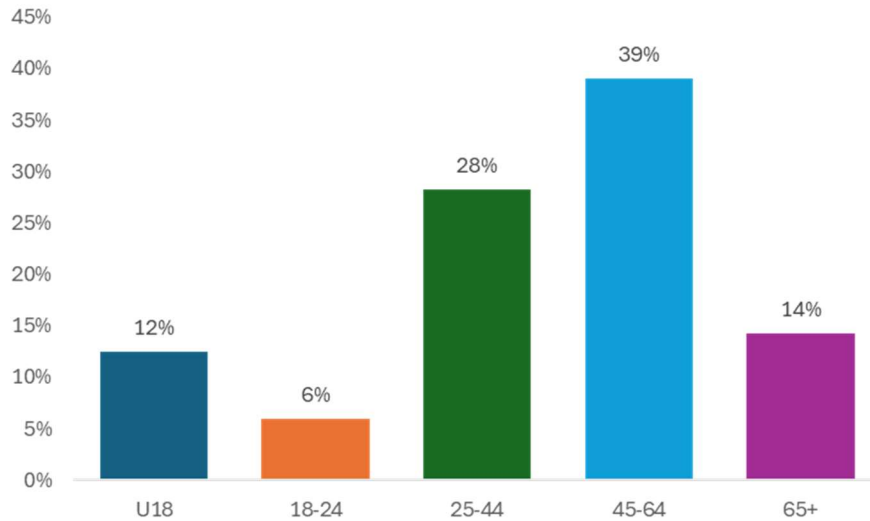
Nearly 3 in 4 (72%) of the cruise related spending in the Bahamas was made by passengers, 24 percent was made by the cruise lines and the Bahamas itself, and the remaining 3 percent was spending made by crew members.



Passenger Demographics

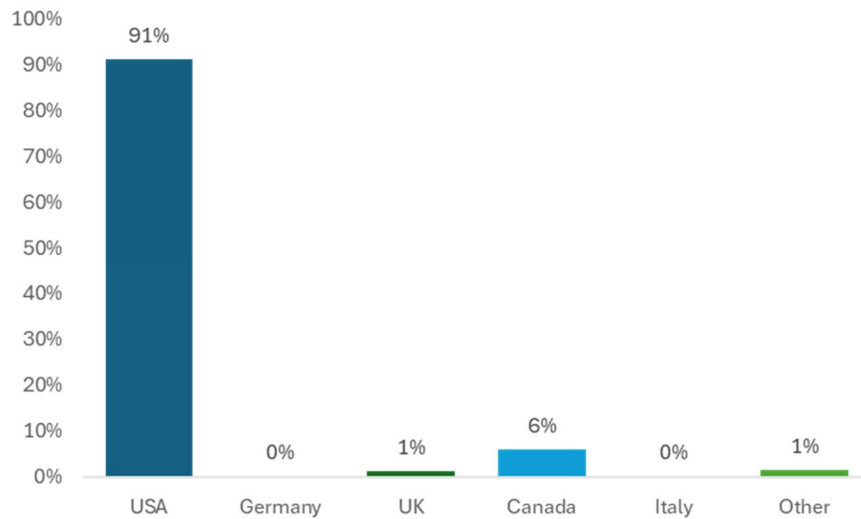
Consistent with the overall industry trends, the average age is down from 47 years old in the last study to 43 years old in this study. About 67 percent of the respondents are between the ages of 25 and 64.

Bahamas Chart 7 – Passenger Age Cohorts



Bahamas Chart 8 – Passenger Residence

Most (91%) of the responding passengers to the Bahamas are residents of the US.



British Virgin Islands

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.⁷ The surveys were undertaken during the eight-month period beginning in October 2023 and ending in May 2024. The surveys were distributed onboard the ships via QR codes, and the guests and crew completed the surveys online. Passengers and crew were only surveyed once during a cruise itinerary.

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 excursions, food & beverages, clothing, etc.;
- visit satisfaction, including shore excursions, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation (passengers only); and
- demographic characteristics, including country of residence, age group, etc.

Combining the expenditure data collected from the passenger and crew surveys with revenue and wage data received directly from the destinations, and destination specific expenditure data by the cruise lines for items such as port fees, provisions and services leads to estimates of the total cruise tourism expenditures for each participating destination.

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

⁷ Surveys were conducted on the ships of the following cruise lines: Aida, 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.

Cruise Tourism Expenditures

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

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

Based on data collected from the British Virgin Islands Ports Authority, 821,990 cruise passengers arrived aboard cruise ships during the 2023/2024 cruise year.⁸ Of these, an estimated 685,540 passengers (83%) disembarked and visited BVI. Utilizing additional data provided by the Ports Authority and visiting cruise lines, 330,800 crew were aboard the cruise ships and 30 percent, or 100,560 crew, disembarked and visited the destination. Passenger arrivals are up more than fourfold from the 2018 study's 140,760 arrivals.

These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **\$85.7** million (\$US) in cruise tourism expenditures in BVI during the 2023/2024 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Passenger Spending

Per passenger spending estimates were derived from more than 650 surveys completed by passengers during the survey period. As shown in **BVI Chart 1**, each passenger cruise party spent an average of \$150.97. The average spend per cruise party is the sum of the weighted spending in each of the 8 purchase categories. For example, 31 percent of the survey respondents reported spending an average of \$43.60 for food and beverages. Spread across all cruise parties that visited BVI, this represented an average of \$13.36 per cruise party ($\$43.60 \times 31\% = \13.36). On a per passenger basis, the average total expenditure was \$72.49. This represents the sum of the per cruise party expenditures, \$150.97, divided by the average size of a cruise party in BVI, 2.1 passengers.

Shore excursions, and watches & jewelry account for 69 percent of cruise passenger expenditures in BVI.

⁸ The 2023/2024 cruise year includes the twelve months beginning in May, 2023 and ending in April, 2024.

Just over half (56%) of the passengers reported that their cruise party purchased a shore excursion. The effective price of the shore excursion was about \$70 per party to the local economy.

BVI Chart 1 – Estimated Passenger Spending (\$US), 2023/2024 cruise year⁹

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	\$125.60	55.8%	\$70.09
F&B at Restaurants & Bars	\$43.60	30.7%	\$13.36
Taxis/Ground Transportation	\$49.90	12.1%	\$6.04
Watches & Jewelry	\$523.70	6.5%	\$33.99
Clothing	\$51.80	23.2%	\$12.04
Other Purchases	\$68.10	10.8%	\$7.36
Local Crafts & Souvenirs	\$27.50	20.7%	\$5.68
Retail Purchases of Liquor	\$48.80	4.9%	\$2.40
Avg. Spend per Cruise Party			\$150.97
Average Size of Cruise Party			2.1
Avg. Spend per Passenger Visit			\$72.49
Passenger Onshore Visits			685,540
Total Passenger Expenditures			\$49,693,636

For the entire 2023/2024 cruise year, the estimated 685,540 cruise passengers who disembarked and visited BVI spent a total of **\$49.7 million** (\$US) in BVI.

Crew Spending

Crew spending estimates were derived from the surveys completed by crew members during the survey period. As shown in **BVI Chart 2**, each crew member who disembarked the ship and visited BVI spent an average of \$45.06. Like the passenger spending, the average expenditure per crew member is the sum of the weighted spending in each of the purchase categories.

Expenditures on food and beverages, taxi/transportation and other purchases accounted for 61 percent of the crew members’ onshore spending.

⁹ The average shore excursion expenditure is a weighted average of the onshore and travel agent/other purchases and the portion of the onboard purchases paid to local tour operators.

For the entire 2023/2024 cruise year, the estimated 100,560 crew who went ashore and visited BVI spent an estimated total of **\$4.5 million** (\$US).

BVI Chart 2 – Estimated Crew Spending (\$US), 2023/2024 cruise year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	\$25.90	50.0%	\$12.94
Taxis/Ground Transportation	\$41.00	13.9%	\$5.69
Watches & Jewelry	\$42.50	5.6%	\$2.36
Clothing	\$31.00	13.9%	\$4.31
Other Purchases	\$45.90	19.4%	\$8.92
Shore Excursions	\$37.50	5.6%	\$2.08
Personal Products	\$27.50	16.7%	\$4.58
Local Crafts & Souvenirs	\$30.00	13.9%	\$4.17
Retail Purchases of Liquor	\$0.00	0.0%	\$0.00
Avg. Spend per Crew Ashore			\$45.06
Number of Crew Onshore Visits			100,560
Total Crew Expenditures			\$4,530,890

Cruise Line & Destination Spending

Cruise lines made payments to local businesses for a variety of goods and services, including payments for port fees and taxes, navigation services, utilities and other supplies. The destination itself had employee wages related to cruise operations. Based upon data provided by the FCCA member cruise lines and the destination, we estimate that cruise lines and the destination were responsible for approximately **\$31.4 million** (\$US) in direct spending in BVI during the 2023/2024 cruise year.

Economic Contribution of Cruise Tourism Expenditures

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

As shown in **BVI Chart 3**, the **\$85.7** million in total cruise tourism expenditures in BVI supported direct employment of 872 residents of BVI paying \$9.6 million in annual wages. Adding the indirect contribution that results from the spending by those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures supported a total employment contribution of 1,666 jobs and \$18.3 million in wage income in BVI during the 2023/2024 cruise year.

BVI Chart 3 – Total Economic Contribution of Cruise Tourism, 2023/2024 cruise year

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	872	\$9.6
Total Economic Contribution	1,666	\$18.3

The Wholesale & Retail Trade, and Transportation & Warehousing sectors account for about 66% of the total job impacts.

Passenger Surveys

BVI Chart 4 shows the major attributes of passenger visits to BVI as derived from the passenger surveys. Of those who completed the survey:

- 73 percent stated this was their first visit to BVI.
- About half (55%) of those who went ashore made at least one purchase while ashore other than a tour.
- the typical cruise party consisted of two passengers (Average: 2.1) and spent an average of 4.0 hours ashore.

BVI Chart 4 – Major Attributes of Passenger Surveys

	Percent
Number Making First Visit	73%
Number Making Any Onshore Purchases:	55%
Average Hours Ashore	4.0
Purchased a Shore Excursion (Tour)	56%
How Purchased Tour:	
Cruise Line	70%
Onshore Tour Operator	5%
Other	24%
Tour Type:	
Historical/Cultural	16%
Beach Day	44%
Land-Based	21%
Water-Based	13%
Other	17%
Reason for No Tour	
Prefer to Tour on Own	43%
Poor Value	20%
Didn't Like Any	16%
Too Similar to Other Dest	9%
Weather	3%
Prefer to Stay on Ship	4%
Other	24%

- More than half (56%) of the passengers that went ashore purchased a shore excursion. Seventy percent of passengers who purchased a tour did so through their cruise line, 5 percent purchased their tour on shore and 24 percent purchased their tour through some other means (travel agent, travel site, etc.).
- Nearly half (44%) of the tours purchased were for “beach day activities”, while 21 percent were “land-based activities”.
- The key reasons why some did not purchase a tour include they prefer to tour on their own (43%), or they thought the excursions were a poor value (20%).

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **BVI Chart 5**. 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 purposes, the satisfaction data from the prior study is also shown in the chart below.

- Cruise passengers were very satisfied with their “overall visit” to BVI (7.5) and the visit “meeting expectations” (7.1).
- “Guided Tours” (or Shore Excursions) received a ‘very satisfied’ mean score of 8.0; Additionally, the high ratings in “knowledge of guide” (8.3), and “value of tours” (7.6) indicates visitors to BVI were very satisfied with their onshore excursions.

BVI Chart 5 – Passenger Visit Satisfaction*

Visit Attributes	2024 Mean Score	2018 Mean Score
Overall Visit	7.5	7.4
Visit Met Expectations	7.1	6.7
Likelihood of a Return Visit	4.4	4.7
Likelihood of Recommending	5.1	5.5
Initial Shoreside Welcome	7.7	7.6
Overall Guided Tour	8.0	8.0
Knowledge of Guide	8.3	8.4
Value of Tour	7.6	7.8
Historic Sites/Museums	6.9	6.3
Variety of Things to See and Do	6.6	5.9
Friendliness of Residents	8.2	8.2
Overall Shopping Experience	6.6	5.9
Courtesy of Employees	8.2	8.0
Overall Prices	6.7	6.3
Taxis/Local Transportation	7.5	7.7

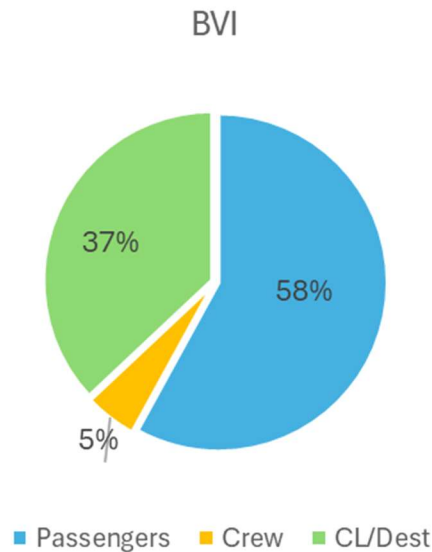
* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows:
 Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3;
 Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Passenger interactions with residents and store employees were very positive as the mean scores for “friendliness of residents” (8.2) and “courtesy of employees” (8.2) were high.
- Passengers were also very satisfied with the “initial onshore welcome” (7.7), a “taxi/transportation” on the island (7.5).
- BVI scored lowest passengers saying they are “likely to return for a land-based visit” (4.4), and their “likelihood of recommending to a friend” (5.1), however, both ratings are similar to the ratings of other destinations.

BVI Chart 6 – Overall Spending

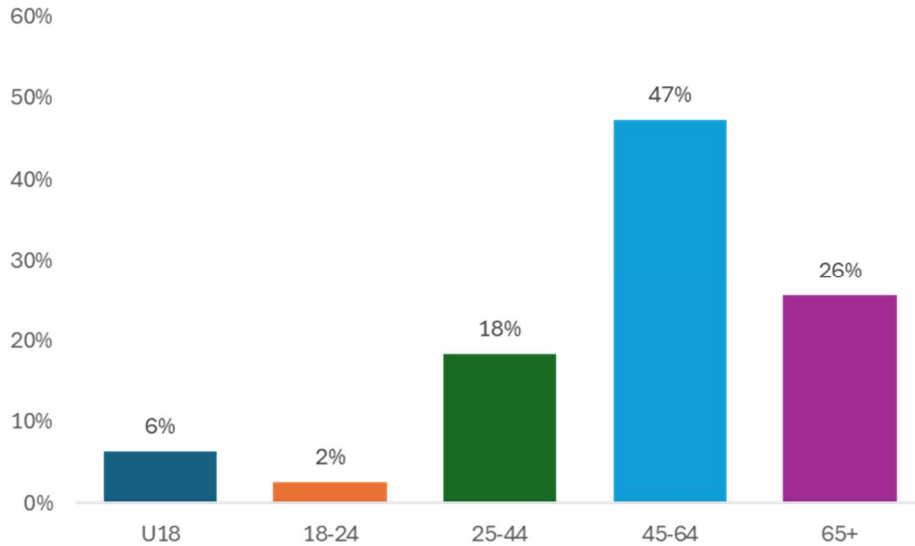
About 6 in ten (58%) of the cruise related spending in BVI was made by passengers, 37 percent was made by the cruise lines and the port itself, and the remaining 5 percent was spending made by crew members.



Passenger Demographics

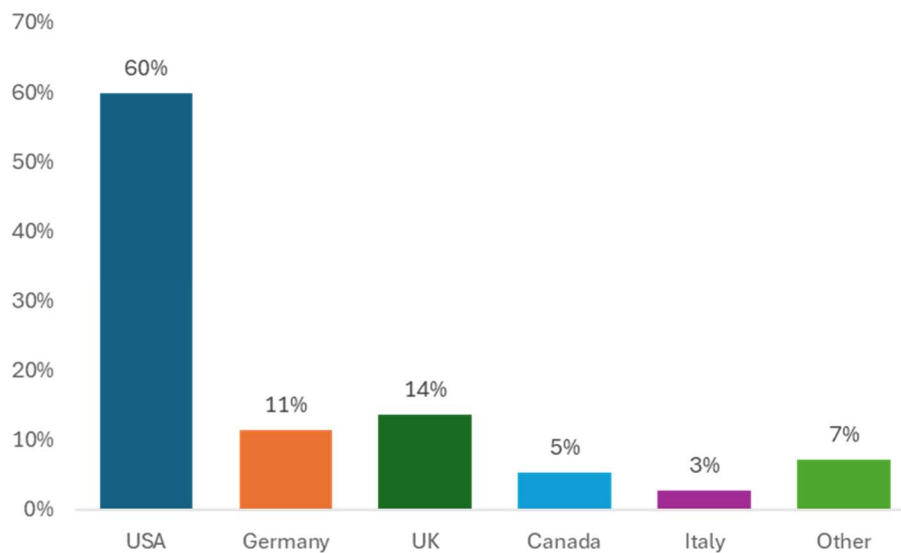
Consistent with the overall industry trends, the average age is down from 58 years old in the last study to 51 years old in this study. About 66 percent of the respondents are between the ages of 25 and 64.

BVI Chart 7 – Passenger Age Cohorts



BVI Chart 8 – Passenger Residence

Most (60%) of the responding passengers to BVI are residents of the US, 14 percent are residents of the UK, and 11 percent are from Germany.



Dominican Republic

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.¹⁰ The surveys were undertaken during the eight-month period beginning in October 2023 and ending in May 2024. The surveys were distributed onboard the ships via QR codes, and the guests and crew completed the surveys online. Passengers and crew were only surveyed once during a cruise itinerary.

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 excursions, food & beverages, clothing, etc.;
- visit satisfaction, including shore excursions, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation (passengers only); and
- demographic characteristics, including country of residence, age group, etc.

Combining the expenditure data collected from the passenger and crew surveys with revenue and wage data received directly from the destinations, and destination specific expenditure data by the cruise lines for items such as port fees, provisions and services leads to estimates of the total cruise tourism expenditures for each participating destination.

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

¹⁰ Surveys were conducted on the ships of the following cruise lines: Aida, 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.

Cruise Tourism Expenditures

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

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

Based on data collected from the Dominican Republic Ministry of Tourism, a total of 2,517,540 cruise passengers arrived aboard cruise ships during the 2023/2024 cruise year.¹¹ Of these, 2,481,470 transit passengers arrived and an estimated 2,000,065 passengers (81%) disembarked and visited the Dominican Republic. There were also an estimated 36,070 passengers who embarked on their cruise from Dominican Republic. Utilizing additional data provided by the Ministry of Tourism, and visiting cruise lines, 780,965 crew were aboard the cruise ships and an estimated 30 percent, or 237,415 disembarked and visited the destination. Both Transit passenger arrivals and embarking passengers are more than 130 percent over the last study in 2017/18.

These passenger and crew visits along with additional expenditures by the cruise lines and the destination itself generated a total of **\$251.4** million (\$US) in cruise tourism expenditures in Dominican Republic during the 2023/2024 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Passenger Spending

Transit passenger spending estimates were derived from more than 1,800 transit surveys completed by passengers during the survey period. As shown in **Dominican Republic Chart 1**, each transit passenger cruise party spent an average of \$161.68. The average spend per cruise party is the sum of the weighted spending in each of the 8 purchase categories. For example, 34 percent of the survey respondents reported spending an average of \$42.40 for food and beverages. Spread across all cruise parties that visited the Dominican Republic, this represents an average of \$14.31 per cruise party ($\$42.40 \times 34\% = \14.31). On a per passenger basis, the average total expenditure was \$78.11. This represents the sum of the per cruise party expenditures, \$161.68, divided by the average size of a cruise party in Dominican Republic, 2.1 passengers.

Shore excursions, watches & jewelry, and food & beverages account for 72 percent of cruise passenger expenditures in the Dominican Republic.

¹¹ The 2023/2024 cruise year includes the twelve months beginning in May 2023 and ending in April 2024.

Just over half (56%) of the passengers reported that their cruise party purchased a shore excursion. The effective price of the shore excursion was about \$81 per party to the local economy.

Dominican Republic Chart 1a – Estimated Transit Passenger Spending (\$US), 2023/2024 cruise year¹²

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	\$144.20	56.3%	\$81.21
F&B at Restaurants & Bars	\$42.40	33.8%	\$14.31
Taxis/Ground Transportation	\$47.60	9.6%	\$4.58
Watches & Jewelry	\$224.70	9.4%	\$21.20
Clothing	\$51.70	25.4%	\$13.12
Other Purchases	\$70.40	17.1%	\$12.06
Local Crafts & Souvenirs	\$36.50	30.8%	\$11.24
Retail Purchases of Liquor	\$44.50	8.9%	\$3.97
Avg. Spend per Cruise Party			\$161.68
Average Size of Cruise Party			2.1
Avg. Spend per Passenger Visit			\$78.11
Passenger Onshore Visits			2,000,065
Total Passenger Expenditures			\$156,220,236

For the entire 2023/2024 cruise year, the estimated 2 million+ transit passengers who disembarked and visited the Dominican Republic spent a total of **\$156.2 million** (\$US) in the Dominican Republic.

¹² The average shore excursion expenditure is a weighted average of the onshore and travel agent/other purchases and the portion of the onboard purchases paid to local tour operators.

Overall, 13 percent of passengers who embarked on their cruise from Dominican Republic reported spending at least one night in Dominican Republic. Of those who spent an overnight, the average amount spent for accommodations was \$1,047 per cruise party. Overall, the weighted spend per embarking party was \$357.52. On a per passenger basis this equates to \$172.71.

Dominican Republic Chart 1b – Estimated Embark Passenger Spending (\$US), 2023/2024 cruise year¹³

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Accommodations	\$1,047.10	13.0%	\$136.40
F&B at Restaurants & Bars	\$61.20	29.3%	\$17.90
Taxis/Ground Transportation	\$63.20	14.8%	\$9.37
Watches & Jewelry	\$47.30	4.8%	\$2.27
Clothing	\$38.60	9.4%	\$3.64
Other Purchases	\$63.40	14.4%	\$9.15
Shore Excursions	\$260.60	65.9%	\$171.83
Local Crafts & Souvenirs	\$32.90	16.6%	\$5.47
Retail Purchases of Liquor	\$27.60	5.4%	\$1.49
Avg. Spend per Homeport Cruise Party			\$357.52
Average Size of a Party			2.1
Avg. Spend per Homeport Passenger			\$172.71
Number of Homeport Passengers			36,070
Total Homeport Passenger Expenditures			\$6,230,099

For the entire 2023/2024 cruise year, the 36,070 embarking passengers spent a total of **\$6.2 million** (\$US) in Dominican Republic.

Crew Spending

Crew spending estimates were derived from surveys completed by crew members during the survey period. As shown in **Dominican Republic Chart 2**, each crew member who disembarked the ship and visited Dominican Republic spent an average of \$36.07. Like the passenger spending, the average expenditure per crew member is the sum of the weighted spending in each of the purchase categories.

Expenditures on food and beverages, taxi, and personal products account for 69 percent of the crew members’ onshore spending.

¹³ The average shore excursion expenditure is a weighted average of the onshore and travel agent/other purchases and the portion of the onboard purchases paid to local tour operators.

For the entire 2023/2024 cruise year, the estimated 237,415 crew who went ashore and visited Dominican Republic spent nearly **\$8.6 million** (\$US).

Dominican Republic Chart 2 – Estimated Crew Spending (\$US), 2023/2024 cruise year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	\$32.80	59.1%	\$19.35
Taxis/Ground Transportation	\$16.40	17.6%	\$2.90
Watches & Jewelry	\$61.80	1.6%	\$0.99
Clothing	\$31.50	8.6%	\$2.70
Other Purchases	\$39.00	8.6%	\$3.34
Shore Excursions	\$44.30	2.1%	\$0.95
Personal Products	\$24.50	10.7%	\$2.62
Local Crafts & Souvenirs	\$19.40	12.6%	\$2.43
Retail Purchases of Liquor	\$24.90	3.2%	\$0.80
Avg. Spend per Crew Ashore			\$36.07
Number of Crew Onshore Visits			237,415
Total Crew Expenditures			\$8,564,678

Cruise Line Spending

Cruise lines made payments to local businesses for a variety of goods and services, including payments for port fees and taxes, navigation services, utilities, bunker fuel and other supplies. The destination itself had employee wages related to cruise operations. Based upon data provided by the FCCA member cruise lines and the destination, we estimate that the cruise lines and the destination were responsible for approximately **\$80.4 million** (\$US) in direct spending in Dominican Republic during the 2023/2024 cruise year.

Economic Contribution of Cruise Tourism Expenditures

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

As shown in **Dominican Republic Chart 3**, the **\$251.4** million in total cruise tourism expenditures in Dominican Republic supported direct employment of 4,375 residents of Dominican Republic paying \$23.5 million in annual wages. Adding the indirect contribution that results from the spending by those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures supported a total employment contribution of 6,469 jobs and \$35.2 million in wage income in Dominican Republic during the 2023/2024 cruise year.

Dominican Republic Chart 3 –Total Economic Contribution of Cruise Tourism, 2023/2024 cruise year

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	4,375	\$23.5
Total Economic Contribution	6,469	\$35.2

The Wholesale & Retail Trade, Manufacturing, and Transportation & Warehousing sectors account for about 78% of the total job impacts.

Passenger Surveys

Dominican Republic Chart 4 shows the major attributes of passenger visits to Dominican Republic as derived from the passenger surveys. Of those who completed the survey:

- 73 percent stated this was their first visit to Dominican Republic.
- More than 3 in 5 (67%) of those who went ashore made at least one purchase while ashore other than a tour.
- the typical cruise party consisted of two passengers (Average: 2.1) and spent an average of 4.6 hours ashore.

Dominican Republic Chart 4 – Major Attributes of Passenger Surveys

	Percent
Number Making First Visit	73%
Number Making Any Onshore Purchases:	67%
Average Hours Ashore	4.6
Purchased a Shore Excursion (Tour)	56%
How Purchased Tour:	
Cruise Line	77%
Onshore Tour Operator	7%
Other	16%
Tour Type:	
Historical/Cultural	28%
Beach Day	25%
Land-Based	25%
Water-Based	14%
Other	20%
Reason for No Tour	
Prefer to Tour on Own	48%
Poor Value	16%
Didn't Like Any	10%
Too Similar to Other Dest	5%
Weather	2%
Prefer to Stay on Ship	2%
Other	31%

- More than half (56%) of the passengers that went ashore purchased a shore excursion. Seventy-seven percent of passengers who purchased a tour did so through their cruise line, 7 percent purchased their tour on shore and 16 percent purchased their tour through some other means (travel agent, travel site, etc.).
- An equal number of tours purchased were visits to “historical or cultural sites” (28%), “beach day activities” (25%) or “land-based activities” (25%).
- The key reasons why some did not purchase a tour include they prefer to tour on their own (48%) and they felt the tours were a poor value (16%).

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Dominican Republic Chart 5**. 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 purposes, the satisfaction data from the prior study is also shown in the chart below.

- Cruise passengers were very satisfied with their “overall visit” to Dominican Republic (8.0) and the visit “meeting expectations” (7.8).
- “Guided Tours” (or Shore Excursions) received a ‘very satisfied’ mean score of 8.5. Additionally, the high ratings in “knowledge of guide” (8.8), and “value of tours” (8.0) indicates visitors to Dominican Republic were very satisfied with their onshore excursions.

Dominican Republic Chart 5 – Passenger Visit Satisfaction*

Visit Attributes	2024 Mean Score	2018 Mean Score
Overall Visit	8.0	7.6
Visit Met Expectations	7.8	7.0
Likelihood of a Return Visit	5.4	5.3
Likelihood of Recommending	6.0	5.8
Initial Shoreside Welcome	8.4	8.1
Overall Guided Tour	8.5	8.2
Knowledge of Guide	8.8	8.4
Value of Tour	8.0	7.6
Historic Sites/Museums	7.7	7.2
Variety of Things to See and Do	7.6	6.9
Friendliness of Residents	8.5	8.0
Overall Shopping Experience	7.7	7.4
Courtesy of Employees	8.6	8.2
Overall Prices	7.2	7.1
Taxis/Local Transportation	7.9	8.1

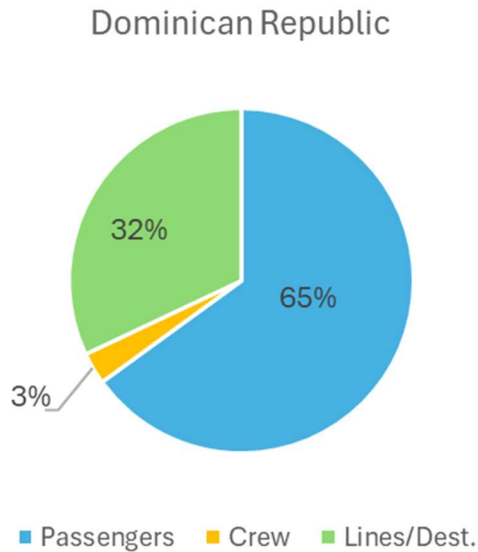
* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows:
 Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3;
 Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Passenger interactions with residents and store employees were very positive as the mean scores for “friendliness of residents” (8.5) and “courtesy of employees” (8.6) were high.
- Passengers were also very satisfied with the “historic sites” (7.7), a “variety of things to see and do” (7.6) and the “overall shopping experience” (7.7). They recorded similar satisfaction ratings for the “overall prices” (7.2).
- As observed with all other destinations, Dominican Republic scored lowest passengers saying they are “likely to return for a land-based visit” (5.4), and their “likelihood of recommending to a friend” (6.0), however, both ratings are similar to the ratings of other destinations.

Dominican Republic Chart 6 – Overall Spending

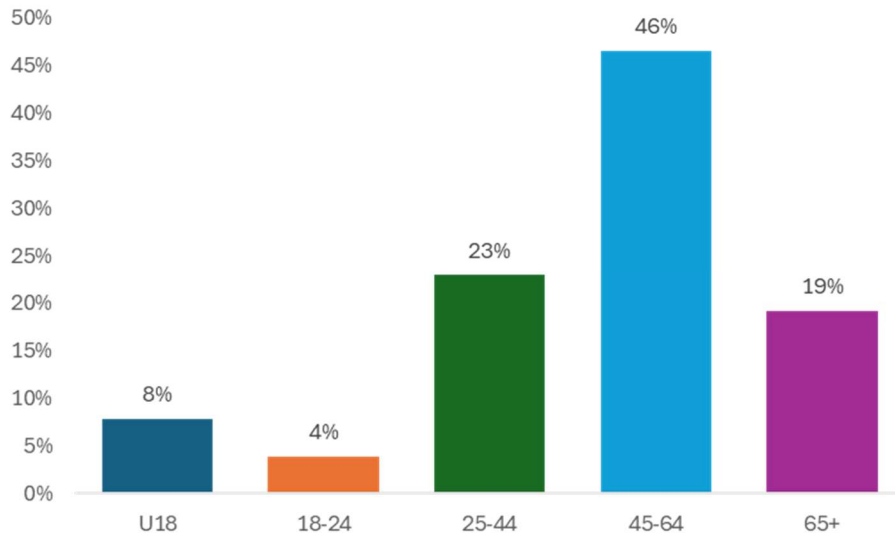
About 2 in 3 (65%) of the cruise related spending in Dominican Republic was made by passengers, 32 percent was made by the cruise lines and the Dominican Republic itself, and the remaining 3 percent was spending made by crew members.



Passenger Demographics

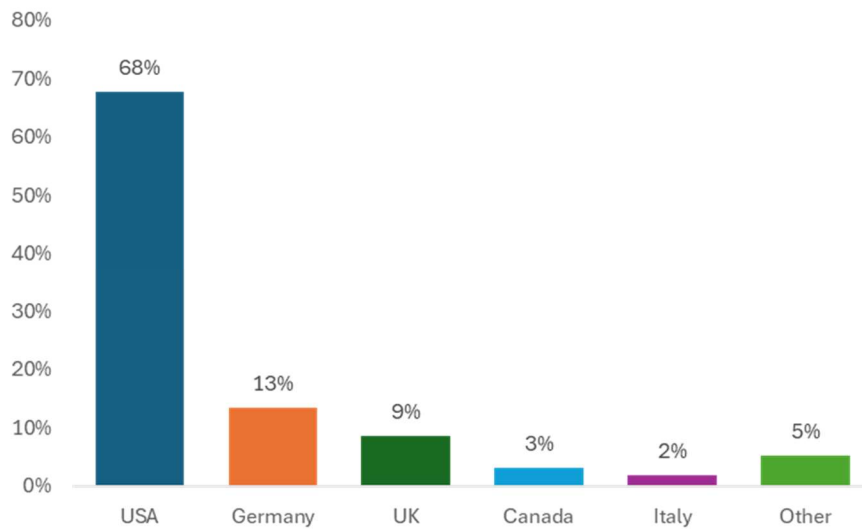
Consistent with the overall industry trends, the average age is down from 53 years old in the last study to 48 years old in this study. About 69 percent of the respondents are between the ages of 25 and 64.

Dominican Republic Chart 7 – Passenger Age Cohorts



Dominican Republic Chart 8 – Passenger Residence

About 7 in 10 (68%) of the responding passengers in the study for Dominican Republic are residents of the US; 13 percent are from Germany and 9 percent are residents of the UK.



Key West

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.¹⁴ The surveys were undertaken during the eight-month period beginning in October 2023 and ending in May 2024. The surveys were distributed onboard the ships via QR codes, and the guests and crew completed the surveys online. Passengers and crew were only surveyed once during a cruise itinerary.

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 excursions, food & beverages, clothing, etc.;
- visit satisfaction, including shore excursions, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation (passengers only); and
- demographic characteristics, including country of residence, age group, etc.

Combining the expenditure data collected from the passenger and crew surveys with revenue and wage data received directly from the destinations, and destination specific expenditure data by the cruise lines for items such as port fees, provisions and services leads to estimates of the total cruise tourism expenditures for each participating destination.

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

¹⁴ Surveys were conducted on the ships of the following cruise lines: Aida, 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.

Cruise Tourism Expenditures

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

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

Based on data collected from Key West, 480,410 cruise passengers arrived aboard cruise ships during the 2023/2024 cruise year.¹⁵ Of these, an estimated 424,680 passengers (88%) disembarked and visited Key West. Utilizing additional data provided by Key West and visiting cruise lines, 197,700 crew were aboard the cruise ships and an estimated 30 percent, or 60,100 crew, disembarked and visited the destination.

These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **\$55.4** million (\$US) in cruise tourism expenditures in Key West during the 2023/2024 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Passenger Spending

Per passenger spending estimates were derived from about 870 surveys completed by passengers during the survey period. As shown in **Key West Chart 1**, each passenger cruise party spent an average of \$193.26. The average spend per cruise party is the sum of the weighted spending in each of the 8 purchase categories. For example, 68 percent of the survey respondents reported spending an average of \$66.00 for food and beverages. Spread across all cruise parties that visited Key West, this represented an average of \$44.70 per cruise party ($\$66.00 \times 68\% = \44.70). On a per passenger basis, the average total expenditure was \$91.15. This represents the sum of the per cruise party expenditures, \$193.26, divided by the average size of a cruise party in Key West, 2.1 passengers.

Shore excursions, clothing, and food & beverages account for 75 percent of cruise passenger expenditures in Key West.

About a third (34%) of the passengers reported that their cruise party purchased a shore excursion. The effective price of the shore excursion was about \$47 per party to the local economy.

¹⁵ The 2023/2024 cruise year includes the twelve months beginning in May 2023 and ending in April 2024.

Key West Chart 1 – Estimated Passenger Spending (\$US), 2023/2024 cruise year¹⁶

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	\$140.80	33.5%	\$47.21
F&B at Restaurants & Bars	\$66.00	67.7%	\$44.70
Taxis/Ground Transportation	\$37.90	33.5%	\$12.70
Watches & Jewelry	\$294.10	5.8%	\$17.14
Clothing	\$79.60	51.6%	\$41.04
Other Purchases	\$74.60	23.1%	\$17.24
Local Crafts & Souvenirs	\$41.60	26.8%	\$11.14
Retail Purchases of Liquor	\$59.00	3.5%	\$2.09
Avg. Spend per Cruise Party			\$193.26
Average Size of Cruise Party			2.1
Avg. Spend per Passenger Visit			\$91.15
Passenger Onshore Visits			424,680
Total Passenger Expenditures			\$38,707,914

For the entire 2023/2024 cruise year, the estimated 424,680 cruise passengers who disembarked and visited Key West spent a total of **\$38.7 million** (\$US) in Key West.

Crew Spending

Crew spending estimates were derived from about 750 surveys completed by crew members during the survey period. As shown in **Key West Chart 2**, each crew member who disembarked the ship and visited Key West spent an average of \$81.81. Like the passenger spending, the average expenditure per crew member is the sum of the weighted spending in each of the purchase categories.

Expenditures on food and beverages, clothing, and personal products account for 79 percent of the crew members’ onshore spending.

For the entire 2023/2024 cruise year, the estimated 60,100 crew who went ashore and visited Key West spent an estimated total of **\$4.9 million** (\$US).

¹⁶ The average shore excursion expenditure is a weighted average of the onshore and travel agent/other purchases and the portion of the onboard purchases paid to local tour operators.

Key West Chart 2 – Estimated Crew Spending (\$US), 2023/2024 cruise year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	\$35.90	57.2%	\$20.54
Taxis/Ground Transportation	\$15.20	26.6%	\$4.06
Watches & Jewelry	\$99.60	7.0%	\$6.96
Clothing	\$83.00	41.0%	\$34.09
Other Purchases	\$64.30	6.1%	\$3.93
Shore Excursions	\$32.80	2.6%	\$0.86
Personal Products	\$40.30	24.0%	\$9.67
Local Crafts & Souvenirs	\$16.30	10.5%	\$1.71
Retail Purchases of Liquor	\$0.00	0.0%	\$0.00
Avg. Spend per Crew Ashore			\$81.81
Number of Crew Onshore Visits			60,100
Total Crew Expenditures			\$4,916,929

Cruise Line & Destination Spending

Cruise lines made payments to local businesses for a variety of goods and services, including payments for port fees and taxes, navigation services, utilities and other supplies. The destination itself had employees and employee wages related to its cruise operations. Based upon data provided by the FCCA member cruise lines and the destination, we estimate that cruise lines and Key West were responsible for approximately **\$11.8 million** (\$US) in direct spending during the 2023/2024 cruise year.

Economic Contribution of Cruise Tourism Expenditures

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

As shown in Key West **Chart 3**, the **\$55.4** million in total cruise tourism expenditures in Key West supported direct employment of 584 residents of Key West paying \$16.1 million in annual wages. Adding the indirect contribution that results from the spending by those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures supported a total employment contribution of 981 jobs and \$33.0 million in wage income in Key West during the 2023/2024 cruise year.

Key West Chart 3 –Total Economic Contribution of Cruise Tourism, 2023/2024 cruise year

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	584	\$16.1
Total Economic Contribution	981	\$33.0

The Wholesale & Retail Trade, Lodging & Food Services, and Transportation & Warehousing sectors account for about 65% of the total job impacts.

Passenger Surveys

Key West Chart 4 shows the major attributes of passenger visits to Key West as derived from the passenger surveys. Of those who completed the survey:

- 53 percent stated this was their first visit to Key West.
- 87 percent of those who went ashore made at least one purchase while ashore other than a tour.
- the typical cruise party consisted of two passengers (Average: 2.1) and spent an average of 4.3 hours ashore.

Key West Chart 4 – Major Attributes of Passenger Surveys

	Percent
Number Making First Visit	53%
Number Making Any Onshore Purchases:	87%
Average Hours Ashore	4.3
Purchased a Shore Excursion (Tour)	34%
How Purchased Tour:	
Cruise Line	64%
Onshore Tour Operator	4%
Other	32%
Tour Type:	
Historical/Cultural	29%
Beach Day	7%
Land-Based	28%
Water-Based	14%
Other	29%
Reason for No Tour	
Prefer to Tour on Own	75%
Poor Value	10%
Didn't Like Any	8%
Too Similar to Other Dest	1%
Weather	2%
Prefer to Stay on Ship	0%
Other	14%

- About a third (34%) of the passengers that went ashore purchased a shore excursion. Sixty-four percent of passengers who purchased a tour did so through their cruise line, 4 percent purchased their tour onshore, and 32 percent purchased their tour through some other means (travel agent, travel site, etc.).
- Twenty-nine percent of the tours purchased were visits to “historical or cultural sites”, while 1 in 4 were “land-based activities” (28%).
- The key reason why some did not purchase a tour include they prefer to tour on their own (75%).

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Key West Chart 5**. 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.

- Cruise passengers were very satisfied with their “overall visit” to Key West (8.7) and the visit “meeting expectations” (8.4).
- “Guided Tours” (or Shore Excursions) received mean score of 9.2; Additionally, the high ratings in “knowledge of guide” (9.4), and “value of tours” (8.8) indicates visitors to Key West were “extremely satisfied” with their onshore excursions.

Key West Chart 5 – Passenger Visit Satisfaction*

Visit Attributes	2024 Mean Score
Overall Visit	8.7
Visit Met Expectations	8.4
Likelihood of a Return Visit	7.0
Likelihood of Recommending	7.5
Initial Shoreside Welcome	8.7
Overall Guided Tour	9.2
Knowledge of Guide	9.4
Value of Tour	8.8
Historic Sites/Museums	8.7
Variety of Things to See and Do	8.5
Friendliness of Residents	8.8
Overall Shopping Experience	8.6
Courtesy of Employees	9.0
Overall Prices	7.8
Taxis/Local Transportation	8.6

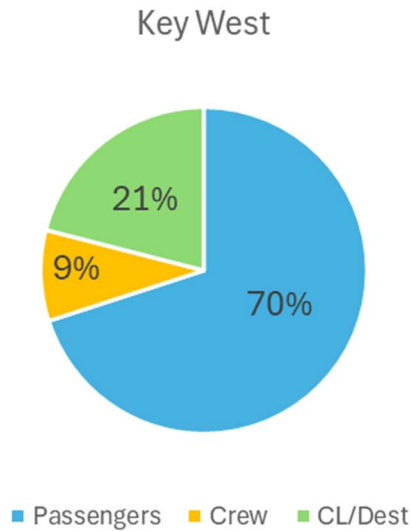
* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows:
 Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3;
 Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Passenger interactions with residents and store employees were very positive as the mean scores for “friendliness of residents” (8.8) and “courtesy of employees” (9.0) were high.
- Passengers were also very satisfied with the “historic sites” (8.7), a “variety of things to see and do” (8.5) and the “overall shopping experience” (8.6).
- Key West scored lowest passengers saying they are “likely to return for a land-based visit” (7.0), and their “likelihood of recommending to a friend” (7.5), however, both ratings are well above the ratings observed for other destinations.

Key West Chart 6 – Overall Spending

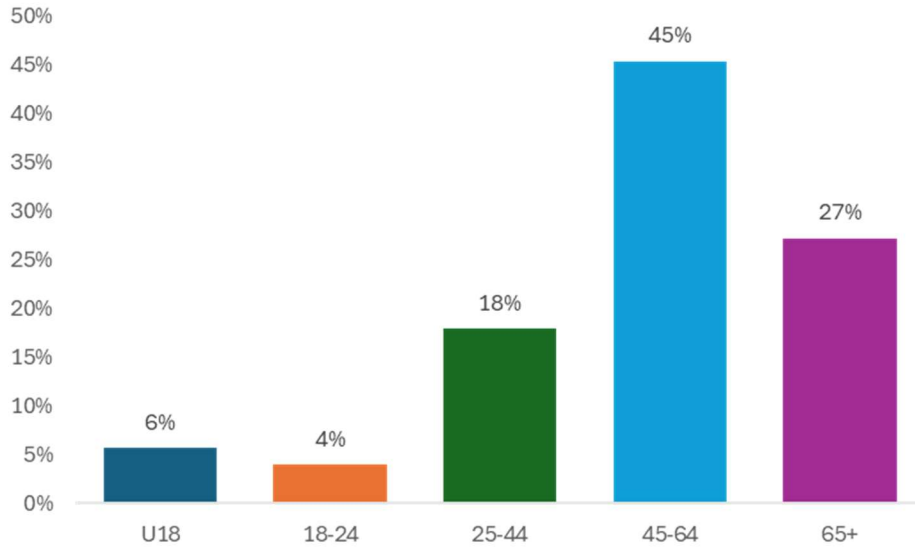
7 in 10 (70%) of the cruise related spending in Key West was made by passengers, 21 percent was made by the cruise lines and Key West itself, and the remaining 9 percent was spending made by crew members.



Passenger Demographics

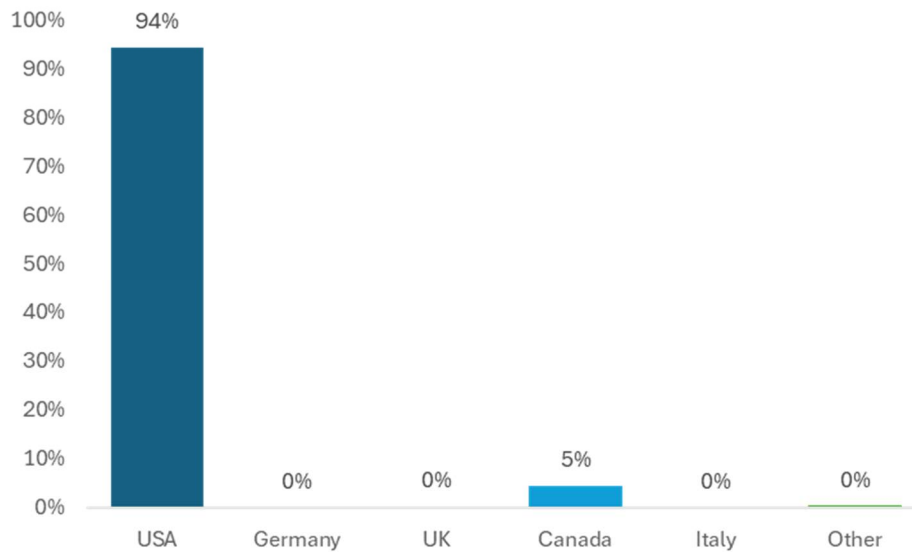
The average age of the passengers in this Key West study was 51 years old in this study. About 63 percent of the respondents are between the ages of 25 and 64.

Key West Chart 7 – Passenger Age Cohorts



Key West Chart 8 – Passenger Residence

Virtually all (94%) of the responding passengers to Key West are residents of the US.



Guadeloupe

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.¹⁷ The surveys were undertaken during the eight-month period beginning in October 2023 and ending in May 2024. The surveys were distributed onboard the ships via QR codes, and the guests and crew completed the surveys online. Passengers and crew were only surveyed once during a cruise itinerary and for a single destination.

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

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

Combining the expenditure data collected from the passenger and crew surveys with revenue and wage data received directly from the destinations, and destination specific expenditure data by the cruise lines for items such as port fees, provisions and services leads to estimates of the total cruise tourism expenditures for each participating destination.

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

¹⁷ Surveys were conducted on the ships of the following cruise lines: Aida, 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.

Cruise Tourism Expenditures

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

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

Based on data collected from the Guadeloupe Islands Tourism Board, a total of 355,000 cruise passengers arrived aboard cruise ships during the 2023/2024 cruise year.¹⁸ Of these, 265,000 transit passengers arrived and an estimated 233,200 passengers (88%) disembarked and visited Guadeloupe. There were also an estimated 90,000 passengers who embarked on their cruise from Guadeloupe. Utilizing additional data provided by the Tourism Board and visiting cruise lines, 110,415 crew were aboard the cruise ships and an estimated 30 percent, or 33,570 disembarked and visited the destination. Overall, transit arrivals and embarking passengers are down significantly from the 2018 study.

These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **\$46.1** million (\$US) in cruise tourism expenditures in Guadeloupe during the 2023/2024 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Passenger Spending

As shown in **Guadeloupe Chart 1**, each transit passenger cruise party spent an average of \$187.21. The average spend per cruise party is the sum of the weighted spending in each of the 8 purchase categories. For example, 36 percent of the survey respondents reported spending an average of \$20.10 for food and beverages. Spread across all cruise parties that visited Guadeloupe, this represented an average of \$7.33 per cruise party ($\$20.10 \times 36\% = \7.33). On a per passenger basis, the average total expenditure was \$93.61. This represents the sum of the per cruise party expenditures, \$187.21, divided by the average size of a cruise party in Guadeloupe, 2.0 passengers.

Shore excursions and watches & jewelry account for 66 percent of cruise passenger expenditures in Guadeloupe.

¹⁸ The 2023/2024 cruise year includes the twelve months beginning in May 2023 and ending in April 2024.

Nearly 2 in 3 (63%) of the passengers reported that their cruise party purchased a shore excursion. The effective price of the shore excursion was about \$98 per party to the local economy.

Guadeloupe Chart 1a – Estimated Transit Passenger Spending (\$US), 2023/2024 cruise year¹⁹

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	\$155.50	62.7%	\$97.51
F&B at Restaurants & Bars	\$20.10	36.4%	\$7.33
Taxis/Ground Transportation	\$53.90	12.0%	\$6.45
Watches & Jewelry	\$480.70	5.5%	\$26.37
Clothing	\$42.20	36.3%	\$15.30
Other Purchases	\$127.20	14.1%	\$17.89
Local Crafts & Souvenirs	\$24.10	52.2%	\$12.56
Retail Purchases of Liquor	\$51.00	7.5%	\$3.80
Avg. Spend per Cruise Party			\$187.21
Average Size of Cruise Party			2.0
Avg. Spend per Passenger Visit			\$93.61
Passenger Onshore Visits			233,200
Total Passenger Expenditures			\$21,829,246

For the entire 2023/2024 cruise year, the estimated 233,200 transit passengers who disembarked and visited Guadeloupe spent a total of **\$21.8 million** (\$US) in Guadeloupe.

¹⁹ The average shore excursion expenditure is a weighted average of the onshore and travel agent/other purchases and the portion of the onboard purchases paid to local tour operators.

Overall, about 18 percent of passengers who embarked on their cruise from Guadeloupe reported spending at least one night in Guadeloupe. Of those who spent an overnight, the average amount spent for accommodations in Guadeloupe was \$302. Overall, the weighted spend per embarking party was \$269.77. On a per passenger basis this equates to \$134.88.

Guadeloupe Chart 1b – Estimated Embark Passenger Spending (\$US), 2023/2024 cruise year²⁰

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Accommodations	\$302.20	18.3%	\$55.24
F&B at Restaurants & Bars	\$69.80	65.1%	\$45.43
Taxis/Ground Transportation	\$72.40	51.2%	\$37.05
Watches & Jewelry			
Clothing	\$76.10	46.3%	\$35.21
Other Purchases	\$133.00	30.0%	\$39.90
Shore Excursions	\$108.00	35.0%	\$37.80
Local Crafts & Souvenirs	\$145.00	10.0%	\$14.50
Retail Purchases of Liquor	\$11.60	40.0%	\$4.64
Avg. Spend per Homeport Cruise Party			\$269.77
Average Size of a Party			2.0
Avg. Spend per Homeport Passenger			\$134.88
Number of Homeport Passengers			90,000
Total Homeport Passenger Expenditures			\$12,139,578

For the entire 2023/2024 cruise year, the 90,000 embarking transit passengers spent a total of **\$12.1 million** (\$US) in Guadeloupe.

Crew Spending

Crew spending estimates were derived from surveys completed by crew members during the survey period. As shown in **Guadeloupe Chart 2**, each crew member who disembarked the ship and visited Guadeloupe spent an average of \$42.09. Like the passenger spending, the average expenditure per crew member is the sum of the weighted spending in each of the purchase categories.

Expenditures on food and beverages, clothing, and taxi/transportation accounted for 71 percent of the crew members’ onshore spending.

²⁰ The average shore excursion expenditure is a weighted average of the onshore and travel agent/other purchases and the portion of the onboard purchases paid to local tour operators.

For the entire 2023/2024 cruise year, the estimated 33,570 crew who went ashore and visited Guadeloupe spent nearly **\$1.4 million** (\$US).

Guadeloupe Chart 2 – Estimated Crew Spending (\$US), 2023/2024 cruise year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	\$21.70	66.7%	\$14.47
Taxis/Ground Transportation	\$22.00	24.1%	\$5.30
Watches & Jewelry	\$11.90	1.1%	\$0.14
Clothing	\$64.10	16.1%	\$10.32
Other Purchases	\$217.80	2.3%	\$5.01
Shore Excursions	\$30.80	2.3%	\$0.71
Personal Products	\$10.20	20.7%	\$2.10
Local Crafts & Souvenirs	\$0.00	0.0%	\$4.05
Retail Purchases of Liquor			
Avg. Spend per Crew Ashore			\$42.09
Number of Crew Onshore Visits			33,570
Total Crew Expenditures			\$1,412,976

Cruise Line Spending

Cruise lines made payments to local businesses for a variety of goods and services, including payments for port fees and taxes, navigation services, utilities and other supplies. Based upon data provided by the FCCA member cruise lines and the destination, we estimate that the cruise lines were responsible for approximately **\$10.7 million** (\$US) in direct spending in Guadeloupe during the 2023/2024 cruise year.

Economic Contribution of Cruise Tourism Expenditures

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

As shown in **Guadeloupe Chart 3**, the **\$46.1** million in total cruise tourism expenditures in Guadeloupe supported direct employment of 572 residents of Guadeloupe paying \$6.4 million in annual wages. Adding the indirect contribution that results from the spending by those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures supported a total employment contribution of 814 jobs and \$9.4 million in wage income in Guadeloupe during the 2023/2024 cruise year.

Guadeloupe Chart 3 –Total Economic Contribution of Cruise Tourism, 2023/2024 cruise year

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	572	\$6.4
Total Economic Contribution	814	\$9.4

The Wholesale & Retail Trade, Lodging & Food Services, and Transportation & Warehousing sectors account for about 83% of the total job impacts.

Passenger Surveys

Guadeloupe Chart 4 shows the major attributes of passenger visits to Guadeloupe as derived from the passenger surveys. Of those who completed the survey:

- 89 percent stated this was their first visit to Guadeloupe.
- 3 in 5 (63%) of those who went ashore made at least one purchase while ashore other than a tour.
- the typical cruise party consisted of two passengers (Average: 2.0) and spent an average of 4.9 hours ashore.

Guadeloupe Chart 4 – Major Attributes of Passenger Surveys

	Percent
Number Making First Visit	89%
Number Making Any Onshore Purchases:	63%
Average Hours Ashore	4.9
Purchased a Shore Excursion (Tour)	63%
How Purchased Tour:	
Cruise Line	82%
Onshore Tour Operator	11%
Other	6%
Tour Type:	
Historical/Cultural	52%
Beach Day	21%
Land-Based	11%
Water-Based	14%
Other	15%
Reason for No Tour	
Prefer to Tour on Own	56%
Poor Value	12%
Didn't Like Any	21%
Too Similar to Other Dest	5%
Weather	*%
Prefer to Stay on Ship	*%
Other	13%

- About two-thirds (63%) of the passengers that went ashore purchased a shore excursion. Eighty two percent of passengers who purchased a tour did so through their cruise line, 11 percent purchased their tour on shore and 6 percent purchased their tour through some other means (travel agent, travel site, etc.).
- About half (52%) of the tours purchased were visits to “historical or cultural sites”, while 1 in 5 were “beach day activities” (21%).
- The key reasons why some did not purchase a tour was they prefer to tour on their own (56%). Twenty-one percent simply did not like any.

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Guadeloupe Chart 5**. 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.

- Cruise passengers were satisfied with their “overall visit” to Guadeloupe (7.2) and the visit “meeting expectations” 6.4).
- “Guided Tours” (or Shore Excursions) received a ‘very satisfied’ mean score of 7.5; Additionally, the ratings in “knowledge of guide” (8.2), and “value of tours” (6.8) indicates visitors to Guadeloupe were satisfied with their onshore excursions.

Guadeloupe Chart 5 – Passenger Visit Satisfaction*

Visit Attributes	2024 Mean Score
Overall Visit	7.2
Visit Met Expectations	6.4
Likelihood of a Return Visit	3.5
Likelihood of Recommending	4.8
Initial Shoreside Welcome	7.3
Overall Guided Tour	7.5
Knowledge of Guide	8.2
Value of Tour	6.8
Historic Sites/Museums	6.6
Variety of Things to See and Do	6.4
Friendliness of Residents	7.6
Overall Shopping Experience	6.4
Courtesy of Employees	7.8
Overall Prices	6.2
Taxis/Local Transportation	6.9

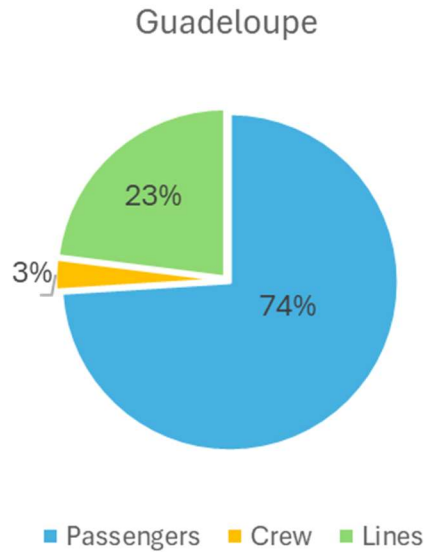
* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows:
 Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3;
 Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Passenger interactions with residents and store employees were very positive as the mean scores for “friendliness of residents” (7.6) and “courtesy of employees” (7.8) were high.
- As is observed with every destination, Guadeloupe scored lowest among passengers saying they are “likely to return for a land-based visit” (3.5), and their “likelihood of recommending to a friend” (4.8).

Guadeloupe Chart 6 – Overall Spending

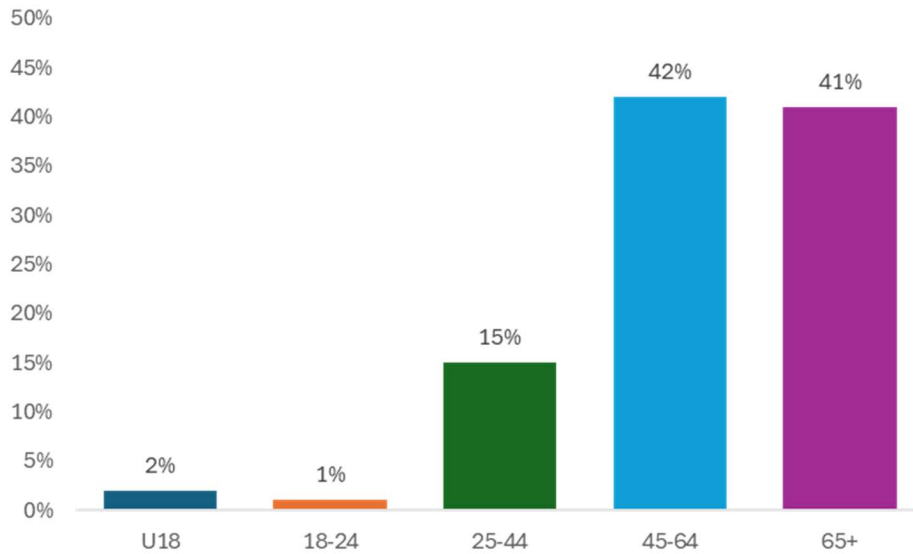
3 in 4 (74%) of the cruise related spending in Guadeloupe was made by passengers, 23 percent was made by the cruise line and the remaining 3 percent was spending made by crew members.



Passenger Demographics

The average age for respondents in this study for Guadeloupe is 57 years old. About 57 percent of the respondents are between the ages of 25 and 64.

Guadeloupe Chart 7 – Passenger Age Cohorts



Guadeloupe– Passenger Residence

Residents of Germany account for 59 percent of the responding passengers, while the US, UK and Canada made up a combined 36 percent of passengers

Puerto Rico

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.²¹ The surveys were undertaken during the eight-month period beginning in October 2023 and ending in May 2024. The surveys were distributed onboard the ships via QR codes, and the guests and crew completed the surveys online. Passengers and crew were only surveyed once during a cruise itinerary.

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 excursions, food & beverages, clothing, etc.;
- visit satisfaction, including shore excursions, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation (passengers only); and
- demographic characteristics, including country of residence, age group, etc.

Combining the expenditure data collected from the passenger and crew surveys with revenue and wage data received directly from the destinations, and destination specific expenditure data by the cruise lines for items such as port fees, provisions and services leads to estimates of the total cruise tourism expenditures for each participating destination.

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

²¹ Surveys were conducted on the ships of the following cruise lines: Aida, 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.

Cruise Tourism Expenditures

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

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

Based on data collected from the Puerto Rico Tourism Authority, a total of 1,717,890 cruise passengers arrived aboard cruise ships during the 2023/2024 cruise year.²² Of these, 1,482,025 were transit passengers; an estimated 1,280,470 (86%) of whom disembarked and visited Puerto Rico. There were also an estimated 235,870 passengers who embarked on their cruise from Puerto Rico. Utilizing additional data provided by the Tourism Authority and visiting cruise lines, 645,695 crew were aboard the cruise ships and an estimated 30 percent, or 196,290 disembarked and visited the destination. Transit arrivals are up about 79 percent over the last study in 2017/18, while embarking passengers are down by 35 percent.

These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **\$201.9** million (\$US) in cruise tourism expenditures in Puerto Rico during the 2023/2024 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Passenger Spending

Per passenger spending estimates were derived from more than 1,650 transit surveys completed by passengers during the survey period. As shown in **Puerto Rico Chart 1**, each transit passenger cruise party spent an average of \$146.38. The average spend per cruise party is the sum of the weighted spending in each of the 8 purchase categories. For example, 50 percent of the survey respondents reported spending an average of \$57.50 for food and beverages. Spread across all cruise parties that visited Puerto Rico, this represented an average of \$28.81 per cruise party ($\$57.50 \times 50\% = \28.81). On a per passenger basis, the average total expenditure was \$69.74. This represents the sum of the per cruise party expenditures, \$146.38, divided by the average size of a cruise party in Puerto Rico, 2.1 passengers.

Shore excursions, food & beverages, and watches & jewelry account for 65 percent of transit passenger expenditures in Puerto Rico.

²² The 2023/2024 cruise year includes the twelve months beginning in May 2023 and ending in April 2024.

About 1 in 3 (34%) of the passengers reported that their cruise party purchased a shore excursion. The effective price of the shore excursion was about \$42 per party to the local economy.

Puerto Rico Chart 1a – Estimated Transit Passenger Spending (\$US), 2023/2024 cruise year²³

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	\$125.20	33.8%	\$42.29
F&B at Restaurants & Bars	\$57.50	50.1%	\$28.81
Taxis/Ground Transportation	\$44.30	12.3%	\$5.45
Watches & Jewelry	\$369.40	6.5%	\$23.86
Clothing	\$65.30	29.7%	\$19.41
Other Purchases	\$56.50	19.5%	\$11.04
Local Crafts & Souvenirs	\$39.50	30.6%	\$12.08
Retail Purchases of Liquor	\$60.50	5.7%	\$3.43
Avg. Spend per Cruise Party			\$146.38
Average Size of Cruise Party			2.1
Avg. Spend per Passenger Visit			\$69.74
Passenger Onshore Visits			1,280,470
Total Passenger Expenditures			\$89,294,911

For the entire 2023/2024 cruise year, the estimated 1,280,470 transit passengers who disembarked and visited Puerto Rico spent a total of **\$89.3 million** (\$US) in Puerto Rico.

²³ The average shore excursion expenditure is a weighted average of the onshore and travel agent/other purchases and the portion of the onboard purchases paid to local tour operators.

Overall, 60 percent of passengers who embarked on their cruise from Puerto Rico reported spending at least one night in Puerto Rico. Of those who spent an overnight, the average amount spent for accommodations in Puerto Rico was \$503. Overall, the weighted spend per embarking party was \$520.72. On a per passenger basis this equates to \$229.39.

Puerto Rico Chart 1b – Estimated Embark Passenger Spending (\$US), 2023/2024 cruise year²⁴

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Accommodations	\$503.40	60.0%	\$302.02
F&B at Restaurants & Bars	\$190.10	52.7%	\$100.09
Taxis/Ground Transportation	\$61.90	43.3%	\$26.79
Watches & Jewelry	\$478.80	3.3%	\$15.63
Clothing	\$75.40	18.4%	\$13.85
Other Purchases	\$112.50	14.3%	\$16.07
Shore Excursions	\$226.70	15.9%	\$36.09
Local Crafts & Souvenirs	\$37.60	13.1%	\$4.91
Retail Purchases of Liquor	\$51.60	10.2%	\$5.26
Avg. Spend per Homeport Cruise Party			\$520.72
Average Size of a Party			2.3
Avg. Spend per Homeport Passenger			\$229.39
Number of Homeport Passengers			235,870
Total Homeport Passenger Expenditures			\$54,105,851

For the entire 2023/2024 cruise year, the 235,870 embarking passengers spent a total of **\$54.1 million** (\$US) in Puerto Rico.

Crew Spending

Crew spending estimates were derived from more than 1,000 surveys completed by crew members during the survey period. As shown in **Puerto Rico Chart 2**, each crew member who disembarked the ship and visited Puerto Rico spent an average of \$79.14. Like the passenger spending, the average expenditure per crew member is the sum of the weighted spending in each of the purchase categories.

Expenditures on food and beverages, clothing, and personal products account for 78 percent of the crew members’ onshore spending.

²⁴ The average shore excursion expenditure is a weighted average of the onshore and travel agent/other purchases and the portion of the onboard purchases paid to local tour operators.

For the entire 2023/2024 cruise year, the estimated 196,290 crew who went ashore and visited Puerto Rico spent nearly **\$15.5 million** (\$US).

Puerto Rico Chart 2 – Estimated Crew Spending (\$US), 2023/2024 cruise year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	\$34.00	60.6%	\$20.64
Taxis/Ground Transportation	\$16.50	18.0%	\$2.96
Watches & Jewelry	\$96.00	3.8%	\$3.66
Clothing	\$92.10	31.2%	\$28.75
Other Purchases	\$70.10	10.3%	\$7.25
Shore Excursions	\$46.40	2.5%	\$1.18
Personal Products	\$39.50	30.5%	\$12.05
Local Crafts & Souvenirs	\$17.40	11.6%	\$2.02
Retail Purchases of Liquor	\$20.30	3.1%	\$0.63
Avg. Spend per Crew Ashore			\$79.14
Number of Crew Onshore Visits			196,290
Total Crew Expenditures			\$15,534,057

Cruise Line/Destination Spending

Cruise lines made payments to local businesses for a variety of goods and services, including payments for port fees and taxes, navigation services, utilities and other supplies. The destination itself had employees and employee wages related to its cruise operations. Based upon data provided by the FCCA member cruise lines and the Tourism Authority, we estimate that cruise lines and the destination were responsible for approximately **\$43.0 million** (\$US) in direct spending in Puerto Rico during the 2023/2024 cruise year.

Economic Contribution of Cruise Tourism Expenditures

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

As shown in **Puerto Rico Chart 3**, the **\$201.9** million in total cruise tourism expenditures in Puerto Rico supported direct employment of 2,681 residents of Puerto Rico paying \$37.6 million in annual wages. Adding the indirect contribution that results from the spending by those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures supported a total employment contribution of 5,019 jobs and \$70.5 million in wage income in Puerto Rico during the 2023/2024 cruise year.

Puerto Rico Chart 3 –Total Economic Contribution of Cruise Tourism, 2023/2024 cruise year

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	2,681	\$37.6
Total Economic Contribution	5,019	\$70.5

The Wholesale & Retail Trade, Lodging & Food Services, and Transportation & Warehousing sectors account for about 66% of the total job impacts.

Passenger Surveys

Puerto Rico Chart 4 shows the major attributes of passenger visits to Puerto Rico as derived from the passenger surveys. Of those who completed the survey:

- 53 percent stated this was their first visit to Puerto Rico.
- nearly three-quarters (74%) of those who went ashore made at least one purchase while ashore other than a tour.
- the typical cruise party consisted of two passengers (Average: 2.1) and spent an average of 4.3 hours ashore.

Puerto Rico Chart 4 – Major Attributes of Passenger Surveys

	Percent
Number Making First Visit	53%
Number Making Any Onshore Purchases:	74%
Average Hours Ashore	4.3
Purchased a Shore Excursion (Tour)	34%
How Purchased Tour:	
Cruise Line	67%
Onshore Tour Operator	5%
Other	28%
Tour Type:	
Historical/Cultural	61%
Beach Day	7%
Land-Based	17%
Water-Based	3%
Other	18%
Reason for No Tour	
Prefer to Tour on Own	66%
Poor Value	13%
Didn't Like Any	15%
Too Similar to Other Dest	2%
Weather	3%
Prefer to Stay on Ship	1%
Other	17%

- About a third (34%) of the passengers that went ashore purchased a shore excursion. Sixty-seven percent of passengers who purchased a tour did so through their cruise line, 5 percent purchased their tour on shore and 28 percent purchased their tour through some other means (travel agent, travel site, etc.).
- More than half (61%) of the tours purchased were visits to “historical or cultural sites”, while 17 percent were “land-based activities”.
- The key reason why some did not purchase a tour was they prefer to tour on their own (66%).

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Puerto Rico Chart 5**. 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 purposes, the satisfaction data from the prior study is also shown in the chart below.

- Cruise passengers were very satisfied with their “overall visit” to Puerto Rico (8.2) and the visit “meeting expectations” (7.9).
- “Guided Tours” (or Shore Excursions) received a ‘very satisfied’ mean score of 8.2; Additionally, the high ratings in “knowledge of guide” (8.9), “and “value of tours” (8.1) indicates visitors to Puerto Rico were very satisfied with their onshore excursions.

Puerto Rico Chart 5 – Passenger Visit Satisfaction*

Visit Attributes	2024 Mean Score	2018 Mean Score
Overall Visit	8.2	7.6
Visit Met Expectations	7.9	7.0
Likelihood of a Return Visit	5.7	5.0
Likelihood of Recommending	6.3	5.6
Initial Shoreside Welcome	8.1	7.7
Overall Guided Tour	8.2	8.6
Knowledge of Guide	8.9	9.1
Value of Tour	8.1	8.3
Historic Sites/Museums	8.5	8.4
Variety of Things to See and Do	8.0	7.2
Friendliness of Residents	8.6	8.2
Overall Shopping Experience	8.0	7.5
Courtesy of Employees	8.7	8.2
Overall Prices	7.7	7.5
Taxis/Local Transportation	8.3	8.1

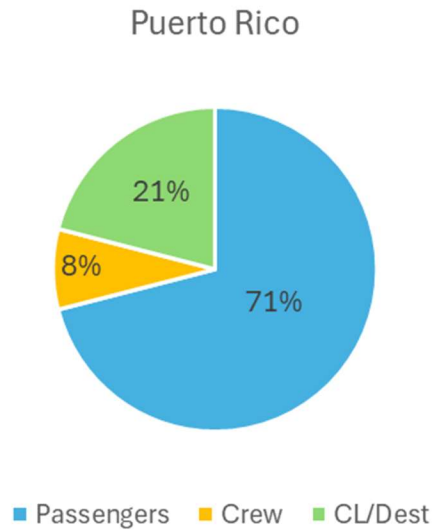
* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows:
 Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3;
 Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Passenger interactions with residents and store employees were very positive as the mean scores for “friendliness of residents” (8.6) and “courtesy of employees” (8.7) were high.
- Passengers were also very satisfied with the “historic sites” (8.5), a “variety of things to see and do” (8.0) and the “overall shopping experience” (8.0). They recorded similar satisfaction ratings for the “overall prices” (7.7).
- Consistent with all other destinations, Puerto Rico scored lowest passengers saying they are “likely to return for a land-based visit” (5.7), and their “likelihood of recommending to a friend” (6.3), however, both ratings are similar to the ratings of other destinations.

Puerto Rico Chart 6 – Overall Spending

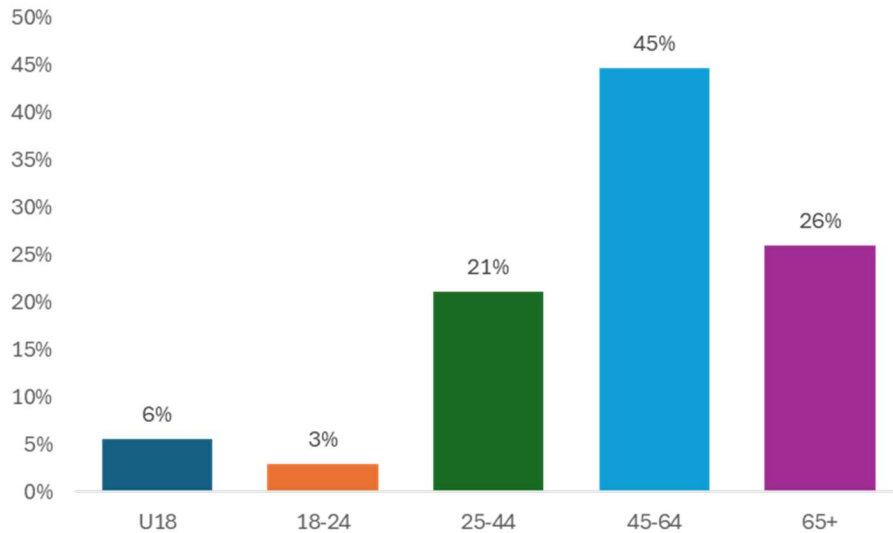
Seven in 10 (71%) of the cruise related spending in Puerto Rico was made by passengers, 21 percent was made by the cruise lines and Puerto Rico itself, and the remaining 8 percent was spending made by crew members.



Passenger Demographics

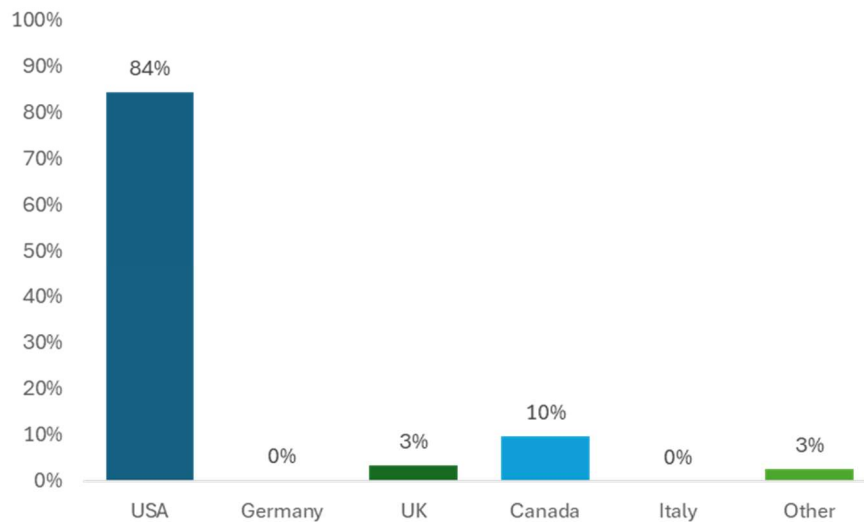
Consistent with the overall industry trends, the average age is down from 57 years old in the last study to 50 years old in this study. About 66 percent of the respondents are between the ages of 25 and 64.

Puerto Rico Chart 7 – Passenger Age Cohorts



Puerto Rico Chart 8 – Passenger Residence

Overall, eighty-four percent of the responding passengers to Puerto Rico are residents of the US. Ten percent are from Canada



St. Kitts and Nevis

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.²⁵ The surveys were undertaken during the eight-month period beginning in October 2023 and ending in May 2024. The surveys were distributed onboard the ships via QR codes, and the guests and crew completed the surveys online. Passengers and crew were only surveyed once during a cruise itinerary.

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 excursions, food & beverages, clothing, etc.;
- visit satisfaction, including shore excursions, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation (passengers only); and
- demographic characteristics, including country of residence, age group, etc.

Combining the expenditure data collected from the passenger and crew surveys with revenue and wage data received directly from the destinations, and destination specific expenditure data by the cruise lines for items such as port fees, provisions and services leads to estimates of the total cruise tourism expenditures for each participating destination.

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

²⁵ Surveys were conducted on the ships of the following cruise lines: Aida, 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.

Cruise Tourism Expenditures

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

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

Based on data collected from the St. Kitts Tourism Authority, 673,940 cruise passengers arrived aboard cruise ships during the 2023/2024 cruise year.²⁶ Of these, an estimated 562,065 passengers (83%) disembarked and visited St. Kitts. Utilizing additional data provided by the Tourism Authority and visiting cruise lines, 258,260 crew were aboard the cruise ships and 30 percent, or 78,510 crew, disembarked and visited the destination. Passenger arrivals are down about 40 percent from the 1.12m passengers reported in the 2018 study.

These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **\$113.1** million (\$US) in cruise tourism expenditures in St. Kitts during the 2023/2024 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Passenger Spending

Per passenger spending estimates were derived from more than 1,040 surveys completed by passengers during the survey period. As shown in **St. Kitts Chart 1**, each passenger cruise party spent an average of \$300.01. The average spend per cruise party is the sum of the weighted spending in each of the 8 purchase categories. For example, 36 percent of the survey respondents reported spending an average of \$35.70 for food and beverages. Spread across all cruise parties that visited St. Kitts, this represented an average of \$12.80 per cruise party ($\$35.70 \times 36\% = \12.80). On a per passenger basis, the average total expenditure was \$145.08. This represents the sum of the per cruise party expenditures, \$300.01, divided by the average size of a cruise party in St. Kitts, 2.1 passengers.

Shore excursions, and watches & jewelry account for 76 percent of cruise passenger expenditures in St. Kitts.

About 2 in 3 (67%) of the passengers reported that their cruise party purchased a shore excursion. The effective price of the shore excursion was about \$101 per party to the local economy.

²⁶ The 2023/2024 cruise year includes the twelve months beginning in May 2023 and ending in April 2024.

St. Kitts Chart 1 – Estimated Passenger Spending (\$US), 2023/2024 cruise year²⁷

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	\$150.90	66.9%	\$100.90
F&B at Restaurants & Bars	\$35.70	35.9%	\$12.80
Taxis/Ground Transportation	\$44.50	15.6%	\$6.93
Watches & Jewelry	\$717.80	17.9%	\$128.57
Clothing	\$54.40	44.4%	\$24.14
Other Purchases	\$66.50	19.6%	\$13.04
Local Crafts & Souvenirs	\$36.10	30.9%	\$11.15
Retail Purchases of Liquor	\$42.30	5.9%	\$2.49
Avg. Spend per Cruise Party			\$300.01
Average Size of Cruise Party			2.1
Avg. Spend per Passenger Visit			\$145.08
Passenger Onshore Visits			562,065
Total Passenger Expenditures			\$81,546,304

For the entire 2023/2024 cruise year, the estimated 562,065 cruise passengers who disembarked and visited St. Kitts spent a total of **\$81.5 million** (\$US) in St. Kitts.

Crew Spending

Crew spending estimates were derived from more than 1,500 surveys completed by crew members during the survey period. As shown in **St. Kitts Chart 2**, each crew member who disembarked the ship and visited St. Kitts spent an average of \$69.64. Like the passenger spending, the average expenditure per crew member is the sum of the weighted spending in each of the purchase categories.

Expenditures on food and beverages, and other purchases accounted for 72 percent of the crew members’ onshore spending.

²⁷ The average shore excursion expenditure is a weighted average of the onshore and travel agent/other purchases and the portion of the onboard purchases paid to local tour operators.

For the entire 2023/2024 cruise year, the estimated 78,510 crew who went ashore and visited St. Kitts spent an estimated total of **\$5.5 million** (\$US).

St. Kitts Chart 2 – Estimated Crew Spending (\$US), 2023/2024 cruise year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	\$33.20	67.2%	\$22.29
Taxis/Ground Transportation	\$28.90	23.0%	\$6.64
Watches & Jewelry	\$242.50	5.4%	\$13.11
Clothing	\$36.90	21.3%	\$7.86
Other Purchases	\$39.20	19.6%	\$7.69
Shore Excursions	\$85.30	5.1%	\$4.32
Personal Products	\$46.50	5.7%	\$2.67
Local Crafts & Souvenirs	\$15.60	27.7%	\$4.31
Retail Purchases of Liquor	\$22.10	3.4%	\$0.75
Avg. Spend per Crew Ashore			\$69.64
Number of Crew Onshore Visits			78,510
Total Crew Expenditures			\$5,467,679

Cruise Line & Destination Spending

Cruise lines made payments to local businesses for a variety of goods and services, including payments for port fees and taxes, navigation services, utilities and other supplies. The destination itself had employee wages related to cruise operations. Based upon data provided by the FCCA member cruise lines and the destination, we estimate that cruise lines and the destination were responsible for approximately **\$26.1 million** (\$US) in direct spending in St. Kitts during the 2023/2024 cruise year.

Economic Contribution of Cruise Tourism Expenditures

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

As shown in **St. Kitts Chart 3**, the **\$113.1** million in total cruise tourism expenditures in St. Kitts supported direct employment of 894 residents of St. Kitts paying \$10.7 million in annual wages. Adding the indirect contribution that results from the spending by those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures supported a total employment contribution of 1,679 jobs and \$19.6 million in wage income in St. Kitts during the 2023/2024 cruise year.

St. Kitts Chart 3 –Total Economic Contribution of Cruise Tourism, 2023/2024 cruise year

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	894	\$10.7
Total Economic Contribution	1,679	\$19.6

The Manufacturing, Wholesale & Retail Trade, and Transportation & Warehousing sectors account for about 82% of the total job impacts.

Passenger Surveys

St. Kitts Chart 4 shows the major attributes of passenger visits to St. Kitts as derived from the passenger surveys. Of those who completed the survey:

- 69 percent stated this was their first visit to St. Kitts.
- three-quarters (78%) of those who went ashore made at least one purchase while ashore other than a tour.
- the typical cruise party consisted of two passengers (Average: 2.1) and spent an average of 4.6 hours ashore.

St. Kitts Chart 4 – Major Attributes of Passenger Surveys

	Percent
Number Making First Visit	69%
Number Making Any Onshore Purchases:	78%
Average Hours Ashore	4.6
Purchased a Shore Excursion (Tour)	67%
How Purchased Tour:	
Cruise Line	72%
Onshore Tour Operator	8%
Other	20%
Tour Type:	
Historical/Cultural	36%
Beach Day	19%
Land-Based	24%
Water-Based	14%
Other	16%
Reason for No Tour	
Prefer to Tour on Own	58%
Poor Value	9%
Didn't Like Any	7%
Too Similar to Other Dest	6%
Weather	3%
Prefer to Stay on Ship	1%
Other	27%

- About 2 in 3 (67%) of the passengers that went ashore purchased a shore excursion. Seventy-two percent of passengers who purchased a tour did so through their cruise line, 8 percent purchased their tour on shore and 20 percent purchased their tour through some other means (travel agent, travel site, etc.).
- More than a third (36%) of the tours purchased were visits to “historical or cultural sites”, while 1 in 4 were “land-based activities” (24%).
- The key reason why some did not purchase a tour was they prefer to tour on their own (58%).

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **St. Kitts Chart 5**. 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 purposes, the satisfaction data from the prior study is also shown in the chart below.

- Cruise passengers were very satisfied with their “overall visit” to St. Kitts (8.2) and the visit “meeting expectations” (7.9).
- “Guided Tours” (or Shore Excursions) received a ‘very satisfied’ mean score of 8.4; Additionally, the high ratings in “knowledge of guide” (8.9), and “value of tours” (8.1) indicates visitors to St. Kitts were very satisfied with their onshore excursions.

St. Kitts Chart 5 – Passenger Visit Satisfaction*

Visit Attributes	2024 Mean Score	2018 Mean Score
Overall Visit	8.2	8.3
Visit Met Expectations	7.9	7.8
Likelihood of a Return Visit	5.3	5.6
Likelihood of Recommending	6.2	6.1
Initial Shoreside Welcome	7.9	7.8
Overall Guided Tour	8.4	8.9
Knowledge of Guide	8.9	9.2
Value of Tour	8.1	8.4
Historic Sites/Museums	8.0	8.1
Variety of Things to See and Do	7.5	7.5
Friendliness of Residents	8.5	8.5
Overall Shopping Experience	7.8	8.1
Courtesy of Employees	8.6	8.5
Overall Prices	7.6	7.8
Taxis/Local Transportation	8.4	8.6

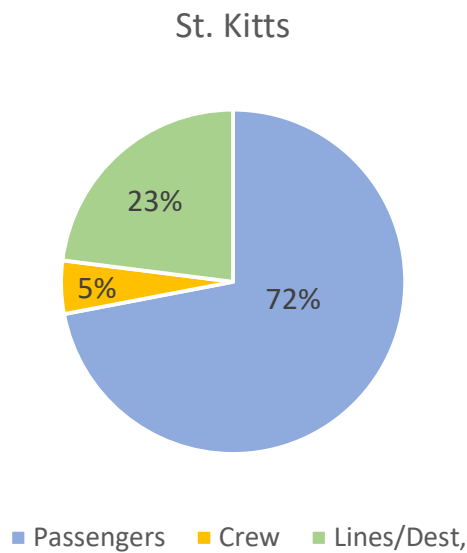
* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows:
 Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3;
 Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Passenger interactions with residents and store employees were very positive as the mean scores for “friendliness of residents” (8.5) and “courtesy of employees” (8.6) were high.
- Passengers were also very satisfied with the “historic sites” (8.0), a “variety of things to see and do” (7.5) and the “overall shopping experience” (7.8).
- As was observed in every destination, St. Kitts scored lowest passengers saying they are “likely to return for a land-based visit” (5.3), and their “likelihood of recommending to a friend” (6.2). These ratings, however, are similar to the ratings of other destinations.

St. Kitts Chart 6 – Overall Spending

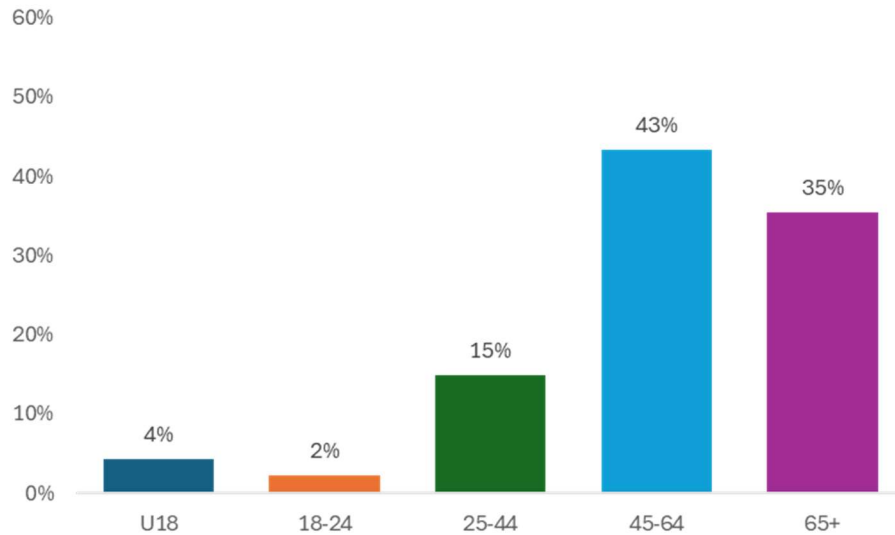
Seven in ten (72%) of the cruise related spending in St. Kitts was made by passengers, 23 percent was made by the cruise lines and the port itself, and the remaining 5 percent was spending made by crew members.



Passenger Demographics

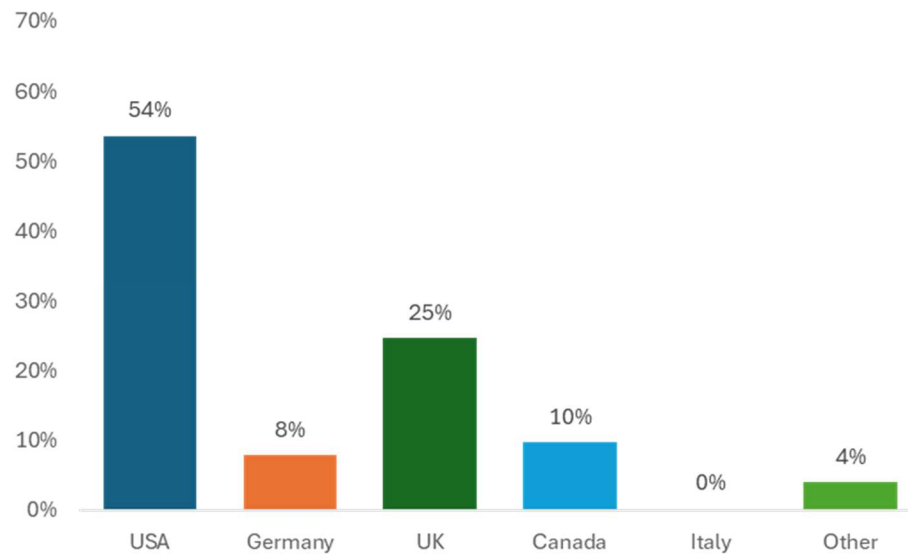
Consistent with the overall industry trends, the average age is down from 58 years old in the last study to 54 years old in this study. About 58 percent of the respondents are between the ages of 25 and 64.

St. Kitts Chart 7 – Passenger Age Cohorts



St. Kitts Chart 8 – Passenger Residence

Most (54%) of the responding passengers to St. Kitts are residents of the US, 25 percent are from the UK and 10 percent are from Canada.



St. Maarten

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.²⁸ The surveys were undertaken during the eight-month period beginning in October 2023 and ending in May 2024. The surveys were distributed onboard the ships via QR codes, and the guests and crew completed the surveys online. Passengers and crew were only surveyed once during a cruise itinerary.

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 excursions, food & beverages, clothing, etc.;
- visit satisfaction, including shore excursions, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation (passengers only); and
- demographic characteristics, including country of residence, age group, etc.

Combining the expenditure data collected from the passenger and crew surveys with revenue and wage data received directly from the destinations, and destination specific expenditure data by the cruise lines for items such as port fees, provisions and services leads to estimates of the total cruise tourism expenditures for each participating destination.

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

²⁸ Surveys were conducted on the ships of the following cruise lines: Aida, Carnival Cruise Lines, Celebrity Cruises, Costa Cruises, Disney Cruise Line, Holland America Line, Norwegian Cruise Line, Princess Cruises, P&O Cruises, and Royal Caribbean International and TUI Cruises.

Cruise Tourism Expenditures

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

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

Based on data collected from Port St. Maarten, 1,303,075 cruise passengers arrived aboard cruise ships during the 2023/2024 cruise year.²⁹ Of these, an estimated 1,099,795 passengers (84%) disembarked and visited St. Maarten. Utilizing additional data provided by Port St. Maarten and visiting cruise lines, 493,115 crew were aboard the cruise ships and an estimated 30 percent, or 149,910 crew, disembarked and visited the destination. Passenger arrivals are up about 45 percent from the last study in 2017/18.

These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **\$237.8** million (\$US) in cruise tourism expenditures in St. Maarten during the 2023/2024 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Passenger Spending

Per passenger spending estimates were derived from more than 1,600 surveys completed by passengers during the survey period. As shown in **St. Maarten Chart 1**, each passenger cruise party spent an average of \$341.79. The average spend per cruise party is the sum of the weighted spending in each of the 8 purchase categories. For example, 45 percent of the survey respondents reported spending an average of \$49.10 for food and beverages. Spread across the cruise parties that visited St. Maarten, this represented an average of \$22.29 per cruise party ($\$49.10 \times 45\% = \22.29). On a per passenger basis, the average total expenditure was \$163.45. This represents the sum of the per cruise party expenditures, \$341.79, divided by the average size of a cruise party in St. Maarten, 2.1 passengers.

Shore excursions, food & beverages and watches & jewelry account for 82 percent of cruise passenger expenditures in St. Maarten.

About half (53%) of the passengers reported that their cruise party purchased a shore excursion. The effective price of the shore excursion was about \$70 per party to the local economy.

²⁹ The 2023/2024 cruise year includes the twelve months beginning in May 2023 and ending in April 2024.

St. Maarten Chart 1 – Estimated Passenger Spending (\$US), 2023/2024 cruise year³⁰

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	\$130.40	53.3%	\$69.55
F&B at Restaurants & Bars	\$49.10	45.4%	\$22.29
Taxis/Ground Transportation	\$41.80	24.6%	\$10.30
Watches & Jewelry	\$918.00	20.5%	\$188.40
Clothing	\$54.10	35.6%	\$19.26
Other Purchases	\$82.10	20.2%	\$16.56
Local Crafts & Souvenirs	\$33.10	28.9%	\$9.57
Retail Purchases of Liquor	\$79.70	7.4%	\$5.87
Avg. Spend per Cruise Party			\$341.79
Average Size of Cruise Party			2.1
Avg. Spend per Passenger Visit			\$163.45
Passenger Onshore Visits			1,099,795
Total Passenger Expenditures			\$179,766,055

For the entire 2023/2024 cruise year, the estimated 1,099,795 cruise passengers who disembarked and visited St. Maarten spent a total of **\$179.8 million** (\$US) in St. Maarten.

Crew Spending

Crew spending estimates were derived from more than 1,000 surveys completed by crew members during the survey period. As shown in **St. Maarten Chart 2**, each crew member who disembarked the ship and visited St. Maarten spent an average of \$117.97. Like the passenger spending, the average expenditure per crew member is the sum of the weighted spending in each of the purchase categories.

Expenditures on food and beverages, clothing, and other purchases account for 69 percent of the crew members’ onshore spending.

For the entire 2023/2024 cruise year, the estimated 149,910 crew who went ashore and visited St. Maarten spent an estimated total of **\$17.7 million** (\$US).

³⁰ The average shore excursion expenditure is a weighted average of the onshore and travel agent/other purchases and the portion of the onboard purchases paid to local tour operators.

St. Maarten Chart 2 – Estimated Crew Spending (\$US), 2023/2024 cruise year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	\$51.90	75.2%	\$38.99
Taxis/Ground Transportation	\$23.60	39.9%	\$9.43
Watches & Jewelry	\$264.90	5.7%	\$15.00
Clothing	\$59.40	26.1%	\$15.51
Other Purchases	\$106.60	25.2%	\$26.81
Shore Excursions	\$71.30	5.3%	\$3.81
Personal Products	\$34.20	6.3%	\$2.15
Local Crafts & Souvenirs	\$22.90	19.2%	\$4.39
Retail Purchases of Liquor	\$33.30	5.7%	\$1.89
Avg. Spend per Crew Ashore			\$117.97
Number of Crew Onshore Visits			149,910
Total Crew Expenditures			\$17,684,779

Cruise Line & Destination Spending

Cruise lines made payments to local businesses for a variety of goods and services, including payments for port fees and taxes, navigation services, utilities and other supplies. The destination itself had employees and employee wages related to its cruise operations. Based upon data provided by the FCCA member cruise lines and the destination, we estimate that cruise lines and Port St. Maarten were responsible for approximately **\$40.4 million** (\$US) in direct spending in St. Maarten during the 2023/2024 cruise year.

Economic Contribution of Cruise Tourism Expenditures

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

As shown in **St. Maarten Chart 3**, the **\$237.8** million in total cruise tourism expenditures in St. Maarten supported direct employment of 2,904 residents of St. Maarten paying \$59.3 million in annual wages. Adding the indirect contribution that results from the spending by those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures supported a total employment contribution of 5,213 jobs and \$104.5 million in wage income in St. Maarten during the 2023/2024 cruise year.

St. Maarten Chart 3 –Total Economic Contribution of Cruise Tourism, 2023/2024 cruise year

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	2,904	\$59.3
Total Economic Contribution	5,213	\$104.5

The Wholesale & Retail Trade, and Transportation & Warehousing sectors account for about 61% of the total job impacts.

Passenger Surveys

St. Maarten Chart 4 shows the major attributes of passenger visits to St. Maarten as derived from the passenger surveys. Of those who completed the survey:

- 59 percent stated this was their first visit to St. Maarten.
- 84 percent of those who went ashore made at least one purchase while ashore other than a tour.
- the typical cruise party consisted of two passengers (Average: 2.1) and spent an average of 4.8 hours ashore.

St. Maarten Chart 4 – Major Attributes of Passenger Surveys

	Percent
Number Making First Visit	59%
Number Making Any Onshore Purchases:	84%
Average Hours Ashore	4.8
Purchased a Shore Excursion (Tour)	53%
How Purchased Tour:	
Cruise Line	71%
Onshore Tour Operator	9%
Other	19%
Tour Type:	
Historical/Cultural	21%
Beach Day	23%
Land-Based	32%
Water-Based	18%
Other	16%
Reason for No Tour	
Prefer to Tour on Own	61%
Poor Value	16%
Didn't Like Any	9%
Too Similar to Other Dest	5%
Weather	5%
Prefer to Stay on Ship	2%
Other	21%

- About half (53%) of the passengers that went ashore purchased a shore excursion. Seventy-one percent of passengers who purchased a tour did so through their cruise line, 9 percent purchased their tour on shore, and 19 percent purchased their tour through some other means (travel agent, travel site, etc.).
- A plurality (32%) of tours purchased were land-based tours, although the overall distribution of tour types was fairly even.
- The key reasons why some did not purchase a tour include they prefer to tour on their own (61%) and they thought they were a poor value (16%).

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **St. Maarten Chart 5**. 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 purposes, the satisfaction data from the prior study is also shown in the chart below.

- Cruise passengers were very satisfied with their “overall visit” to St. Maarten (8.2) and the visit “meeting expectations” (7.9)
- “Guided Tours” (or Shore Excursions) received a ‘very satisfied’ mean score of 8.3; Additionally, the high ratings in “knowledge of guide” (8.7), and “value of tours” (8.1) indicates visitors to St. Maarten were very satisfied with their onshore excursions.

St. Maarten Chart 5 – Passenger Visit Satisfaction*

Visit Attributes	2024 Mean Score	2018 Mean Score
Overall Visit	8.2	8.1
Visit Met Expectations	7.9	7.3
Likelihood of a Return Visit	5.7	5.4
Likelihood of Recommending	6.5	5.6
Initial Shoreside Welcome	8.3	7.8
Overall Guided Tour	8.3	8.6
Knowledge of Guide	8.7	8.9
Value of Tour	8.1	8.3
Historic Sites/Museums	7.6	7.1
Variety of Things to See and Do	7.7	7.1
Friendliness of Residents	8.5	8.5
Overall Shopping Experience	7.9	7.9
Courtesy of Employees	8.7	8.4
Overall Prices	7.5	7.6
Taxis/Local Transportation	8.2	8.4

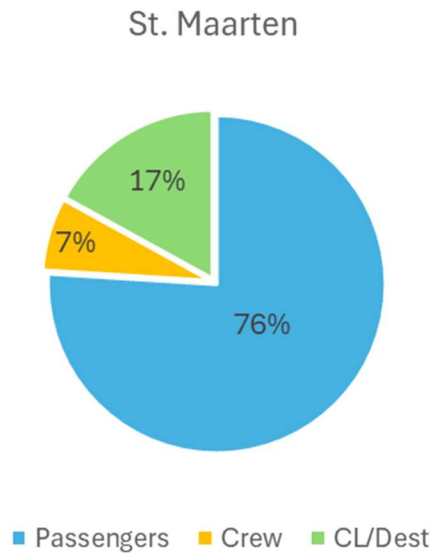
* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows:
 Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3;
 Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Passenger interactions with residents and store employees were very positive as the mean scores for “friendliness of residents” (8.5) and “courtesy of employees” (8.7) were high.
- Passengers were also very satisfied with the “historic sites” (7.6), a “variety of things to see and do” (7.7) and the “overall shopping experience” (7.9).
- As observed in all other destinations, St. Maarten scored lowest passengers saying they are “likely to return for a land-based visit” (5.7), and their “likelihood of recommending to a friend” (6.5), however, both ratings are similar to the ratings of other destinations.

St. Maarten Chart 6 – Overall Spending

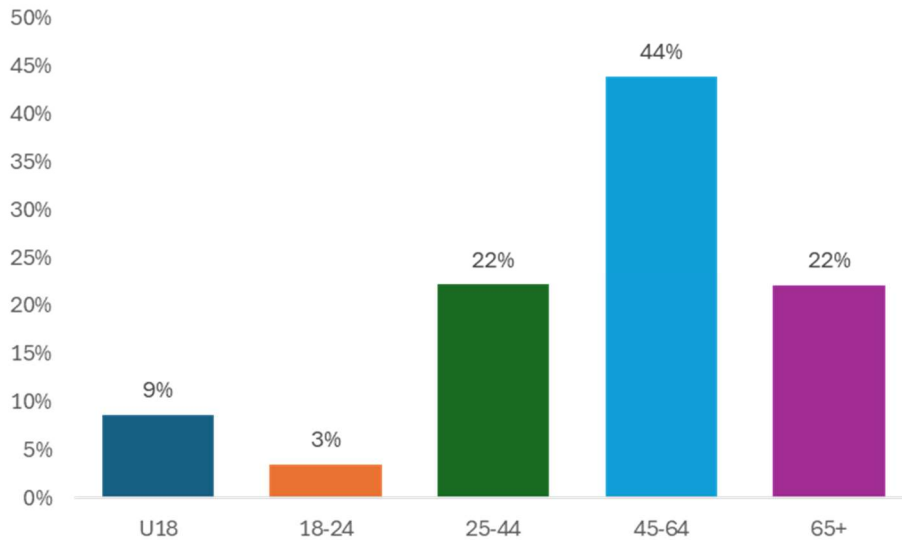
Overall, 76 percent of the cruise related spending in St. Maarten was made by passengers, 17 percent was made by the cruise lines and St. Maarten itself, and the remaining 7 percent was spending made by crew members.



Passenger Demographics

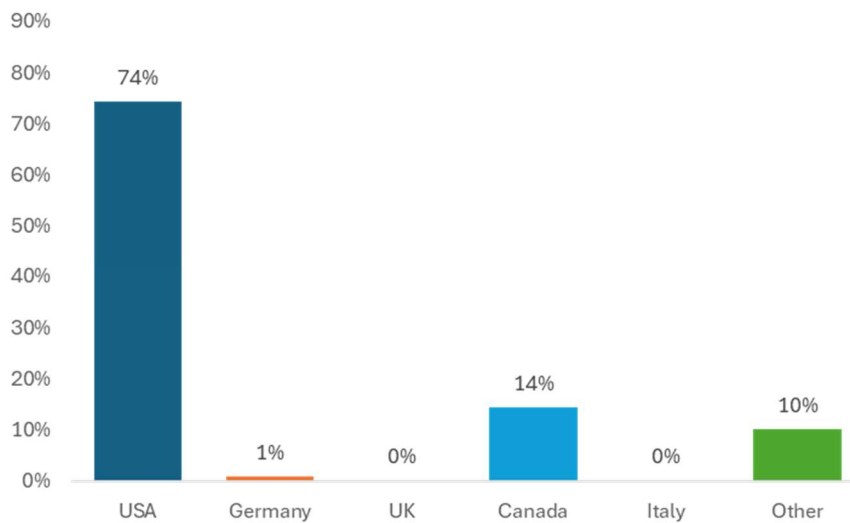
Consistent with the overall industry trends, the average age is down from 57 years old in the last study to 48 years old in this study. About 66 percent of the respondents are between the ages of 25 and 64.

St. Maarten Chart 7 – Passenger Age Cohorts



St. Maarten Chart 8 – Passenger Residence

Most (74%) of the responding passengers to St. Maarten are residents of the US. Fourteen percent are from Canada.



Turks & Caicos

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.³¹ The surveys were undertaken during the eight-month period beginning in October 2023 and ending in May 2024. The surveys were distributed onboard the ships via QR codes, and the guests and crew completed the surveys online. Passengers and crew were only surveyed once during a cruise itinerary.

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 excursions, food & beverages, clothing, etc.;
- visit satisfaction, including shore excursions, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation (passengers only); and
- demographic characteristics, including country of residence, age group, etc.

Combining the expenditure data collected from the passenger and crew surveys with revenue and wage data received directly from the destinations, and destination specific expenditure data by the cruise lines for items such as port fees, provisions and services leads to estimates of the total cruise tourism expenditures for each participating destination.

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

³¹ Surveys were conducted on the ships of the following cruise lines: Aida, 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.

Cruise Tourism Expenditures

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

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

Based on data collected from the Turks & Caicos Ministry of Tourism 945,040 cruise passengers arrived aboard cruise ships during the 2023/2024 cruise year.³² Of these, an estimated 796,670 passengers (84%) disembarked and visited Turks & Caicos. Utilizing additional industry data and visiting cruise lines, 288,515 crew were aboard the cruise ships and 30 percent, or 87,710 crew, disembarked and visited the destination. Passenger arrivals are up 15 percent from the last study in 2017/18.

These passenger and crew visits along with additional expenditures by the cruise lines and the destination itself generated a total of **\$116.1** million (\$US) in cruise tourism expenditures in Turks & Caicos during the 2023/2024 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Passenger Spending

Per passenger spending estimates were derived from nearly 2,100 surveys completed by passengers during the survey period. As shown in **Turks & Caicos Chart 1**, each passenger cruise party spent an average of \$219.55. The average spend per cruise party is the sum of the weighted spending in each of the 8 purchase categories. For example, 49 percent of the survey respondents reported spending an average of \$56.50 for food and beverages. Spread across all cruise parties that visited Turks & Caicos, this represented an average of \$27.65 per cruise party ($\$56.50 \times 49\% = \27.65). On a per passenger basis, the average total expenditure was \$102.22. This represents the sum of the per cruise party expenditures, \$219.55, divided by the average size of a cruise party in Turks & Caicos, 2.1 passengers.

Shore excursions, watches & jewelry, and food & beverages account for 73 percent of cruise passenger expenditures in Turks & Caicos.

³² The 2023/2024 cruise year includes the twelve months beginning in May 2023 and ending in April 2024.

Thirty-eight percent of the passengers reported that their cruise party purchased a shore excursion. The effective price of the shore excursion was about \$57 per party to the local economy.

Turks & Caicos Chart 1 – Estimated Passenger Spending (\$US), 2023/2024 cruise year³³

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	\$148.50	38.4%	\$57.01
F&B at Restaurants & Bars	\$56.50	49.0%	\$27.65
Taxis/Ground Transportation	\$67.40	8.8%	\$5.96
Watches & Jewelry	\$591.90	12.9%	\$76.25
Clothing	\$66.60	39.2%	\$26.13
Other Purchases	\$61.90	15.9%	\$9.83
Local Crafts & Souvenirs	\$37.90	32.2%	\$12.19
Retail Purchases of Liquor	\$68.70	6.6%	\$4.53
Avg. Spend per Cruise Party			\$219.55
Average Size of Cruise Party			2.1
Avg. Spend per Passenger Visit			\$102.22
Passenger Onshore Visits			796,670
Total Passenger Expenditures			\$81,432,475

For the entire 2023/2024 cruise year, the estimated 791,730 cruise passengers who disembarked and visited Turks & Caicos spent a total of **\$81.4 million** (\$US) in Turks & Caicos.

Crew Spending

Crew spending estimates were derived from more than 450 surveys completed by crew members during the survey period. As shown in **Turks & Caicos Chart 2**, each crew member who disembarked the ship and visited Turks & Caicos spent an average of \$51.23. Like the passenger spending, the average expenditure per crew member is the sum of the weighted spending in each of the purchase categories.

Expenditures on food and beverages, clothing, and other purchases account for 74 percent of the crew members’ onshore spending.

³³ The average shore excursion expenditure is a weighted average of the onshore and travel agent/other purchases and the portion of the onboard purchases paid to local tour operators.

For the entire 2023/2024 cruise year, the estimated 95,780 crew who went ashore and visited Turks & Caicos spent an estimated total of **\$4.5 million** (\$US).

Turks & Caicos Chart 2 – Estimated Crew Spending (\$US), 2023/2024 cruise year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	\$48.40	54.5%	\$26.34
Taxis/Ground Transportation	\$17.50	7.5%	\$1.32
Watches & Jewelry	\$57.50	4.3%	\$2.47
Clothing	\$35.90	11.1%	\$3.99
Other Purchases	\$52.10	14.3%	\$7.48
Shore Excursions	\$68.00	3.6%	\$2.44
Personal Products	\$25.80	11.5%	\$2.96
Local Crafts & Souvenirs	\$92.00	3.9%	\$3.63
Retail Purchases of Liquor	\$4.10	14.7%	\$0.61
Avg. Spend per Crew Ashore			\$51.23
Number of Crew Onshore Visits			87,710
Total Crew Expenditures			\$4,492,965

Cruise Line & Destination Spending

Cruise lines made payments to local businesses for a variety of goods and services, including payments for port fees and taxes, navigation services, utilities and other supplies. The destination itself had employees and employee wages related to its cruise operations. Based upon data provided by the FCCA member cruise lines and the destination, we estimate that cruise lines and Turks & Caicos itself were responsible for approximately **\$30.2 million** (\$US) in direct spending in Turks & Caicos during the 2023/2024 cruise year.

Economic Contribution of Cruise Tourism Expenditures

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

As shown in **Turks & Caicos Chart 3**, the **\$116.1** million in total cruise tourism expenditures in Turks & Caicos supported direct employment of 1,197 residents of Turks & Caicos paying \$21.8 million in annual wages. Adding the indirect contribution that results from the spending by those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures supported a total employment contribution of 1,965 jobs and \$35.0 million in wage income in Turks & Caicos during the 2023/2024 cruise year.

Turks & Caicos Chart 3 –Total Economic Contribution of Cruise Tourism, 2023/2024 cruise year

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	1,197	\$21.8
Total Economic Contribution	1,965	\$35.0

The Manufacturing, Wholesale & Retail Trade, and Transportation & Warehousing sectors account for about 75% of the total job impacts.

Passenger Surveys

Turks & Caicos Chart 4 shows the major attributes of passenger visits to Turks & Caicos as derived from the passenger surveys. Of those who completed the survey:

- 60 percent stated this was their first visit to Turks & Caicos.
- 4 in 5 (79%) of those who went ashore made at least one purchase while ashore other than a tour.
- the typical cruise party consisted of two passengers (Average: 2.1) and spent an average of 4.3 hours ashore.

Turks & Caicos Chart 4 – Major Attributes of Passenger Surveys

	Percent
Number Making First Visit	60%
Number Making Any Onshore Purchases:	79%
Average Hours Ashore	4.3
Purchased a Shore Excursion (Tour)	38%
How Purchased Tour:	
Cruise Line	74%
Onshore Tour Operator	5%
Other	21%
Tour Type:	
Historical/Cultural	21%
Beach Day	26%
Land-Based	29%
Water-Based	19%
Other	16%
Reason for No Tour	
Prefer to Tour on Own	48%
Poor Value	13%
Didn't Like Any	13%
Too Similar to Other Dest	5%
Weather	1%
Prefer to Stay on Ship	1%
Other	31%

- Fewer than half (38%) of the passengers that went ashore purchased a shore excursion. Seventy-four percent of passengers who purchased a tour did so through their cruise line, 5 percent purchased their tour on shore and 21 percent purchased their tour through some other means (travel agent, travel site, etc.).
- Tours purchased were fairly well distributed across the tour types.
- The key reasons why some did not purchase a tour include they prefer to tour on their own (48%), or they thought the excursions were a poor value (13%) and they did not like any (13%).

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Turks & Caicos Chart 5**. 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 purposes, the satisfaction data from the prior study is also shown in the chart below.

- Cruise passengers were very satisfied with their “overall visit” to Turks & Caicos (8.6) and the visit “meeting expectations” (8.4).
- “Guided Tours” (or Shore Excursions) received a ‘very satisfied’ mean score of 9.1; Additionally, the high ratings in “knowledge of guide” (9.4), and “value of tours” (9.0) indicates visitors to Turks & Caicos were very satisfied with their onshore excursions.

Turks & Caicos Chart 5 – Passenger Visit Satisfaction*

Visit Attributes	2024 Mean Score	2018 Mean Score
Overall Visit	8.6	7.4
Visit Met Expectations	8.4	6.7
Likelihood of a Return Visit	6.7	4.6
Likelihood of Recommending	7.2	4.9
Initial Shoreside Welcome	8.8	7.6
Overall Guided Tour	9.1	8.5
Knowledge of Guide	9.4	8.9
Value of Tour	9.0	7.9
Historic Sites/Museums	8.3	7.2
Variety of Things to See and Do	8.0	6.2
Friendliness of Residents	8.9	8.0
Overall Shopping Experience	8.4	7.4
Courtesy of Employees	9.1	8.0
Overall Prices	7.9	6.8
Taxis/Local Transportation	8.8	7.6

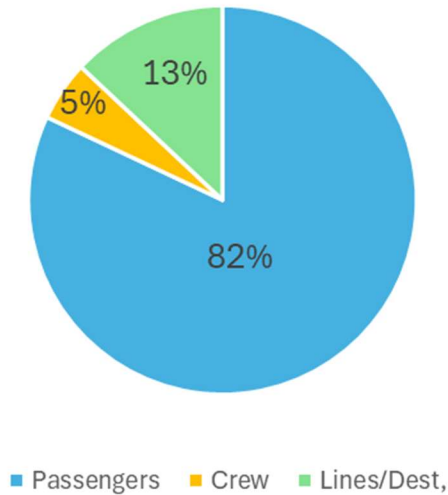
* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows:
 Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3;
 Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Passenger interactions with residents and store employees were extremely positive as the mean scores for “friendliness of residents” (8.9) and “courtesy of employees” (9.1) were high.
- Passengers were also very satisfied with the “historic sites” (8.3), a “variety of things to see and do” (8.0) and the “overall shopping experience” (8.4).
- As observed across all destinations, Turks & Caicos scored lowest passengers saying they are “likely to return for a land-based visit” (6.7), and their “likelihood of recommending to a friend” (7.2), however, both ratings are among the highest of any destination.

Turks & Caicos Chart 6 – Overall Spending

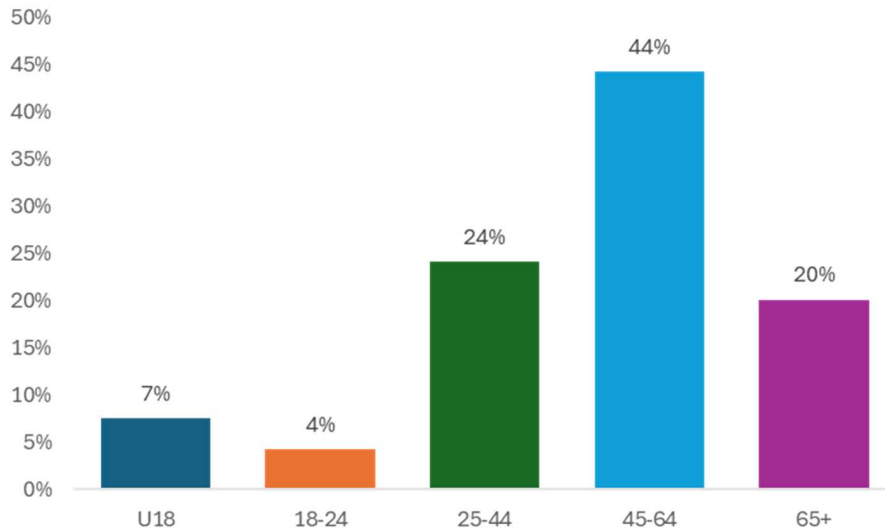
More than 4 in 5 (82%) of the cruise related spending in Turks & Caicos was made by passengers, 13 percent was made by the cruise lines, and the remaining 5 percent was spending made by crew members.



Passenger Demographics

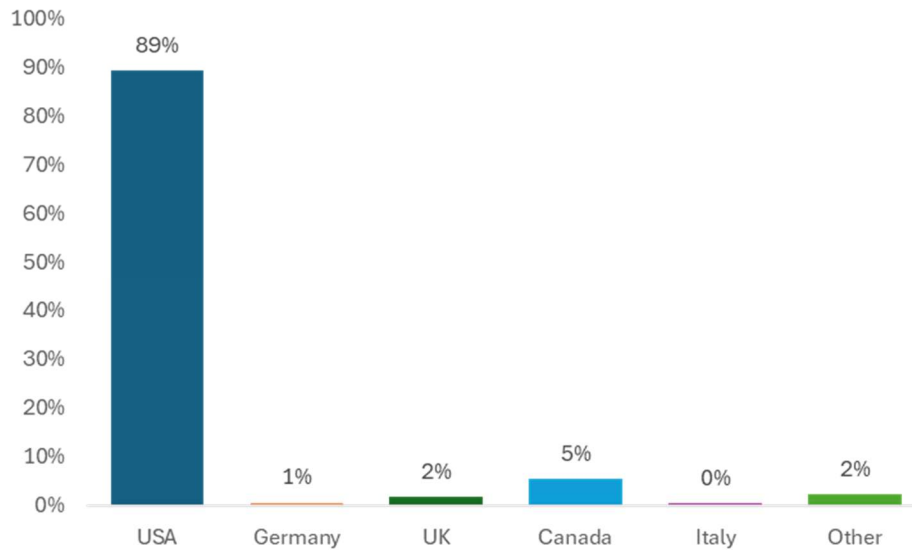
Consistent with the overall industry trends, the average age is down from 55 years old in the last study to 48 years old in this study. About 68 percent of the respondents are between the ages of 25 and 64.

Turks & Caicos Chart 7 – Passenger Age Cohorts



Turks & Caicos Chart 8 – Passenger Residence

The majority (89%) of the responding passengers to Turks & Caicos are residents of the US, 5 percent are residents Canada.



U.S. Virgin Islands

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.³⁴ The surveys were undertaken during the eight-month period beginning in October 2023 and ending in May 2024. The surveys were distributed onboard the ships via QR codes, and the guests and crew completed the surveys online. Passengers and crew were only surveyed once during a cruise itinerary.

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 excursions, food & beverages, clothing, etc.;
- visit satisfaction, including shore excursions, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation (passengers only); and
- demographic characteristics, including country of residence, age group, etc.

Combining the expenditure data collected from the passenger and crew surveys with revenue and wage data received directly from the destinations, and destination specific expenditure data by the cruise lines for items such as port fees, provisions and services leads to estimates of the total cruise tourism expenditures for each participating destination.

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

³⁴ Surveys were conducted on the ships of the following cruise lines: Aida, 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.

Cruise Tourism Expenditures

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

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

Based on data collected from industry sources and available statistics, 1,577,730 cruise passengers arrived aboard cruise ships during the 2023/2024 cruise year.³⁵ Of these, an estimated 1,331,605 passengers (84%) disembarked and visited USVI. Utilizing additional industry data and visiting cruise lines, 557,715 crew were aboard the cruise ships and 30 percent, or 169,550 crew, disembarked and visited the destination. Passenger arrivals are up more than 40 percent from the last study in 2017/18.

These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **\$258.1** million (\$US) in cruise tourism expenditures in USVI during the 2023/2024 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Passenger Spending

Per passenger spending estimates were derived from more than 2,100 surveys completed by passengers during the survey period. As shown in **USVI Chart 1**, each passenger cruise party spent an average of \$353.78. The average spend per cruise party is the sum of the weighted spending in each of the 8 purchase categories. For example, 38 percent of the survey respondents reported spending an average of \$51.80 for food and beverages. Spread across all cruise parties that visited USVI, this represented an average of \$19.70 per cruise party ($\$51.80 \times 38\% = \19.70). On a per passenger basis, the average total expenditure was \$166.22. This represents the sum of the per cruise party expenditures, \$353.78, divided by the average size of a cruise party in USVI, 2.1 passengers.

Shore excursions, and watches & jewelry account for 76 percent of cruise passenger expenditures in USVI.

About half (54%) of the passengers reported that their cruise party purchased a shore excursion. The effective price of the shore excursion was about \$81 per party to the local economy.

³⁵ The 2023/2024 cruise year includes the twelve months beginning in May 2023 and ending in April 2024.

USVI Chart 1 – Estimated Passenger Spending (\$US), 2023/2024 cruise year³⁶

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	\$148.60	54.3%	\$80.64
F&B at Restaurants & Bars	\$51.80	38.0%	\$19.70
Taxis/Ground Transportation	\$58.70	22.9%	\$13.43
Watches & Jewelry	\$921.60	20.6%	\$189.50
Clothing	\$57.60	40.8%	\$23.49
Other Purchases	\$114.80	13.1%	\$15.04
Local Crafts & Souvenirs	\$35.70	26.6%	\$9.48
Retail Purchases of Liquor	\$51.50	4.9%	\$2.50
Avg. Spend per Cruise Party			\$353.78
Average Size of Cruise Party			2.1
Avg. Spend per Passenger Visit			\$166.22
Passenger Onshore Visits			1,331,605
Total Passenger Expenditures			\$221,338,591

For the entire 2023/2024 cruise year, the estimated 1,331,605 cruise passengers who disembarked and visited USVI spent a total of **\$221.3 million** (\$US) in USVI.

Crew Spending

Crew spending estimates were derived from more than 600 surveys completed by crew members during the survey period. As shown in **USVI Chart 2**, each crew member who disembarked the ship and visited USVI spent an average of \$60.13. Like the passenger spending, the average expenditure per crew member is the sum of the weighted spending in each of the purchase categories.

Expenditures on food and beverages, clothing, and other purchases account for 80 percent of the crew members’ onshore spending.

³⁶ The average shore excursion expenditure is a weighted average of the onshore and travel agent/other purchases and the portion of the onboard purchases paid to local tour operators.

For the entire 2023/2024 cruise year, the estimated 169,550 crew who went ashore and visited USVI spent an estimated total of **\$2.1 million** (\$US).

USVI Chart 2 – Estimated Crew Spending (\$US), 2023/2024 cruise year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	\$28.20	70.8%	\$19.94
Taxis/Ground Transportation	\$12.80	29.2%	\$3.75
Watches & Jewelry	\$83.60	4.5%	\$3.76
Clothing	\$64.60	16.5%	\$10.68
Other Purchases	\$53.50	32.2%	\$17.24
Shore Excursions	\$31.20	2.9%	\$0.89
Personal Products	\$26.40	4.5%	\$1.18
Local Crafts & Souvenirs	\$23.10	10.2%	\$2.35
Retail Purchases of Liquor	\$20.60	1.6%	\$0.34
Avg. Spend per Crew Ashore			\$60.13
Number of Crew Onshore Visits			169,550
Total Crew Expenditures			\$10,195,567

Cruise Line & Destination Spending

Cruise lines made payments to local businesses for a variety of goods and services, including payments for port fees and taxes, navigation services, utilities and other supplies. Based upon data provided by the FCCA member cruise lines, we estimate that cruise lines were responsible for approximately **\$26.6 million** (\$US) in direct spending in USVI during the 2023/2024 cruise year.

Economic Contribution of Cruise Tourism Expenditures

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

As shown in **USVI Chart 3**, the **\$258.1** million in total cruise tourism expenditures in USVI supported direct employment of 2,721 residents of USVI paying \$59.7 million in annual wages. Adding the indirect contribution that results from the spending by those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures supported a total employment contribution of 5,095 jobs and \$123.7 million in wage income in USVI during the 2023/2024 cruise year.

USVI Chart 3 –Total Economic Contribution of Cruise Tourism, 2023/2024 cruise year

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	2,721	\$59.7
Total Economic Contribution	5,095	\$123.7

The Manufacturing and Transportation & Warehousing sectors account for about 68% of the total job impacts.

Passenger Surveys

USVI Chart 4 shows the major attributes of passenger visits to USVI as derived from the passenger surveys. Of those who completed the survey:

- 57 percent stated this was their first visit to USVI.
- Nearly 3 in 4 (74%) of those who went ashore made at least one purchase while ashore other than a tour.
- the typical cruise party consisted of two passengers (Average: 2.1) and spent an average of 4.4 hours ashore.

USVI Chart 4 – Major Attributes of Passenger Surveys

	Percent
Number Making First Visit	57%
Number Making Any Onshore Purchases:	74%
Average Hours Ashore	4.4
Purchased a Shore Excursion (Tour)	54%
How Purchased Tour:	
Cruise Line	76%
Onshore Tour Operator	5%
Other	19%
Tour Type:	
Historical/Cultural	19%
Beach Day	31%
Land-Based	15%
Water-Based	24%
Other	22%
Reason for No Tour	
Prefer to Tour on Own	54%
Poor Value	17%
Didn't Like Any	11%
Too Similar to Other Dest	6%
Weather	5%
Prefer to Stay on Ship	3%
Other	20%

- About half (54%) of the passengers that went ashore purchased a shore excursion. Seventy-six percent of passengers who purchased a tour did so through their cruise line, 5 percent purchased their tour on shore and 19 percent purchased their tour through some other means (travel agent, travel site, etc.).
- A third (31%) of the tours purchased were visits to “beach day activities” while 24 percent were “water-based activities”.
- The key reasons why some did not purchase a tour include they prefer to tour on their own (54%), or they thought the excursions were a poor value (17%).

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **USVI Chart 5**. 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 purposes, the satisfaction data from the prior study is also shown in the chart below.

- Cruise passengers were very satisfied with their “overall visit” to USVI (8.0) and the visit “meeting expectations” (7.6).
- “Guided Tours” (or Shore Excursions) received a ‘very satisfied’ mean score of 7.9; Additionally, the high ratings in “knowledge of guide” (8.3), and “value of tours” (7.5) indicates visitors to USVI were very satisfied with their onshore excursions.

USVI Chart 5 – Passenger Visit Satisfaction*

Visit Attributes	2024 Mean Score	2018 Mean Score
Overall Visit	8.0	7.9
Visit Met Expectations	7.6	7.2
Likelihood of a Return Visit	5.6	5.5
Likelihood of Recommending	6.3	6.0
Initial Shoreside Welcome	8.0	8.1
Overall Guided Tour	7.9	8.4
Knowledge of Guide	8.3	8.6
Value of Tour	7.5	7.8
Historic Sites/Museums	7.6	6.9
Variety of Things to See and Do	7.5	6.9
Friendliness of Residents	8.3	8.3
Overall Shopping Experience	7.7	7.7
Courtesy of Employees	8.5	8.4
Overall Prices	7.1	7.4
Taxis/Local Transportation	7.7	8.2

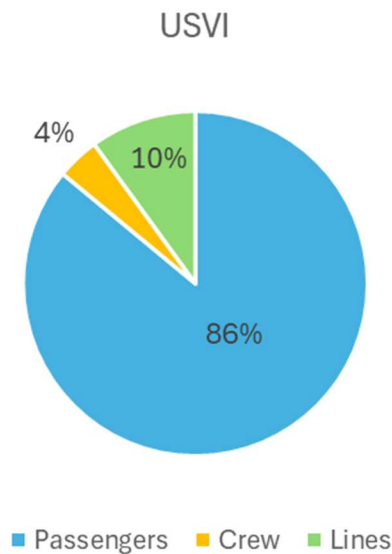
* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows:
 Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3;
 Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Passenger interactions with residents and store employees were very positive as the mean scores for “friendliness of residents” (8.3) and “courtesy of employees” (8.5) were high.
- Passengers were also very satisfied with the “historic sites” (7.6), a “variety of things to see and do” (7.5) and the “overall shopping experience” (7.7).
- As observed across all destinations, USVI scored lowest passengers saying they are “likely to return for a land-based visit” (5.6), and their “likelihood of recommending to a friend” (6.3), however, both ratings are in the upper range of those of other destinations.

USVI Chart 6 – Overall Spending

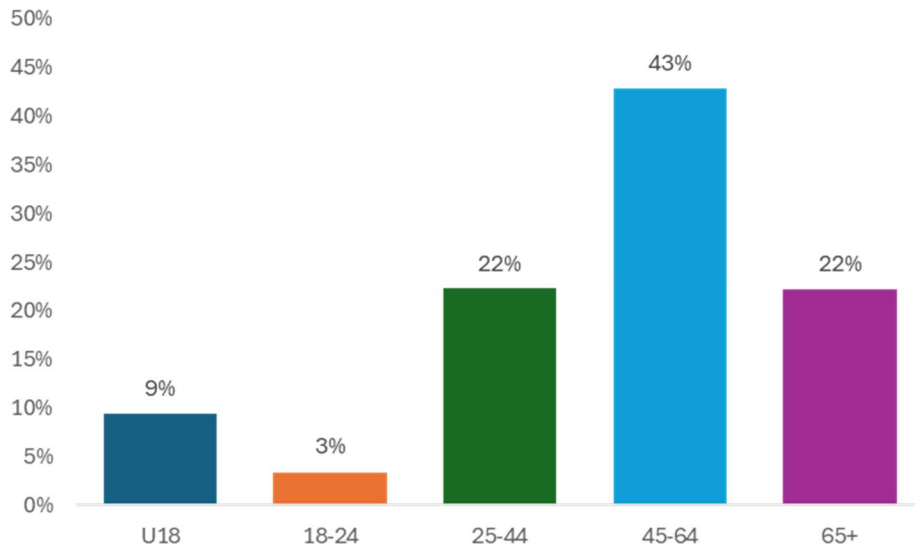
Nearly 9 in 10 (86%) of the cruise related spending in USVI was made by passengers, 10 percent was made by the cruise lines, and the remaining 4 percent was spending made by crew members.



Passenger Demographics

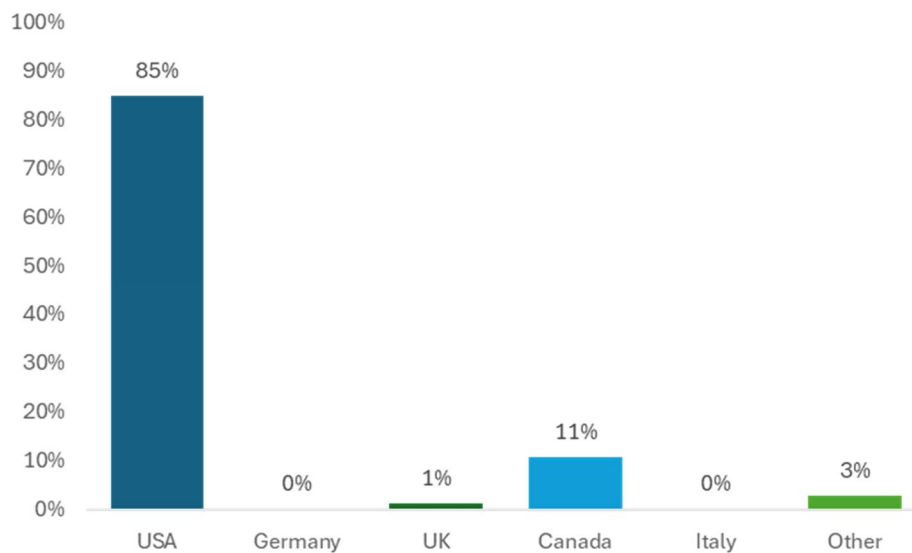
Consistent with the overall industry trends, the average age is down from 54 years old in the last study to 48 years old in this study. 65 percent of the respondents are between the ages of 25 and 64.

USVI Chart 7 – Passenger Age Cohorts



USVI Chart 8 – Passenger Residence

The majority (85%) of the responding passengers to USVI are residents of the US, 11 percent are residents of Canada.



Cruise Destinations of the Western Caribbean

Belize

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.³⁷ The surveys were undertaken during the eight-month period beginning in October 2023 and ending in May 2024. The surveys were distributed onboard the ships via QR codes, and the guests and crew completed the surveys online. Passengers and crew were only surveyed once during a cruise itinerary.

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 excursions, food & beverages, clothing, etc.;
- visit satisfaction, including shore excursions, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation (passengers only); and
- demographic characteristics, including country of residence, age group, etc.

Combining the expenditure data collected from the passenger and crew surveys with revenue and wage data received directly from the destinations, and destination specific expenditure data by the cruise lines for items such as port fees, provisions and services leads to estimates of the total cruise tourism expenditures for each participating destination.

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

³⁷ Surveys were conducted on the ships of the following cruise lines: Aida, 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.

Cruise Tourism Expenditures

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

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

Based on data collected from industry sources and available statistics, 864,120 cruise passengers arrived aboard cruise ships during the 2023/2024 cruise year.³⁸ Of these, an estimated 737,960 passengers (85%) disembarked and visited Belize. Utilizing additional industry data and visiting cruise lines, 314,945 crew were aboard the cruise ships and 30 percent, or 95,745 crew, disembarked and visited the destination. Passenger arrivals are down about 15 percent from the last study in 2017/18.

These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **\$88.6** million (\$US) in cruise tourism expenditures in Belize during the 2023/2024 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Passenger Spending

Per passenger spending estimates were derived from more than 1,900 surveys completed by passengers during the survey period. As shown in **Belize Chart 1**, each passenger cruise party spent an average of \$192.55. The average spend per cruise party is the sum of the weighted spending in each of the 8 purchase categories. For example, 38 percent of the survey respondents reported spending an average of \$46.40 for food and beverages. Spread across all cruise parties that visited Belize, this represented an average of \$17.56 per cruise party ($\$46.40 \times 38\% = \17.56). On a per passenger basis, the average total expenditure was \$87.42. This represents the sum of the per cruise party expenditures, \$192.55, divided by the average size of a cruise party in Belize, 2.2 passengers.

Shore excursions, clothing, and food and beverages account for 79 percent of cruise passenger expenditures in Belize.

About 2 in 3 (67%) of the passengers reported that their cruise party purchased a shore excursion. The effective price of the shore excursion was about \$115 per party to the local economy.

³⁸ The 2023/2024 cruise year includes the twelve months beginning in May, 2023 and ending in April, 2024.

Belize Chart 1 – Estimated Passenger Spending (\$US), 2023/2024 cruise year³⁹

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	\$171.80	67.0%	\$115.00
F&B at Restaurants & Bars	\$46.40	37.8%	\$17.56
Taxis/Ground Transportation	\$57.60	6.1%	\$3.54
Watches & Jewelry	\$197.10	6.0%	\$11.85
Clothing	\$51.50	37.3%	\$19.20
Other Purchases	\$64.80	14.4%	\$9.36
Local Crafts & Souvenirs	\$38.50	34.3%	\$13.23
Retail Purchases of Liquor	\$47.00	6.0%	\$2.83
Avg. Spend per Cruise Party			\$192.55
Average Size of Cruise Party			2.2
Avg. Spend per Passenger Visit			\$87.42
Passenger Onshore Visits			737,960
Total Passenger Expenditures			\$64,509,688

For the entire 2023/2024 cruise year, the estimated 737,960 cruise passengers who disembarked and visited Belize spent a total of **\$64.5 million** (\$US) in Belize.

Crew Spending

Crew spending estimates were derived from surveys completed by crew members during the survey period. As shown in **Belize Chart 2**, each crew member who disembarked the ship and visited Belize spent an average of \$48.90. Like the passenger spending, the average expenditure per crew member is the sum of the weighted spending in each of the purchase categories.

Expenditures on food and beverages, clothing, and other purchases account for 70 percent of the crew members' onshore spending.

³⁹ The average shore excursion expenditure is a weighted average of the onshore and travel agent/other purchases and the portion of the onboard purchases paid to local tour operators.

For the entire 2023/2024 cruise year, the estimated 95,745 crew who went ashore and visited Belize spent an estimated total of **\$4.7 million** (\$US).

Belize Chart 2 – Estimated Crew Spending (\$US), 2023/2024 cruise year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	\$35.30	63.2%	\$22.32
Taxis/Ground Transportation	\$18.10	7.9%	\$1.43
Watches & Jewelry	\$76.20	7.9%	\$6.02
Clothing	\$43.70	13.2%	\$5.75
Other Purchases	\$47.40	14.9%	\$7.06
Shore Excursions	\$92.00	2.6%	\$2.42
Personal Products	\$29.00	4.4%	\$1.27
Local Crafts & Souvenirs	\$21.40	12.3%	\$2.63
Retail Purchases of Liquor	\$0.00	0.0%	\$0.00
Avg. Spend per Crew Ashore			\$48.90
Number of Crew Onshore Visits			95,745
Total Crew Expenditures			\$4,682,202

Cruise Line & Destination Spending

Cruise lines made payments to local businesses for a variety of goods and services, including payments for port fees and taxes, navigation services, utilities and other supplies. The destination itself had employee wages related to cruise operations. Based upon data provided by the FCCA member cruise lines and the destination, we estimate that cruise lines and the destination were responsible for approximately **\$19.4 million** (\$US) in direct spending in Belize during the 2023/2024 cruise year.

Economic Contribution of Cruise Tourism Expenditures

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

As shown in **Belize Chart 3**, the **\$88.6** million in total cruise tourism expenditures in Belize supported direct employment of 1,675 residents of Belize paying \$14.9 million in annual wages. Adding the indirect contribution that results from the spending by those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures supported a total employment contribution of 2,293 jobs and \$23.3 million in wage income in Belize during the 2023/2024 cruise year.

Belize Chart 3 – Total Economic Contribution of Cruise Tourism, 2023/2024 cruise year

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	1,675	\$14.9
Total Economic Contribution	2,293	\$23.3

The Wholesale & Retail Trade, Lodging & Food Services, and Transportation & Warehousing sectors account for about 83% of the total job impacts.

Passenger Surveys

Belize Chart 4 shows the major attributes of passenger visits to Belize as derived from the passenger surveys. Of those who completed the survey:

- 74 percent stated this was their first visit to Belize.
- Nearly three-quarters (71%) of those who went ashore made at least one purchase while ashore other than a tour.
- the typical cruise party consisted of two passengers (Average: 2.2) and spent an average of 4.6 hours ashore.

Belize Chart 4 – Major Attributes of Passenger Surveys

	Percent
Number Making First Visit	74%
Number Making Any Onshore Purchases:	71%
Average Hours Ashore	4.6
Purchased a Shore Excursion (Tour)	67%
How Purchased Tour:	
Cruise Line	74%
Onshore Tour Operator	7%
Other	19%
Tour Type:	
Historical/Cultural	39%
Beach Day	6%
Land-Based	20%
Water-Based	26%
Other	18%
Reason for No Tour	
Prefer to Tour on Own	38%
Poor Value	11%
Didn't Like Any	14%
Too Similar to Other Dest	10%
Weather	9%
Prefer to Stay on Ship	1%
Other	28%

- About two-thirds (67%) of the passengers that went ashore purchased a shore excursion. Seventy-four percent of passengers who purchased a tour did so through their cruise line, 7 percent purchased their tour on shore and 19 percent purchased their tour through some other means (travel agent, travel site, etc.).
- More than a third (39%) of the tours purchased were visits to “historical or cultural sites”, while 1 in 4 were “water-based activities” (26%).
- The key reasons why some did not purchase a tour include they prefer to tour on their own (38%), they did not like any (14%) or they did not think the excursions were a good value (11%).

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Belize Chart 5**. 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 purposes, the satisfaction data from the prior study is also shown in the chart below.

- Cruise passengers were very satisfied with their “overall visit” to Belize (7.6) and the visit “meeting expectations” (7.2).
- “Guided Tours” (or Shore Excursions) received a ‘very satisfied’ mean score of 8.5. Additionally, the high ratings in “knowledge of guide” (9.0), and “value of tours” (8.1) indicates visitors to Belize were very satisfied with their onshore excursions.

Belize Chart 5 – Passenger Visit Satisfaction*

Visit Attributes	2024 Mean Score	2018 Mean Score
Overall Visit	7.6	7.9
Visit Met Expectations	7.2	7.3
Likelihood of a Return Visit	5.5	5.3
Likelihood of Recommending	5.7	5.8
Initial Shoreside Welcome	8.0	8.2
Overall Guided Tour	8.5	8.6
Knowledge of Guide	9.0	9.2
Value of Tour	8.1	8.3
Historic Sites/Museums	7.9	8.4
Variety of Things to See and Do	7.1	7.1
Friendliness of Residents	8.4	8.5
Overall Shopping Experience	7.5	7.6
Courtesy of Employees	8.6	8.4
Overall Prices	7.3	6.9
Taxis/Local Transportation	8.0	8.4

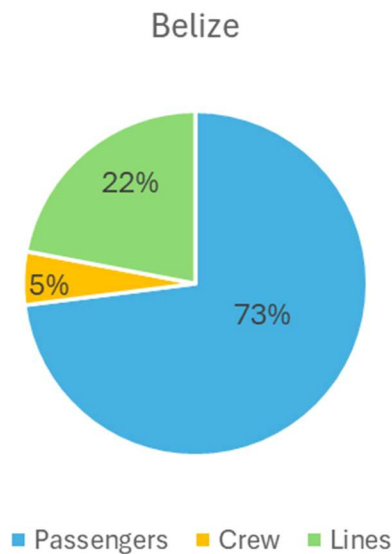
* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows:
 Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3;
 Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Passenger interactions with residents and store employees were very positive as the mean scores for “friendliness of residents” (8.4) and “courtesy of employees” (8.6) were high.
- Passengers were also very satisfied with the “historic sites” (7.9), a “variety of things to see and do” (7.1) and the “overall shopping experience” (7.5).
- As was observed in all other destinations, Belize scored lowest passengers saying they are “likely to return for a land-based visit” (5.5), and their “likelihood of recommending to a friend” (5.7), however, both ratings are in the same range as most other destinations.

Belize Chart 6 – Overall Spending

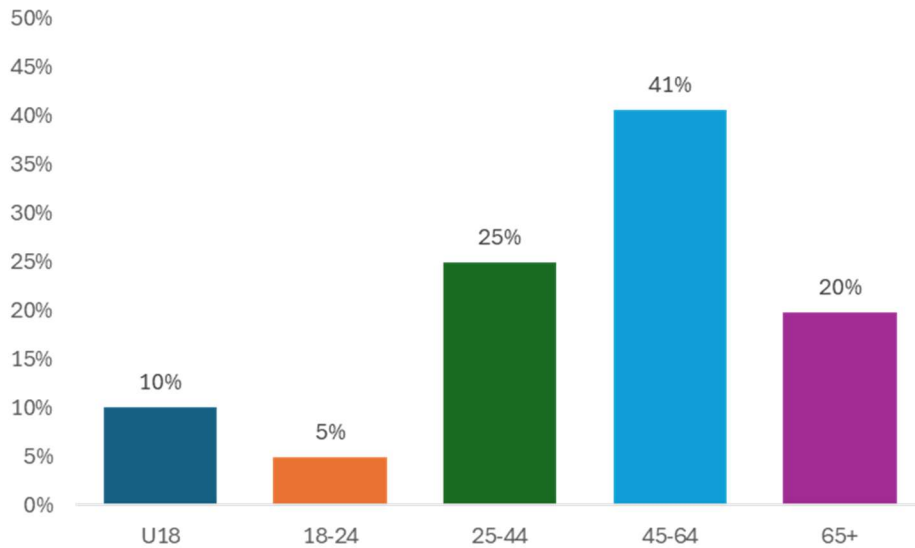
Nearly 3 in 4 (73%) of the cruise related spending in Belize was made by passengers, 22 percent was made by the cruise lines and the port itself, and the remaining 5 percent was spending made by crew members.



Passenger Demographics

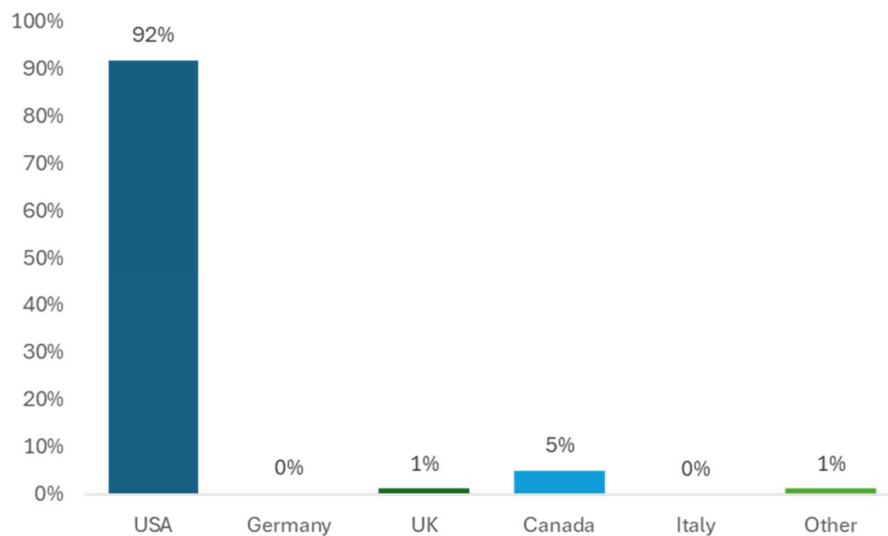
Consistent with the overall industry trends, the average age is down from 49 years old in the last study to 46 years old in this study. About 65 percent of the respondents are between the ages of 25 and 64.

Belize Chart 7 – Passenger Age Cohorts



Belize Chart 8 – Passenger Residence

Most (92%) of the responding passengers to Belize are residents of the US, 5 percent are from Canada.



Cayman Islands

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.⁴⁰ The surveys were undertaken during the eight-month period beginning in October 2023 and ending in May 2024. The surveys were distributed onboard the ships via QR codes, and the guests and crew completed the surveys online. Passengers and crew were only surveyed once during a cruise itinerary.

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 excursions, food & beverages, clothing, etc.;
- visit satisfaction, including shore excursions, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation (passengers only); and
- demographic characteristics, including country of residence, age group, etc.

Combining the expenditure data collected from the passenger and crew surveys with revenue and wage data received directly from the destinations, and destination specific expenditure data by the cruise lines for items such as port fees, provisions and services leads to estimates of the total cruise tourism expenditures for each participating destination.

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

⁴⁰ Surveys were conducted on the ships of the following cruise lines: Aida, 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.

Cruise Tourism Expenditures

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

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

Based on data collected from the Cayman Islands Department of Tourism, 1,216,025 cruise passengers arrived aboard cruise ships during the 2023/2024 cruise year.⁴¹ This is down about 35 percent from the 2017/18 study. Of these, an estimated 1,026,325 passengers (84%) disembarked and visited Cayman Islands. Utilizing additional data provided by the Department of Tourism and visiting cruise lines, 425,000 crew were aboard the cruise ships and an estimated 30 percent, or 129,200 crew, disembarked and visited the destination.

These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **\$161.5** million (\$US) in cruise tourism expenditures in Cayman Islands during the 2023/2024 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Passenger Spending

Per passenger spending estimates were derived from about 1,630 surveys completed by passengers during the survey period. As shown in **Cayman Islands Chart 1**, each passenger cruise party spent an average of \$241.53. The average spend per cruise party is the sum of the weighted spending in each of the 8 purchase categories. For example, 40 percent of the survey respondents reported spending an average of \$57.90 for food and beverages. Spread across all cruise parties that visited Cayman Islands, this represented an average of \$23.27 per cruise party ($\$57.90 \times 40\% = \23.27). On a per passenger basis, the average total expenditure was \$115.68. This represents the sum of the per cruise party expenditures, \$241.53, divided by the average size of a cruise party in Cayman Islands, 2.1 passengers.

Shore excursions, clothing and watches & jewelry account for 76 percent of cruise passenger expenditures in Cayman Islands.

⁴¹ The 2023/2024 cruise year includes the twelve months beginning in May, 2023 and ending in April, 2024.

Just over half (59%) of the passengers reported that their cruise party purchased a shore excursion. The effective price of the shore excursion was about \$102 per party to the local economy.

Cayman Islands Chart 1 – Estimated Passenger Spending (\$US), 2023/2024 cruise year⁴²

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	\$173.40	58.9%	\$102.06
F&B at Restaurants & Bars	\$57.90	40.2%	\$23.27
Taxis/Ground Transportation	\$37.70	14.3%	\$5.39
Watches & Jewelry	\$465.10	12.4%	\$57.61
Clothing	\$62.20	39.2%	\$24.39
Other Purchases	\$65.80	19.0%	\$12.49
Local Crafts & Souvenirs	\$41.20	30.7%	\$12.63
Retail Purchases of Liquor	\$57.10	6.5%	\$3.68
Avg. Spend per Cruise Party			\$241.53
Average Size of Cruise Party			2.1
Avg. Spend per Passenger Visit			\$115.68
Passenger Onshore Visits			1,026,325
Total Passenger Expenditures			\$118,726,310

For the entire 2023/2024 cruise year, the estimated 1,026,325 cruise passengers who disembarked and visited Cayman Islands spent a total of **\$118.7 million** (\$US) in Cayman Islands.

Crew Spending

Crew spending estimates were derived from more than 500 surveys completed by crew members during the survey period. As shown in **Cayman Islands Chart 2**, each crew member who disembarked the ship and visited Cayman Islands spent an average of \$76.10. Like the passenger spending, the average expenditure per crew member is the sum of the weighted spending in each of the purchase categories.

Expenditures on food and beverages, other purchases account for 69 percent of the crew members’ onshore spending.

For the entire 2023/2024 cruise year, the estimated 128,350 crew who went ashore and visited Cayman Islands spent an estimated total of **\$9.8 million** (\$US).

⁴² The average shore excursion expenditure is a weighted average of the onshore and travel agent/other purchases and the portion of the onboard purchases paid to local tour operators.

Cayman Islands Chart 2 – Estimated Crew Spending (\$US), 2023/2024 cruise year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	\$43.20	72.6%	\$31.37
Taxis/Ground Transportation	\$13.50	21.0%	\$2.85
Watches & Jewelry	\$95.80	7.0%	\$6.71
Clothing	\$38.20	8.3%	\$3.16
Other Purchases	\$69.50	30.6%	\$21.24
Shore Excursions	\$57.50	5.1%	\$2.93
Personal Products	\$0.00	0.0%	\$0.00
Local Crafts & Souvenirs	\$25.60	19.7%	\$5.05
Retail Purchases of Liquor	\$36.40	7.6%	\$2.78
Avg. Spend per Crew Ashore			\$76.10
Number of Crew Onshore Visits			129,200
Total Crew Expenditures			\$9,831,561

Cruise Line & Destination Spending

Cruise lines made payments to local businesses for a variety of goods and services, including payments for port fees and taxes, navigation services, utilities and other supplies. The destination itself had employees and employee wages related to its cruise operations. Based upon data provided by the FCCA member cruise lines and the destination, we estimate that cruise lines and the Cayman Islands were responsible for nearly **\$33.0 million** (\$US) in direct spending in the Cayman Islands during the 2023/2024 cruise year.

Economic Contribution of Cruise Tourism Expenditures

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

As shown in Cayman Islands **Chart 3**, the **\$161.5** million in total cruise tourism expenditures in Cayman Islands supported direct employment of 1,717 residents of Cayman Islands paying \$34.9 million in annual wages. Adding the indirect contribution that results from the spending by those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures supported a total employment contribution of 2,988 jobs and \$67.1 million in wage income in Cayman Islands during the 2023/2024 cruise year.

Cayman Islands Chart 3 – Total Economic Contribution of Cruise Tourism, 2023/2024 cruise year

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	1,717	\$34.9
Total Economic Contribution	2,988	\$67.1

The Wholesale & Retail Trade, Manufacturing, and Transportation & Warehousing sectors account for about 72% of the total job impacts.

Passenger Surveys

Cayman Islands Chart 4 shows the major attributes of passenger visits to Cayman Islands as derived from the passenger surveys. Of those who completed the survey:

- 55 percent stated this was their first visit to Cayman Islands.
- 74 percent of those who went ashore made at least one purchase while ashore other than a tour.
- the typical cruise party consisted of two passengers (Average: 2.1) and spent an average of 4.0 hours ashore.

Cayman Islands Chart 4 – Major Attributes of Passenger Surveys

	Percent
Number Making First Visit	55%
Number Making Any Onshore Purchases:	74%
Average Hours Ashore	4.0
Purchased a Shore Excursion (Tour)	59%
How Purchased Tour:	
Cruise Line	77%
Onshore Tour Operator	5%
Other	19%
Tour Type:	
Historical/Cultural	19%
Beach Day	12%
Land-Based	13%
Water-Based	41%
Other	23%
Reason for No Tour	
Prefer to Tour on Own	55%
Poor Value	15%
Didn't Like Any	12%
Too Similar to Other Dest	5%
Weather	4%
Prefer to Stay on Ship	1%
Other	23%

- About half (59%) of the passengers that went ashore purchased a shore excursion. Seventy-seven percent of passengers who purchased a tour did so through their cruise line, 5 percent purchased their tour onshore, and 19 percent purchased their tour through some other means (travel agent, travel site, etc.).
- Nineteen percent of the tours purchased were visits to “historical or cultural sites”, while 2 in 5 were “water-based activities” (41%).
- The key reasons why some did not purchase a tour include they prefer to tour on their own (55%) and they thought they were a poor value (15%).

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Cayman Islands Chart 5**. 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 purposes, the satisfaction data from the prior study is also shown in the chart below.

- Cruise passengers were very satisfied with their “overall visit” to Cayman Islands (7.7) and the visit “meeting expectations” (7.4).
- “Guided Tours” (or Shore Excursions) received a ‘very satisfied’ mean score of 8.1; Additionally, the high ratings in “knowledge of guide” (8.8), and “value of tours” (7.8) indicates visitors to Cayman Islands were very satisfied with their onshore excursions.

Cayman Islands Chart 5 – Passenger Visit Satisfaction*

Visit Attributes	2024 Mean Score	2018 Mean Score
Overall Visit	7.7	8.1
Visit Met Expectations	7.4	7.5
Likelihood of a Return Visit	5.6	5.8
Likelihood of Recommending	6.2	6.4
Initial Shoreside Welcome	7.8	7.7
Overall Guided Tour	8.1	8.7
Knowledge of Guide	8.8	9.0
Value of Tour	7.8	8.3
Historic Sites/Museums	7.4	8.0
Variety of Things to See and Do	7.3	7.4
Friendliness of Residents	8.5	8.4
Overall Shopping Experience	7.5	7.9
Courtesy of Employees	8.5	8.3
Overall Prices	7.0	7.1
Taxis/Local Transportation	8.1	8.1

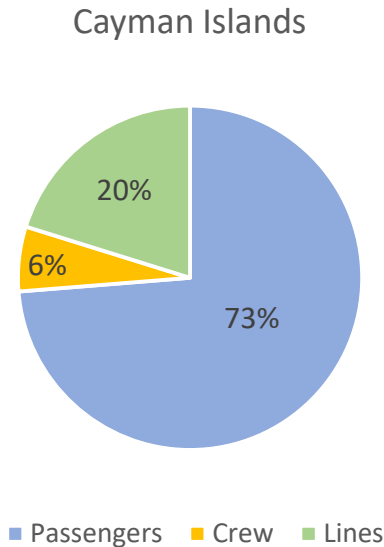
* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows:
 Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3;
 Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Passenger interactions with residents and store employees were very positive as the mean scores for “friendliness of residents” (8.5) and “courtesy of employees” (8.5) were high.
- Passengers were also very satisfied with the “historic sites” (7.4), a “variety of things to see and do” (7.3) and the “overall shopping experience” (7.5).
- As observed in every other destination, Cayman Islands scored lowest passengers saying they are “likely to return for a land-based visit” (5.6), and their “likelihood of recommending to a friend” (6.2). Both ratings are similar to the ratings of other destinations.

Cayman Islands Chart 6 – Overall Spending

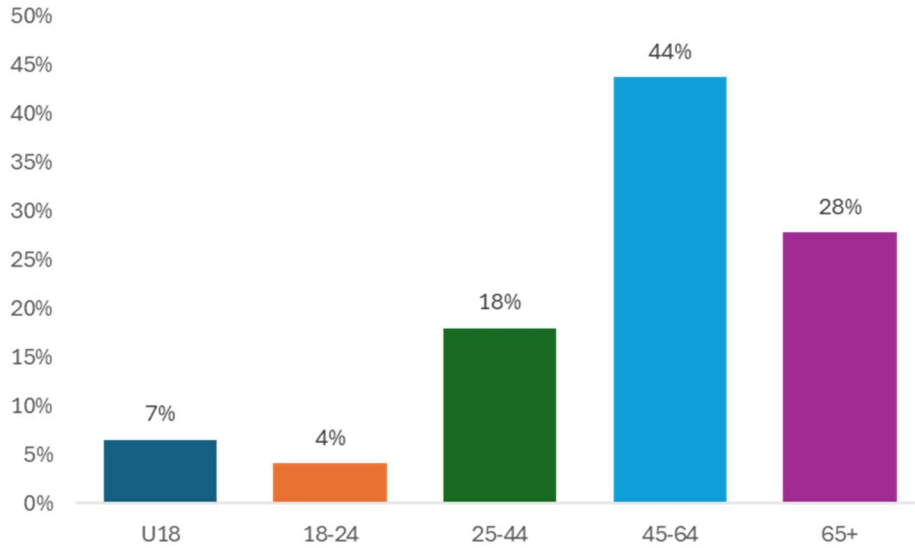
Nearly 3 in 4 (73%) of the cruise related spending in Cayman Islands was made by passengers, 20 percent was made by the cruise lines and Cayman Islands itself, and the remaining 6 percent was spending made by crew members.



Passenger Demographics

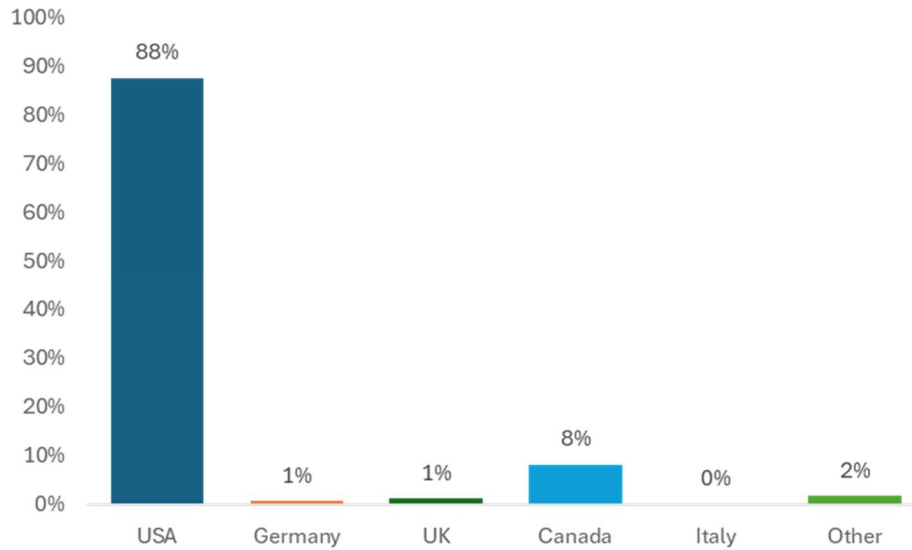
The average age of passengers to the Cayman Islands in this study is 50 years old. About 62 percent of the respondents are between the ages of 25 and 64.

Cayman Islands Chart 7 – Passenger Age Cohorts



Cayman Islands Chart 8 – Passenger Residence

Nearly 9 in 10 (88%) of the responding passengers to Cayman Islands are residents of the US. Eight percent are residents of Canada.



Colombia

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.⁴³ The surveys were undertaken during the eight-month period beginning in October 2023 and ending in May 2024. The surveys were distributed onboard the ships via QR codes, and the guests and crew completed the surveys online. Passengers and crew were only surveyed once during a cruise itinerary and for a single destination.

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

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

Combining the expenditure data collected from the passenger and crew surveys with revenue and wage data received directly from the destinations, and destination specific expenditure data by the cruise lines for items such as port fees, provisions and services leads to estimates of the total cruise tourism expenditures for each participating destination.

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

⁴³ Surveys were conducted on the ships of the following cruise lines: Aida, 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.

Cruise Tourism Expenditures

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

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

Based on data collected from the Sociedad Portuaria Regional Cartagena, a total of 348,920 cruise passengers arrived aboard cruise ships during the 2023/2024 cruise year.⁴⁴ Of these, 331,365 transit passengers arrived and an estimated 273,045 passengers (82%) disembarked and visited Colombia. There were also an estimated 17,555 passengers who embarked on their cruise from Colombia. Utilizing additional data provided by Colombia, and visiting cruise lines, 146,215 crew were aboard the cruise ships and an estimated 30 percent, or 44,450 disembarked and visited the destination. Transit passenger arrivals were down about 6 percent from the 2018 study, while embarking passengers were down by more than 70 percent.

These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **\$49.9** million (\$US) in cruise tourism expenditures in Colombia during the 2023/2024 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Passenger Spending

Per passenger spending estimates were derived from more than 1,000 transit surveys completed by passengers during the survey period. As shown in **Colombia Chart 1**, each transit passenger cruise party spent an average of \$232.65. The average spend per cruise party is the sum of the weighted spending in each of the 8 purchase categories. For example, 25 percent of the survey respondents reported spending an average of \$46.73 for food and beverages. Spread across all cruise parties that visited Colombia, this represented an average of \$11.48 per cruise party ($\$46.73 \times 25\% = \11.48). On a per passenger basis, the average total expenditure was \$112.38. This represents the sum of the per cruise party expenditures, \$232.65, divided by the average size of a cruise party in Colombia, 2.1 passengers.

Shore excursions and watches & jewelry account for 71 percent of cruise passenger expenditures in Colombia.

⁴⁴ The 2023/2024 cruise year includes the twelve months beginning in May, 2023 and ending in April, 2024.

Nearly 4 in 5 (78%) of the passengers reported that their cruise party purchased a shore excursion. The effective price of the shore excursion was about \$103 per party to the local economy.

Colombia Chart 1a – Estimated Transit Passenger Spending (\$US), 2023/2024 cruise year⁴⁵

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	\$132.06	78.2%	\$103.30
F&B at Restaurants & Bars	\$46.73	24.6%	\$11.48
Taxis/Ground Transportation	\$63.72	10.6%	\$6.75
Watches & Jewelry	\$364.64	17.3%	\$62.94
Clothing	\$59.27	22.8%	\$13.49
Other Purchases	\$46.63	27.6%	\$12.87
Local Crafts & Souvenirs	\$54.09	37.4%	\$20.26
Retail Purchases of Liquor	\$86.45	1.8%	\$1.56
Avg. Spend per Cruise Party			\$232.65
Average Size of Cruise Party			2.1
Avg. Spend per Passenger Visit			\$112.38
Passenger Onshore Visits			273,045
Total Passenger Expenditures			\$30,683,477

For the entire 2023/2024 cruise year, the estimated 273,045 transit passengers who disembarked and visited Colombia spent a total of **\$30.7 million** (\$US) in Colombia.

⁴⁵ The average shore excursion expenditure is a weighted average of the onshore and travel agent/other purchases and the portion of the onboard purchases paid to local tour operators.

Overall, 74 percent of passengers who embarked on their cruise from Colombia reported spending at least one night in Colombia. Of those who spent an overnight, the average amount spent for accommodations was \$637 per cruise party. Overall, the weighted spend per embarking party was \$624.21. On a per passenger basis this equates to \$279.92

Colombia Chart 1b – Estimated Embark Passenger Spending (\$US), 2023/2024 cruise year⁴⁶

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Accommodations	\$637.40	74.2%	\$472.92
F&B at Restaurants & Bars	\$145.50	35.5%	\$51.61
Taxis/Ground Transportation	\$20.90	25.8%	\$5.39
Watches & Jewelry	\$500.00	3.2%	\$16.13
Clothing	\$104.70	9.7%	\$10.13
Other Purchases	\$53.00	9.7%	\$5.13
Shore Excursions	\$170.00	32.3%	\$54.84
Local Crafts & Souvenirs	\$66.70	9.7%	\$6.45
Retail Purchases of Liquor	\$50.00	3.2%	\$1.61
Avg. Spend per Homeport Cruise Party			\$624.21
Average Size of a Party			2.2
Avg. Spend per Homeport Passenger			\$279.92
Number of Homeport Passengers			17,555
Total Homeport Passenger Expenditures			\$4,914,219

For the entire 2023/2024 cruise year, the 17,555 embarking transit passengers spent a total of **\$4.9 million** (\$US) in Colombia.

Crew Spending

Crew spending estimates were derived from surveys completed by crew members during the survey period. As shown in **Colombia Chart 2**, each crew member who disembarked the ship and visited Colombia spent an average of \$71.22. Like the passenger spending, the average expenditure per crew member is the sum of the weighted spending in each of the purchase categories.

Expenditures on food and beverages, taxi, and other purchases accounted for 74 percent of the crew members’ onshore spending.

⁴⁶ The average shore excursion expenditure is a weighted average of the onshore and travel agent/other purchases and the portion of the onboard purchases paid to local tour operators.

For the entire 2023/2024 cruise year, the estimated 44,450 crew who went ashore and visited Colombia spent nearly **\$3.2 million** (\$US).

Colombia Chart 2 – Estimated Crew Spending (\$US), 2023/2024 cruise year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	\$29.10	73.9%	\$21.52
Taxis/Ground Transportation	\$18.60	55.5%	\$10.34
Watches & Jewelry	\$62.50	12.0%	\$7.52
Clothing	\$31.20	14.4%	\$4.49
Other Purchases	\$58.00	35.8%	\$20.75
Shore Excursions	\$41.60	3.7%	\$1.53
Personal Products	\$34.50	2.0%	\$0.69
Local Crafts & Souvenirs	\$16.90	23.1%	\$3.90
Retail Purchases of Liquor	\$20.00	2.3%	\$0.47
Avg. Spend per Crew Ashore			\$71.22
Number of Crew Onshore Visits			44,450
Total Crew Expenditures			\$3,165,546

Cruise Line Spending

Cruise lines made payments to local businesses for a variety of goods and services, including payments for port fees and taxes, navigation services, utilities, bunker fuel and other supplies. The destination itself had employee wages related to cruise operations. Based upon data provided by the FCCA member cruise lines and the destination, we estimate that cruise lines and the destination were responsible for approximately **\$11.2 million** (\$US) in direct spending in Colombia during the 2023/2024 cruise year.

Economic Contribution of Cruise Tourism Expenditures

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

As shown in **Colombia Chart 3**, the **\$49.9** million in total cruise tourism expenditures in Colombia supported direct employment of 723 residents of Colombia paying \$5.8 million in annual wages. Adding the indirect contribution that results from the spending by those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures supported a total employment contribution of 1,227 jobs and \$10.1 million in wage income in Colombia during the 2023/2024 cruise year.

Colombia Chart 3 –Total Economic Contribution of Cruise Tourism, 2023/2024 cruise year

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	723	\$5.8
Total Economic Contribution	1,227	\$10.1

The Wholesale & Retail Trade, Lodging & Food Services, and Transportation & Warehousing sectors account for about 72% of the total job impacts.

Passenger Surveys

Colombia Chart 4 shows the major attributes of passenger visits to Colombia as derived from the passenger surveys. Of those who completed the survey:

- 82 percent stated this was their first visit to Colombia.
- More than 3 in 5 (64%) of those who went ashore made at least one purchase while ashore other than a tour.
- the typical cruise party consisted of two passengers (Average: 2.1) and spent an average of 4.7 hours ashore.

Colombia Chart 4 – Major Attributes of Passenger Surveys

	Percent
Number Making First Visit	82%
Number Making Any Onshore Purchases:	64%
Average Hours Ashore	4.7
Purchased a Shore Excursion (Tour)	78%
How Purchased Tour:	
Cruise Line	85%
Onshore Tour Operator	3%
Other	12%
Tour Type:	
Historical/Cultural	80%
Beach Day	1%
Land-Based	6%
Water-Based	4%
Other	14%
Reason for No Tour	
Prefer to Tour on Own	58%
Poor Value	15%
Didn't Like Any	11%
Too Similar to Other Dest	0%
Weather	2%
Prefer to Stay on Ship	3%
Other	24%

- A majority (78%) of passengers that went ashore purchased a shore excursion. Eighty-five percent of passengers who purchased a tour did so through their cruise line, 3 percent purchased their tour on shore and 12 percent purchased their tour through some other means (travel agent, travel site, etc.).
- The majority of tours purchased were to “historical or cultural sites” (80%).
- The key reasons why some did not purchase a tour include they prefer to tour on their own (58%), while 15 percent believe them to be a poor value.

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Colombia Chart 5**. 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 purposes, the satisfaction data from the prior study is also shown in the chart below.

- Cruise passengers were very satisfied with their “overall visit” to Colombia (7.4) and the visit “meeting expectations” (7.2).
- “Guided Tours” (or Shore Excursions) received a ‘very satisfied’ mean score of 7.6; Additionally, the high ratings in “knowledge of guide” (8.5), and “value of tours” (7.4) indicates visitors to Colombia were very satisfied with their onshore excursions.

Colombia Chart 5 – Passenger Visit Satisfaction*

Visit Attributes	2024 Mean Score	2018 Mean Score
Overall Visit	7.4	7.9
Visit Met Expectations	7.2	7.4
Likelihood of a Return Visit	4.0	3.9
Likelihood of Recommending	4.8	5.1
Initial Shoreside Welcome	8.1	8.1
Overall Guided Tour	7.6	8.3
Knowledge of Guide	8.5	8.8
Value of Tour	7.4	8.1
Historic Sites/Museums	7.8	8.1
Variety of Things to See and Do	7.6	7.7
Friendliness of Residents	7.6	7.5
Overall Shopping Experience	6.7	7.2
Courtesy of Employees	8.3	8.0
Overall Prices	7.3	7.3
Taxis/Local Transportation	7.5	8.1

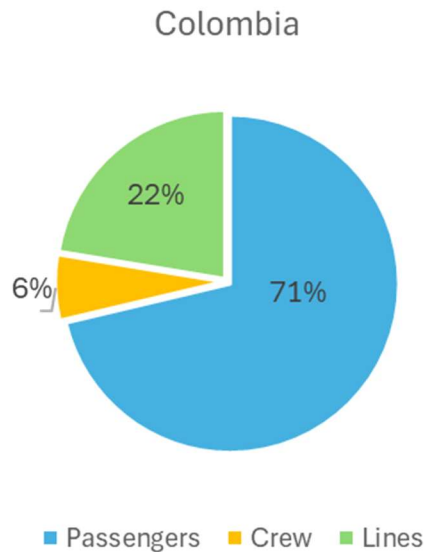
* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows:
 Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3;
 Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Passenger interactions with residents and store employees were very positive as the mean scores for "friendliness of residents" (7.6) and "courtesy of employees" (8.3) were high.
- Passengers were also very satisfied with the "historic sites" (7.8), there being a 'variety to see and do" (7.6) and with the taxis/transportation on the island (7.5).
- As is seen in all other destinations, Colombia scored lowest passengers saying they are "likely to return for a land-based visit" (4.0), and their "likelihood of recommending to a friend" (4.8).

Colombia Chart 6 – Overall Spending

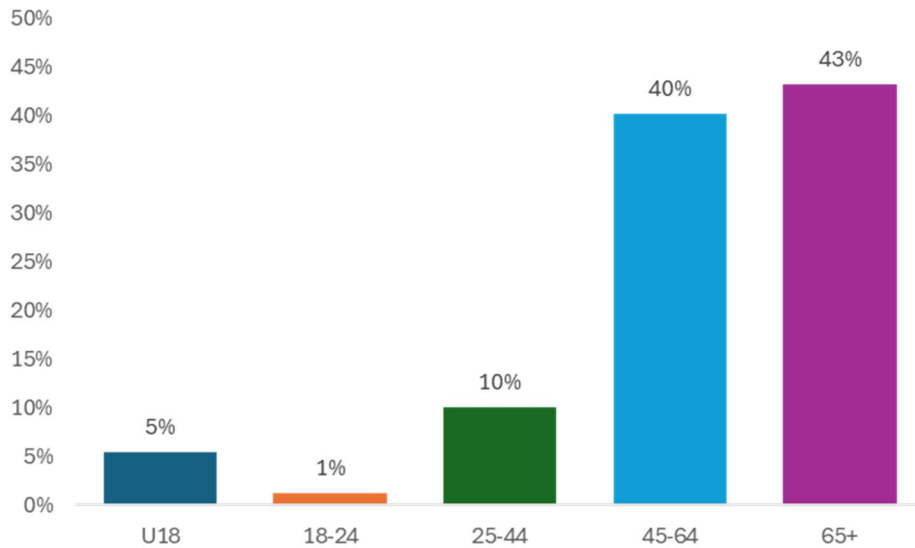
Overall, 7 in 10 (71%) of the cruise related spending in Colombia was made by passengers, 22 percent was made by the cruise lines, and the remaining 6 percent was spending made by crew members.



Passenger Demographics

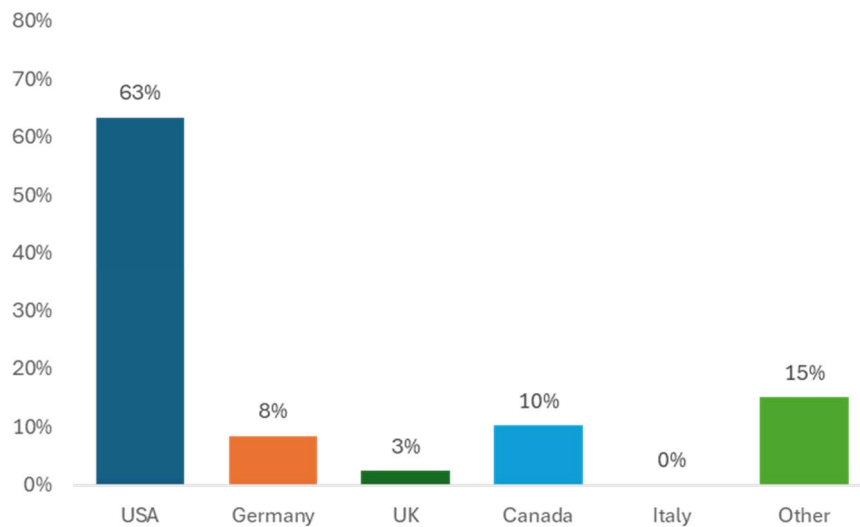
Consistent with the overall industry trends, the average age is down from 61 years old in the last study to 56 years old in this study. About 50 percent of the respondents are between the ages of 25 and 64.

Colombia Chart 7 – Passenger Age Cohorts



Colombia Chart 8 – Passenger Residence

The majority (63%) of respondents in this Colombia study are residents of the US. Ten percent are from Canada and 8 percent are from Germany.



Costa Rica

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.⁴⁷ The surveys were undertaken during the eight-month period beginning in October 2023 and ending in May 2024. The surveys were distributed onboard the ships via QR codes, and the guests and crew completed the surveys online. Passengers and crew were only surveyed once during a cruise itinerary.

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 excursions, food & beverages, clothing³, etc.;
- visit satisfaction, including excursions, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation (passengers only); and
- demographic characteristics, including country of residence, age group, etc.

Combining the expenditure data collected from the passenger and crew surveys with revenue and wage data received directly from the destinations, and destination specific expenditure data by the cruise lines for items such as port fees, provisions and services leads to estimates of the total cruise tourism expenditures for each participating destination.

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

⁴⁷ Surveys were conducted on the ships of the following cruise lines: Aida, 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.

Cruise Tourism Expenditures

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

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

Based on data collected from the Costa Rica Tourism Board, 280,395 cruise passengers arrived aboard cruise ships during the 2023/2024 cruise year.⁴⁸ This is down by more than 20 percent from the 2017/18 study. Of these, an estimated 228,240 passengers (81%) disembarked and visited Costa Rica. Utilizing additional data provided by the Costa Rica Tourism Board and visiting cruise lines, 165,270 crew were aboard the cruise ships and an estimated 30 percent, or 50,245 crew, disembarked and visited the destination.

These passenger and crew visits along with additional expenditures by the cruise lines and Costa Rica itself generated a total of **\$32.2** million (\$US) in cruise tourism expenditures in Costa Rica during the 2023/2024 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Passenger Spending

Per passenger spending estimates were derived from more than 1,400 surveys completed by passengers during the survey period. As shown in **Costa Rica Chart 1**, each passenger cruise party spent an average of \$142.61. The average spend per cruise party is the sum of the weighted spending in each of the 8 purchase categories. For example, 18 percent of the survey respondents reported spending an average of \$29.10 for food and beverages. Spread across all cruise parties that visited Costa Rica, this represented an average of \$5.12 per cruise party ($\$29.10 \times 18\% = \5.12). On a per passenger basis, the average total expenditure was \$72.74. This represents the sum of the per cruise party expenditures, \$142.61, divided by the average size of a cruise party in Costa Rica, 2.0 passengers.

Shore excursions, clothing, and local crafts & souvenirs account for 87 percent of cruise passenger expenditures in Costa Rica.

Four in five (80%) of the passengers reported that their cruise party purchased a shore excursion. The effective price of the shore excursion was about \$102 per party to the local economy.

⁴⁸ The 2023/2024 cruise year includes the twelve months beginning in May 2023 and ending in April 2024.

Costa Rica Chart 1 – Estimated Passenger Spending (\$US), 2023/2024 cruise year⁴⁹

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	\$127.70	79.7%	\$101.76
F&B at Restaurants & Bars	\$29.10	17.6%	\$5.12
Taxis/Ground Transportation	\$65.90	3.9%	\$2.57
Watches & Jewelry	\$72.10	3.8%	\$2.75
Clothing	\$43.40	24.3%	\$10.53
Other Purchases	\$44.10	15.4%	\$6.82
Local Crafts & Souvenirs	\$37.80	33.0%	\$12.49
Retail Purchases of Liquor	\$37.90	1.5%	\$0.57
Avg. Spend per Cruise Party			\$142.61
Average Size of Cruise Party			2.0
Avg. Spend per Passenger Visit			\$72.74
Passenger Onshore Visits			228,240
Total Passenger Expenditures			\$16,601,139

For the entire 2023/2024 cruise year, the estimated 228,240 cruise passengers who disembarked and visited Costa Rica spent a total of **\$16.6 million** (\$US).

Crew Spending

Crew spending estimates were derived from surveys completed by crew members during the survey period. As shown in **Costa Rica Chart 2**, each crew member who disembarked the ship and visited Costa Rica spent an average of \$50.07. Like the passenger spending, the average expenditure per crew member is the sum of the weighted spending in each of the purchase categories.

Expenditures on food and beverages, local crafts & souvenirs, and other purchases account for 77 percent of the crew members’ onshore spending.

For the entire 2023/2024 cruise year, the estimated 50,245 crew who went ashore and visited Costa Rica spent an estimated total of **\$1.7 million** (\$US).

⁴⁹ The average shore excursion expenditure is a weighted average of the onshore and travel agent/other purchases and the portion of the onboard purchases paid to local tour operators.

Costa Rica Chart 2 – Estimated Crew Spending (\$US), 2023/2024 cruise year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	\$22.40	67.6%	\$15.13
Taxis/Ground Transportation	\$14.90	7.8%	\$1.16
Watches & Jewelry	\$54.00	2.3%	\$1.23
Clothing	\$33.10	8.2%	\$2.72
Other Purchases	\$27.70	26.5%	\$7.32
Shore Excursions	\$47.90	3.2%	\$1.53
Personal Products	\$34.50	2.7%	\$0.95
Local Crafts & Souvenirs	\$14.90	20.5%	\$3.06
Retail Purchases of Liquor	\$15.00	0.9%	\$0.14
Avg. Spend per Crew Ashore			\$33.23
Number of Crew Onshore Visits			50,245
Total Crew Expenditures			\$1,669,709

Cruise Line & Destination Spending

Cruise lines made payments to local businesses for a variety of goods and services, including payments for port fees and taxes, navigation services, utilities and other supplies. The destination itself had employees and employee wages related to its cruise operations. Based upon data provided by the FCCA member cruise lines and the destination, we estimate that cruise lines and the Costa Rica Tourism Board were responsible for approximately **\$14.0 million** (\$US) in direct spending in Costa Rica during the 2023/2024 cruise year.

Economic Contribution of Cruise Tourism Expenditures

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

As shown in **Costa Rica Chart 3**, the **\$32.2** million in total cruise tourism expenditures in Costa Rica supported direct employment of 502 residents of Costa Rica paying \$4.3 million in annual wages. Adding the indirect contribution that results from the spending by those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures supported a total employment contribution of 852 jobs and \$7.9 million in wage income in Costa Rica during the 2023/2024 cruise year.

Costa Rica Chart 3 –Total Economic Contribution of Cruise Tourism, 2023/2024 cruise year

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	502	\$4.3
Total Economic Contribution	852	\$7.9

The Transportation & Warehousing, and Wholesale & Retail Trade sectors account for about 81% of the total job impacts.

Passenger Surveys

Costa Rica Chart 4 shows the major attributes of passenger visits to Costa Rica as derived from the passenger surveys. Of those who completed the survey:

- 82 percent stated this was their first visit to Costa Rica.
- 61 percent of those who went ashore made at least one purchase while ashore other than a tour.
- the typical cruise party consisted of two passengers (Average: 2.0) and spent an average of 5.1 hours ashore.

Costa Rica Chart 4 – Major Attributes of Passenger Surveys

	Percent
Number Making First Visit	82%
Number Making Any Onshore Purchases:	61%
Average Hours Ashore	5.1
Purchased a Shore Excursion (Tour)	80%
How Purchased Tour:	
Cruise Line	85%
Onshore Tour Operator	4%
Other	10%
Tour Type:	
Historical/Cultural	31%
Beach Day	4%
Land-Based	33%
Water-Based	17%
Other	25%
Reason for No Tour	
Prefer to Tour on Own	46%
Poor Value	17%
Didn't Like Any	22%
Too Similar to Other Dest	4%
Weather	0%
Prefer to Stay on Ship	2%
Other	32%

- Most (80%) of the passengers that went ashore purchased a shore excursion. Eighty-five percent of passengers who purchased a tour did so through their cruise line, 4 percent purchased their tour on shore, and 10 percent purchased their tour through some other means (travel agent, travel site, etc.).
- An equal number of tours purchased were either to “historical or cultural sites” (31%) or were “land based” activities (33%).
- The key reasons why some did not purchase a tour include they prefer to tour on their own (46%) and they didn’t like any (22%).

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Costa Rica Chart 5**. 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 purposes, the satisfaction data from the prior study is also shown in the chart below.

- Cruise passengers were very satisfied with their “overall visit” to Costa Rica (7.8) and with the visit “meeting expectations” (7.5).
- “Guided Tours” (or Shore Excursions) received a ‘very satisfied’ mean score of 8.5; Additionally, the high ratings in “knowledge of guide” (9.1), and “value of tours” (8.1) indicates visitors to Costa Rica were very satisfied with their onshore excursions.

Costa Rica Chart 5 – Passenger Visit Satisfaction*

Visit Attributes	2024 Mean Score	2018 Mean Score
Overall Visit	7.8	8.2
Visit Met Expectations	7.5	7.4
Likelihood of a Return Visit	4.5	4.5
Likelihood of Recommending	5.3	6.0
Initial Shoreside Welcome	8.3	7.6
Overall Guided Tour	8.5	8.8
Knowledge of Guide	9.1	9.2
Value of Tour	8.1	8.2
Historic Sites/Museums	7.7	7.6
Variety of Things to See and Do	7.5	7.5
Friendliness of Residents	8.6	8.6
Overall Shopping Experience	7.3	7.7
Courtesy of Employees	8.9	8.4
Overall Prices	7.4	7.4
Taxis/Local Transportation	7.8	8.7

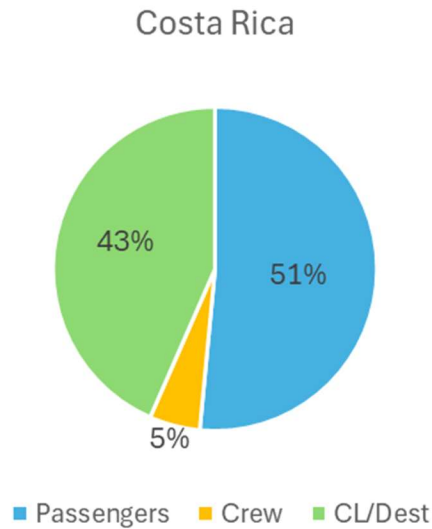
* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows:
 Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3;
 Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Passenger interactions with residents and store employees were very positive as the mean scores for “friendliness of residents” (8.6) and “courtesy of employees” (8.9) were high.
- Passengers were also very satisfied with the “historic sites” (7.7) and there being a variety to see and do (7.5).
- As observed in all other destinations, Costa Rica scored lowest on passengers saying they are “likely to return for a land-based visit” (4.5), and their “likelihood of recommending to a friend” (5.3).

Costa Rica Chart 6 – Overall Spending

Half (51%) of the cruise related spending in Costa Rica was made by passengers, 43 percent was made by the cruise lines and the destination itself, and the remaining 5 percent was spending made by crew members.



Passenger Demographics

Consistent with the overall industry trends, the average age is down from 66 years old in the last study to 60 years old in this study. About 42 percent of the respondents are between the ages of 25 and 64.

Costa Rica Chart 7 – Passenger Age Cohorts

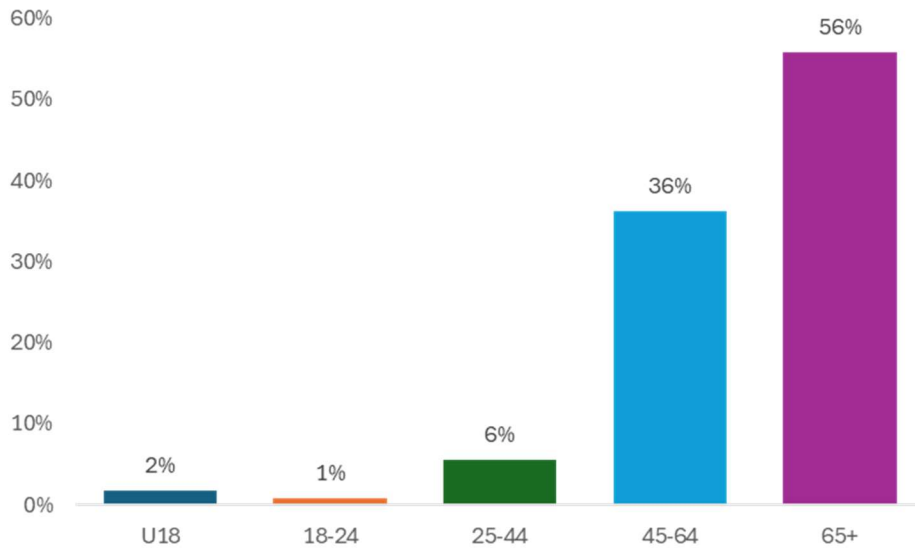
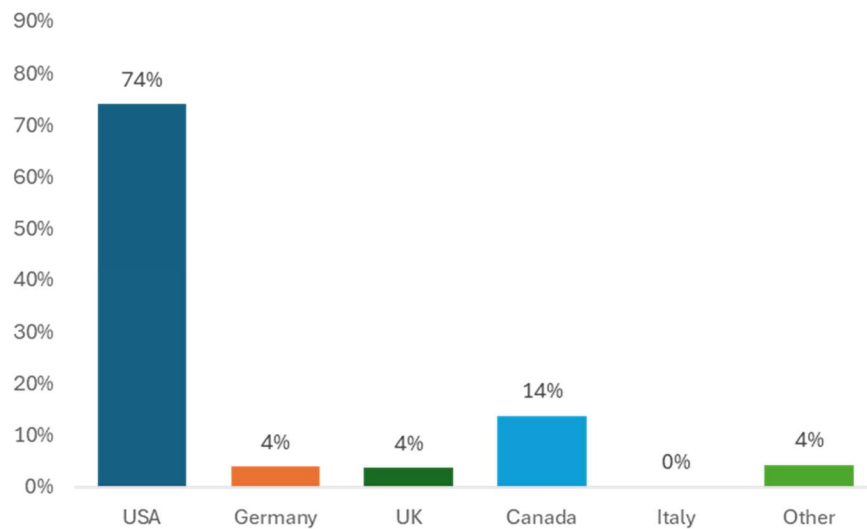


Chart 8 – Passenger Residence

About 3 in 4 (74%) of the responding passengers to Costa Rica are residents of the United States, while 14 percent are from Canada.



Honduras

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.⁵⁰ The surveys were undertaken during the eight-month period beginning in October 2023 and ending in May 2024. The surveys were distributed onboard the ships via QR codes, and the guests and crew completed the surveys online. Passengers and crew were only surveyed once during a cruise itinerary.

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 excursions, food & beverages, clothing, etc.;
- visit satisfaction, including shore excursions, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation (passengers only); and
- demographic characteristics, including country of residence, age group, etc.

Combining the expenditure data collected from the passenger and crew surveys with revenue and wage data received directly from the destinations, and destination specific expenditure data by the cruise lines for items such as port fees, provisions and services leads to estimates of the total cruise tourism expenditures for each participating destination.

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

⁵⁰ Surveys were conducted on the ships of the following cruise lines: Aida, 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.

Cruise Tourism Expenditures

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

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

Based on data collected from the ports of Honduras, 1,684,015 cruise passengers arrived aboard cruise ships during the 2023/2024 cruise year.⁵¹ Of these, an estimated 1,404,470 passengers (83%) disembarked and visited Honduras. Utilizing additional data provided by Honduras and visiting cruise lines 566,945 crew were aboard the cruise ships and 30 percent, or 172,350 crew, disembarked and visited the destination. Passenger arrivals are up more than 50% from the last study in 2017/18.

These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **\$180.4** million (\$US) in cruise tourism expenditures in Honduras during the 2023/2024 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Passenger Spending

Per passenger spending estimates were derived from more than 1,500 surveys completed by passengers during the survey period. As shown in **Honduras Chart 1**, each passenger cruise party spent an average of \$210.30. The average spend per cruise party is the sum of the weighted spending in each of the 8 purchase categories. For example, 41 percent of the survey respondents reported spending an average of \$60.60 for food and beverages. Spread across all cruise parties that visited Honduras, this represented an average of \$24.87 per cruise party ($\$60.60 \times 41\% = \24.87). On a per passenger basis, the average total expenditure was \$99.20. This represents the sum of the per cruise party expenditures, \$210.30, divided by the average size of a cruise party in Honduras, 2.1 passengers.

Shore excursions, and food and beverages account for 68 percent of cruise passenger expenditures in Honduras.

⁵¹ The 2023/2024 cruise year includes the twelve months beginning in May 2023 and ending in April 2024.

Three-quarters (74%) of the passengers reported that their cruise party purchased a shore excursion. The effective price of the shore excursion was about \$119 per party to the local economy.

Honduras Chart 1 – Estimated Passenger Spending (\$US), 2023/2024 cruise year⁵²

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	\$160.50	74.2%	\$119.11
F&B at Restaurants & Bars	\$60.60	41.0%	\$24.87
Taxis/Ground Transportation	\$59.30	8.4%	\$5.00
Watches & Jewelry	\$191.70	8.8%	\$16.85
Clothing	\$48.60	28.5%	\$13.86
Other Purchases	\$71.30	19.7%	\$14.01
Local Crafts & Souvenirs	\$38.80	34.3%	\$13.30
Retail Purchases of Liquor	\$85.50	3.9%	\$3.29
Avg. Spend per Cruise Party			\$210.30
Average Size of Cruise Party			2.1
Avg. Spend per Passenger Visit			\$99.20
Passenger Onshore Visits			1,404,470
Total Passenger Expenditures			\$139,317,672

For the entire 2023/2024 cruise year, the estimated 1,404,470 cruise passengers who disembarked and visited Honduras spent a total of **\$139.3 million** (\$US) in Honduras.

Crew Spending

Crew spending estimates were derived from more than 500 surveys completed by crew members during the survey period. As shown in **Honduras Chart 2**, each crew member who disembarked the ship and visited Honduras spent an average of \$51.18. Like the passenger spending, the average expenditure per crew member is the sum of the weighted spending in each of the purchase categories.

Expenditures on food and beverages, and other purchases accounted for 68 percent of the crew members’ onshore spending.

⁵² The average shore excursion expenditure is a weighted average of the onshore and travel agent/other purchases and the portion of the onboard purchases paid to local tour operators.

For the entire 2023/2024 cruise year, the estimated 172,350 crew who went ashore and visited Honduras spent an estimated total of **\$8.8 million** (\$US).

Honduras Chart 2 – Estimated Crew Spending (\$US), 2023/2024 cruise year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	\$31.70	64.7%	\$20.54
Taxis/Ground Transportation	\$18.60	16.2%	\$3.01
Watches & Jewelry	\$54.40	1.7%	\$0.94
Clothing	\$25.40	8.2%	\$2.09
Other Purchases	\$53.10	26.4%	\$14.02
Shore Excursions	\$67.80	3.5%	\$2.35
Personal Products	\$19.50	2.2%	\$0.42
Local Crafts & Souvenirs	\$25.70	14.5%	\$3.73
Retail Purchases of Liquor	\$78.60	5.2%	\$4.08
Avg. Spend per Crew Ashore			\$51.18
Number of Crew Onshore Visits			172,350
Total Crew Expenditures			\$8,821,625

Cruise Line & Destination Spending

Cruise lines made payments to local businesses for a variety of goods and services, including payments for port fees and taxes, navigation services, utilities and other supplies. The destination itself had employee wages related to cruise operations. Based upon data provided by the FCCA member cruise lines and the destination, we estimate that cruise lines and the destination were responsible for approximately **\$32.3 million** (\$US) in direct spending in Honduras during the 2023/2024 cruise year.

Economic Contribution of Cruise Tourism Expenditures

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

As shown in **Honduras Chart 3**, the **\$180.4** million in total cruise tourism expenditures in Honduras supported direct employment of 2,133 residents of Honduras paying \$18.1 million in annual wages. Adding the indirect contribution that results from the spending by those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures supported a total employment contribution of 3,386 jobs and \$30.6 million in wage income in Honduras during the 2023/2024 cruise year.

Honduras Chart 3 –Total Economic Contribution of Cruise Tourism, 2023/2024 cruise year

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	2,133	\$18.1
Total Economic Contribution	3,386	\$30.6

The Manufacturing, Wholesale & Retail Trade, and Transportation & Warehousing sectors account for about 76% of the total job impacts.

Passenger Surveys

Honduras Chart 4 shows the major attributes of passenger visits to Honduras as derived from the passenger surveys. Of those who completed the survey:

- 72 percent stated this was their first visit to Honduras.
- three-quarters (73%) of those who went ashore made at least one purchase while ashore other than a tour.
- the typical cruise party consisted of two passengers (Average: 2.1) and spent an average of 4.7 hours ashore.

Honduras Chart 4 – Major Attributes of Passenger Surveys

	Percent
Number Making First Visit	72%
Number Making Any Onshore Purchases:	73%
Average Hours Ashore	4.7
Purchased a Shore Excursion (Tour)	74%
How Purchased Tour:	
Cruise Line	69%
Onshore Tour Operator	13%
Other	17%
Tour Type:	
Historical/Cultural	15%
Beach Day	32%
Land-Based	22%
Water-Based	19%
Other	26%
Reason for No Tour	
Prefer to Tour on Own	43%
Poor Value	14%
Didn't Like Any	12%
Too Similar to Other Dest	6%
Weather	6%
Prefer to Stay on Ship	4%
Other	28%

- Three-quarters (74%) of the passengers that went ashore purchased a shore excursion. Sixty-nine percent of passengers who purchased a tour did so through their cruise line, 13 percent purchased their tour on shore and 17 percent purchased their tour through some other means (travel agent, travel site, etc.).
- About a third (32%) of the tours purchased were visits to “beach day activities”, while 22 percent were for “land-based activities”.
- The key reasons why some did not purchase a tour include they prefer to tour on their own (43%), or they felt the excursions were a poor value (14%).

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Honduras Chart 5**. 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 purposes, the satisfaction data from the prior study is also shown in the chart below.

- Cruise passengers were very satisfied with their “overall visit” to Honduras (8.1) and the visit “meeting expectations” (7.9).
- “Guided Tours” (or Shore Excursions) received a ‘very satisfied’ mean score of 8.7; Additionally, the high ratings in “knowledge of guide” (9.1), and “value of tours” (8.4) indicates visitors to Honduras were very satisfied with their onshore excursions.

Honduras Chart 5 – Passenger Visit Satisfaction*

Visit Attributes	2024 Mean Score	2018 Mean Score
Overall Visit	8.1	8.2
Visit Met Expectations	7.9	7.7
Likelihood of a Return Visit	5.7	5.8
Likelihood of Recommending	6.0	6.3
Initial Shoreside Welcome	8.4	8.4
Overall Guided Tour	8.7	8.7
Knowledge of Guide	9.1	9.0
Value of Tour	8.4	8.3
Historic Sites/Museums	8.0	7.6
Variety of Things to See and Do	7.7	7.5
Friendliness of Residents	8.6	8.6
Overall Shopping Experience	7.7	8.0
Courtesy of Employees	8.8	8.5
Overall Prices	7.5	7.5
Taxis/Local Transportation	8.0	8.3

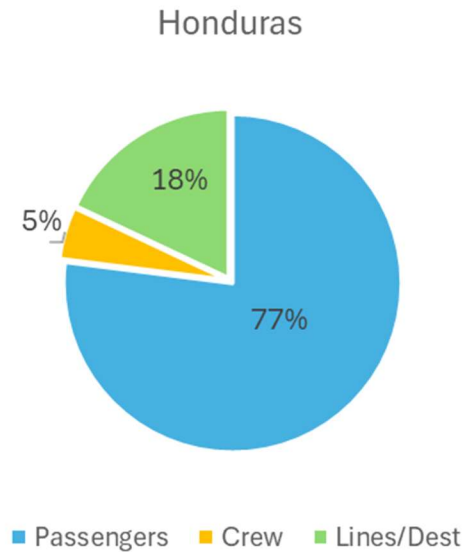
* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows:
 Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3;
 Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Passenger interactions with residents and store employees were very positive as the mean scores for “friendliness of residents” (8.6) and “courtesy of employees” (8.8) were high.
- Passengers were also very satisfied with the “historic sites” (8.0), a “variety of things to see and do” (7.7) and the “overall shopping experience” (7.7).
- As with all other destinations, Honduras scored lowest passengers saying they are “likely to return for a land-based visit” (5.7), and their “likelihood of recommending to a friend” (6.0), both ratings are similar to the ratings of other destinations.

Honduras Chart 6 – Overall Spending

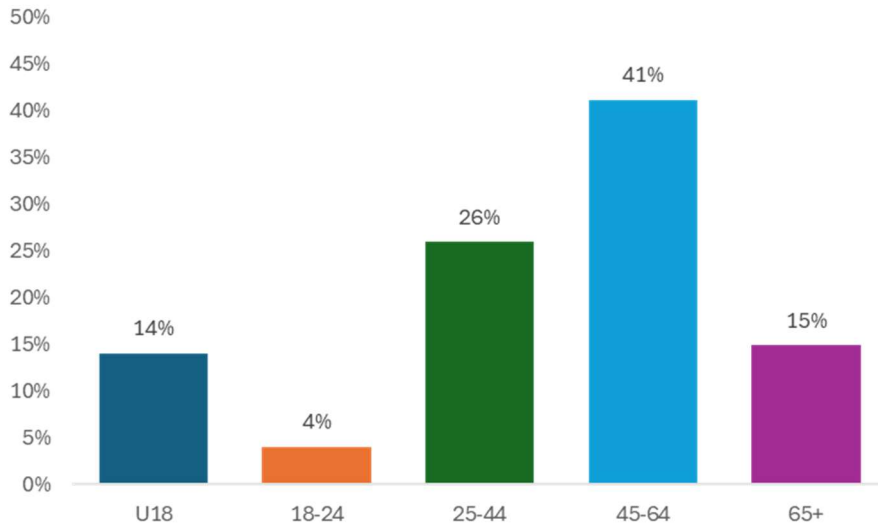
More than three-quarters (77%) of the cruise related spending in Honduras was made by passengers, 18 percent was made by the cruise lines and the port itself, and the remaining 5 percent was spending made by crew members.



Passenger Demographics

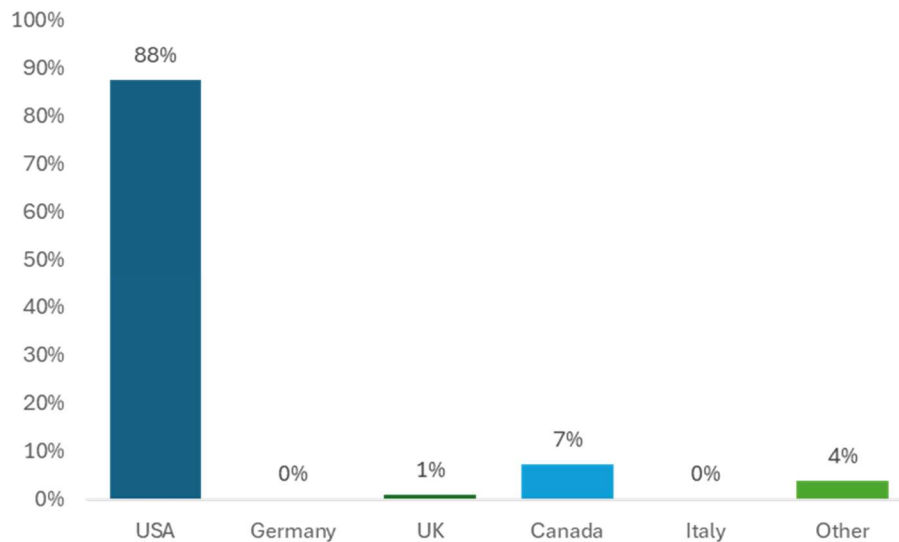
Consistent with the overall industry trends, the average age is down from 54 years old in the last study to 44 years old in this study. About 67 percent of the respondents are between the ages of 25 and 64.

Honduras Chart 7 – Passenger Age Cohorts



Honduras Chart 8 – Passenger Residence

Most (88%) of the responding passengers to Honduras are residents of the US, 7 percent are from Canada.



Jamaica

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.⁵³ The surveys were undertaken during the eight-month period beginning in October 2023 and ending in May 2024. The surveys were distributed onboard the ships via QR codes, and the guests and crew completed the surveys online. Passengers and crew were only surveyed once during a cruise itinerary.

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 excursions, food & beverages, clothing, etc.;
- visit satisfaction, including shore excursions, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation (passengers only); and
- demographic characteristics, including country of residence, age group, etc.

Combining the expenditure data collected from the passenger and crew surveys with revenue and wage data received directly from the destinations, and destination specific expenditure data by the cruise lines for items such as port fees, provisions and services leads to estimates of the total cruise tourism expenditures for each participating destination.

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

⁵³ Surveys were conducted on the ships of the following cruise lines: Aida, 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.

Cruise Tourism Expenditures

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

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

Based on data collected from the Jamaica Vacations Limited, a total of 1,426,485 cruise passengers arrived aboard cruise ships during the 2023/2024 cruise year.⁵⁴ Of these, 1,388,775 transit passengers arrived and an estimated 1,158,240 passengers (83%) disembarked and visited Jamaica. There were also an estimated 37,710 passengers who embarked on their cruise from Jamaica. Utilizing additional data provided by the Jamaica Vacations Limited, and visiting cruise lines, 548,650 crew were aboard the cruise ships and an estimated 30 percent, or 166,790 disembarked and visited the destination. Transit passenger arrivals are down 28 percent, and embarking passengers are down by 41 percent from the 2017/18 study.

These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **\$197.8** million (\$US) in cruise tourism expenditures in Jamaica during the 2023/2024 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Passenger Spending

Per passenger spending estimates were derived from about 1,300 transit surveys completed by passengers during the survey period. As shown in **Jamaica Chart 1**, each transit passenger cruise party spent an average of \$245.51. The average spend per cruise party is the sum of the weighted spending in each of the 8 purchase categories. For example, 35 percent of the survey respondents reported spending an average of \$49.20 for food and beverages. Spread across all cruise parties that visited Jamaica, this represented an average of \$17.42 per cruise party ($\$49.20 \times 35\% = \17.42). On a per passenger basis, the average total expenditure was \$118.03. This represents the sum of the per cruise party expenditures, \$245.51, divided by the average size of a cruise party in Jamaica, 2.1 passengers.

Shore excursions, clothing and watches & jewelry account for 71 percent of cruise passenger expenditures in Jamaica.

⁵⁴ The 2023/2024 cruise year includes the twelve months beginning in May 2023 and ending in April 2024.

More than 3 in 5 (62%) of the passengers reported that their cruise party purchased a shore excursion. The effective price of the shore excursion was about \$102 per party to the local economy.

Jamaica Chart 1a – Estimated Transit Passenger Spending (\$US), 2023/2024 cruise year⁵⁵

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	\$163.90	62.0%	\$101.67
F&B at Restaurants & Bars	\$49.20	35.4%	\$17.42
Taxis/Ground Transportation	\$61.30	10.8%	\$6.60
Watches & Jewelry	\$417.00	10.3%	\$42.99
Clothing	\$76.70	39.3%	\$30.15
Other Purchases	\$98.00	20.4%	\$19.99
Local Crafts & Souvenirs	\$50.40	40.9%	\$20.62
Retail Purchases of Liquor	\$73.20	8.3%	\$6.07
Avg. Spend per Cruise Party			\$245.51
Average Size of Cruise Party			2.1
Avg. Spend per Passenger Visit			\$118.03
Passenger Onshore Visits			1,158,240
Total Passenger Expenditures			\$136,711,878

For the entire 2023/2024 cruise year, the estimated 1,158,240 transit passengers who disembarked and visited Jamaica spent a total of **\$136.7 million** (\$US) in Jamaica.

⁵⁵ The average shore excursion expenditure is a weighted average of the onshore and travel agent/other purchases and the portion of the onboard purchases paid to local tour operators.

Overall, 5 percent of passengers who embarked on their cruise from Jamaica reported spending at least one night in Jamaica. Of those who spent an overnight, the average amount spent for accommodations in Jamaica was \$647 per cruise party. Overall, the weighted spend per embarking party was \$180.68. On a per passenger basis this equates to \$88.13

Jamaica Chart 1b – Estimated Embark Passenger Spending (\$US), 2023/2024 cruise year⁵⁶

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Accommodations	\$647.10	4.5%	\$28.80
F&B at Restaurants & Bars	\$39.10	14.1%	\$5.53
Taxis/Ground Transportation	\$49.00	8.4%	\$4.10
Watches & Jewelry	\$12.50	0.5%	\$0.07
Clothing	\$44.00	12.0%	\$5.30
Other Purchases	\$37.20	5.8%	\$2.14
Shore Excursions	\$175.50	74.3%	\$130.49
Local Crafts & Souvenirs	\$46.20	7.1%	\$3.26
Retail Purchases of Liquor	\$25.10	3.9%	\$0.99
Avg. Spend per Homeport Cruise Party			\$180.68
Average Size of a Party			2.1
Avg. Spend per Homeport Passenger			\$88.13
Number of Homeport Passengers			37,710
Total Homeport Passenger Expenditures			\$3,323,566

For the entire 2023/2024 cruise year, the 37,710 embarking transit passengers spent a total of **\$3.3 million** (\$US) in Jamaica.

Crew Spending

Crew spending estimates were derived from surveys completed by crew members during the survey period. As shown in **Jamaica Chart 2**, each crew member who disembarked the ship and visited Jamaica spent an average of \$48.48. Like the passenger spending, the average expenditure per crew member is the sum of the weighted spending in each of the purchase categories.

Expenditures on food and beverages, taxi, and other purchases accounted for 76 percent of the crew members’ onshore spending.

⁵⁶ The average shore excursion expenditure is a weighted average of the onshore and travel agent/other purchases and the portion of the onboard purchases paid to local tour operators.

For the entire 2023/2024 cruise year, the estimated 166,790 crew who went ashore and visited Jamaica spent nearly **\$8.1 million** (\$US).

Jamaica Chart 2 – Estimated Crew Spending (\$US), 2023/2024 cruise year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	\$30.30	76.4%	\$23.19
Taxis/Ground Transportation	\$15.70	25.6%	\$4.01
Watches & Jewelry	\$137.10	2.8%	\$3.90
Clothing	\$23.70	8.1%	\$1.92
Other Purchases	\$42.30	23.2%	\$9.80
Shore Excursions	\$43.60	5.7%	\$2.48
Personal Products	\$34.00	1.2%	\$0.41
Local Crafts & Souvenirs	\$17.30	14.2%	\$2.46
Retail Purchases of Liquor	\$25.00	1.2%	\$0.30
Avg. Spend per Crew Ashore			\$48.48
Number of Crew Onshore Visits			166,790
Total Crew Expenditures			\$8,085,877

Cruise Line Spending

Cruise lines made payments to local businesses for a variety of goods and services, including payments for port fees and taxes, navigation services, utilities, bunker fuel and other supplies. Based upon data provided by the FCCA member cruise lines and the destination, we estimate that the cruise lines were responsible for approximately **\$49.7 million** (\$US) in direct spending in Jamaica during the 2023/2024 cruise year.

Economic Contribution of Cruise Tourism Expenditures

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

As shown in **Jamaica Chart 3**, the **\$197.8** million in total cruise tourism expenditures in Jamaica supported direct employment of 3,920 residents of Jamaica paying \$36.1 million in annual wages. Adding the indirect contribution that results from the spending by those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures supported a total employment contribution of 6,322 jobs and \$55.3 million in wage income in Jamaica during the 2023/2024 cruise year.

Jamaica Chart 3 –Total Economic Contribution of Cruise Tourism, 2023/2024 cruise year

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	3,920	\$36.1
Total Economic Contribution	6,322	\$55.3

The Wholesale & Retail Trade, Agriculture, Utilities & Mining, and Transportation & Warehousing sectors account for about 70% of the total job impacts.

Passenger Surveys

Jamaica Chart 4 shows the major attributes of passenger visits to Jamaica as derived from the passenger surveys. Of those who completed the survey:

- 73 percent stated this was their first visit to Jamaica.
- 7 in 10 (67%) of those who went ashore made at least one purchase while ashore other than a tour.
- the typical cruise party consisted of two passengers (Average: 2.1) and spent an average of 4.3 hours ashore.

Jamaica Chart 4 – Major Attributes of Passenger Surveys

	Percent
Number Making First Visit	73%
Number Making Any Onshore Purchases:	68%
Average Hours Ashore	4.3
Purchased a Shore Excursion (Tour)	62%
How Purchased Tour:	
Cruise Line	81%
Onshore Tour Operator	9%
Other	10%
Tour Type:	
Historical/Cultural	17%
Beach Day	30%
Land-Based	19%
Water-Based	15%
Other	25%
Reason for No Tour	
Prefer to Tour on Own	35%
Poor Value	17%
Didn't Like Any	15%
Too Similar to Other Dest	1%
Weather	2%
Prefer to Stay on Ship	5%
Other	42%

- More than half (62%) of the passengers that went ashore purchased a shore excursion. Eighty-one percent of passengers who purchased a tour did so through their cruise line, 9 percent purchased their tour on shore and 10 percent purchased their tour through some other means (travel agent, travel site, etc.).
- Thirty percent of the tours purchased were “beach day activities”, while an equal percent purchased were visits to “historical or cultural sites” (17%), “land-based tours” (19%) or “water based-tours” (15%).
- The key reasons why some did not purchase a tour include they prefer to tour on their own (35%). Forty-two percent listed some other reason for not touring.

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Jamaica Chart 5**. 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 purposes, the satisfaction data from the prior study is also shown in the chart below.

- Cruise passengers were very satisfied with their “overall visit” to Jamaica (7.3) and the visit “meeting expectations” (7.0).
- “Guided Tours” (or Shore Excursions) received a ‘very satisfied’ mean score of 8.3; Additionally, the high ratings in “knowledge of guide” (8.7), and “value of tours” (7.7) indicates visitors to Jamaica were very satisfied with their onshore excursions.

Jamaica Chart 5 – Passenger Visit Satisfaction*

Visit Attributes	2024 Mean Score	2018 Mean Score
Overall Visit	7.3	7.1
Visit Met Expectations	7.0	6.5
Likelihood of a Return Visit	5.4	4.3
Likelihood of Recommending	5.5	5.0
Initial Shoreside Welcome	7.8	7.1
Overall Guided Tour	8.3	8.4
Knowledge of Guide	8.7	8.8
Value of Tour	7.7	8.0
Historic Sites/Museums	7.2	7.3
Variety of Things to See and Do	6.8	6.6
Friendliness of Residents	7.9	7.6
Overall Shopping Experience	6.9	6.8
Courtesy of Employees	8.3	7.6
Overall Prices	6.8	6.4
Taxis/Local Transportation	7.5	7.7

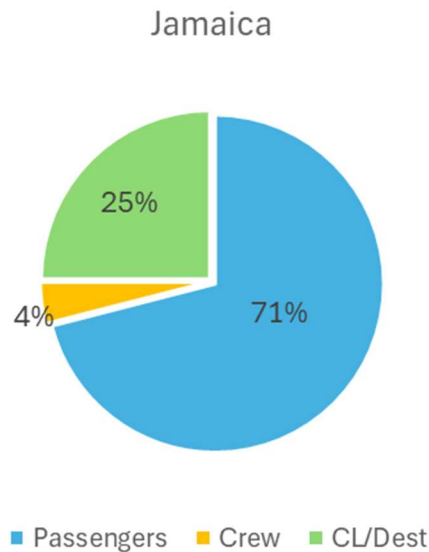
* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows:
 Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3;
 Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Passenger interactions with residents and store employees were very positive as the mean scores for “friendliness of residents” (7.9) and “courtesy of employees” (8.3) were high.
- Passengers were also very satisfied with the “historic sites” (7.2), and with the taxis/transportation on the island (7.5).
- Jamaica scored lowest passengers saying they are “likely to return for a land-based visit” (5.4), and their “likelihood of recommending to a friend” (5.5), however, both ratings are similar to the ratings of other destinations.

Jamaica Chart 6 – Overall Spending

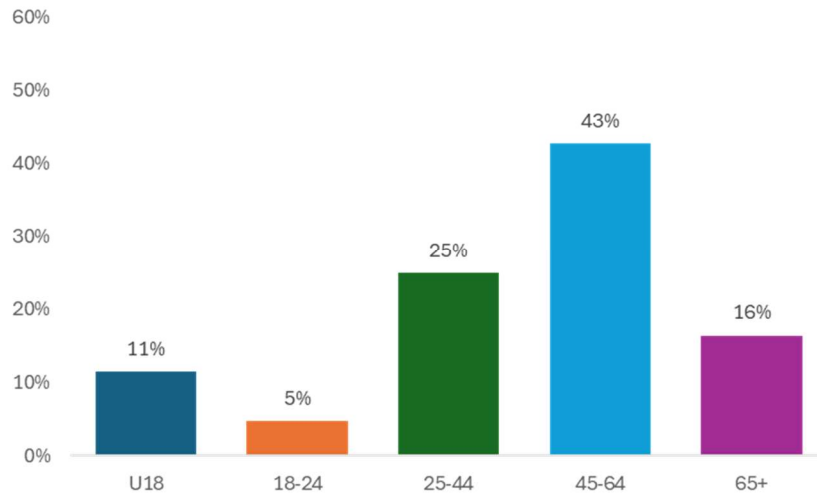
Seven in 10 (71%) of the cruise related spending in Jamaica was made by passengers, 25 percent was made by the cruise lines, and the remaining 4 percent was spending made by crew members.



Passenger Demographics

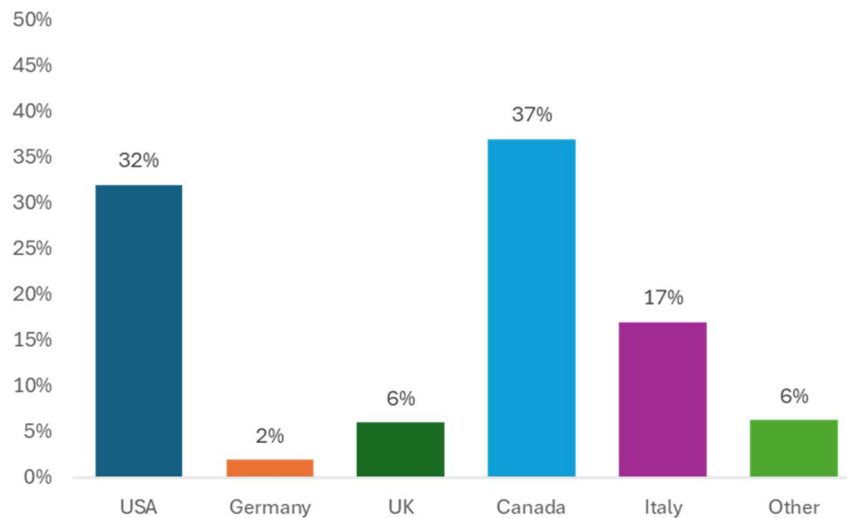
Consistent with the overall industry trends, the average age is down from 51 years old in the last study to 45 years old in this study. About 68 percent of the respondents are between the ages of 25 and 64.

Jamaica Chart 7 – Passenger Age Cohorts



Jamaica Chart 8 – Passenger Residence

An equal number of respondents in this Jamaica study are residents of the US (32%) and Canada (37%).



Panama

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.⁵⁷ The surveys were undertaken during the eight-month period beginning in October 2023 and ending in May 2024. The surveys were distributed onboard the ships via QR codes, and the guests and crew completed the surveys online. Passengers and crew were only surveyed once during a cruise itinerary.

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 excursions, food & beverages, clothing, etc.;
- visit satisfaction, including shore excursions, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation (passengers only); and
- demographic characteristics, including country of residence, age group, etc.

Combining the expenditure data collected from the passenger and crew surveys with revenue and wage data received directly from the destinations, and destination specific expenditure data by the cruise lines for items such as port fees, provisions and services leads to estimates of the total cruise tourism expenditures for each participating destination.

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

⁵⁷ Surveys were conducted on the ships of the following cruise lines: Aida, 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.

Cruise Tourism Expenditures

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

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

Based on data collected from the Panama and its ports, a total of 336,655 cruise passengers arrived aboard cruise ships during the 2023/2024 cruise year.⁵⁸ Of these, 256,625 were transit passengers; an estimated 203,760 (79%) of whom disembarked and visited Panama. There were also an estimated 80,030 passengers who embarked on their cruise from Panama. Utilizing additional data provided by Panama and visiting cruise lines, 124,190 crew were aboard the cruise ships and an estimated 30 percent, or 37,755 disembarked and visited the destination.

These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **\$114.0** million (\$US) in cruise tourism expenditures in Panama during the 2023/2024 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Passenger Spending

Per passenger spending estimates were derived from about 425 transit surveys completed by passengers during the survey period. As shown in **Panama Chart 1**, each transit passenger cruise party spent an average of \$171.23. The average spend per cruise party is the sum of the weighted spending in each of the 8 purchase categories. For example, 18 percent of the survey respondents reported spending an average of \$35.90 for food and beverages. Spread across all cruise parties that visited Panama, this represented an average of \$6.29 per cruise party ($\$35.90 \times 18\% = \6.29). On a per passenger basis, the average total expenditure was \$82.61. This represents the sum of the per cruise party expenditures, \$171.23, divided by the average size of a cruise party in Panama, 2.1 passengers.

Shore excursions, clothing and local crafts & souvenirs accounted for 87 percent of cruise passenger expenditures in Panama.

⁵⁸ The 2023/2024 cruise year includes the twelve months beginning in May 2023 and ending in April 2024.

About 7 in 10 (69%) of the passengers reported that their cruise party purchased a shore excursion. The effective price of the shore excursion was about \$129 per party to the local economy.

Panama Chart 1a – Estimated Transit Passenger Spending (\$US), 2023/2024 cruise year⁵⁹

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	\$187.70	68.6%	\$128.81
F&B at Restaurants & Bars	\$35.90	17.5%	\$6.29
Taxis/Ground Transportation	\$83.20	10.4%	\$8.66
Watches & Jewelry	\$46.40	2.5%	\$1.17
Clothing	\$45.20	22.1%	\$9.99
Other Purchases	\$32.70	16.1%	\$5.28
Local Crafts & Souvenirs	\$36.50	28.6%	\$10.44
Retail Purchases of Liquor	\$44.00	1.3%	\$0.59
Avg. Spend per Cruise Party			\$171.23
Average Size of Cruise Party			2.1
Avg. Spend per Passenger Visit			\$82.61
Passenger Onshore Visits			203,760
Total Passenger Expenditures			\$16,833,150

For the entire 2023/2024 cruise year, the estimated 203,760 transit passengers who disembarked and visited Panama spent a total of **\$16.8 million** (\$US) in Panama.

⁵⁹ The average shore excursion expenditure is a weighted average of the onshore and travel agent/other purchases and the portion of the onboard purchases paid to local tour operators.

Overall, 84 percent of passengers who embarked on their cruise from Panama reported spending at least one night in Panama. Of those who spent an overnight, the average amount spent for accommodations in Panama was \$824. Overall, the weighted spend per embarking party was \$1,070.81. On a per passenger basis this equates to \$465.56.

Panama Chart 1b – Estimated Embark Passenger Spending (\$US), 2023/2024 cruise year⁶⁰

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Accommodations	\$824.46	84.1%	\$693.60
F&B at Restaurants & Bars	\$195.00	42.9%	\$83.57
Taxis/Ground Transportation	\$131.45	30.2%	\$39.64
Watches & Jewelry	\$161.00	7.9%	\$12.78
Clothing	\$204.56	21.3%	\$43.57
Other Purchases	\$214.50	17.5%	\$37.45
Shore Excursions	\$413.04	34.5%	\$142.50
Local Crafts & Souvenirs	\$98.57	11.1%	\$10.95
Retail Purchases of Liquor	\$106.88	6.3%	\$6.79
Avg. Spend per Homeport Cruise Party			\$1,070.85
Average Size of a Party			2.30
Avg. Spend per Homeport Passenger			\$465.59
Number of Homeport Passengers			80,030
Total Homeport Passenger Expenditures			\$37,260,910

For the entire 2023/2024 cruise year, the 80,030 embarking passengers spent a total of **\$37.3 million** (\$US) in Panama.

Crew Spending

Crew spending estimates were derived from surveys completed by crew members during the survey period. As shown in **Panama Chart 2**, each crew member who disembarked the ship and visited Panama spent an average of \$81.23. Like the passenger spending, the average expenditure per crew member is the sum of the weighted spending in each of the purchase categories.

Expenditures on food and beverages, clothing, and other purchases accounted for 82 percent of the crew members’ onshore spending.

⁶⁰ The average shore excursion expenditure is a weighted average of the onshore and travel agent/other purchases and the portion of the onboard purchases paid to local tour operators.

For the entire 2023/2024 cruise year, the estimated 37,755 crew who went ashore and visited Panama spent nearly **\$3.1 million** (\$US).

Panama Chart 2 – Estimated Crew Spending (\$US), 2023/2024 cruise year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	\$22.50	70.0%	\$15.77
Taxis/Ground Transportation	\$14.70	25.6%	\$3.77
Watches & Jewelry	\$45.00	2.2%	\$1.00
Clothing	\$77.50	11.1%	\$8.61
Other Purchases	\$108.00	38.9%	\$41.99
Shore Excursions	\$71.90	3.4%	\$2.44
Personal Products	\$20.50	4.4%	\$0.91
Local Crafts & Souvenirs	\$27.90	22.2%	\$6.19
Retail Purchases of Liquor	\$16.70	3.3%	\$0.56
Avg. Spend per Crew Ashore			\$81.23
Number of Crew Onshore Visits			37,755
Total Crew Expenditures			\$3,066,864

Cruise Line Spending

Cruise lines made payments to local businesses for a variety of goods and services, including payments for port fees, navigation services and utilities, government taxes including Panama Canal tolls, and local supplies. Based upon data provided by the FCCA member cruise lines and the destination, we estimate that cruise lines and ports were responsible for approximately **\$56.9 million** (\$US) in direct spending in Panama during the 2023/2024 cruise year.

Economic Contribution of Cruise Tourism Expenditures

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

As shown in **Panama Chart 3**, the **\$114.0** million in total cruise tourism expenditures in Panama supported direct employment of 1,954 residents of Panama paying \$16.1 million in annual wages. Adding the indirect contribution that results from the spending by those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures supported a total employment contribution of 2,972 jobs and \$27.4 million in wage income in Panama during the 2023/2024 cruise year.

Panama Chart 3 –Total Economic Contribution of Cruise Tourism, 2023/2024 cruise year

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	1,954	\$16.1
Total Economic Contribution	2,972	\$27.4

The Wholesale & Retail Trade, and Transportation & Warehousing sectors account for about 71% of the total job impacts.

Passenger Surveys

Panama Chart 4 shows the major attributes of passenger visits to Panama as derived from the passenger surveys. Of those who completed the survey:

- 88 percent stated this was their first visit to Panama.
- Just over half (55%) of those who went ashore made at least one purchase while ashore other than a tour.
- the typical cruise party consisted of two passengers (Average: 2.1) and spent an average of 5.0 hours ashore.

Panama Chart 4 – Major Attributes of Passenger Surveys

	Percent
Number Making First Visit	88%
Number Making Any Onshore Purchases:	55%
Average Hours Ashore	5.0
Purchased a Shore Excursion (Tour)	69%
How Purchased Tour:	
Cruise Line	89%
Onshore Tour Operator	2%
Other	9%
Tour Type:	
Historical/Cultural	58%
Beach Day	1%
Land-Based	13%
Water-Based	12%
Other	24%
Reason for No Tour	
Prefer to Tour on Own	37%
Poor Value	15%
Didn't Like Any	18%
Too Similar to Other Dest	9%
Weather	1%
Prefer to Stay on Ship	13%
Other	26%

- More than half (69%) of the passengers who went ashore purchased a shore excursion. Eighty-nine percent of passengers who purchased a tour did so through their cruise line, 2 percent purchased their tour on shore and 9 percent purchased their tour through some other means (travel agent, travel site, etc.).
- More than half (58%) of the tours purchased were visits to “historical or cultural sites”.
- The key reasons why some did not purchase a tour include they prefer to tour on their own (37%), they simply did not like any (18%), or they thought the excursions were a poor value (15%).

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Panama Chart 5**. 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 purposes, the satisfaction data from the prior study is also shown in the chart below.

- Cruise passengers were somewhat satisfied with their “overall visit” to Panama (6.9) and the visit “meeting expectations” (6.8).
- “Guided Tours” (or Shore Excursions) received a ‘very satisfied’ mean score of 7.7; Additionally, the high ratings in “knowledge of guide” (8.4), and “value of tours” (7.4) indicates visitors to Panama were very satisfied with their onshore excursions.

Panama Chart 5 – Passenger Visit Satisfaction*

Visit Attributes	2024 Mean Score	2018 Mean Score
Overall Visit	6.9	7.6
Visit Met Expectations	6.8	7.0
Likelihood of a Return Visit	3.5	3.2
Likelihood of Recommending	4.1	4.7
Initial Shoreside Welcome	7.4	7.6
Overall Guided Tour	7.7	7.9
Knowledge of Guide	8.4	8.6
Value of Tour	7.4	7.3
Historic Sites/Museums	7.5	7.7
Variety of Things to See and Do	6.8	7.1
Friendliness of Residents	7.7	8.0
Overall Shopping Experience	6.6	6.6
Courtesy of Employees	8.1	8.0
Overall Prices	6.8	6.6
Taxis/Local Transportation	7.1	8.0

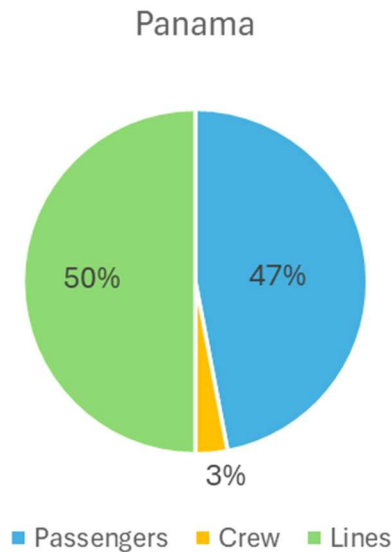
* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows:
 Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3;
 Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Passenger interactions with residents and store employees were very positive as the mean scores for “friendliness of residents” (7.7) and “courtesy of employees” (8.1) were high.
- Passengers were also very satisfied with the “historic sites” (7.5) and taxis and transportation around the island (7.1).
- Similar to all other destinations, Panama scored the lowest on passengers saying they are “likely to return for a land-based visit” (3.5), and their “likelihood of recommending to a friend” (4.1).

Panama Chart 6 – Overall Spending

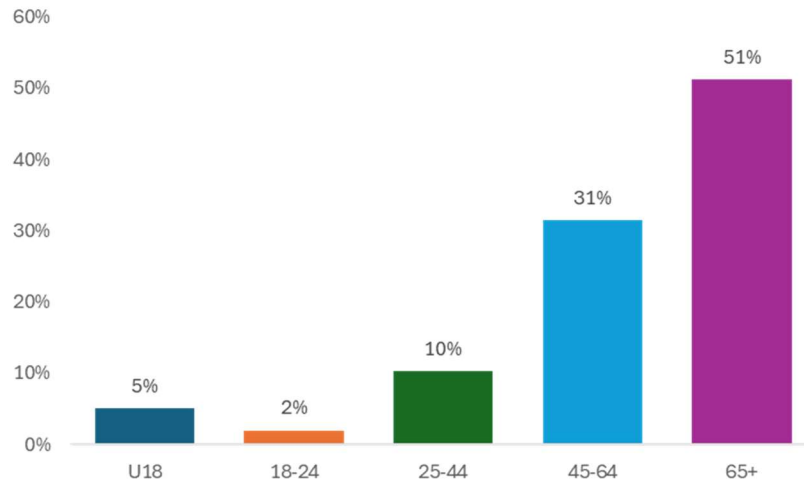
About half (47%) of the cruise related spending in Panama was made by passengers. The cruise lines made up 50 percent, and the remaining 3 percent was spending made by crew members.



Passenger Demographics

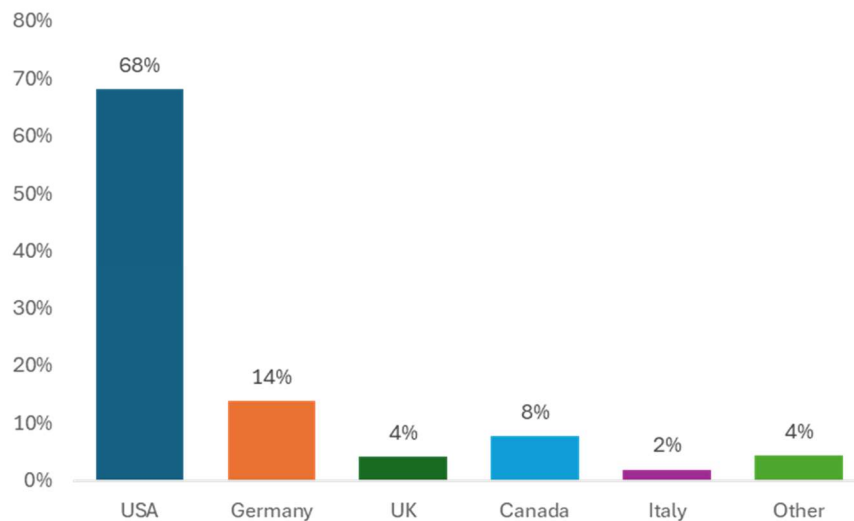
Consistent with the overall industry trends, the average age is down from 64 years old in the last study to 56 years old in this study. About 42 percent of the respondents are between the ages of 25 and 64.

Panama Chart 7 – Passenger Age Cohorts



Panama Chart 8 – Passenger Residence

Nearly 7 in 10 (68%) of the responding transit passengers in this Panama study are residents of the US. Fourteen percent are from Germany



Cruise Destinations of the Southern Caribbean

Aruba

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.⁶¹ The surveys were undertaken during the eight-month period beginning in October 2023 and ending in May 2024. The surveys were distributed onboard the ships via QR codes, and the guests and crew completed the surveys online. Passengers and crew were only surveyed once during a cruise itinerary.

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 excursions, food & beverages, clothing, etc.;
- visit satisfaction, including excursions, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation (passengers only); and
- demographic characteristics, including country of residence, age group, etc.

Combining the expenditure data collected from the passenger and crew surveys with revenue and wage data received directly from the destinations, and destination specific expenditure data by the cruise lines for items such as port fees, provisions and services leads to estimates of the total cruise tourism expenditures for each participating destination.

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

⁶¹ Surveys were conducted on the ships of the following cruise lines: Aida, 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.

Cruise Tourism Expenditures

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

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

Based on data collected from the Aruba Ports Authority, 857,570 cruise passengers arrived aboard cruise ships during the 2023/2024 cruise year.⁶² Of these, an estimated 715,215 passengers (83%) disembarked and visited Aruba. Utilizing additional data provided by the Aruba Ports Authority and visiting cruise lines, 323,570 crew were aboard the cruise ships and 30 percent, or 98,365 crew, disembarked and visited the destination. Passenger arrivals are up about 6 percent from the last study in 2017/18.

These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **\$133.2** million (\$US) in cruise tourism expenditures in Aruba during the 2023/2024 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Passenger Spending

Per passenger spending estimates were derived from more than 1,040 surveys completed by passengers during the survey period. As shown in **Aruba Chart 1**, each passenger cruise party spent an average of \$279.03. The average spend per cruise party is the sum of the weighted spending in each of the 8 purchase categories. For example, 39 percent of the survey respondents reported spending an average of \$66.10 for food and beverages. Spread across all cruise parties that visited Aruba, this represented an average of \$25.73 per cruise party ($\$66.10 \times 39\% = \25.73). On a per passenger basis, the average total expenditure was \$131.05. This represents the sum of the per cruise party expenditures, \$279.03, divided by the average size of a cruise party in Aruba, 2.1 passengers.

Shore excursions, watches & jewelry, and food and beverages account for 75 percent of cruise passenger expenditures in Aruba.

⁶² The 2023/2024 cruise year includes the twelve months beginning in May, 2023 and ending in April, 2024.

Just over half (60%) of the passengers reported that their cruise party purchased a shore excursion. The effective price of the shore excursion was about \$77.78 per party to the local economy.

Aruba Chart 1 – Estimated Passenger Spending (\$US), 2023/2024 cruise year⁶³

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	\$129.20	60.2%	\$77.78
F&B at Restaurants & Bars	\$66.10	38.9%	\$25.73
Taxis/Ground Transportation	\$49.40	22.7%	\$11.21
Watches & Jewelry	\$712.50	14.9%	\$106.45
Clothing	\$62.50	41.2%	\$25.74
Other Purchases	\$79.90	22.5%	\$18.01
Local Crafts & Souvenirs	\$37.50	33.0%	\$12.35
Retail Purchases of Liquor	\$46.50	3.8%	\$1.75
Avg. Spend per Cruise Party			\$279.03
Average Size of Cruise Party			2.1
Avg. Spend per Passenger Visit			\$131.05
Passenger Onshore Visits			715,215
Total Passenger Expenditures			\$93,730,724

For the entire 2023/2024 cruise year, the estimated 715,215 cruise passengers who disembarked and visited Aruba spent a total of **\$93.7 million** (\$US) in Aruba.

Crew Spending

Crew spending estimates were derived from more than 500 surveys completed by crew members during the survey period. As shown in **Aruba Chart 2**, each crew member who disembarked the ship and visited Aruba spent an average of \$86.43. Like the passenger spending, the average expenditure per crew member is the sum of the weighted spending in each of the purchase categories.

Expenditures on food and beverages, and other purchases account for 72 percent of the crew members’ onshore spending.

⁶³ The average shore excursion expenditure is a weighted average of the onshore and travel agent/other purchases and the portion of the onboard purchases paid to local tour operators.

For the entire 2023/2024 cruise year, the estimated 98,365 crew who went ashore and visited Aruba spent an estimated total of **\$8.5 million** (\$US).

Aruba Chart 2 – Estimated Crew Spending (\$US), 2023/2024 cruise year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	\$41.30	73.8%	\$30.50
Taxis/Ground Transportation	\$21.00	13.3%	\$2.79
Watches & Jewelry	\$295.10	3.8%	\$11.20
Clothing	\$64.10	21.1%	\$13.53
Other Purchases	\$66.30	33.1%	\$21.95
Shore Excursions	\$69.80	3.4%	\$2.35
Personal Products	\$35.00	1.9%	\$0.66
Local Crafts & Souvenirs	\$21.20	15.0%	\$3.17
Retail Purchases of Liquor	\$30.80	0.8%	\$0.26
Avg. Spend per Crew Ashore			\$86.43
Number of Crew Onshore Visits			98,365
Total Crew Expenditures			\$8,501,696

Cruise Line & Destination Spending

Cruise lines made payments to local businesses for a variety of goods and services, including payments for port fees and taxes, navigation services, utilities and other supplies. The destination itself had employee wages related to cruise operations. Based upon data provided by the FCCA member cruise lines and the destination, we estimate that cruise lines and the destination were responsible for nearly **\$31.0 million** (\$US) in direct spending in Aruba during the 2023/2024 cruise year.

Economic Contribution of Cruise Tourism Expenditures

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

As shown in **Aruba Chart 3**, the **\$133.2** million in total cruise tourism expenditures in Aruba supported direct employment of 1,266 residents of Aruba paying \$30.1 million in annual wages. Adding the indirect contribution that results from the spending by those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures supported a total employment contribution of 2,462 jobs and \$61.5 million in wage income in Aruba during the 2023/2024 cruise year.

Aruba Chart 3 – Total Economic Contribution of Cruise Tourism, 2023/2024 cruise year

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	1,266	\$30.1
Total Economic Contribution	2,462	\$61.5

The Manufacturing, and Transportation & Warehousing sectors account for about 64% of the total job impacts.

Passenger Surveys

Aruba Chart 4 shows the major attributes of passenger visits to Aruba as derived from the passenger surveys. Of those who completed the survey:

- 65 percent stated this was their first visit to Aruba.
- three-quarters (74%) of those who went ashore made at least one purchase while ashore other than a tour.
- the typical cruise party consisted of two passengers (Average: 2.1) and spent an average of 5.3 hours ashore.

Aruba Chart 4 – Major Attributes of Passenger Surveys

	Percent
Number Making First Visit	65%
Number Making Any Onshore Purchases:	74%
Average Hours Ashore	5.3
Purchased a Shore Excursion (Tour)	60%
How Purchased Tour:	
Cruise Line	72%
Onshore Tour Operator	8%
Other	20%
Tour Type:	
Historical/Cultural	38%
Beach Day	25%
Land-Based	18%
Water-Based	25%
Other	13%
Reason for No Tour	
Prefer to Tour on Own	66%
Poor Value	11%
Didn't Like Any	9%
Too Similar to Other Dest	3%
Weather	1%
Prefer to Stay on Ship	1%
Other	22%

- More than half (60%) of the passengers that went ashore purchased a shore excursion. Seventy-two percent of passengers who purchased a tour did so through their cruise line, 8 percent purchased their tour on shore and 20 percent purchased their tour through some other means (travel agent, travel site, etc.).
- More than a third (38%) of the tours purchased were visits to “historical or cultural sites”, while 1 in 4 were “beach day activities” (25%).
- The key reason why some did not purchase a tour include they prefer to tour on their own (66%).

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Aruba Chart 5**. 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 purposes, the satisfaction data from the prior study is also shown in the chart below.

- Cruise passengers were very satisfied with their “overall visit” to Aruba (8.2) and the visit “meeting expectations” (7.8).
- “Guided Tours” (or Shore Excursions) received a ‘very satisfied’ mean score of 8.5; Additionally, the high ratings in “knowledge of guide” (9.0), and “value of tours” (8.2) indicates visitors to Aruba were very satisfied with their onshore excursions.

Aruba Chart 5 – Passenger Visit Satisfaction*

Visit Attributes	2024 Mean Score	2018 Mean Score
Overall Visit	8.2	8.4
Visit Met Expectations	7.8	7.8
Likelihood of a Return Visit	5.7	5.7
Likelihood of Recommending	6.6	6.7
Initial Shoreside Welcome	8.1	7.9
Overall Guided Tour	8.5	8.7
Knowledge of Guide	9.0	9.0
Value of Tour	8.2	8.4
Historic Sites/Museums	7.8	7.9
Variety of Things to See and Do	7.8	7.8
Friendliness of Residents	8.7	8.5
Overall Shopping Experience	7.8	8.1
Courtesy of Employees	8.7	8.5
Overall Prices	7.3	7.6
Taxis/Local Transportation	8.2	8.5

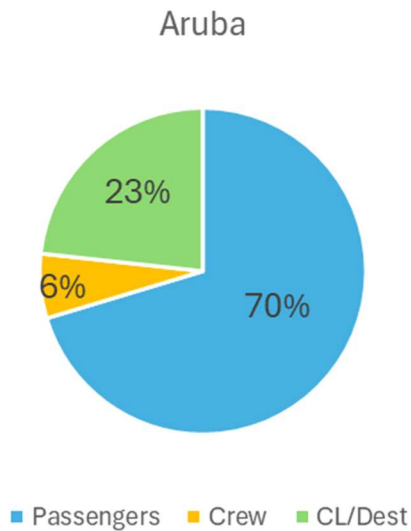
* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows:
 Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3;
 Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Passenger interactions with residents and store employees were very positive as the mean scores for “friendliness of residents” (8.7) and “courtesy of employees” (8.7) were high.
- Passengers were also very satisfied with the “historic sites” (7.8), a “variety of things to see and do” (7.8) and the “overall shopping experience” (7.8).
- Aruba scored lowest passengers saying they are “likely to return for a land-based visit” (5.7), and their “likelihood of recommending to a friend” (6.6), however, both ratings are in line with the ratings of other destinations.

Aruba Chart 6 – Overall Spending

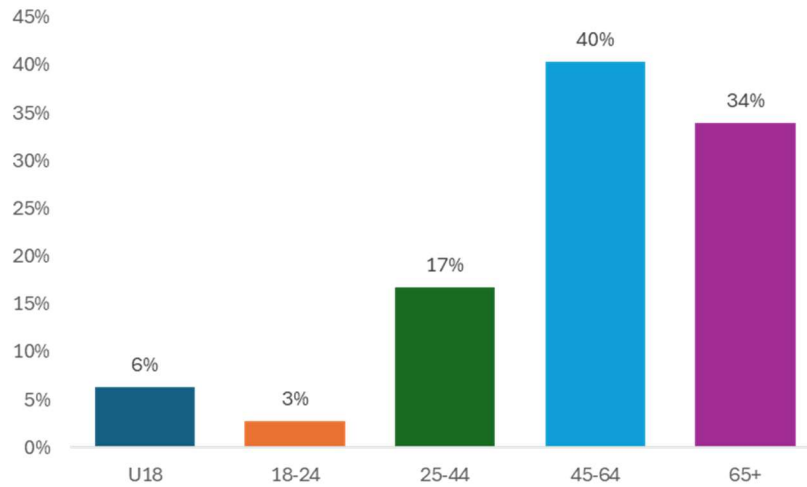
Seven in ten (70%) of the cruise related spending in Aruba was made by passengers, 23 percent was made by the cruise lines and the port itself, and the remaining 6 percent was spending made by crew members.



Passenger Demographics

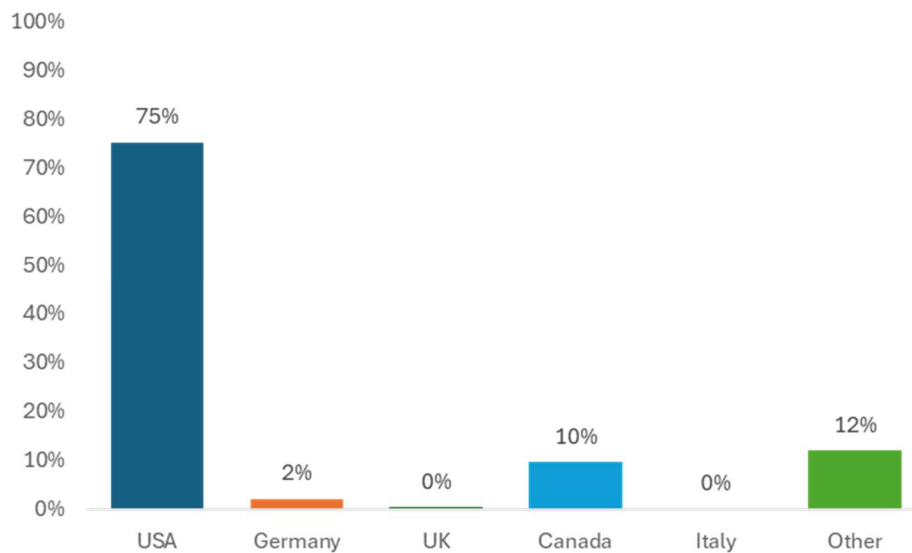
Consistent with the overall industry trends, the average age is down from 61 years old in the last study to 52 years old in this study. About 57 percent of the respondents are between the ages of 25 and 64.

Aruba Chart 7 – Passenger Age Cohorts



Aruba Chart 8 – Passenger Residence

Most (75%) of the responding passengers to Aruba are residents of the US, 10 percent are from Canada.



Barbados

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.⁶⁴ The surveys were undertaken during the eight-month period beginning in October 2023 and ending in May 2024. The surveys were distributed onboard the ships via QR codes, and the guests and crew completed the surveys online. Passengers and crew were only surveyed once during a cruise itinerary.

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 excursions, food & beverages, clothing, etc.;
- visit satisfaction, including shore excursions, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation (passengers only); and
- demographic characteristics, including country of residence, age group, etc.

Combining the expenditure data collected from the passenger and crew surveys with revenue and wage data received directly from the destinations, and destination specific expenditure data by the cruise lines for items such as port fees, provisions and services leads to estimates of the total cruise tourism expenditures for each participating destination.

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

⁶⁴ Surveys were conducted on the ships of the following cruise lines: Aida, 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.

Cruise Tourism Expenditures

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

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

Based on data collected from the Barbados Port Inc., a total of 693,240 cruise passengers arrived aboard cruise ships during the 2023/2024 cruise year.⁶⁵ Of these, 492,820 transit passengers arrived and an estimated 411,010 passengers (83%) disembarked and visited Barbados. There were also an estimated 200,420 passengers who embarked on their cruise from Barbados. Utilizing additional data provided by the Barbados Port Inc. and visiting cruise lines, 290,130 crew were aboard the cruise ships and an estimated 30 percent, or 88,200 disembarked and visited the destination. Transit passenger arrivals are down 15 percent from the last study in 2017/18, while embarking passengers are up about 35 percent. This led to an overall reduction in passengers of about 5 percent (730,910 vs. 695,240).

These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **\$83.5** million (\$US) in cruise tourism expenditures in Barbados during the 2023/2024 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Passenger Spending

Transit passenger spending estimates were derived from about 465 transit surveys completed by passengers during the survey period. As shown in **Barbados Chart 1**, each transit passenger cruise party spent an average of \$127.46. The average spend per cruise party is the sum of the weighted spending in each of the 8 purchase categories. For example, 26 percent of the survey respondents reported spending an average of \$50.60 for food and beverages. Spread across all cruise parties that visited Barbados, this represented an average of \$13.01 per cruise party ($\$50.60 \times 26\% = \13.01). On a per passenger basis, the average total expenditure was \$60.99. This represents the sum of the per cruise party expenditures, \$127.46, divided by the average size of a cruise party in Barbados, 2.1 passengers.

Shore excursions, clothing and food & beverages account for 76 percent of cruise passenger expenditures in Barbados.

⁶⁵ The 2023/2024 cruise year includes the twelve months beginning in May, 2023 and ending in April, 2024.

Just over half (57%) of the passengers reported that their cruise party purchased a shore excursion. The effective price of the shore excursion was about \$72 per party to the local economy.

Barbados Chart 1a – Estimated Transit Passenger Spending (\$US), 2023/2024 cruise year⁶⁶

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	\$126.90	56.6%	\$71.88
F&B at Restaurants & Bars	\$50.60	25.7%	\$13.01
Taxis/Ground Transportation	\$33.10	18.7%	\$6.20
Watches & Jewelry	\$106.60	4.4%	\$4.74
Clothing	\$54.10	22.9%	\$12.40
Other Purchases	\$57.70	13.3%	\$7.68
Local Crafts & Souvenirs	\$27.50	24.6%	\$6.77
Retail Purchases of Liquor	\$48.40	9.9%	\$4.78
Avg. Spend per Cruise Party			\$127.46
Average Size of Cruise Party			2.1
Avg. Spend per Passenger Visit			\$60.99
Passenger Onshore Visits			411,010
Total Passenger Expenditures			\$25,065,513

For the entire 2023/2024 cruise year, the estimated 411,010 transit passengers who disembarked and visited Barbados spent a total of **\$25.1 million** (\$US) in Barbados.

⁶⁶ The average shore excursion expenditure is a weighted average of the onshore and travel agent/other purchases and the portion of the onboard purchases paid to local tour operators.

Overall, about 13 percent of passengers who embarked on their cruise from Barbados reported spending at least one night in Barbados. Of those who spent an overnight, the average amount spent for accommodations was \$768 per cruise party. Overall, the weighted spend per embarking party was \$261.24. On a per passenger basis this equates to \$125.00

Barbados Chart 1b – Estimated Embark Passenger Spending (\$US), 2023/2024 cruise year⁶⁷

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Accommodations	\$768.00	12.6%	\$96.86
F&B at Restaurants & Bars	\$39.94	30.6%	\$12.23
Taxis/Ground Transportation	\$36.69	16.2%	\$5.95
Watches & Jewelry	\$40.00	1.8%	\$0.72
Clothing	\$62.94	16.2%	\$10.21
Other Purchases	\$35.57	23.0%	\$8.17
Shore Excursions	\$193.87	61.3%	\$118.77
Local Crafts & Souvenirs	\$25.94	15.8%	\$4.09
Retail Purchases of Liquor	\$29.41	14.4%	\$4.24
Avg. Spend per Homeport Cruise Party			\$261.24
Average Size of a Party			2.1
Avg. Spend per Homeport Passenger			\$125.00
Number of Homeport Passengers			200,420
Total Homeport Passenger Expenditures			\$25,051,977

For the entire 2023/2024 cruise year, the 200,420 embarking passengers spent a total of **\$25.1 million** (\$US) in Barbados.

Crew Spending

Crew spending estimates were derived from surveys completed by crew members during the survey period. As shown in **Barbados Chart 2**, each crew member who disembarked the ship and visited Barbados spent an average of \$63.46. Like the passenger spending, the average expenditure per crew member is the sum of the weighted spending in each of the purchase categories.

Expenditures on food and beverages, taxi, and other purchases accounted for 69 percent of the crew members’ onshore spending.

⁶⁷ The average shore excursion expenditure is a weighted average of the onshore and travel agent/other purchases and the portion of the onboard purchases paid to local tour operators.

For the entire 2023/2024 cruise year, the estimated 88,200 crew who went ashore and visited Barbados spent nearly **\$5.6 million** (\$US).

Barbados Chart 2 – Estimated Crew Spending (\$US), 2023/2024 cruise year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	\$31.90	67.6%	\$21.60
Taxis/Ground Transportation	\$22.20	36.4%	\$8.10
Watches & Jewelry	\$81.70	2.2%	\$1.80
Clothing	\$45.00	11.8%	\$5.29
Other Purchases	\$56.20	24.6%	\$13.85
Shore Excursions	\$64.40	7.0%	\$4.50
Personal Products	\$27.40	4.8%	\$1.31
Local Crafts & Souvenirs	\$21.50	25.4%	\$5.46
Retail Purchases of Liquor	\$28.10	5.5%	\$1.55
Avg. Spend per Crew Ashore			\$63.46
Number of Crew Onshore Visits			88,200
Total Crew Expenditures			\$5,597,064

Cruise Line Spending

Cruise lines made payments to local businesses for a variety of goods and services, including payments for port fees and taxes, navigation services, utilities, bunker fuel and other supplies. Based upon data provided by the FCCA member cruise lines and the destination, we estimate that the cruise lines were responsible for approximately **\$27.8 million** (\$US) in direct spending in Barbados during the 2023/2024 cruise year.

Economic Contribution of Cruise Tourism Expenditures

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

As shown in **Barbados Chart 3**, the **\$83.5** million in total cruise tourism expenditures in Barbados supported direct employment of 1,250 residents of Barbados paying \$18.3 million in annual wages. Adding the indirect contribution that results from the spending by those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures supported a total employment contribution of 2,211 jobs and \$32.9 million in wage income in Barbados during the 2023/2024 cruise year.

Barbados Chart 3 –Total Economic Contribution of Cruise Tourism, 2023/2024 cruise year

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	1,250	\$18.3
Total Economic Contribution	2,211	\$32.9

The Wholesale & Retail Trade, Lodging & Food Services, and Transportation & Warehousing sectors account for about 79% of the total job impacts.

Passenger Surveys

Barbados Chart 4 shows the major attributes of passenger visits to Barbados as derived from the passenger surveys. Of those who completed the survey:

- 65 percent stated this was their first visit to Barbados.
- 3 in 5 (60%) of those who went ashore made at least one purchase while ashore other than a tour.
- the typical cruise party consisted of two passengers (Average: 2.1) and spent an average of 4.6 hours ashore.

Barbados Chart 4 – Major Attributes of Passenger Surveys

	Percent
Number Making First Visit	65%
Number Making Any Onshore Purchases:	60%
Average Hours Ashore	4.6
Purchased a Shore Excursion (Tour)	57%
How Purchased Tour:	
Cruise Line	73%
Onshore Tour Operator	8%
Other	19%
Tour Type:	
Historical/Cultural	31%
Beach Day	32%
Land-Based	13%
Water-Based	20%
Other	11%
Reason for No Tour	
Prefer to Tour on Own	56%
Poor Value	15%
Didn't Like Any	10%
Too Similar to Other Dest	3%
Weather	2%
Prefer to Stay on Ship	1%
Other	23%

- More than half (57%) of the passengers that went ashore purchased a shore excursion. Seventy-three percent of passengers who purchased a tour did so through their cruise line, 8 percent purchased their tour on shore and 19 percent purchased their tour through some other means (travel agent, travel site, etc.).
- An equal number of tours purchased were visits to “historical or cultural sites” (31%) and “beach day activities” (32%).
- The key reasons why some did not purchase a tour include they prefer to tour on their own (56%) and they felt the tours were a poor value (15%).

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Barbados Chart 5**. 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 purposes, the satisfaction data from the prior study is also shown in the chart below.

- Cruise passengers were very satisfied with their “overall visit” to Barbados (8.2) and the visit “meeting expectations” (7.7).
- “Guided Tours” (or Shore Excursions) received a ‘very satisfied’ mean score of 8.6; Additionally, the high ratings in “knowledge of guide” (9.0), and “value of tours” (8.1) indicates visitors to Barbados were very satisfied with their onshore excursions.

Barbados Chart 5 – Passenger Visit Satisfaction*

Visit Attributes	2024 Mean Score	2018 Mean Score
Overall Visit	8.2	8.2
Visit Met Expectations	7.7	7.6
Likelihood of a Return Visit	5.3	5.2
Likelihood of Recommending	6.0	6.2
Initial Shoreside Welcome	8.2	7.5
Overall Guided Tour	8.6	8.8
Knowledge of Guide	9.0	9.1
Value of Tour	8.1	8.5
Historic Sites/Museums	7.7	8.1
Variety of Things to See and Do	7.7	7.4
Friendliness of Residents	8.3	8.5
Overall Shopping Experience	7.8	7.4
Courtesy of Employees	8.5	8.1
Overall Prices	7.3	6.8
Taxis/Local Transportation	8.0	8.3

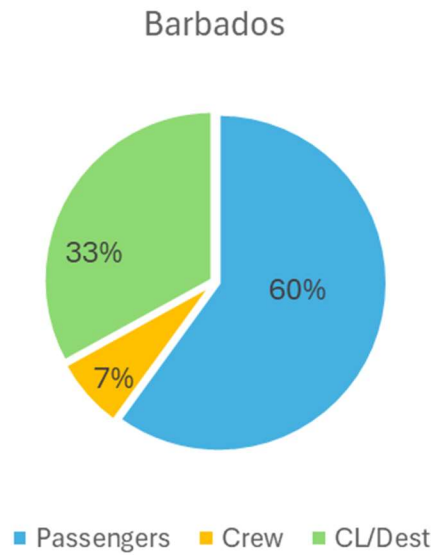
* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows:
 Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3;
 Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Passenger interactions with residents and store employees were very positive as the mean scores for “friendliness of residents” (8.3) and “courtesy of employees” (8.5) were high.
- Passengers were also very satisfied with the “historic sites” (7.7), a “variety of things to see and do” (7.7) and the “overall shopping experience” (7.8). They recorded similar satisfaction ratings for the “overall prices” (7.3).
- Barbados scored lowest passengers saying they are “likely to return for a land-based visit” (5.3), and their “likelihood of recommending to a friend” (6.0), however, both ratings are similar to the ratings of other destinations.

Barbados Chart 6 – Overall Spending

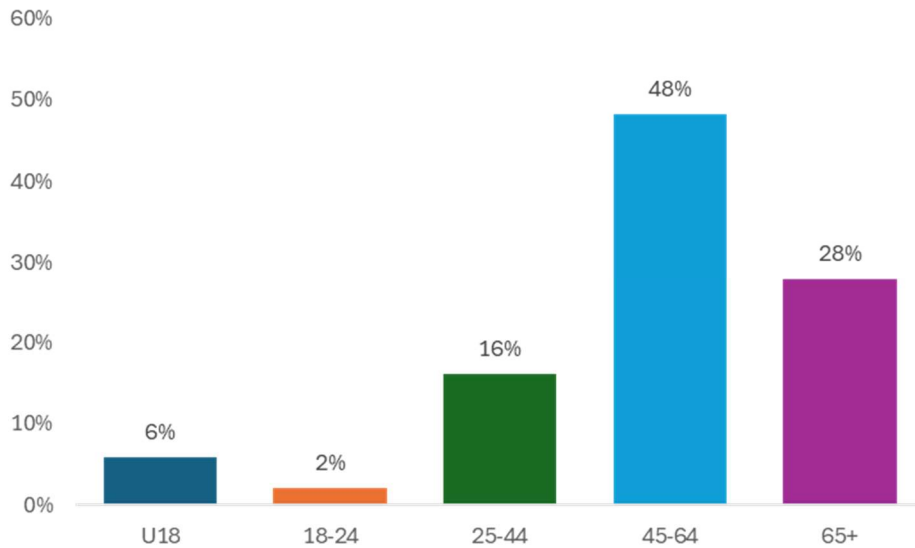
Three in five (60%) of the cruise related spending in Barbados was made by passengers, 33 percent was made by the cruise lines and Barbados itself, and the remaining 7 percent was spending made by crew members.



Passenger Demographics

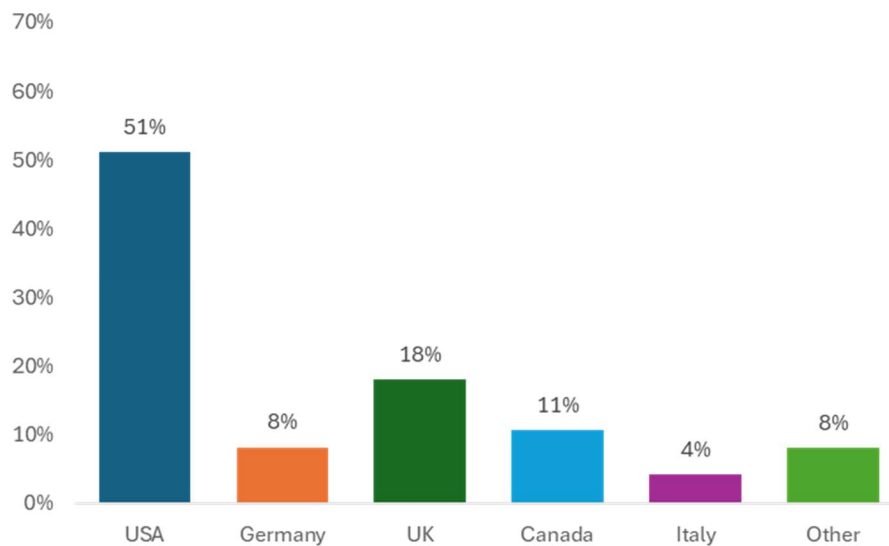
Consistent with the overall industry trends, the average age is down from 61 years old in the last study to 52 years old in this study. About 64 percent of the respondents are between the ages of 25 and 64.

Barbados Chart 7 – Passenger Age Cohorts



Barbados Chart 8 – Passenger Residence

Half (51%) of the responding passengers in the study for Barbados are residents of the US; 18 percent are from the UK and 11 percent are residents of Canada.



Bonaire

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.⁶⁸ The surveys were undertaken during the eight-month period beginning in October 2023 and ending in May 2024. The surveys were distributed onboard the ships via QR codes, and the guests and crew completed the surveys online. Passengers and crew were only surveyed once during a cruise itinerary.

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 excursions, food & beverages, clothing, etc.;
- visit satisfaction, including shore excursions, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation (passengers only); and
- demographic characteristics, including country of residence, age group, etc.

Combining the expenditure data collected from the passenger and crew surveys with revenue and wage data received directly from the destinations, and destination specific expenditure data by the cruise lines for items such as port fees, provisions and services leads to estimates of the total cruise tourism expenditures for each participating destination.

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

⁶⁸ Surveys were conducted on the ships of the following cruise lines: Aida, 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.

Cruise Tourism Expenditures

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

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

Based on data collected from industry sources and available statistics, 426,900 cruise passengers arrived aboard cruise ships during the 2023/2024 cruise year.⁶⁹ Of these, an estimated 351,765 passengers (82%) disembarked and visited Bonaire. Utilizing additional industry data and visiting cruise lines, 155,235 crew were aboard the cruise ships and 30 percent, or 47,195 crew, disembarked and visited the destination. Passenger arrivals are down approximately 11 percent from the last study in 2017/18.

These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **\$33.4** million (\$US) in cruise tourism expenditures in Bonaire during the 2023/2024 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Passenger Spending

Per passenger spending estimates were derived from more than 925 surveys completed by passengers during the survey period. As shown in **Bonaire Chart 1**, each passenger cruise party spent an average of \$152.33. The average spend per cruise party is the sum of the weighted spending in each of the 8 purchase categories. For example, 30 percent of the survey respondents reported spending an average of \$40.80 for food and beverages. Spread across all cruise parties that visited Bonaire, this represented an average of \$12.17 per cruise party ($\$40.80 \times 30\% = \12.17). On a per passenger basis, the average total expenditure was \$73.97. This represents the sum of the per cruise party expenditures, \$152.33, divided by the average size of a cruise party in Bonaire, 2.1 passengers.

Shore excursions, watches & jewelry, and local crafts & souvenirs accounted for 76 percent of cruise passenger expenditures in Bonaire.

Two-thirds (66%) of the passengers reported that their cruise party purchased a shore excursion. The effective price of the shore excursion was about \$89 per party to the local economy.

⁶⁹ The 2023/2024 cruise year includes the twelve months beginning in May, 2023 and ending in April, 2024.

Bonaire Chart 1 – Estimated Passenger Spending (\$US), 2023/2024 cruise year⁷⁰

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	\$135.20	65.9%	\$89.17
F&B at Restaurants & Bars	\$40.80	29.9%	\$12.17
Taxis/Ground Transportation	\$55.70	10.2%	\$5.69
Watches & Jewelry	\$216.10	6.2%	\$13.42
Clothing	\$53.70	22.8%	\$12.25
Other Purchases	\$41.90	12.1%	\$5.07
Local Crafts & Souvenirs	\$39.00	35.0%	\$13.65
Retail Purchases of Liquor	\$32.30	2.9%	\$0.92
Avg. Spend per Cruise Party			\$152.33
Average Size of Cruise Party			2.1
Avg. Spend per Passenger Visit			\$73.97
Passenger Onshore Visits			351,765
Total Passenger Expenditures			\$26,020,432

For the entire 2023/2024 cruise year, the estimated 351,765 cruise passengers who disembarked and visited Bonaire spent a total of **\$26.0 million** (\$US) in Bonaire.

Crew Spending

Crew spending estimates were derived from more than 425 surveys completed by crew members during the survey period. As shown in **Bonaire Chart 2**, each crew member who disembarked the ship and visited Bonaire spent an average of \$44.40. Like the passenger spending, the average expenditure per crew member is the sum of the weighted spending in each of the purchase categories.

Expenditures on food and beverages, clothing, and other purchases account for 71 percent of the crew members’ onshore spending.

⁷⁰ The average shore excursion expenditure is a weighted average of the onshore and travel agent/other purchases and the portion of the onboard purchases paid to local tour operators.

For the entire 2023/2024 cruise year, the estimated 47,195 crew who went ashore and visited Bonaire spent an estimated total of **\$2.1 million** (\$US).

Bonaire Chart 2 – Estimated Crew Spending (\$US), 2023/2024 cruise year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	\$25.70	72.4%	\$18.60
Taxis/Ground Transportation	\$19.20	12.1%	\$2.33
Watches & Jewelry	\$42.80	3.0%	\$1.30
Clothing	\$33.00	11.0%	\$3.62
Other Purchases	\$55.80	16.4%	\$9.13
Shore Excursions	\$72.90	8.2%	\$5.96
Personal Products	\$23.80	0.9%	\$0.22
Local Crafts & Souvenirs	\$17.50	16.1%	\$2.82
Retail Purchases of Liquor	\$36.60	1.2%	\$0.43
Avg. Spend per Crew Ashore			\$44.40
Number of Crew Onshore Visits			47,195
Total Crew Expenditures			\$2,095,502

Cruise Line & Destination Spending

Cruise lines made payments to local businesses for a variety of goods and services, including payments for port fees and taxes, navigation services, utilities and other supplies. Based upon data provided by the FCCA member cruise lines, we estimate that cruise lines were responsible for approximately **\$5.3 million** (\$US) in direct spending in Bonaire during the 2023/2024 cruise year.

Economic Contribution of Cruise Tourism Expenditures

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

As shown in **Bonaire Chart 3**, the **\$33.4** million in total cruise tourism expenditures in Bonaire supported direct employment of 352 residents of Bonaire paying \$6.6 million in annual wages. Adding the indirect contribution that results from the spending by those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures supported a total employment contribution of 627 jobs and \$12.2 million in wage income in Bonaire during the 2023/2024 cruise year.

Bonaire Chart 3 –Total Economic Contribution of Cruise Tourism, 2023/2024 cruise year

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	352	\$6.6
Total Economic Contribution	627	\$12.2

The Manufacturing and Transportation & Warehousing sectors account for about 68% of the total job impacts.

Passenger Surveys

Bonaire Chart 4 shows the major attributes of passenger visits to Bonaire as derived from the passenger surveys. Of those who completed the survey:

- 79 percent stated this was their first visit to Bonaire.
- two-thirds (66%) of those who went ashore made at least one purchase while ashore other than a tour.
- the typical cruise party consisted of two passengers (Average: 2.1) and spent an average of 4.7 hours ashore.

Bonaire Chart 4 – Major Attributes of Passenger Surveys

	Percent
Number Making First Visit	79%
Number Making Any Onshore Purchases:	66%
Average Hours Ashore	4.7
Purchased a Shore Excursion (Tour)	66%
How Purchased Tour:	
Cruise Line	69%
Onshore Tour Operator	12%
Other	19%
Tour Type:	
Historical/Cultural	33%
Beach Day	21%
Land-Based	21%
Water-Based	30%
Other	11%
Reason for No Tour	
Prefer to Tour on Own	57%
Poor Value	15%
Didn't Like Any	7%
Too Similar to Other Dest	5%
Weather	1%
Prefer to Stay on Ship	1%
Other	31%

- Two-thirds (66%) of the passengers that went ashore purchased a shore excursion. Sixty-nine percent of passengers who purchased a tour did so through their cruise line, 12 percent purchased their tour on shore and 19 percent purchased their tour through some other means (travel agent, travel site, etc.).
- A third (33%) of the tours purchased were visits to "historical or cultural sites" while 30 percent were "water-based activities".
- The key reasons why some did not purchase a tour include they prefer to tour on their own (57%), or they thought the excursions were a poor value (15%).

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Bonaire Chart 5**. 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 purposes, the satisfaction data from the prior study is also shown in the chart below.

- Cruise passengers were very satisfied with their “overall visit” to Bonaire (8.2) and the visit “meeting expectations” (7.9).
- “Guided Tours” (or Shore Excursions) received a ‘very satisfied’ mean score of 8.8; Additionally, the high ratings in “knowledge of guide” (9.0), and “value of tours” (8.2) indicates visitors to Bonaire were very satisfied with their onshore excursions.

Bonaire Chart 5 – Passenger Visit Satisfaction*

Visit Attributes	2024 Mean Score	2018 Mean Score
Overall Visit	8.2	7.6
Visit Met Expectations	7.9	7.0
Likelihood of a Return Visit	4.9	3.2
Likelihood of Recommending	6.1	4.7
Initial Shoreside Welcome	8.1	7.6
Overall Guided Tour	8.8	7.9
Knowledge of Guide	9.0	8.6
Value of Tour	8.2	7.3
Historic Sites/Museums	7.7	7.7
Variety of Things to See and Do	7.4	7.1
Friendliness of Residents	8.7	8.0
Overall Shopping Experience	7.5	6.6
Courtesy of Employees	8.8	8.0
Overall Prices	7.2	6.6
Taxis/Local Transportation	7.4	8.0

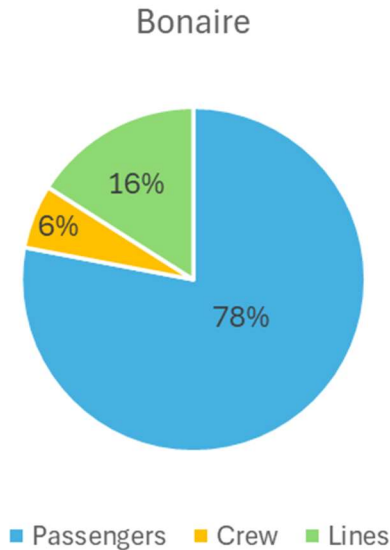
* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows:
 Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3;
 Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Passenger interactions with residents and store employees were very positive as the mean scores for “friendliness of residents” (8.7) and “courtesy of employees” (8.8) were high.
- Passengers were also very satisfied with the “historic sites” (7.7), a “variety of things to see and do” (7.4) and the “overall shopping experience” (7.5).
- As observed across all destinations, Bonaire scored lowest passengers saying they are “likely to return for a land-based visit” (4.9), and their “likelihood of recommending to a friend” (6.1), however, both ratings are in line with those of other destinations.

Bonaire Chart 6 – Overall Spending

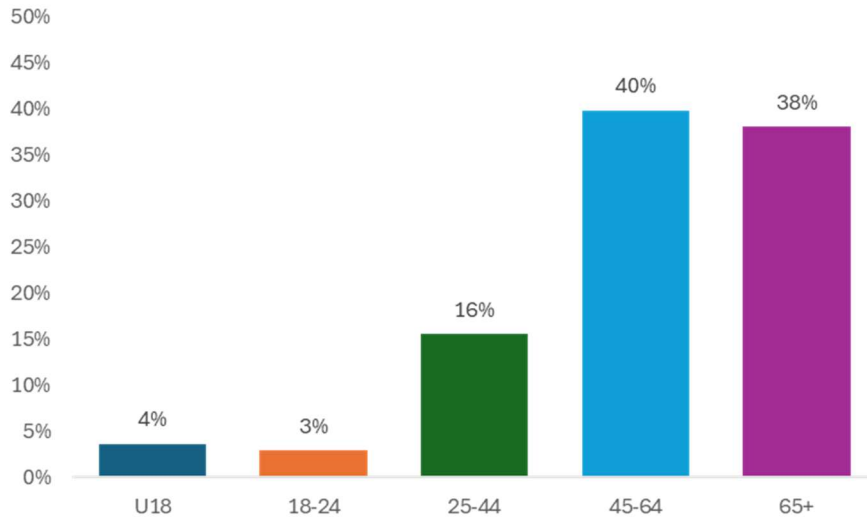
Nearly 4 in 5 (78%) of the cruise related spending in Bonaire was made by passengers, 16 percent was made by the cruise lines, and the remaining 6 percent was spending made by crew members.



Passenger Demographics

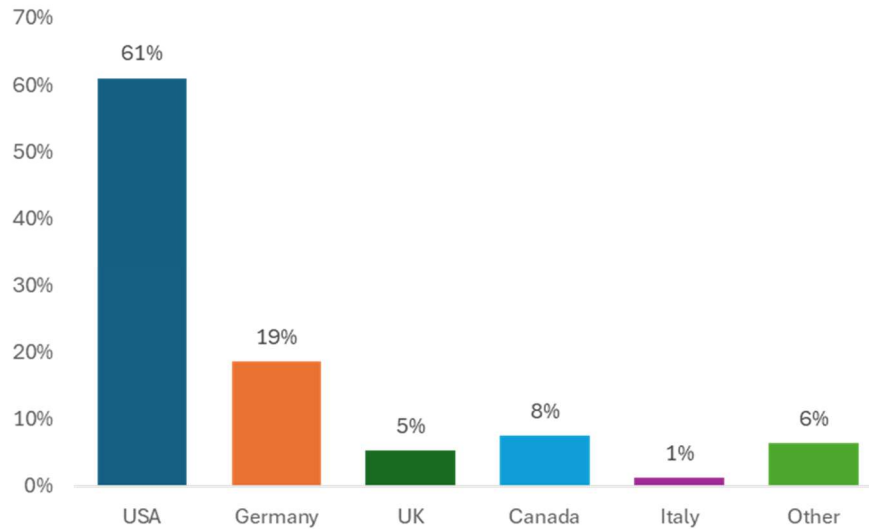
Consistent with the overall industry trends, the average age is down from 64 years old in the last study to 54 years old in this study. About 55 percent of the respondents are between the ages of 25 and 64.

Bonaire Chart 7 – Passenger Age Cohorts



Bonaire Chart 8 – Passenger Residence

The majority (61%) of the responding passengers to Bonaire are residents of the US, 19 percent are residents of Germany, and 8 percent are from Canada.



Curacao

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.⁷¹ The surveys were undertaken during the eight-month period beginning in October 2023 and ending in May 2024. The surveys were distributed onboard the ships via QR codes, and the guests and crew completed the surveys online. Passengers and crew were only surveyed once during a cruise itinerary.

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 excursions, food & beverages, clothing, etc.;
- visit satisfaction, including shore excursions, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation (passengers only); and
- demographic characteristics, including country of residence, age group, etc.

Combining the expenditure data collected from the passenger and crew surveys with revenue and wage data received directly from the destinations, and destination specific expenditure data by the cruise lines for items such as port fees, provisions and services leads to estimates of the total cruise tourism expenditures for each participating destination.

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

⁷¹ Surveys were conducted on the ships of the following cruise lines: Aida, 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.

Cruise Tourism Expenditures

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

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

Based on data collected from the Curacao Ports Authority, 769,330 cruise passengers arrived aboard cruise ships during the 2023/2024 cruise year.⁷² Of these, an estimated 641,625 passengers (83%) disembarked and visited Curacao. Utilizing additional data provided by the Ports Authority and visiting cruise lines, 298,900 crew were aboard the cruise ships and 30 percent, or 90,870 crew, disembarked and visited the destination. Passenger arrivals are up about 6 percent from the 2018 study.

These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **\$93.3** million (\$US) in cruise tourism expenditures in Curacao during the 2023/2024 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Passenger Spending

Per passenger spending estimates were derived from more than 2,000 surveys completed by passengers during the survey period. As shown in **Curacao Chart 1**, each passenger cruise party spent an average of \$163.66. The average spend per cruise party is the sum of the weighted spending in each of the 8 purchase categories. For example, 43 percent of the survey respondents reported spending an average of \$47.10 for food and beverages. Spread across all cruise parties that visited Curacao, this represented an average of \$20.36 per cruise party ($\$47.10 \times 43\% = \20.36). On a per passenger basis, the average total expenditure was \$78.01. This represents the sum of the per cruise party expenditures, \$163.66, divided by the average size of a cruise party in Curacao, 2.1 passengers.

Shore excursions, food & beverages and watches & jewelry account for 67 percent of cruise passenger expenditures in Curacao.

⁷² The 2023/2024 cruise year includes the twelve months beginning in May 2023 and ending in April 2024.

Just over half (58%) of the passengers reported that their cruise party purchased a shore excursion. The effective price of the shore excursion was about \$67 per party to the local economy.

Curacao Chart 1 – Estimated Passenger Spending (\$US), 2023/2024 cruise year⁷³

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	\$116.90	57.7%	\$67.45
F&B at Restaurants & Bars	\$47.10	43.2%	\$20.36
Taxis/Ground Transportation	\$54.10	14.0%	\$7.60
Watches & Jewelry	\$324.30	6.5%	\$21.07
Clothing	\$60.90	31.9%	\$19.44
Other Purchases	\$65.90	14.7%	\$9.69
Local Crafts & Souvenirs	\$37.00	33.1%	\$12.24
Retail Purchases of Liquor	\$48.30	12.0%	\$5.81
Avg. Spend per Cruise Party			\$163.66
Average Size of Cruise Party			2.1
Avg. Spend per Passenger Visit			\$78.01
Passenger Onshore Visits			641,625
Total Passenger Expenditures			\$50,051,407

For the entire 2023/2024 cruise year, the estimated 641,625 cruise passengers who disembarked and visited Curacao spent a total of **\$50.1 million** (\$US) in Curacao.

Crew Spending

Crew spending estimates were derived from approximately 500 surveys completed by crew members during the survey period. As shown in **Curacao Chart 2**, each crew member who disembarked the ship and visited Curacao spent an average of \$73.24. Like the passenger spending, the average expenditure per crew member is the sum of the weighted spending in each of the purchase categories.

Expenditures on food and beverages, clothing and other purchases accounted for 70 percent of the crew members’ onshore spending.

⁷³ The average shore excursion expenditure is a weighted average of the onshore and travel agent/other purchases and the portion of the onboard purchases paid to local tour operators.

For the entire 2023/2024 cruise year, the estimated 90,870 crew who went ashore and visited Curacao spent an estimated total of **\$6.7million** (\$US).

Curacao Chart 2 – Estimated Crew Spending (\$US), 2023/2024 cruise year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	\$31.60	70.6%	\$22.31
Taxis/Ground Transportation	\$30.50	16.2%	\$4.94
Watches & Jewelry	\$183.60	3.5%	\$6.51
Clothing	\$48.40	21.8%	\$10.54
Other Purchases	\$86.00	21.3%	\$18.29
Shore Excursions	\$64.40	4.3%	\$2.77
Personal Products	\$53.70	5.3%	\$2.85
Local Crafts & Souvenirs	\$17.20	22.8%	\$3.92
Retail Purchases of Liquor	\$25.40	4.3%	\$1.09
Avg. Spend per Crew Ashore			\$73.24
Number of Crew Onshore Visits			90,870
Total Crew Expenditures			\$6,654,879

Cruise Line & Destination Spending

Cruise lines made payments to local businesses for a variety of goods and services, including payments for port fees and taxes, navigation services, utilities and other supplies. The destination itself had employee wages related to cruise operations. Based upon data provided by the FCCA member cruise lines and the destination, we estimate that cruise lines and the destination were responsible for approximately **\$36.6 million** (\$US) in direct spending in Curacao during the 2023/2024 cruise year.

Economic Contribution of Cruise Tourism Expenditures

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

As shown in **Curacao Chart 3**, the **\$93.3** million in total cruise tourism expenditures in Curacao supported direct employment of 785 residents of Curacao paying \$17.5 million in annual wages. Adding the indirect contribution that results from the spending by those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures supported a total employment contribution of 1,557 jobs and \$36.5 million in wage income in Curacao during the 2023/2024 cruise year.

Curacao Chart 3 –Total Economic Contribution of Cruise Tourism, 2023/2024 cruise year

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	785	\$17.5
Total Economic Contribution	1,557	\$36.5

The Manufacturing, Wholesale & Retail Trade, and Transportation & Warehousing sectors account for about 78% of the total job impacts.

Passenger Surveys

Curacao Chart 4 shows the major attributes of passenger visits to Curacao as derived from the passenger surveys. Of those who completed the survey:

- 72 percent stated this was their first visit to Curacao.
- Nearly 3 in 4 (72%) of those who went ashore made at least one purchase while ashore other than a tour.
- the typical cruise party consisted of two passengers (Average: 2.1) and spent an average of 5.1 hours ashore.

Curacao Chart 4 – Major Attributes of Passenger Surveys

	Percent
Number Making First Visit	72%
Number Making Any Onshore Purchases:	72%
Average Hours Ashore	5.1
Purchased a Shore Excursion (Tour)	58%
How Purchased Tour:	
Cruise Line	75%
Onshore Tour Operator	9%
Other	16%
Tour Type:	
Historical/Cultural	48%
Beach Day	31%
Land-Based	15%
Water-Based	17%
Other	14%
Reason for No Tour	
Prefer to Tour on Own	65%
Poor Value	15%
Didn't Like Any	9%
Too Similar to Other Dest	4%
Weather	0%
Prefer to Stay on Ship	0%
Other	24%

- Just over half (58%) of the passengers that went ashore purchased a shore excursion. Seventy-five percent of passengers who purchased a tour did so through their cruise line, 9 percent purchased their tour on shore and 16 percent purchased their tour through some other means (travel agent, travel site, etc.).
- Nearly half (48%) of the tours purchased were to “historical sights or museums”, while 31 percent were “beach day activities”.
- The key reason why some did not purchase a tour include they prefer to tour on their own (65%).

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Curacao Chart 5**. 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 purposes, the satisfaction data from the prior study is also shown in the chart below.

- Cruise passengers were very satisfied with their “overall visit” to Curacao (8.4) and the visit “meeting expectations” (8.0).
- “Guided Tours” (or Shore Excursions) received a ‘very satisfied’ mean score of 8.3. Additionally, the high ratings in “knowledge of guide” (9.0), and “value of tour” (8.0) indicates visitors to Curacao were very satisfied with their onshore excursions.

Curacao Chart 5 – Passenger Visit Satisfaction*

Visit Attributes	2024 Mean Score	2018 Mean Score
Overall Visit	8.4	8.4
Visit Met Expectations	8.0	7.8
Likelihood of a Return Visit	5.6	4.9
Likelihood of Recommending	6.5	6.3
Initial Shoreside Welcome	8.4	7.9
Overall Guided Tour	8.3	8.6
Knowledge of Guide	9.0	9.1
Value of Tour	8.0	8.2
Historic Sites/Museums	8.0	7.9
Variety of Things to See and Do	7.9	7.7
Friendliness of Residents	8.7	8.4
Overall Shopping Experience	8.0	8.0
Courtesy of Employees	8.7	8.4
Overall Prices	7.6	7.4
Taxis/Local Transportation	7.8	8.0

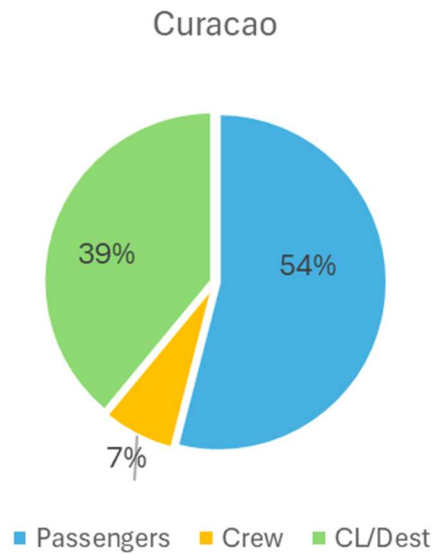
* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows:
 Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3;
 Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Passenger interactions with residents and store employees were very positive as the mean scores for “friendliness of residents” (8.7) and “courtesy of employees” (8.7) were high.
- Passengers were also very satisfied with the “initial onshore welcome” (8.4), a “variety of things to see and do” (7.9) and the “taxis/transportation” on the island (7.8).
- Curacao scored lowest passengers saying they are “likely to return for a land-based visit” (5.6), and their “likelihood of recommending to a friend” (6.5), however, both ratings are similar to the ratings of other destinations.

Curacao Chart 6 – Overall Spending

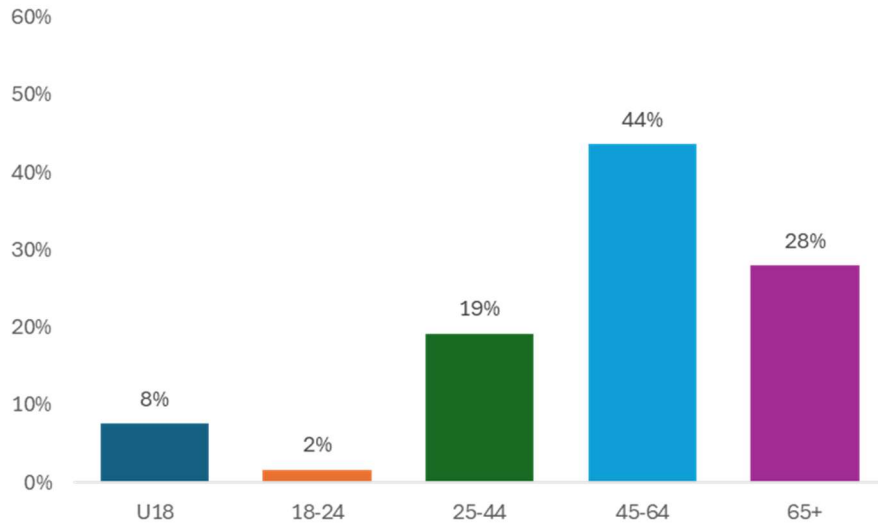
Slightly more than half (54%) of the cruise related spending in Curacao was made by passengers, 39 percent was made by the cruise lines and the port itself, and the remaining 7 percent was made by crew members.



Passenger Demographics

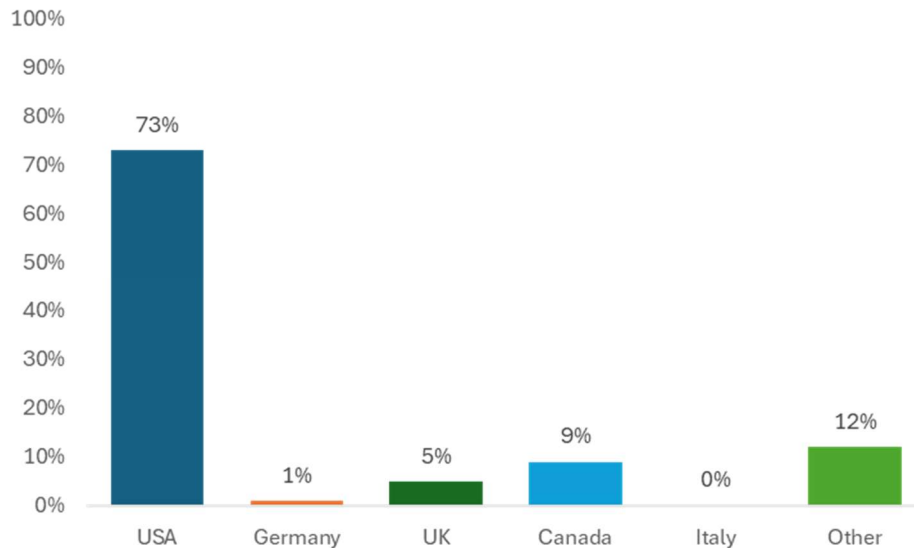
Consistent with the overall industry trends, the average age is down from 60 years old in the last study to 51 years old in this study. About 63 percent of the respondents are between the ages of 25 and 64.

Curacao Chart 7 – Passenger Age Cohorts



Curacao Chart 8 – Passenger Residence

Most (73%) of the responding passengers to Curacao are residents of the US, 9 percent are from Canada.



Dominica

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.⁷⁴ The surveys were undertaken during the eight-month period beginning in October 2023 and ending in May 2024. The surveys were distributed onboard the ships via QR codes, and the guests and crew completed the surveys online. Passengers and crew were only surveyed once during a cruise itinerary.

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 excursions, food & beverages, clothing, etc.;
- visit satisfaction, including shore excursions, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation (passengers only); and
- demographic characteristics, including country of residence, age group, etc.

Combining the expenditure data collected from the passenger and crew surveys with revenue and wage data received directly from the destinations, and destination specific expenditure data by the cruise lines for items such as port fees, provisions and services leads to estimates of the total cruise tourism expenditures for each participating destination.

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

⁷⁴ Surveys were conducted on the ships of the following cruise lines: Aida, 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.

Cruise Tourism Expenditures

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

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

Based on data collected from the Discover Dominica Authority, 308,885 cruise passengers arrived aboard cruise ships during the 2023/2024 cruise year.⁷⁵ Of these, an estimated 254,210 passengers (82%) disembarked and visited Dominica. Utilizing additional data provided by the Discover Dominica Authority and visiting cruise lines, 128,590 crew were aboard the cruise ships and 30 percent, or 39,095 crew, disembarked and visited the destination.

These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **\$20.9** million (\$US) in cruise tourism expenditures in Dominica during the 2023/2024 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Passenger Spending

Per passenger spending estimates were derived from about 525 surveys completed by passengers during the survey period. As shown in **Dominica Chart 1**, each passenger cruise party spent an average of \$137.85. The average spend per cruise party is the sum of the weighted spending in each of the 8 purchase categories. For example, 25 percent of the survey respondents reported spending an average of \$39.10 for food and beverages. Spread across all cruise parties that visited Dominica, this represented an average of \$9.89 per cruise party ($\$39.10 \times 25\% = \9.89). On a per passenger basis, the average total expenditure was \$63.17. This represents the sum of the per cruise party expenditures, \$137.85, divided by the average size of a cruise party in Dominica, 2.2 passengers.

Shore excursions, food & beverages and local crafts & souvenirs account for 72 percent of cruise passenger expenditures in Dominica.

Just over half (58%) of the passengers reported that their cruise party purchased a shore excursion. The effective price of the shore excursion was about \$82 per party to the local economy.

⁷⁵ The 2023/2024 cruise year includes the twelve months beginning in May 2023 and ending in April 2024.

Dominica Chart 1 – Estimated Passenger Spending (\$US), 2023/2024 cruise year⁷⁶

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	\$141.90	57.8%	\$82.03
F&B at Restaurants & Bars	\$39.10	25.3%	\$9.89
Taxis/Ground Transportation	\$66.40	10.6%	\$7.04
Watches & Jewelry	\$93.00	8.1%	\$7.57
Clothing	\$39.70	16.9%	\$6.72
Other Purchases	\$35.30	19.8%	\$6.98
Local Crafts & Souvenirs	\$22.60	29.7%	\$6.71
Retail Purchases of Liquor	\$283.00	3.9%	\$10.92
Avg. Spend per Cruise Party			\$137.85
Average Size of Cruise Party			2.2
Avg. Spend per Passenger Visit			\$63.17
Passenger Onshore Visits			254,210
Total Passenger Expenditures			\$16,057,855

For the entire 2023/2024 cruise year, the estimated 254,210 cruise passengers who disembarked and visited Dominica spent a total of **\$16.1 million** (\$US) in Dominica.

Crew Spending

Crew spending estimates were derived from surveys completed by crew members during the survey period. As shown in **Dominica Chart 2**, each crew member who disembarked the ship and visited Dominica spent an average of \$57.49. Like the passenger spending, the average expenditure per crew member is the sum of the weighted spending in each of the purchase categories.

Expenditures on food and beverages, local crafts & souvenirs and watches & jewelry account for 70 percent of the crew members’ onshore spending.

⁷⁶ The average shore excursion expenditure is a weighted average of the onshore and travel agent/other purchases and the portion of the onboard purchases paid to local tour operators.

For the entire 2023/2024 cruise year, the estimated 39,095 crew who went ashore and visited Dominica spent an just over **\$2.2 million** (\$US).

Dominica Chart 2 – Estimated Crew Spending (\$US), 2023/2024 cruise year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	\$26.50	74.5%	\$19.76
Taxis/Ground Transportation	\$26.20	16.4%	\$4.29
Watches & Jewelry	\$111.30	7.3%	\$8.09
Clothing	\$24.00	18.2%	\$4.36
Other Purchases	\$15.50	20.0%	\$3.11
Shore Excursions	\$32.50	7.3%	\$2.36
Personal Products	\$22.00	9.1%	\$2.00
Local Crafts & Souvenirs	\$40.50	30.9%	\$12.51
Retail Purchases of Liquor	\$27.50	3.6%	\$1.00
Avg. Spend per Crew Ashore			\$57.49
Number of Crew Onshore Visits			39,095
Total Crew Expenditures			\$2,247,433

Cruise Line & Destination Spending

Cruise lines made payments to local businesses for a variety of goods and services, including payments for port fees and taxes, navigation services, utilities and other supplies. Based upon data provided by the FCCA member cruise lines, we estimate that cruise lines were responsible for approximately **\$2.6 million** (\$US) in direct spending in Dominica during the 2023/2024 cruise year.

Economic Contribution of Cruise Tourism Expenditures

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

As shown in **Dominica Chart 3**, the **\$20.9** million in total cruise tourism expenditures in Dominica supported direct employment of 336 residents of Dominica paying \$2.8 million in annual wages. Adding the indirect contribution that results from the spending by those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures supported a total employment contribution of 479 jobs and \$4.2 million in wage income in Dominica during the 2023/2024 cruise year.

Dominica Chart 3 –Total Economic Contribution of Cruise Tourism, 2023/2024 cruise year

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	336	\$2.8
Total Economic Contribution	497	\$4.2

The Wholesale & Retail Trade, and Transportation & Warehousing sectors account for about 75% of the total job impacts.

Passenger Surveys

Dominica Chart 4 shows the major attributes of passenger visits to Dominica as derived from the passenger surveys. Of those who completed the survey:

- 85 percent stated this was their first visit to Dominica.
- Nearly 3 in 5 (56%) of those who went ashore made at least one purchase while ashore other than a tour.
- the typical cruise party consisted of two passengers (Average: 2.2) and spent an average of 4.6 hours ashore.

Dominica Chart 4 – Major Attributes of Passenger Surveys

	Percent
Number Making First Visit	85%
Number Making Any Onshore Purchases:	56%
Average Hours Ashore	4.6
Purchased a Shore Excursion (Tour)	58%
How Purchased Tour:	
Cruise Line	78%
Onshore Tour Operator	8%
Other	15%
Tour Type:	
Historical/Cultural	23%
Beach Day	12%
Land-Based	37%
Water-Based	18%
Other	22%
Reason for No Tour	
Prefer to Tour on Own	61%
Poor Value	29%
Didn't Like Any	8%
Too Similar to Other Dest	3%
Weather	2%
Prefer to Stay on Ship	1%
Other	15%

- Just over than half (58%) of the passengers that went ashore purchased a shore excursion. Seventy-eight percent of passengers who purchased a tour did so through their cruise line, 8 percent purchased their tour on shore and 15 percent purchased their tour through some other means (travel agent, travel site, etc.).
- The types of tours were fairly balanced across Dominica, with 37 percent opting for “land-based activities”, and 23 percent were to “historical sites or museums”.
- The key reasons why some did not purchase a tour was they prefer to tour on their own (61%). An additional 29 percent simply felt the excursions were a poor value.

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Dominica Chart 5**. 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.

- Cruise passengers were very satisfied with their “overall visit” to Dominica (7.5) and the visit “meeting expectations” (7.3).
- “Guided Tours” (or Shore Excursions) received a ‘very satisfied’ mean score of 8.1. Additionally, the high ratings in “knowledge of guide” (8.3), and “value of tour” (7.5) indicates visitors to Dominica were very satisfied with their onshore excursions.

Dominica Chart 5 – Passenger Visit Satisfaction*

Visit Attributes	2024 Mean Score
Overall Visit	7.5
Visit Met Expectations	7.3
Likelihood of a Return Visit	3.7
Likelihood of Recommending	4.8
Initial Shoreside Welcome	7.6
Overall Guided Tour	8.1
Knowledge of Guide	8.3
Value of Tour	7.5
Historic Sites/Museums	7.3
Variety of Things to See and Do	7.2
Friendliness of Residents	8.2
Overall Shopping Experience	6.6
Courtesy of Employees	8.2
Overall Prices	6.9
Taxis/Local Transportation	7.5

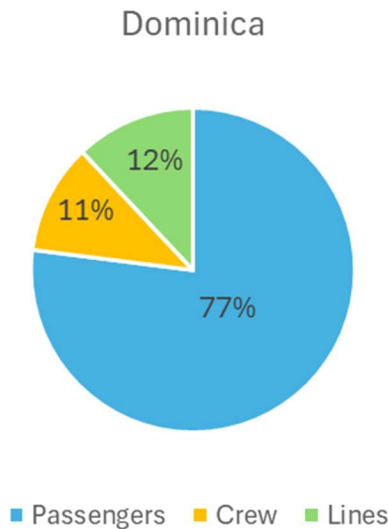
* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows:
 Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3;
 Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Passenger interactions with residents and store employees were very positive as the mean scores for “friendliness of residents” (8.2) and “courtesy of employees” (8.2) were high.
- Passengers were also very satisfied with the “initial onshore welcome” (7.6), a “variety of things to see and do” (7.2) and the “taxis/transportation” on the island (7.5).
- As was observed in every other destination, Dominica scored lowest on passengers saying they are “likely to return for a land-based visit” (3.7) and their “likelihood of recommending to a friend” (4.8).

Dominica Chart 6 – Overall Spending

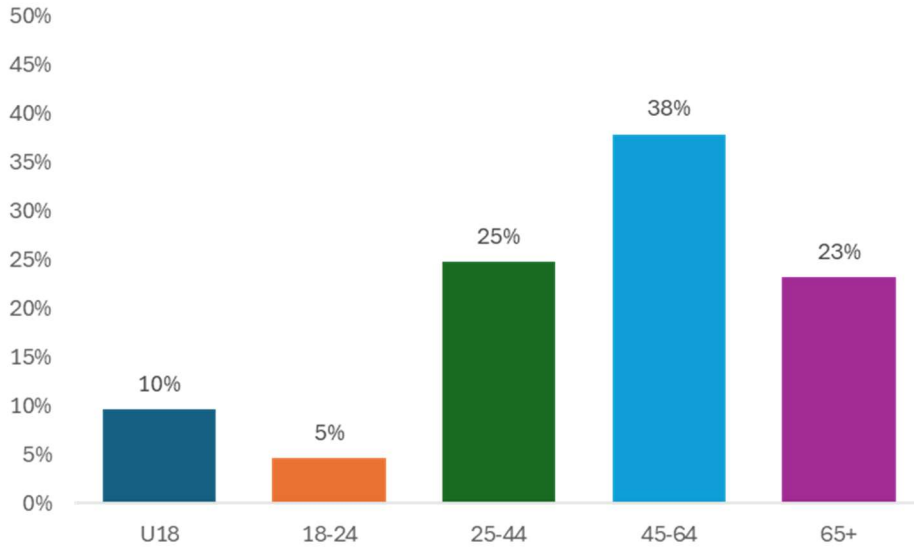
More than 3 in 4 (77%) of the cruise related spending in Dominica was made by passengers, 12 percent was made by the cruise lines, and the remaining 11 percent was made by crew members.



Passenger Demographics

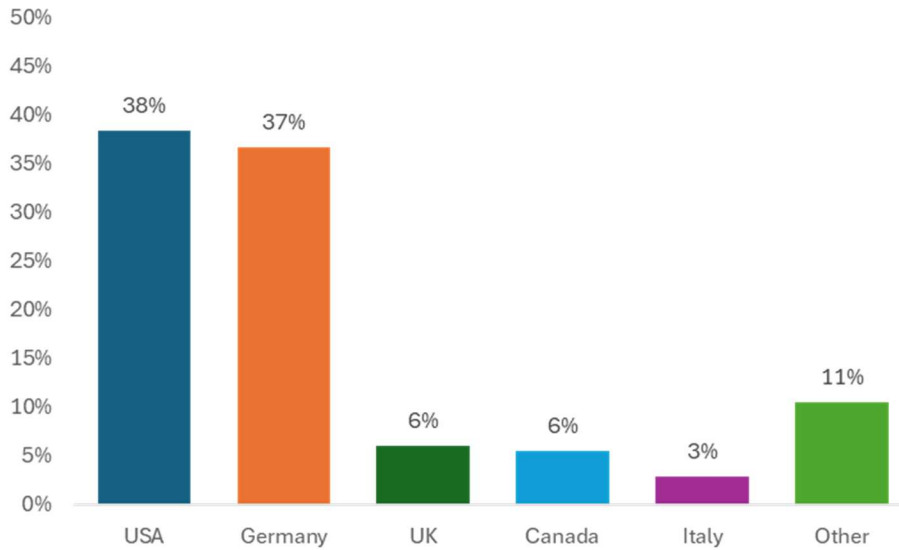
The average age of respondents in this study for Dominica is 47 years old. About 63 percent of the respondents are between the ages of 25 and 64.

Dominica Chart 7 – Passenger Age Cohorts



Dominica Chart 8 – Passenger Residence

An equal percent of responding passengers to Dominica are residents of the US (38%) or Germany (37%).



Grenada

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.⁷⁷ The surveys were undertaken during the eight-month period beginning in October 2023 and ending in May 2024. The surveys were distributed onboard the ships via QR codes, and the guests and crew completed the surveys online. Passengers and crew were only surveyed once during a cruise itinerary.

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 excursions, food & beverages, clothing, etc.;
- visit satisfaction, including shore excursions, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation (passengers only); and
- demographic characteristics, including country of residence, age group, etc.

Combining the expenditure data collected from the passenger and crew surveys with revenue and wage data received directly from the destinations, and destination specific expenditure data by the cruise lines for items such as port fees, provisions and services leads to estimates of the total cruise tourism expenditures for each participating destination.

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

⁷⁷ Surveys were conducted on the ships of the following cruise lines: Aida, 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.

Cruise Tourism Expenditures

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

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

Based on data collected from the Grenada Tourism Authority, 298,245 cruise passengers arrived aboard cruise ships during the 2023/2024 cruise year.⁷⁸ This is down 13 percent from the last study in 2017/2018. Of these, an estimated 257,385 passengers (86%) disembarked and visited Grenada. Utilizing additional data provided by the Tourism Authority and visiting cruise lines, 118,840 crew were aboard the cruise ships and an estimated 30 percent, or 36,130 crew, disembarked and visited the destination.

These passenger and crew visits along with additional expenditures by the cruise lines generated nearly **\$22.4** million (\$US) in cruise tourism expenditures in Grenada during the 2023/2024 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Passenger Spending

Per passenger spending estimates were derived from nearly 600 surveys completed by passengers during the survey period. As shown in **Grenada Chart 1**, each passenger cruise party spent an average of \$130.22. The average spend per cruise party is the sum of the weighted spending in each of the 8 purchase categories. For example, 26 percent of the survey respondents reported spending an average of \$50.70 for food and beverages. Spread across all cruise parties that visited Grenada, this represented an average of \$13.24 per cruise party ($\$50.70 \times 26\% = \13.24). On a per passenger basis, the average total expenditure was \$62.83. This represents the sum of the per cruise party expenditures, \$130.22, divided by the average size of a cruise party in Grenada, 2.1 passengers.

Shore excursions and F&B accounted for 53 percent of Cruise passenger onshore expenditures in Grenada.

⁷⁸ The 2023/2024 cruise year includes the twelve months beginning in May 2023 and ending in April 2024.

Just over half (55%) of the passengers reported that their cruise party purchased a shore excursion. The effective price of the shore excursion was about \$59 per party to the local economy.

Grenada Chart 1 – Estimated Passenger Spending (\$US), 2023/2024 cruise year⁷⁹

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	\$107.60	54.5%	\$58.67
F&B at Restaurants & Bars	\$50.70	26.1%	\$13.24
Taxis/Ground Transportation	\$45.90	17.8%	\$8.15
Watches & Jewelry	\$369.00	2.8%	\$10.35
Clothing	\$50.40	20.5%	\$10.33
Other Purchases	\$46.50	22.8%	\$10.61
Local Crafts & Souvenirs	\$24.60	37.4%	\$9.19
Retail Purchases of Liquor	\$28.30	9.5%	\$2.69
Chocolates & Spices	\$36.20	19.3%	\$7.00
Avg. Spend per Cruise Party			\$130.22
Average Size of Cruise Party			2.1
Avg. Spend per Passenger Visit			\$62.83
Passenger Onshore Visits			257,385
Total Passenger Expenditures			\$16,172,563

For the entire 2023/2024 cruise year, the estimated 257,385 cruise passengers who disembarked and visited Grenada spent a total of **\$16.2 million** (\$US) in Grenada.

Crew Spending

Crew spending estimates were derived from nearly 400 surveys completed by crew members during the survey period. As shown in **Grenada Chart 2**, each crew member who disembarked the ship and visited Grenada spent an average of \$49.46. Like the passenger spending, the average expenditure per crew member is the sum of the weighted spending in each of the purchase categories.

Expenditures on food and beverages, watches & jewelry, and local crafts & souvenirs accounted for 53 percent of the crew members' onshore spending.

⁷⁹ The average shore excursion expenditure is a weighted average of the onshore and travel agent/other purchases and the portion of the onboard purchases paid to local tour operators.

For the entire 2023/2024 cruise year, the estimated 36,130 crew who went ashore and visited Grenada spent an estimated total of **\$1.8 million** (\$US).

Grenada Chart 2 – Estimated Crew Spending (\$US), 2023/2024 cruise year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	\$24.60	61.0%	\$14.98
Taxis/Ground Transportation	\$22.30	15.2%	\$3.38
Watches & Jewelry	\$213.90	2.7%	\$5.80
Clothing	\$45.00	10.3%	\$4.63
Other Purchases	\$43.20	24.7%	\$10.64
Shore Excursions	\$68.80	5.7%	\$3.92
Personal Products	\$18.30	1.9%	\$0.35
Local Crafts & Souvenirs	\$22.40	23.3%	\$5.22
Retail Purchases of Liquor	\$33.30	1.6%	\$0.54
Avg. Spend per Crew Ashore			\$49.46
Number of Crew Onshore Visits			36,130
Total Crew Expenditures			\$1,786,719

Cruise Line Spending

Cruise lines made payments to local businesses for a variety of goods and services, including payments for port fees and taxes, navigation services, utilities and other supplies. Based upon data provided by the FCCA member cruise lines and the destination, we estimate that cruise lines were responsible for approximately **\$4.5 million** (\$US) in direct spending in Grenada during the 2023/2024 cruise year.

Economic Contribution of Cruise Tourism Expenditures

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

As shown in **Grenada Chart 3**, the **\$22.4** million in total cruise tourism expenditures in Grenada supported direct employment of 392 residents of Grenada paying \$3.3 million in annual wages. Adding the indirect contribution that results from the spending by those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures supported a total employment contribution of 604 jobs and \$5.1 million in wage income in Grenada during the 2023/2024 cruise year.

Grenada Chart 3 –Total Economic Contribution of Cruise Tourism, 2023/2024 cruise year

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	392	\$3.3
Total Economic Contribution	604	\$5.1

The Transportation & Warehousing, and Wholesale & Retail Trade sectors account for about 74% of the total job impacts.

Passenger Surveys

Grenada Chart 4 shows the major attributes of passenger visits to Grenada as derived from the passenger surveys. Of those who completed the survey:

- nearly three-quarters (74%) stated this was their first visit to Grenada.
- nearly three-quarters (74%) of those who went ashore, made at least one purchase while ashore other than a tour.
- the typical cruise party consisted of two passengers (average: 2.1) and spent an average of 4.3 hours ashore.

Grenada Chart 4 – Major Attributes of Passenger Surveys

	Percent
Number Making First Visit	74%
Number Making Any Onshore Purchases:	74%
Average Hours Ashore	4.3
Purchased a Shore Excursion (Tour)	55%
How Purchased Tour:	
Cruise Line	68%
Onshore Tour Operator	4%
Other	28%
Tour Type:	
Historical/Cultural	54%
Beach Day	17%
Land-Based	18%
Water Based	13%
Other	8%
Reason for No Tour	
Prefer to Tour on Own	66%
Poor Value	20%
Didn't Like Any	9%
Too Similar to Other Dest.	8%
Weather	0%
Prefer to Stay on Ship	0%
Other	14%

- More than half (55%) of the passengers that went ashore purchased a shore excursion. Sixty-eight percent of passengers who purchased a tour did so through their cruise line, 4 percent purchased their tour on shore and 28 percent purchased their tour through some other means (travel agent, travel site, etc.).
- Half (54%) of the tours purchased were visits to “historical or cultural sites”, while an equal percentage were “beach day activities” (17%), or “land-based activities” (18%).
- The key reasons why some did not purchase a tour include they prefer to tour on their own (66%); or they believe the excursions are a poor value (20%)

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Grenada Chart 5**. 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.

- Cruise passengers were very satisfied with their “overall visit” to Grenada (7.6) and terms of the visit “meeting expectations” (7.4).
- “Guided Tours” (or Shore Excursions) received a ‘very satisfied’ mean score of 8.6; Additionally, the high ratings in “knowledge of guide” (8.7) and “value of tour” (8.1) indicate visitors to Grenada were very satisfied with their onshore excursions.

Grenada Chart 5 – Passenger Visit Satisfaction*

Visit Attributes	2024 Mean Score	2018 Mean Score
Overall Visit	7.6	7.1
Visit Met Expectations	7.4	6.5
Likelihood of a Return Visit	5.1	3.9
Likelihood of Recommending	5.5	4.6
Initial Shoreside Welcome	7.9	7.5
Overall Guided Tour	8.6	8.1
Knowledge of Guide	8.7	8.4
Value of Your	8.1	7.7
Historic Sites/Museums	7.5	7.1
Variety of Things to See and Do	7.6	6.6
Friendliness of Residents	8.0	7.7
Overall Shopping Experience	7.4	6.8
Courtesy of Employees	8.1	7.7
Overall Prices	7.1	6.7
Taxis/Local Transportation	8.0	7.5

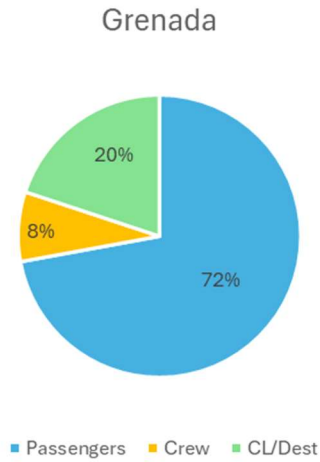
* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows:
 Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3;
 Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Passenger interactions with residents and store employees were very positive as the mean scores for “friendliness of residents” (8.0) and “courtesy of employees” (8.1) were high.
- Passengers were also very satisfied with a “variety of things to see and do” (7.6) and the “overall shopping experience” (7.4). They recorded similar satisfaction ratings for satisfaction with the “overall prices” (7.1).
- Grenada scored lowest passengers saying say they are “likely to return for a land-based visit” (5.1), and their “likelihood of recommending to a friend” (5.5), however, both ratings were in the ‘somewhat likely’ range.

Grenada Chart 6 – Overall Spending

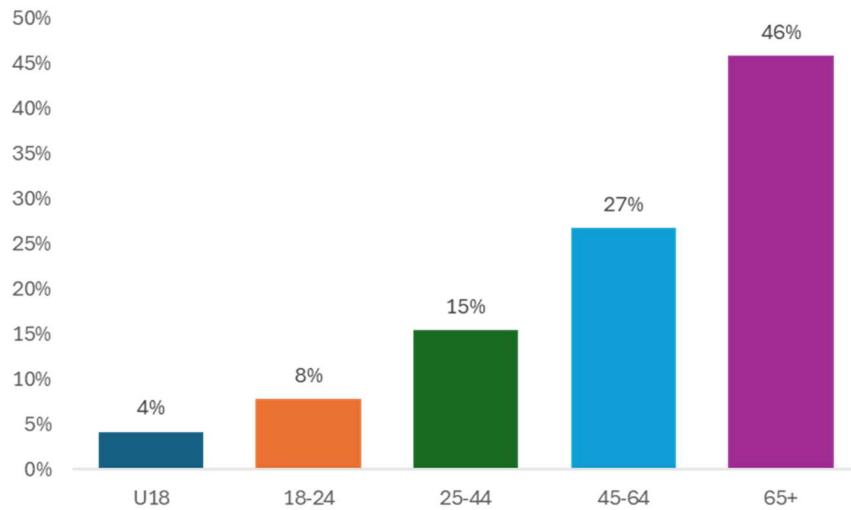
Overall, 72 percent of the cruise related spending in Grenada was made by passengers, 20 percent was made by the cruise lines, and the remaining 8 percent was spending made by crew members.



Passenger Demographics

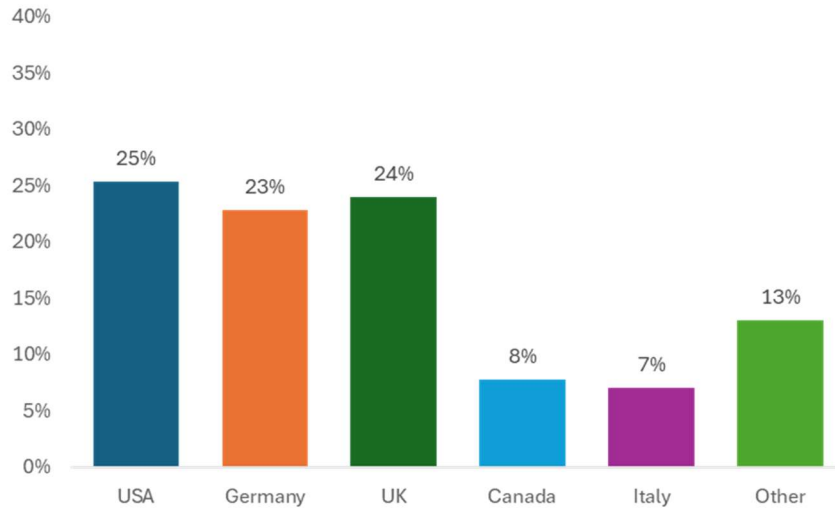
Consistent with the overall industry trends, the average age is down significantly from 61 years old in the last study to 53 years old in this study. About 42 percent of the respondents are between the ages of 45 and 64.

Grenada Chart 7 – Passenger Age Cohorts



Passengers to Grenada in this study are equally as likely to be from the US (25%) Germany (23%) or the UK (24%).

Grenada Chart 8 – Passenger Residence



Martinique

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.⁸⁰ The surveys were undertaken during the eight-month period beginning in October 2023 and ending in May 2024. The surveys were distributed onboard the ships via QR codes, and the guests and crew completed the surveys online. Passengers and crew were only surveyed once during a cruise itinerary.

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 excursions, food & beverages, clothing, etc.;
- visit satisfaction, including shore excursions, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation (passengers only); and
- demographic characteristics, including country of residence, age group, etc.

Combining the expenditure data collected from the passenger and crew surveys with revenue and wage data received directly from the destinations, and destination specific expenditure data by the cruise lines for items such as port fees, provisions and services leads to estimates of the total cruise tourism expenditures for each participating destination.

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

⁸⁰ Surveys were conducted on the ships of the following cruise lines: Aida, 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.

Cruise Tourism Expenditures

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

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

Based on data collected from the Martinique Tourism Authority, a total of 445,780 cruise passengers arrived aboard cruise ships during the 2023/2024 cruise year.⁸¹ Of these, 290,915 transit passengers arrived and an estimated 242,040 passengers (83%) disembarked and visited Martinique. There were also an estimated 154,865 passengers who embarked on their cruise from Martinique. Utilizing additional data provided by the Martinique Tourism Authority and visiting cruise lines, 123,590 crew were aboard the cruise ships and an estimated 30 percent, or 37,570 disembarked and visited the destination. Overall, transit passenger arrivals are down 45 percent, crew arrivals are down 47 percent, while embarking passengers are up 140 percent over the 2017/18 study. Overall, Martinique experienced a decrease of about 25 percent in overall passenger volume when compared with the 2017/18 study.

These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **\$42.2** million (\$US) in cruise tourism expenditures in Martinique during the 2023/2024 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Passenger Spending

Per passenger spending estimates were derived from about 475 transit surveys completed by passengers during the survey period. As shown in **Martinique Chart 1a**, each transit passenger cruise party spent an average of \$110.76. The average spend per cruise party is the sum of the weighted spending in each of the 8 purchase categories. For example, 34 percent of the survey respondents reported spending an average of \$40.90 for food and beverages. Spread across all cruise parties that visited Martinique, this represented an average of \$13.92 per cruise party ($\$40.90 \times 34\% = \13.92). On a per passenger basis, the average total expenditure was \$54.52. This represents the sum of the per cruise party expenditures, \$110.76, divided by the average size of a cruise party in Martinique, 2.0 passengers.

⁸¹ The 2023/2024 cruise year includes the twelve months beginning in May 2023 and ending in April 2024.

Shore excursions, clothing and food & beverages accounted for 79 percent of cruise passenger expenditures in Martinique.

About half (48%) of the passengers reported that their cruise party purchased a shore excursion. The effective price of the shore excursion was about \$64 per party to the local economy.

Martinique Chart 1a – Estimated Transit Passenger Spending (\$US), 2023/2024 cruise year⁸²

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	\$135.00	47.6%	\$64.19
F&B at Restaurants & Bars	\$40.90	34.1%	\$13.92
Taxis/Ground Transportation	\$50.80	11.1%	\$5.63
Watches & Jewelry	\$49.10	3.7%	\$1.82
Clothing	\$44.10	22.3%	\$9.82
Other Purchases	\$39.00	14.3%	\$5.58
Local Crafts & Souvenirs	\$25.50	23.9%	\$6.09
Retail Purchases of Liquor	\$46.70	7.9%	\$3.71
Avg. Spend per Cruise Party			\$110.76
Average Size of Cruise Party			2.0
Avg. Spend per Passenger Visit			\$54.52
Passenger Onshore Visits			242,040
Total Passenger Expenditures			\$13,197,138

For the entire 2023/2024 cruise year, the estimated 242,040 transit passengers who disembarked and visited Martinique spent a total of **\$13.2 million** (\$US) in Martinique.

⁸² The average shore excursion expenditure is a weighted average of the onshore and travel agent/other purchases and the portion of the onboard purchases paid to local tour operators.

Overall, about 10 percent of passengers who embarked on their cruise from Martinique reported spending at least one night in Martinique. Of those who spent an overnight, the average amount spent for accommodations in Martinique was \$355. Overall, the weighted spend per embarking party was \$221.39. On a per passenger basis this equates to \$110.14.

Martinique Chart 1b – Estimated Embark Passenger Spending (\$US), 2023/2024 cruise year⁸³

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Accommodations	\$354.80	9.6%	\$34.06
F&B at Restaurants & Bars	\$33.40	56.1%	\$18.71
Taxis/Ground Transportation	\$41.50	56.1%	\$23.30
Watches & Jewelry	\$78.90	4.2%	\$3.32
Clothing	\$68.40	26.4%	\$18.06
Other Purchases	\$103.30	28.2%	\$29.14
Shore Excursions	\$189.50	36.3%	\$68.78
Local Crafts & Souvenirs	\$38.20	41.6%	\$15.87
Retail Purchases of Liquor	\$65.50	15.5%	\$10.14
Avg. Spend per Homeport Cruise Party			\$221.39
Average Size of a Party			2.0
Avg. Spend per Homeport Passenger			\$110.14
Number of Homeport Passengers			154,865
Total Homeport Passenger Expenditures			\$17,057,639

For the entire 2023/2024 cruise year, the 154,865 embarking transit passengers spent a total of **\$17.1 million** (\$US) in Martinique.

Crew Spending

Crew spending estimates were derived from surveys completed by crew members during the survey period. As shown in **Martinique Chart 2**, each crew member who disembarked the ship and visited Martinique spent an average of \$44.31. Like the passenger spending, the average expenditure per crew member is the sum of the weighted spending in each of the purchase categories.

Expenditures on food and beverages, clothing, and other purchases accounted for 77 percent of the crew members’ onshore spending.

⁸³ The average shore excursion expenditure is a weighted average of the onshore and travel agent/other purchases and the portion of the onboard purchases paid to local tour operators.

For the entire 2023/2024 cruise year, the estimated 37,570 crew who went ashore and visited Martinique spent nearly **\$1.7 million** (\$US).

Martinique Chart 2 – Estimated Crew Spending (\$US), 2023/2024 cruise year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	\$25.70	65.0%	\$16.73
Taxis/Ground Transportation	\$23.30	11.7%	\$2.72
Watches & Jewelry	\$18.30	3.3%	\$0.61
Clothing	\$53.00	12.5%	\$6.63
Other Purchases	\$50.40	21.7%	\$10.92
Shore Excursions	\$11.60	6.7%	\$0.78
Personal Products	\$34.00	4.2%	\$1.42
Local Crafts & Souvenirs	\$11.00	27.5%	\$3.03
Retail Purchases of Liquor	\$35.80	4.2%	\$1.49
Avg. Spend per Crew Ashore			\$44.31
Number of Crew Onshore Visits			37,570
Total Crew Expenditures			\$1,664,711

Cruise Line Spending

Cruise lines made payments to local businesses for a variety of goods and services, including payments for port fees and taxes, navigation services, utilities and other supplies. The destination itself had employees and employee wages related to its cruise operations. Based upon data provided by the FCCA member cruise lines and the destination, we estimate that the cruise lines and Martinique itself were responsible for approximately **\$10.3 million** (\$US) in direct spending in Martinique during the 2023/2024 cruise year.

Economic Contribution of Cruise Tourism Expenditures

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

As shown in **Martinique Chart 3**, the **\$42.2** million in total cruise tourism expenditures in Martinique supported direct employment of 583 residents of Martinique paying \$5.3 million in annual wages. Adding the indirect contribution that results from the spending by those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures supported a total employment contribution of 901 jobs and \$8.1 million in wage income in Martinique during the 2023/2024 cruise year.

Martinique Chart 3 –Total Economic Contribution of Cruise Tourism, 2023/2024 cruise year

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	583	\$5.3
Total Economic Contribution	901	\$8.1

The Wholesale & Retail Trade, Lodging & Food Services, and Transportation & Warehousing sectors account for about 85% of the total job impacts.

Passenger Surveys

Martinique Chart 4 shows the major attributes of passenger visits to Martinique as derived from the passenger surveys. Of those who completed the survey:

- 65 percent stated this was their first visit to Martinique .
- 3 in 5 (61%) of those who went ashore made at least one purchase while ashore other than a tour.
- the typical cruise party consisted of two passengers (Average: 2.0) and spent an average of 4.5 hours ashore.

Martinique Chart 4 – Major Attributes of Passenger Surveys

	Percent
Number Making First Visit	65%
Number Making Any Onshore Purchases:	61%
Average Hours Ashore	4.5
Purchased a Shore Excursion (Tour)	48%
How Purchased Tour:	
Cruise Line	77%
Onshore Tour Operator	4%
Other	19%
Tour Type:	
Historical/Cultural	47%
Beach Day	19%
Land-Based	17%
Water-Based	11%
Other	12%
Reason for No Tour	
Prefer to Tour on Own	60%
Poor Value	16%
Didn't Like Any	16%
Too Similar to Other Dest	6%
Weather	1%
Prefer to Stay on Ship	2%
Other	21%

- About half (48%) of the passengers that went ashore purchased a shore excursion. Seventy-seven percent of passengers who purchased a tour did so through their cruise line, 4 percent purchased their tour on shore and 19 percent purchased their tour through some other means (travel agent, travel site, etc.).
- About half (47%) of the tours purchased were visits to “historical or cultural sites”, while 1 in 5 were “beach day activities” (19%).
- The key reasons why some did not purchase a tour was they prefer to tour on their own (60%). A similar percent (16%) did not like an excursions, or felt the excursions were a poor value.

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Martinique Chart 5**. 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 purposes, the satisfaction data from the prior study is also shown in the chart below.

- Cruise passengers were very satisfied with their “overall visit” to Martinique (7.4) and the visit “meeting expectations” (7.1).
- “Guided Tours” (or Shore Excursions) received a ‘very satisfied’ mean score of 7.9; Additionally, the high ratings in “knowledge of guide” (8.4), and “value of tours” (7.2) indicates visitors to Martinique were very satisfied with their onshore excursions.

Martinique Chart 5 – Passenger Visit Satisfaction*

Visit Attributes	2024 Mean Score	2018 Mean Score
Overall Visit	7.4	7.0
Visit Met Expectations	7.1	6.4
Likelihood of a Return Visit	4.8	3.8
Likelihood of Recommending	5.3	4.5
Initial Shoreside Welcome	7.6	7.5
Overall Guided Tour	7.9	7.9
Knowledge of Guide	8.4	8.5
Value of Tour	7.2	7.5
Historic Sites/Museums	7.5	7.2
Variety of Things to See and Do	7.1	6.5
Friendliness of Residents	7.8	7.1
Overall Shopping Experience	6.8	6.7
Courtesy of Employees	7.9	7.3
Overall Prices	6.5	6.3
Taxis/Local Transportation	7.0	6.9

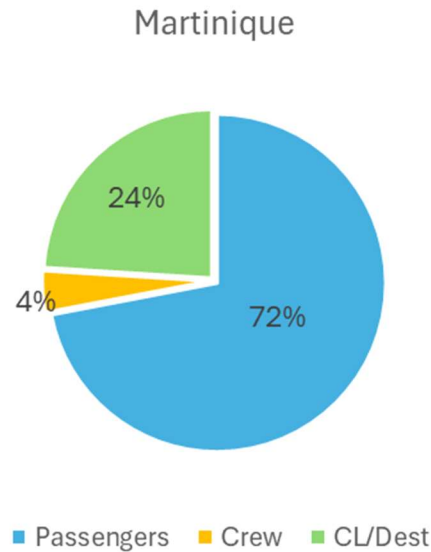
* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows:
 Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3;
 Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Passenger interactions with residents and store employees were very positive as the mean scores for “friendliness of residents” (7.8) and “courtesy of employees” (7.9) were high.
- Passengers were also very satisfied with the “Historic sites” (7.5), and a “variety of things to see and do” (7.1). They recorded similar satisfaction ratings for the “taxi/transportation” (7.0).
- Similar to all other destinations, Martinique scored lowest passengers saying they are “likely to return for a land-based visit” (4.8), and their “likelihood of recommending to a friend” (5.3), however, both ratings are similar to the ratings of other destinations.

Martinique Chart 6 – Overall Spending

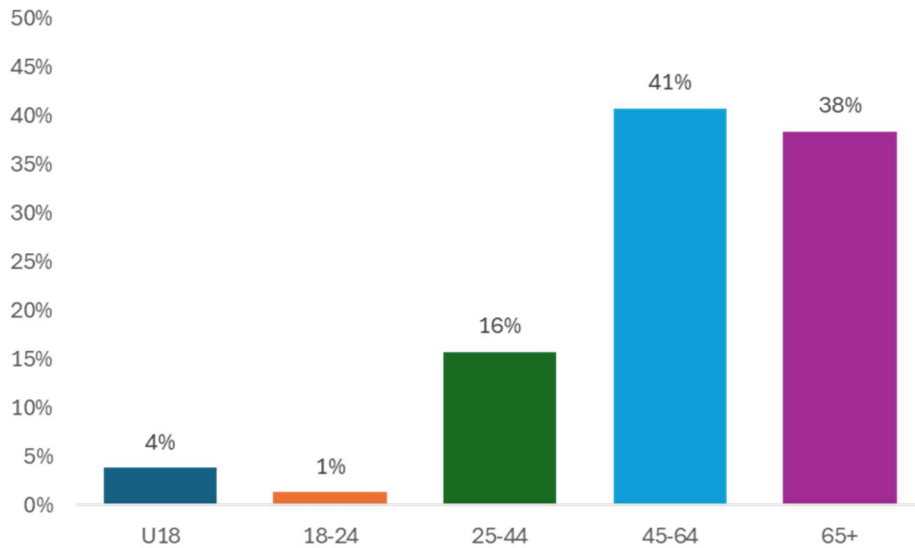
Nearly 3 in 4 (72%) of the cruise related spending in Martinique was made by passengers, 24 percent was made by the cruise lines and Martinique itself, and the remaining 4 percent was spending made by crew members.



Passenger Demographics

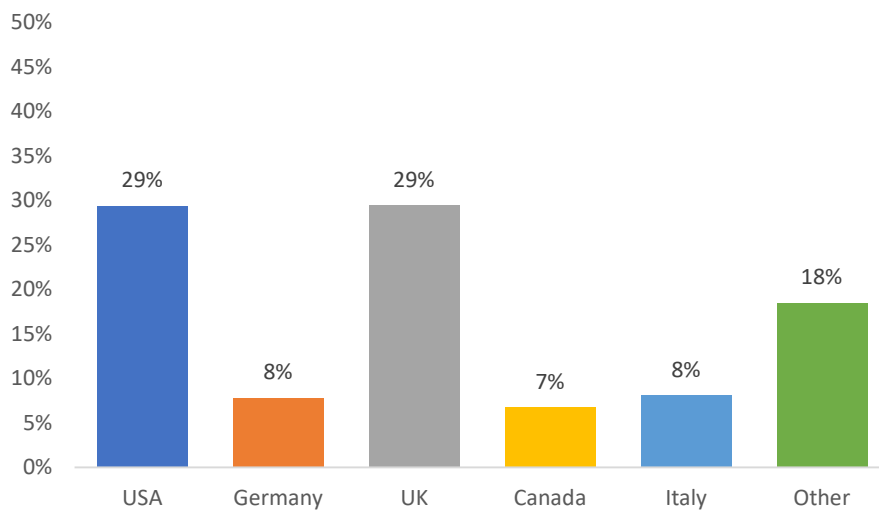
Consistent with the overall industry trends, the average age is down from 56 years old in the last study to 51 years old in this study. About 57 percent of the respondents are between the ages of 25 and 64.

Martinique Chart 7 – Passenger Age Cohorts



Martinique Chart 8 – Passenger Residence

Responding passengers in Martinique are spread across a range of countries, with an equal percentage being from the US (29%) and the UK (29%).



St. Lucia

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.⁸⁴ The surveys were undertaken during the eight-month period beginning in October 2023 and ending in May 2024. The surveys were distributed onboard the ships via QR codes, and the guests and crew completed the surveys online. Passengers and crew were only surveyed once during a cruise itinerary.

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 excursions, food & beverages, clothing, etc.;
- visit satisfaction, including shore excursions, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation (passengers only); and
- demographic characteristics, including country of residence, age group, etc.

Combining the expenditure data collected from the passenger and crew surveys with revenue and wage data received directly from the destinations, and destination specific expenditure data by the cruise lines for items such as port fees, provisions and services leads to estimates of the total cruise tourism expenditures for each participating destination.

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

⁸⁴ Surveys were conducted on the ships of the following cruise lines: Aida, 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.

Cruise Tourism Expenditures

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

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

Based on data collected from industry sources and available statistics, 757,795 cruise passengers arrived aboard cruise ships during the 2023/2024 cruise year.⁸⁵ Of these, an estimated 646,400 passengers (85%) disembarked and visited St. Lucia. Utilizing additional industry data and visiting cruise lines, 450,735 crew were aboard the cruise ships and 30 percent, or 137,025 crew, disembarked and visited the destination. Passenger arrivals are up approximately 13 percent from the last study in 2017/18.

These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **\$72.7** million (\$US) in cruise tourism expenditures in St. Lucia during the 2023/2024 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Passenger Spending

Per passenger spending estimates were derived from more than 500 surveys completed by passengers during the survey period. As shown in **St. Lucia Chart 1**, each passenger cruise party spent an average of \$171.90. The average spend per cruise party is the sum of the weighted spending in each of the 8 purchase categories. For example, 24 percent of the survey respondents reported spending an average of \$37.10 for food and beverages. Spread across all cruise parties that visited St. Lucia, this represented an average of \$8.74 per cruise party ($\$37.10 \times 24\% = \8.74). On a per passenger basis, the average total expenditure was \$84.95. This represents the sum of the per cruise party expenditures, \$171.90, divided by the average size of a cruise party in St. Lucia, 2.0 passengers.

Shore excursions, watches & jewelry, and clothing account for 81 percent of cruise passenger expenditures in St. Lucia.

⁸⁵ The 2023/2024 cruise year includes the twelve months beginning in May 2023 and ending in April 2024.

Seven in ten (71%) of the passengers reported that their cruise party purchased a shore excursion. The effective price of the shore excursion was about \$115 per party to the local economy.

St. Lucia Chart 1 – Estimated Passenger Spending (\$US), 2023/2024 cruise year⁸⁶

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	\$162.40	70.8%	\$115.08
F&B at Restaurants & Bars	\$37.10	23.6%	\$8.74
Taxis/Ground Transportation	\$43.50	7.1%	\$3.09
Watches & Jewelry	\$277.70	5.5%	\$15.16
Clothing	\$48.60	20.2%	\$9.80
Other Purchases	\$48.80	14.5%	\$7.09
Local Crafts & Souvenirs	\$33.20	28.4%	\$9.43
Retail Purchases of Liquor	\$62.90	5.6%	\$3.50
Avg. Spend per Cruise Party			\$171.90
Average Size of Cruise Party			2.0
Avg. Spend per Passenger Visit			\$84.95
Passenger Onshore Visits			646,400
Total Passenger Expenditures			\$54,908,483

For the entire 2023/2024 cruise year, the estimated 646,400 cruise passengers who disembarked and visited St. Lucia spent a total of **\$54.9 million** (\$US) in St. Lucia.

Crew Spending

Crew spending estimates were derived from more than 350 surveys completed by crew members during the survey period. As shown in **St. Lucia Chart 2**, each crew member who disembarked the ship and visited St. Lucia spent an average of \$69.31. Like the passenger spending, the average expenditure per crew member is the sum of the weighted spending in each of the purchase categories.

Crew expenditures were spread across the various spending categories.

⁸⁶ The average shore excursion expenditure is a weighted average of the onshore and travel agent/other purchases and the portion of the onboard purchases paid to local tour operators.

For the entire 2023/2024 cruise year, the estimated 137,025 crew who went ashore and visited St. Lucia spent an estimated total of **\$9.5 million** (\$US).

St. Lucia Chart 2 – Estimated Crew Spending (\$US), 2023/2024 cruise year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	\$26.20	48.3%	\$12.65
Taxis/Ground Transportation	\$33.20	23.6%	\$7.85
Watches & Jewelry	\$188.30	3.0%	\$5.57
Clothing	\$37.10	19.7%	\$7.32
Other Purchases	\$58.30	35.0%	\$20.40
Shore Excursions	\$86.40	8.9%	\$7.66
Personal Products	\$36.90	3.9%	\$1.45
Local Crafts & Souvenirs	\$17.90	30.5%	\$5.46
Retail Purchases of Liquor	\$27.40	3.4%	\$0.95
Avg. Spend per Crew Ashore			\$69.31
Number of Crew Onshore Visits			137,025
Total Crew Expenditures			\$9,497,132

Cruise Line & Destination Spending

Cruise lines made payments to local businesses for a variety of goods and services, including payments for port fees and taxes, navigation services, utilities and other supplies. Based upon data provided by the FCCA member cruise lines, we estimate that cruise lines were responsible for approximately **\$8.3 million** (\$US) in direct spending in St. Lucia during the 2023/2024 cruise year.

Economic Contribution of Cruise Tourism Expenditures

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

As shown in **St. Lucia Chart 3**, the **\$72.7** million in total cruise tourism expenditures in St. Lucia supported direct employment of 1,183 residents of St. Lucia paying \$10.5 million in annual wages. Adding the indirect contribution that results from the spending by those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures supported a total employment contribution of 1,754 jobs and \$15.8 million in wage income in St. Lucia during the 2023/2024 cruise year.

St. Lucia Chart 3 – Total Economic Contribution of Cruise Tourism, 2023/2024 cruise year

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	1,183	\$10.5
Total Economic Contribution	1,754	\$15.8

The Wholesale & Retail Trade, Lodging & Food Services, and Transportation & Warehousing sectors account for about 80% of the total job impacts.

Passenger Surveys

St. Lucia Chart 4 shows the major attributes of passenger visits to St. Lucia as derived from the passenger surveys. Of those who completed the survey:

- 63 percent stated this was their first visit to St. Lucia.
- About 3 in 5 (57%) of those who went ashore made at least one purchase while ashore other than a tour.
- the typical cruise party consisted of two passengers (Average: 2.0) and spent an average of 5.0 hours ashore.

St. Lucia Chart 4 – Major Attributes of Passenger Surveys

	Percent
Number Making First Visit	63%
Number Making Any Onshore Purchases:	57%
Average Hours Ashore	5.0
Purchased a Shore Excursion (Tour)	71%
How Purchased Tour:	
Cruise Line	74%
Onshore Tour Operator	10%
Other	16%
Tour Type:	
Historical/Cultural	23%
Beach Day	16%
Land-Based	29%
Water-Based	32%
Other	16%
Reason for No Tour	
Prefer to Tour on Own	52%
Poor Value	19%
Didn't Like Any	14%
Too Similar to Other Dest	6%
Weather	2%
Prefer to Stay on Ship	1%
Other	18%

- More than two-thirds (71%) of the passengers that went ashore purchased a shore excursion. Seventy-four percent of passengers who purchased a tour did so through their cruise line, 10 percent purchased their tour on shore and 16 percent purchased their tour through some other means (travel agent, travel site, etc.).
- The most frequently purchased tours were “water-based activities” (32%), “land-based activities” (29%) and or to “historical or cultural sites” (23%).
- The key reasons why some did not purchase a tour include they prefer to tour on their own (52%), or they thought the excursions were a poor value (19%).

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **St. Lucia Chart 5**. 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 purposes, the satisfaction data from the prior study is also shown in the chart below.

- Cruise passengers were very satisfied with their “overall visit” to St. Lucia (7.5) and the visit “meeting expectations” (7.2).
- “Guided Tours” (or Shore Excursions) received a ‘very satisfied’ mean score of 7.7; Additionally, the high ratings in “knowledge of guide” (8.4), and “value of tours” (7.5) indicates visitors to St. Lucia were very satisfied with their onshore excursions.

St. Lucia Chart 5 – Passenger Visit Satisfaction*

Visit Attributes	2024 Mean Score	2018 Mean Score
Overall Visit	7.5	8.1
Visit Met Expectations	7.2	7.5
Likelihood of a Return Visit	4.9	5.1
Likelihood of Recommending	5.9	6.1
Initial Shoreside Welcome	7.8	7.7
Overall Guided Tour	7.7	8.7
Knowledge of Guide	8.4	8.8
Value of Tour	7.5	8.1
Historic Sites/Museums	7.4	7.9
Variety of Things to See and Do	7.3	7.5
Friendliness of Residents	8.2	8.1
Overall Shopping Experience	7.2	7.4
Courtesy of Employees	8.4	7.9
Overall Prices	6.9	7.1
Taxis/Local Transportation	7.3	8.2

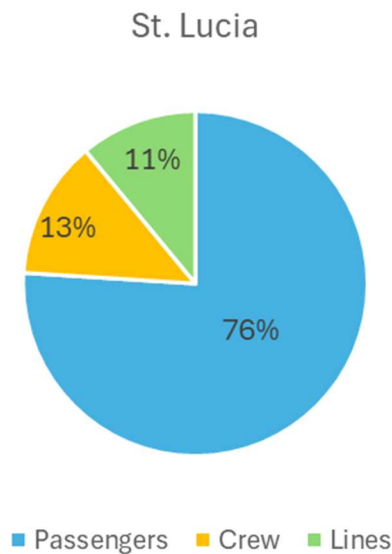
* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows:
 Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3;
 Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Passenger interactions with residents and store employees were very positive as the mean scores for “friendliness of residents” (8.2) and “courtesy of employees” (8.4) were high.
- Passengers were also very satisfied with the “historic sites” (7.4), a “variety of things to see and do” (7.3) and the “overall shopping experience” (7.2).
- As observed across all destinations, St. Lucia scored lowest passengers saying they are “likely to return for a land-based visit” (4.9), and their “likelihood of recommending to a friend” (5.9), however, both ratings are in line with those of other destinations.

St. Lucia Chart 6 – Overall Spending

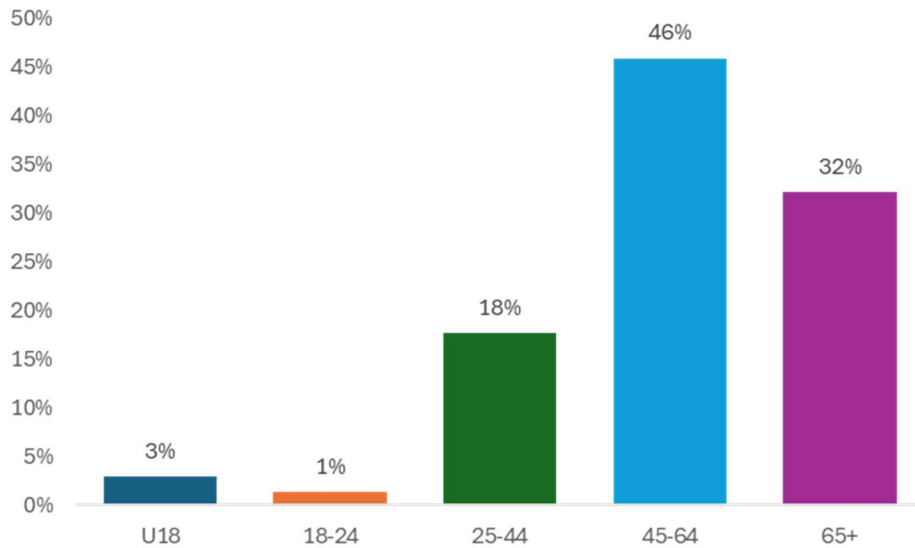
About 3 in 4 (76%) of the cruise related spending in St. Lucia was made by passengers, 11 percent was made by the cruise lines, and the remaining 13 percent was spending made by crew members.



Passenger Demographics

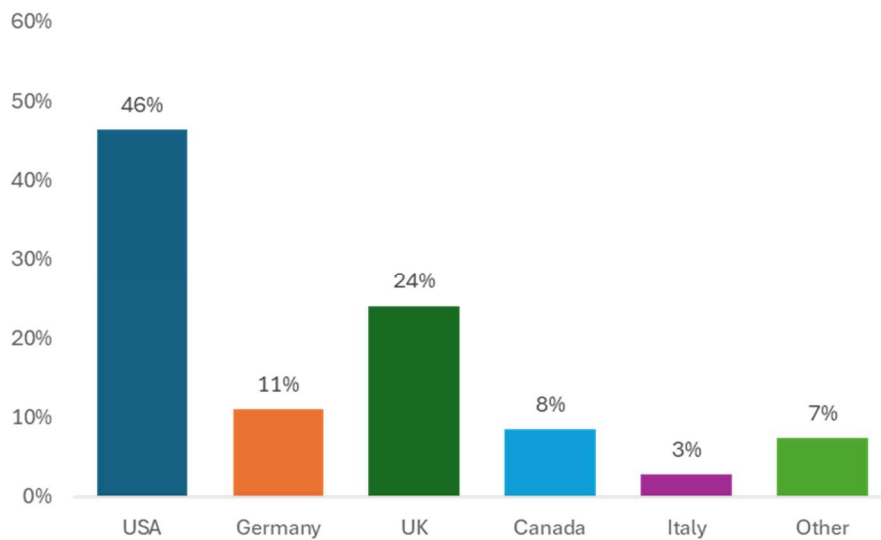
Consistent with the overall industry trends, the average age is down from 59 years old in the last study to 54 years old in this study. About 64 percent of the respondents are between the ages of 25 and 64.

St. Lucia Chart 7 – Passenger Age Cohorts



St. Lucia Chart 8 – Passenger Residence

Nearly half (46%) of the responding passengers to St. Lucia are residents of the US, 24 percent are residents of the UK, and 11 percent are from Germany.



St. Vincent & the Grenadines

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.⁸⁷ The surveys were undertaken during the eight-month period beginning in October 2023 and ending in May 2024. The surveys were distributed onboard the ships via QR codes, and the guests and crew completed the surveys online. Passengers and crew were only surveyed once during a cruise itinerary.

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 excursions, food & beverages, clothing, etc.;
- visit satisfaction, including shore excursions, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation (passengers only); and
- demographic characteristics, including country of residence, age group, etc.

Combining the expenditure data collected from the passenger and crew surveys with revenue and wage data received directly from the destinations, and destination specific expenditure data by the cruise lines for items such as port fees, provisions and services leads to estimates of the total cruise tourism expenditures for each participating destination.

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

⁸⁷ Surveys were conducted on the ships of the following cruise lines: Aida, 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.

Cruise Tourism Expenditures

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

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

Based on data collected from the St. Vincent & the Grenadines Port Authority (SVGPA), 228,820 cruise passengers arrived aboard cruise ships during the 2023/2024 cruise year.⁸⁸ This is down about 5 percent from the 2017/18 study. Of these, an estimated 195,180 passengers (85%) disembarked and visited St. Vincent. Utilizing additional data provided by SVGPA and visiting cruise lines, 91,160 crew were aboard the cruise ships and an estimated 30 percent, or 27,715 crew, disembarked and visited the destination.

These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **\$19.3** million (\$US) in cruise tourism expenditures in St. Vincent during the 2023/2024 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Passenger Spending

Per passenger spending estimates were derived from about 500 surveys completed by passengers during the survey period. As shown in **St. Vincent Chart 1**, each passenger cruise party spent an average of \$127.44. The average spend per cruise party is the sum of the weighted spending in each of the 8 purchase categories. For example, 26 percent of the survey respondents reported spending an average of \$53.70 for food and beverages. Spread across all cruise parties that visited St. Vincent, this represented an average of \$14.00 per cruise party ($\$53.70 \times 26\% = \14.00). On a per passenger basis, the average total expenditure was \$59.39. This represents the sum of the per cruise party expenditures, \$127.44, divided by the average size of a cruise party in St. Vincent, 2.1 passengers.

Shore excursions, clothing, and food & beverages account for 84 percent of cruise passenger expenditures in St. Vincent.

⁸⁸ The 2023/2024 cruise year includes the twelve months beginning in May 2023 and ending in April 2024.

Just over half (57%) of the passengers reported that their cruise party purchased a shore excursion. The effective price of the shore excursion was about \$84 per party to the local economy.

St. Vincent Chart 1 – Estimated Passenger Spending (\$US), 2023/2024 cruise year⁸⁹

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	\$147.50	56.8%	\$83.75
F&B at Restaurants & Bars	\$53.70	26.1%	\$14.00
Taxis/Ground Transportation	\$53.10	17.8%	\$9.43
Watches & Jewelry	\$5.70	2.8%	\$0.16
Clothing	\$44.90	20.5%	\$9.20
Other Purchases	\$24.10	22.8%	\$5.50
Local Crafts & Souvenirs	\$12.00	37.4%	\$4.47
Retail Purchases of Liquor	\$9.80	9.5%	\$0.93
Avg. Spend per Cruise Party			\$127.44
Average Size of Cruise Party			2.15
Avg. Spend per Passenger Visit			\$59.39
Passenger Onshore Visits			195,180
Total Passenger Expenditures			\$11,590,887

For the entire 2023/2024 cruise year, the estimated 195,180 cruise passengers who disembarked and visited St. Vincent spent a total of **\$11.6 million** (\$US) in St. Vincent.

Crew Spending

Crew spending estimates were derived from surveys completed by crew members during the survey period. As shown in **St. Vincent Chart 2**, each crew member who disembarked the ship and visited St. Vincent spent an average of \$50.07. Like the passenger spending, the average expenditure per crew member is the sum of the weighted spending in each of the purchase categories.

Expenditures on food and beverages, shore excursions, and other purchases account for 72 percent of the crew members’ onshore spending.

For the entire 2023/2024 cruise year, the estimated 27,715 crew who went ashore and visited St. Vincent spent nearly **\$1.4 million** (\$US).

⁸⁹ The average shore excursion expenditure is a weighted average of the onshore and travel agent/other purchases and the portion of the onboard purchases paid to local tour operators.

St. Vincent Chart 2 – Estimated Crew Spending (\$US), 2023/2024 cruise year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	\$27.30	59.4%	\$16.20
Taxis/Ground Transportation	\$36.30	19.4%	\$7.06
Watches & Jewelry	\$120.00	1.1%	\$1.33
Clothing	\$24.00	6.1%	\$1.47
Other Purchases	\$48.20	20.0%	\$9.63
Shore Excursions	\$77.50	13.3%	\$10.33
Personal Products	\$15.30	1.7%	\$0.26
Local Crafts & Souvenirs	\$17.40	15.6%	\$2.70
Retail Purchases of Liquor	\$24.60	4.4%	\$1.09
Avg. Spend per Crew Ashore			\$50.07
Number of Crew Onshore Visits			27,715
Total Crew Expenditures			\$1,387,666

Cruise Line & Destination Spending

Cruise lines made payments to local businesses for a variety of goods and services, including payments for port fees and taxes, navigation services, utilities and other supplies. The destination itself had employees and employee wages related to its cruise operations. Based upon data provided by the FCCA member cruise lines and the destination, we estimate that cruise lines and SVGPA were responsible for approximately **\$6.3 million** (\$US) in direct spending in St. Vincent during the 2023/2024 cruise year.

Economic Contribution of Cruise Tourism Expenditures

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

As shown in St. Vincent **Chart 3**, the **\$19.3** million in total cruise tourism expenditures in St. Vincent supported direct employment of 318 residents of St. Vincent paying \$2.7 million in annual wages. Adding the indirect contribution that results from the spending by those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures supported a total employment contribution of 478 jobs and \$4.3 million in wage income in St. Vincent during the 2023/2024 cruise year.

St. Vincent Chart 3 –Total Economic Contribution of Cruise Tourism, 2023/2024 cruise year

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	318	\$2.7
Total Economic Contribution	478	\$4.3

The Transportation & Warehousing, and Lodging & Food Services sectors account for about 79% of the total job impacts.

Passenger Surveys

St. Vincent Chart 4 shows the major attributes of passenger visits to St. Vincent as derived from the passenger surveys. Of those who completed the survey:

- 88 percent stated this was their first visit to St. Vincent.
- 49 percent of those who went ashore made at least one purchase while ashore other than a tour.
- the typical cruise party consisted of two passengers (Average: 2.1) and spent an average of 3.9 hours ashore.

St. Vincent Chart 4 – Major Attributes of Passenger Surveys

	Percent
Number Making First Visit	88%
Number Making Any Onshore Purchases:	49%
Average Hours Ashore	3.9
Purchased a Shore Excursion (Tour)	57%
How Purchased Tour:	
Cruise Line	66%
Onshore Tour Operator	4%
Other	30%
Tour Type:	
Historical/Cultural	55%
Beach Day	15%
Land-Based	11%
Water-Based	16%
Other	10%
Reason for No Tour	
Prefer to Tour on Own	58%
Poor Value	14%
Didn't Like Any	3%
Too Similar to Other Dest	3%
Weather	3%
Prefer to Stay on Ship	0%
Other	26%

- About half (57%) of the passengers that went ashore purchased a shore excursion. Sixty-six percent of passengers who purchased a tour did so through their cruise line, 4 percent purchased their tour on shore, and 30 percent purchased their tour through some other means (travel agent, travel site, etc.).
- Fifty-five percent of the tours purchased were visits to “historical or cultural sites”, while the percentages to all other activities were similar.
- The key reasons why some did not purchase a tour include they prefer to tour on their own (58%) or they thought the excursions were a poor value (14%).

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **St. Vincent Chart 5**. 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 purposes, the satisfaction data from the prior study is also shown in the chart below.

- Cruise passengers were satisfied with their “overall visit” to St. Vincent (7.2) and with the visit “meeting expectations” (6.9).
- “Guided Tours” (or Shore Excursions) received a ‘very satisfied’ mean score of 8.1; Additionally, the high ratings in “knowledge of guide” (8.5), and “value of tours” (7.7) indicates visitors to St. Vincent were very satisfied with their onshore excursions.

St. Vincent Chart 5 – Passenger Visit Satisfaction*

Visit Attributes	2024 Mean Score	2018 Mean Score
Overall Visit	7.2	7.6
Visit Met Expectations	6.9	7.1
Likelihood of a Return Visit	3.7	4.0
Likelihood of Recommending	4.8	4.9
Initial Shoreside Welcome	7.8	8.1
Overall Guided Tour	8.1	8.8
Knowledge of Guide	8.5	9.0
Value of Tour	7.7	8.4
Historic Sites/Museums	7.0	7.7
Variety of Things to See and Do	6.7	6.7
Friendliness of Residents	7.9	8.4
Overall Shopping Experience	6.1	6.4
Courtesy of Employees	7.5	8.0
Overall Prices	6.3	6.3
Taxis/Local Transportation	6.7	8.3

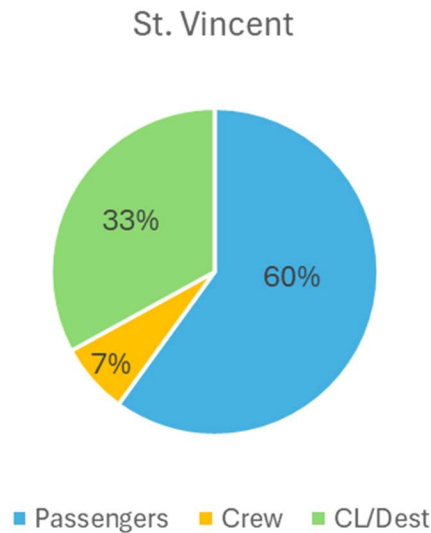
* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows:
 Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3;
 Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Passenger interactions with residents and store employees were very positive as the mean scores for “friendliness of residents” (7.9) and “courtesy of employees” (7.5) were high.
- Passengers were also very satisfied with the “historic sites” (7.0).
- As observed in all other destinations, St. Vincent scored lowest on passengers saying they are “likely to return for a land-based visit” (3.7), and their “likelihood of recommending to a friend” (4.8).

St. Vincent Chart 6 – Overall Spending

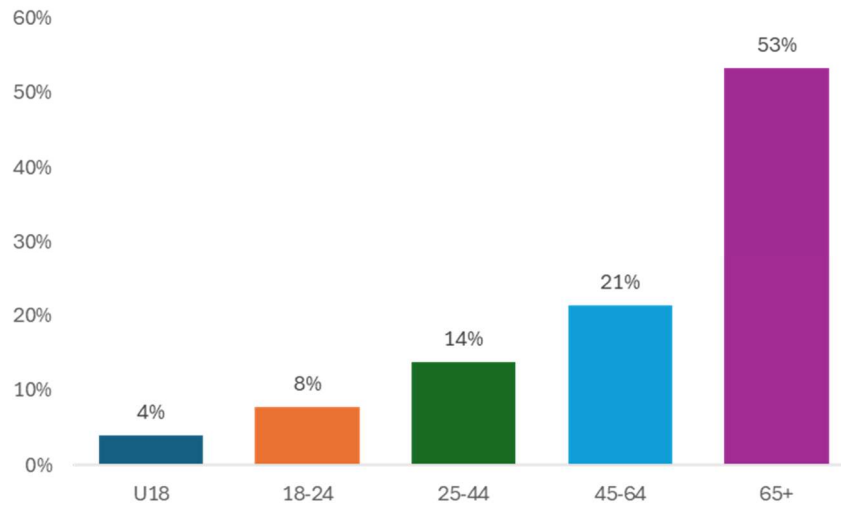
3 in 5 (60%) of the cruise related spending in St. Vincent was made by passengers, 33 percent was made by the cruise lines and SVGPA itself, and the remaining 7 percent was spending made by crew members.



Passenger Demographics

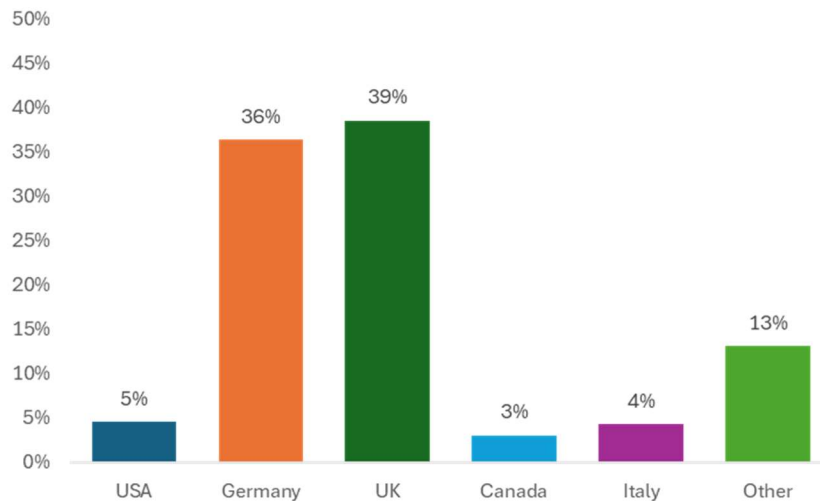
Consistent with the overall industry trends, the average age is down from 65 years old in the last study to 55 years old in this study. About 35 percent of the respondents are between the ages of 25 and 64.

St. Vincent Chart 7 – Passenger Age Cohorts



St. Vincent Chart 8 – Passenger Residence

An equal percentage of the responding passengers to St. Vincent are residents of either Germany (36%) or the UK (39%).



Trinidad

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.⁹⁰ The surveys were undertaken during the eight-month period beginning in October 2023 and ending in May 2024. The surveys were distributed onboard the ships via QR codes, and the guests and crew completed the surveys online. Passengers and crew were only surveyed once during a cruise itinerary.

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 excursions, food & beverages, clothing, etc.;
- visit satisfaction, including shore excursions, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation (passengers only); and
- demographic characteristics, including country of residence, age group, etc.

Combining the expenditure data collected from the passenger and crew surveys with revenue and wage data received directly from the destinations, and destination specific expenditure data by the cruise lines for items such as port fees, provisions and services leads to estimates of the total cruise tourism expenditures for each participating destination.

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

⁹⁰ Surveys were conducted on the ships of the following cruise lines: Aida, 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.

Cruise Tourism Expenditures

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

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

Based on data collected from Trinidad Tourism Limited, 78,150 cruise passengers arrived aboard cruise ships during the 2023/2024 cruise year.⁹¹ Of these, an estimated 65,880 passengers (84%) disembarked and visited Trinidad. Utilizing additional data provided by the Trinidad Tourism Limited and visiting cruise lines, 29,240 crew were aboard the cruise ships and 30 percent, or 8,890 crew, disembarked and visited the destination.

These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **\$5.4** million (\$US) in cruise tourism expenditures in Trinidad during the 2023/2024 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Passenger Spending

Per passenger spending estimates were derived from more than 725 surveys completed by passengers during the survey period. As shown in **Trinidad Chart 1**, each passenger cruise party spent an average of \$116.20. The average spend per cruise party is the sum of the weighted spending in each of the 8 purchase categories. For example, 16 percent of the survey respondents reported spending an average of \$26.80 for food and beverages. Spread across all cruise parties that visited Trinidad, this represented an average of \$4.34 per cruise party ($\$26.80 \times 16\% = \4.34). On a per passenger basis, the average total expenditure was \$58.69. This represents the sum of the per cruise party expenditures, \$116.20, divided by the average size of a cruise party in Trinidad, 2.0 passengers.

Shore excursions, clothing, and food and beverages accounted for 80 percent of cruise passenger expenditures in Trinidad.

About 2 in 3 (67%) of the passengers reported that their cruise party purchased a shore excursion. The effective price of the shore excursion was about \$82 per party to the local economy.

⁹¹ The 2023/2024 cruise year includes the twelve months beginning in May 2023 and ending in April 2024.

Trinidad Chart 1 – Estimated Passenger Spending (\$US), 2023/2024 cruise year⁹²

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	\$123.40	66.7%	\$82.35
F&B at Restaurants & Bars	\$26.80	16.2%	\$4.34
Taxis/Ground Transportation	\$64.20	4.2%	\$2.72
Watches & Jewelry	\$59.40	5.2%	\$3.10
Clothing	\$36.70	17.1%	\$6.27
Other Purchases	\$28.40	16.8%	\$4.76
Local Crafts & Souvenirs	\$32.00	35.7%	\$11.43
Retail Purchases of Liquor	\$32.00	3.8%	\$1.23
Avg. Spend per Cruise Party			\$116.20
Average Size of Cruise Party			2.0
Avg. Spend per Passenger Visit			\$58.69
Passenger Onshore Visits			65,880
Total Passenger Expenditures			\$3,866,152

For the entire 2023/2024 cruise year, the estimated 65,880 cruise passengers who disembarked and visited Trinidad spent nearly **\$3.9 million** (\$US) in Trinidad.

Crew Spending

Crew spending estimates were derived from more than 1,500 surveys completed by crew members during the survey period. As shown in **Trinidad Chart 2**, each crew member who disembarked the ship and visited Trinidad spent an average of \$38.69. Like the passenger spending, the average expenditure per crew member is the sum of the weighted spending in each of the purchase categories.

Expenditures on food and beverages, and other purchases accounted for 72 percent of the crew members’ onshore spending.

⁹² The average shore excursion expenditure is a weighted average of the onshore and travel agent/other purchases and the portion of the onboard purchases paid to local tour operators.

For the entire 2023/2024 cruise year, the estimated 8,890 crew who went ashore and visited Trinidad spent an estimated total of **\$340,100** (\$US).

Trinidad Chart 2 – Estimated Crew Spending (\$US), 2023/2024 cruise year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	\$19.20	70.4%	\$13.49
Taxis/Ground Transportation	\$18.30	11.1%	\$2.04
Watches & Jewelry	\$50.00	3.7%	\$1.85
Clothing	\$18.30	18.5%	\$3.40
Other Purchases	\$15.80	25.9%	\$4.10
Shore Excursions	\$19.70	11.1%	\$2.19
Personal Products	\$25.00	3.7%	\$0.93
Local Crafts & Souvenirs	\$27.50	29.6%	\$8.15
Retail Purchases of Liquor	\$30.00	7.4%	\$2.22
Avg. Spend per Crew Ashore			\$38.36
Number of Crew Onshore Visits			8,890
Total Crew Expenditures			\$340,928

Cruise Line & Destination Spending

Cruise lines made payments to local businesses for a variety of goods and services, including payments for port fees and taxes, navigation services, utilities and other supplies. The destination itself had employee wages related to cruise operations. Based upon data provided by the FCCA member cruise lines and the destination, we estimate that cruise lines and the destination were responsible for approximately **\$1.2 million** (\$US) in direct spending in Trinidad during the 2023/2024 cruise year.

Economic Contribution of Cruise Tourism Expenditures

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

As shown in **Trinidad Chart 3**, the **\$5.4** million in total cruise tourism expenditures in Trinidad supported direct employment of 115 residents of Trinidad paying \$1.5 million in annual wages. Adding the indirect contribution that results from the spending by those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures supported a total employment contribution of 197 jobs and \$2.5 million in wage income in Trinidad during the 2023/2024 cruise year.

Trinidad Chart 3 –Total Economic Contribution of Cruise Tourism, 2023/2024 cruise year

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	115	\$1.5
Total Economic Contribution	197	\$2.5

The Manufacturing, and Transportation & Warehousing sectors account for about 64% of the total job impacts.

Passenger Surveys

Trinidad Chart 4 shows the major attributes of passenger visits to Trinidad as derived from the passenger surveys. Of those who completed the survey:

- 87 percent stated this was their first visit to Trinidad.
- About 3 in 5 (58%) of those who went ashore made at least one purchase while ashore other than a tour.
- the typical cruise party consisted of two passengers (Average: 2.0) and spent an average of 3.8 hours ashore.

Trinidad Chart 4 – Major Attributes of Passenger Surveys

	Percent
Number Making First Visit	87%
Number Making Any Onshore Purchases:	58%
Average Hours Ashore	3.8
Purchased a Shore Excursion (Tour)	67%
How Purchased Tour:	
Cruise Line	76%
Onshore Tour Operator	10%
Other	15%
Tour Type:	
Historical/Cultural	65%
Beach Day	12%
Land-Based	14%
Water-Based	2%
Other	9%
Reason for No Tour	
Prefer to Tour on Own	41%
Poor Value	3%
Didn't Like Any	4%
Too Similar to Other Dest	9%
Weather	0%
Prefer to Stay on Ship	0%
Other	48%

- More than half (67%) of the passengers that went ashore purchased a shore excursion. Seventy-six percent of passengers who purchased a tour did so through their cruise line, 10 percent purchased their tour on shore and 15 percent purchased their tour through some other means (travel agent, travel site, etc.).
- 2 in 3 (65%) of the tours purchased were visits to “historical or cultural sites”.
- The key reason why some did not purchase a tour was they prefer to tour on their own (41%).

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Trinidad Chart 5**. 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 purposes, the satisfaction data from the prior study is also shown in the chart below.

- Cruise passengers were very satisfied with their “overall visit” to Trinidad (6.9) and the visit “meeting their expectations” (6.2).
- “Guided Tours” (or Shore Excursions) received a ‘very satisfied’ mean score of 7.6; Additionally, the high ratings in “knowledge of guide” (8.0), and “value of tours” (7.2) indicates visitors to Trinidad were very satisfied with their onshore excursions.

Trinidad Chart 5 – Passenger Visit Satisfaction*

Visit Attributes	2024 Mean Score	2018 Mean Score
Overall Visit	6.9	6.6
Visit Met Expectations	6.2	5.8
Likelihood of a Return Visit	3.5	3.4
Likelihood of Recommending	4.0	3.8
Initial Shoreside Welcome	7.8	7.6
Overall Guided Tour	7.6	7.4
Knowledge of Guide	8.0	7.8
Value of Tour	7.2	7.1
Historic Sites/Museums	7.4	7.2
Variety of Things to See and Do	6.3	5.9
Friendliness of Residents	7.7	7.5
Overall Shopping Experience	6.5	6.0
Courtesy of Employees	7.9	7.7
Overall Prices	6.8	6.6
Taxis/Local Transportation	7.5	7.4

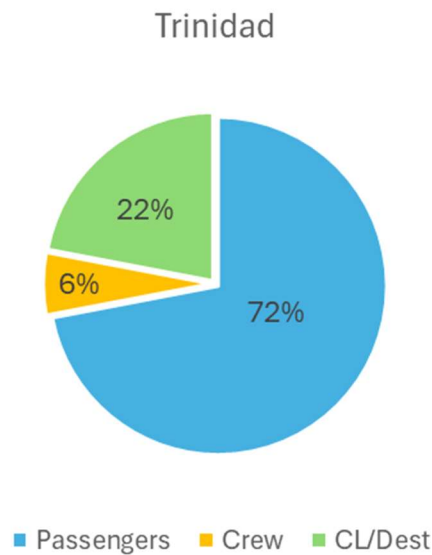
* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows:
 Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3;
 Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Passenger interactions with residents and store employees were very positive as the mean scores for “friendliness of residents” (7.7) and “courtesy of employees” (7.2) were high.
- Passengers were also very satisfied with the “historic sites” (7.4), and taxis/transportation around the island (7.5).
- Consistent with the other destinations, Trinidad scored lowest passengers saying they are “likely to return for a land-based visit” (3.5), and their “likelihood of recommending to a friend” (4.0), however, both ratings are similar to the ratings of other destinations.

Trinidad Chart 6 – Overall Spending

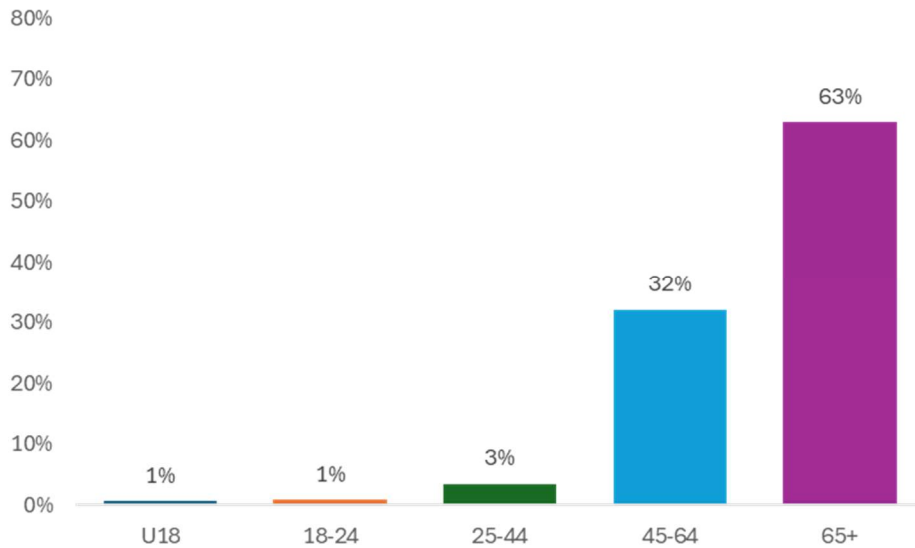
Seven in ten (72%) of the cruise related spending in Trinidad was made by passengers, 22 percent was made by the cruise lines and the port itself, and the remaining 6 percent was spending made by crew members.



Passenger Demographics

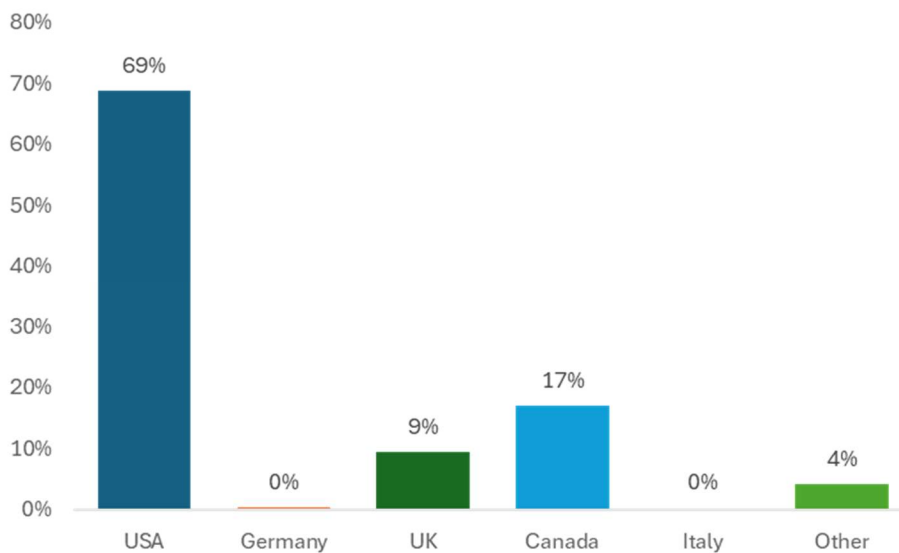
Consistent with the overall industry trends, the average age is down slightly from 64 years old in the last study to 62 years old in this study. Sixty-three of the respondents are over 65 years of age.

Trinidad Chart 7 – Passenger Age Cohorts



Trinidad Chart 8 – Passenger Residence

Most (69%) of the responding passengers to Trinidad are residents of the US, 17 percent are from Canada.



Cruise Destinations of Mexico

Costa Maya

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.⁹³ The surveys were undertaken during the eight-month period beginning in October 2023 and ending in May 2024. The surveys were distributed onboard the ships via QR codes, and the guests and crew completed the surveys online. Passengers and crew were only surveyed once during a cruise itinerary.

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 excursions, food & beverages, clothing, etc.;
- visit satisfaction, including shore excursions, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation (passengers only); and
- demographic characteristics, including country of residence, age group, etc.

Combining the expenditure data collected from the passenger and crew surveys with revenue and wage data received directly from the destinations, and destination specific expenditure data by the cruise lines for items such as port fees, provisions and services leads to estimates of the total cruise tourism expenditures for each participating destination.

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

⁹³ Surveys were conducted on the ships of the following cruise lines: Aida, 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.

Cruise Tourism Expenditures

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

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

Based on data collected from industry sources and available statistics, 2,196,510 cruise passengers arrived aboard cruise ships during the 2023/2024 cruise year.⁹⁴ Of these, an estimated 1,853,855 passengers (84%) disembarked and visited Costa Maya. Utilizing additional industry data and visiting cruise lines, 767,940 crew were aboard the cruise ships and 30 percent, or 233,455 crew, disembarked and visited the destination. Passenger arrivals are nearly double what they were in the last study in 2017/18.

These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **\$187.9** million (\$US) in cruise tourism expenditures in Costa Maya during the 2023/2024 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Passenger Spending

Per passenger spending estimates were derived from more than 1,800 surveys completed by passengers during the survey period. As shown in **Costa Maya Chart 1**, each passenger cruise party spent an average of \$179.13. The average spend per cruise party is the sum of the weighted spending in each of the 8 purchase categories. For example, 34 percent of the survey respondents reported spending an average of \$51.00 for food and beverages. Spread across all cruise parties that visited Costa Maya, this represented an average of \$17.47 per cruise party ($\$51.00 \times 34\% = \17.47). On a per passenger basis, the average total expenditure was \$78.17. This represents the sum of the per cruise party expenditures, \$179.13, divided by the average size of a cruise party in Costa Maya, 2.3 passengers.

Shore excursions, clothing, and food and beverages account for 74 percent of cruise passenger expenditures in Costa Maya.

Half (49%) of the passengers reported that their cruise party purchased a shore excursion. The effective price of the shore excursion was about \$99 per party to the local economy.

⁹⁴ The 2023/2024 cruise year includes the twelve months beginning in May 2023 and ending in April 2024.

Costa Maya Chart 1 – Estimated Passenger Spending (\$US), 2023/2024 cruise year⁹⁵

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	\$201.70	49.1%	\$99.15
F&B at Restaurants & Bars	\$51.00	34.3%	\$17.47
Taxis/Ground Transportation	\$43.20	10.0%	\$4.30
Watches & Jewelry	\$219.60	6.9%	\$15.20
Clothing	\$56.80	27.9%	\$15.86
Other Purchases	\$80.80	14.0%	\$11.35
Local Crafts & Souvenirs	\$44.00	32.5%	\$14.31
Retail Purchases of Liquor	\$50.90	2.9%	\$1.49
Avg. Spend per Cruise Party			\$179.13
Average Size of Cruise Party			2.3
Avg. Spend per Passenger Visit			\$78.17
Passenger Onshore Visits			1,853,855
Total Passenger Expenditures			\$144,912,343

For the entire 2023/2024 cruise year, the estimated 1,853,855 cruise passengers who disembarked and visited Costa Maya spent a total of **\$144.9 million** (\$US) in Costa Maya.

Crew Spending

Crew spending estimates were derived from more than 500 surveys completed by crew members during the survey period. As shown in **Costa Maya Chart 2**, each crew member who disembarked the ship and visited Costa Maya spent an average of \$43.88. Like the passenger spending, the average expenditure per crew member is the sum of the weighted spending in each of the purchase categories.

Expenditures on food and beverages, clothing, and local crafts & souvenirs account for 74 percent of the crew members’ onshore spending.

⁹⁵ The average shore excursion expenditure is a weighted average of the onshore and travel agent/other purchases and the portion of the onboard purchases paid to local tour operators.

For the entire 2023/2024 cruise year, the estimated 233,455 crew who went ashore and visited Costa Maya spent an estimated total of **\$10.2 million** (\$US).

Costa Maya Chart 2 – Estimated Crew Spending (\$US), 2023/2024 cruise year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	\$36.10	71.0%	\$25.65
Taxis/Ground Transportation	\$9.00	22.9%	\$2.07
Watches & Jewelry	\$44.40	3.9%	\$1.72
Clothing	\$30.00	13.3%	\$3.98
Other Purchases	\$30.90	15.5%	\$4.78
Shore Excursions	\$36.40	4.1%	\$1.51
Personal Products	\$26.70	4.4%	\$1.18
Local Crafts & Souvenirs	\$17.90	15.7%	\$2.83
Retail Purchases of Liquor	\$12.00	1.4%	\$0.17
Avg. Spend per Crew Ashore			\$43.88
Number of Crew Onshore Visits			233,455
Total Crew Expenditures			\$10,243,597

Cruise Line & Destination Spending

Cruise lines made payments to local businesses for a variety of goods and services, including payments for port fees and taxes, navigation services, utilities and other supplies. Based upon data provided by the FCCA member cruise lines and the destination, we estimate that cruise lines were responsible for approximately **\$32.8 million** (\$US) in direct spending in Costa Maya during the 2023/2024 cruise year.

Economic Contribution of Cruise Tourism Expenditures

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

As shown in **Costa Maya Chart 3**, the **\$187.9** million in total cruise tourism expenditures in Costa Maya supported direct employment of 2,688 residents of Costa Maya paying \$25.7 million in annual wages. Adding the indirect contribution that results from the spending by those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures supported a total employment contribution of 3,466 jobs and \$36.0 million in wage income in Costa Maya during the 2023/2024 cruise year.

Costa Maya Chart 3 –Total Economic Contribution of Cruise Tourism, 2023/2024 cruise year

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	2,688	\$25.7
Total Economic Contribution	3,466	\$36.0

The Wholesale & Retail Trade, Lodging and Food Services, and Transportation & Warehousing sectors account for about 79% of the total job impacts.

Passenger Surveys

Costa Maya Chart 4 shows the major attributes of passenger visits to Costa Maya as derived from the passenger surveys. Of those who completed the survey:

- 77 percent stated this was their first visit to Costa Maya.
- Two-thirds (67%) of those who went ashore made at least one purchase while ashore other than a tour.
- the typical cruise party consisted of two passengers (Average: 2.3) and spent an average of 4.2 hours ashore.

Costa Maya Chart 4 – Major Attributes of Passenger Surveys

	Percent
Number Making First Visit	77%
Number Making Any Onshore Purchases:	67%
Average Hours Ashore	4.2
Purchased a Shore Excursion (Tour)	49%
How Purchased Tour:	
Cruise Line	71%
Onshore Tour Operator	9%
Other	20%
Tour Type:	
Historical/Cultural	33%
Beach Day	28%
Land-Based	10%
Water-Based	18%
Other	18%
Reason for No Tour	
Prefer to Tour on Own	43%
Poor Value	17%
Didn't Like Any	16%
Too Similar to Other Dest	11%
Weather	1%
Prefer to Stay on Ship	2%
Other	26%

- Half (49%) of the passengers that went ashore purchased a shore excursion. Seventy-one percent of passengers who purchased a tour did so through their cruise line, 9 percent purchased their tour on shore and 20 percent purchased their tour through some other means (travel agent, travel site, etc.).
- A third (33%) of the tours purchased were visits to “historical or cultural sites”, while slightly fewer (28%) were to “beach day activities”.
- The key reasons why some did not purchase a tour include they prefer to tour on their own (43%), they felt the excursions were a poor value (17%), or they simply did not like any (16%).

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Costa Maya Chart 5**. 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 purposes, the satisfaction data from the prior study is also shown in the chart below.

- Cruise passengers were very satisfied with their “overall visit” to Costa Maya (7.8) and the visit “meeting expectations” (7.6).
- “Guided Tours” (or Shore Excursions) received a ‘very satisfied’ mean score of 8.6; Additionally, the high ratings in “knowledge of guide” (8.9), and “value of tours” (8.1) indicates visitors to Costa Maya were very satisfied with their onshore excursions.

Costa Maya Chart 5 – Passenger Visit Satisfaction*

Visit Attributes	2024 Mean Score	2018 Mean Score
Overall Visit	7.8	6.7
Visit Met Expectations	7.6	6.2
Likelihood of a Return Visit	5.3	3.7
Likelihood of Recommending	5.5	4.3
Initial Shoreside Welcome	8.3	7.2
Overall Guided Tour	8.6	7.8
Knowledge of Guide	8.9	8.3
Value of Tour	8.1	7.1
Historic Sites/Museums	8.0	7.5
Variety of Things to See and Do	7.4	6.0
Friendliness of Residents	8.4	7.5
Overall Shopping Experience	7.5	6.7
Courtesy of Employees	8.5	7.3
Overall Prices	7.0	6.1
Taxis/Local Transportation	8.0	7.7

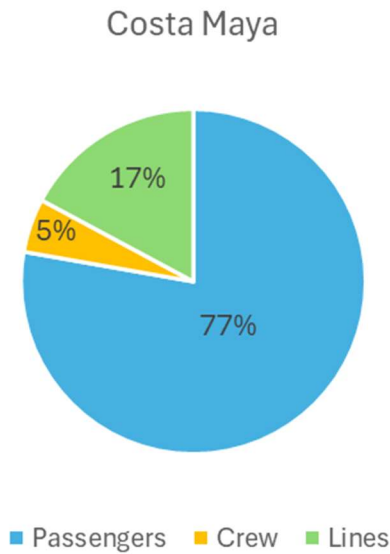
* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows:
 Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3;
 Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Passenger interactions with residents and store employees were very positive as the mean scores for “friendliness of residents” (8.4) and “courtesy of employees” (8.5) were high.
- Passengers were also very satisfied with the “historic sites” (8.0), a “variety of things to see and do” (7.4) and the “overall shopping experience” (7.5).
- Similar to all other destinations, Costa Maya scored lowest passengers saying they are “likely to return for a land-based visit” (5.3), and their “likelihood of recommending to a friend” (5.5). Both ratings are similar to the ratings of other destinations.

Costa Maya Chart 6 – Overall Spending

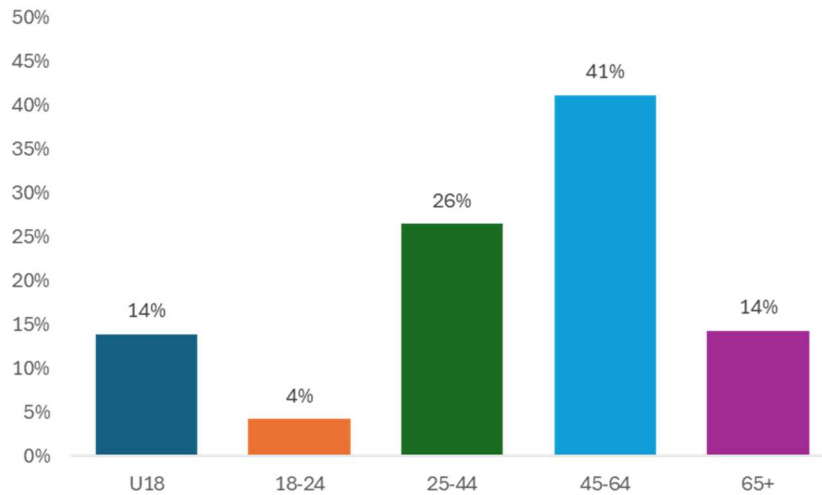
Three-quarters (77%) of the cruise related spending in Costa Maya was made by passengers, 17 percent was made by the cruise lines, and the remaining 5 percent was spending made by crew members.



Passenger Demographics

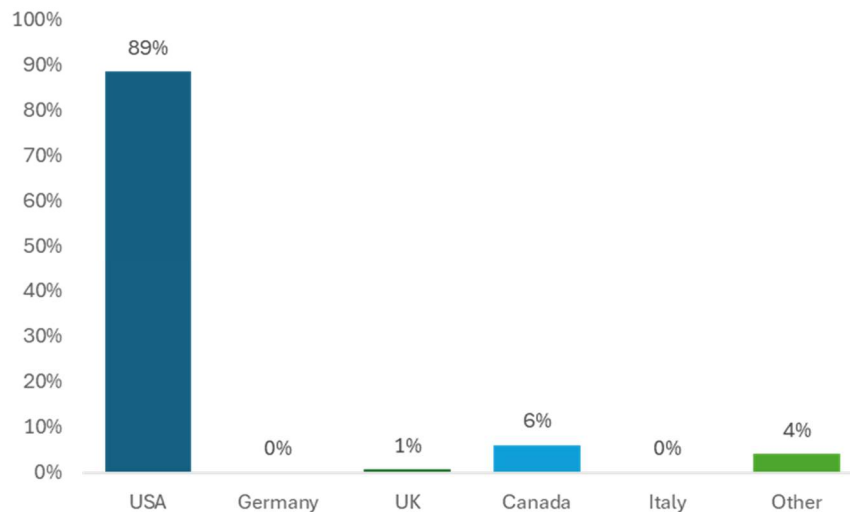
Consistent with the overall industry trends, the average age is down from 48 years old in the last study to 44 years old in this study. About 68 percent of the respondents are between the ages of 25 and 64.

Costa Maya Chart 7 – Passenger Age Cohorts



Costa Maya Chart 8 – Passenger Residence

Most (89%) of the responding passengers to Costa Maya are residents of the US, 6 percent are from Canada.



Cozumel

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.⁹⁶ The surveys were undertaken during the eight-month period beginning in October 2023 and ending in May 2024. The surveys were distributed onboard the ships via QR codes, and the guests and crew completed the surveys online. Passengers and crew were only surveyed once during a cruise itinerary.

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 excursions, food & beverages, clothing, etc.;
- visit satisfaction, including shore excursions, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation (passengers only); and
- demographic characteristics, including country of residence, age group, etc.

Combining the expenditure data collected from the passenger and crew surveys with revenue and wage data received directly from the destinations, and destination specific expenditure data by the cruise lines for items such as port fees, provisions and services leads to estimates of the total cruise tourism expenditures for each participating destination.

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

⁹⁶ Surveys were conducted on the ships of the following cruise lines: Aida, 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.

Cruise Tourism Expenditures

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

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

Based on data collected from industry sources and available statistics, 4,170,880 cruise passengers arrived aboard cruise ships during the 2023/2024 cruise year.⁹⁷ Of these, an estimated 3,561,930 passengers (85%) disembarked and visited Cozumel. Utilizing additional industry data and visiting cruise lines, 1,597,470 crew were aboard the cruise ships and 30 percent, or 485,630 crew, disembarked and visited the destination. Passenger arrivals are up approximately 2 percent from the last study in 2017/18.

These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **\$483.1** million (\$US) in cruise tourism expenditures in Cozumel during the 2023/2024 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Passenger Spending

Per passenger spending estimates were derived from more than 2,500 surveys completed by passengers during the survey period. As shown in **Cozumel Chart 1**, each passenger cruise party spent an average of \$236.51. The average spend per cruise party is the sum of the weighted spending in each of the 8 purchase categories. For example, 40 percent of the survey respondents reported spending an average of \$57.40 for food and beverages. Spread across all cruise parties that visited Cozumel, this represented an average of \$22.66 per cruise party ($\$57.40 \times 40\% = \22.66). On a per passenger basis, the average total expenditure was \$110.01. This represents the sum of the per cruise party expenditures, \$236.51, divided by the average size of a cruise party in Cozumel, 2.2 passengers.

Shore excursions, watches & jewelry, and food and beverages accounted for 67 percent of cruise passenger expenditures in Cozumel.

⁹⁷ The 2023/2024 cruise year includes the twelve months beginning in May 2023 and ending in April 2024.

Just over half (57%) of the passengers reported that their cruise party purchased a shore excursion. The effective price of the shore excursion was about \$101 per party to the local economy.

Cozumel Chart 1 – Estimated Passenger Spending (\$US), 2023/2024 cruise year⁹⁸

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	\$178.20	56.5%	\$100.75
F&B at Restaurants & Bars	\$57.40	39.5%	\$22.66
Taxis/Ground Transportation	\$44.60	18.9%	\$8.41
Watches & Jewelry	\$330.80	10.8%	\$35.75
Clothing	\$62.70	36.5%	\$22.87
Other Purchases	\$88.20	21.1%	\$18.62
Local Crafts & Souvenirs	\$45.80	34.8%	\$15.97
Retail Purchases of Liquor	\$112.10	10.3%	\$11.49
Avg. Spend per Cruise Party			\$236.51
Average Size of Cruise Party			2.2
Avg. Spend per Passenger Visit			\$110.01
Passenger Onshore Visits			3,561,930
Total Passenger Expenditures			\$391,835,038

For the entire 2023/2024 cruise year, the estimated 3,561,930 cruise passengers who disembarked and visited Cozumel spent a total of **\$391.8 million** (\$US) in Cozumel.

Crew Spending

Crew spending estimates were derived from more than 500 surveys completed by crew members during the survey period. As shown in **Cozumel Chart 2**, each crew member who disembarked the ship and visited Cozumel spent an average of \$67.90. Like the passenger spending, the average expenditure per crew member is the sum of the weighted spending in each of the purchase categories.

Expenditures on food and beverages, personal products, and taxis or ground transportation account for 72 percent of the crew members’ onshore spending.

⁹⁸ The average shore excursion expenditure is a weighted average of the onshore and travel agent/other purchases and the portion of the onboard purchases paid to local tour operators.

For the entire 2023/2024 cruise year, the estimated 485,630 crew who went ashore and visited Cozumel spent an estimated total of nearly **\$33.0 million** (\$US).

Cozumel Chart 2 – Estimated Crew Spending (\$US), 2023/2024 cruise year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	\$41.10	79.8%	\$32.82
Taxis/Ground Transportation	\$19.00	24.5%	\$4.67
Watches & Jewelry	\$112.10	3.8%	\$4.26
Clothing	\$44.40	10.6%	\$4.72
Other Purchases	\$48.10	10.8%	\$5.21
Shore Excursions	\$61.90	3.0%	\$1.88
Personal Products	\$38.90	28.5%	\$11.09
Local Crafts & Souvenirs	\$28.80	9.5%	\$2.73
Retail Purchases of Liquor	\$15.40	3.2%	\$0.50
Avg. Spend per Crew Ashore			\$67.90
Number of Crew Onshore Visits			485,630
Total Crew Expenditures			\$32,972,280

Cruise Line & Destination Spending

Cruise lines made payments to local businesses for a variety of goods and services, including payments for port fees and taxes, navigation services, utilities and other supplies. Based upon data provided by the FCCA member cruise lines, we estimate that cruise lines were responsible for approximately **\$58.3 million** (\$US) in direct spending in Cozumel during the 2023/2024 cruise year.

Economic Contribution of Cruise Tourism Expenditures

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

As shown in **Cozumel Chart 3**, the **\$483.1** million in total cruise tourism expenditures in Cozumel supported direct employment of 7,441 residents of Cozumel paying \$59.5 million in annual wages. Adding the indirect contribution that results from the spending by those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures supported a total employment contribution of 11,998 jobs and \$95.6 million in wage income in Cozumel during the 2023/2024 cruise year.

Cozumel Chart 3 – Total Economic Contribution of Cruise Tourism, 2023/2024 cruise year

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	7,441	\$59.5
Total Economic Contribution	11,998	\$95.6

The Wholesale & Retail Trade, Transportation & Warehousing, and Lodging and Food Services sectors account for about 74% of the total job impacts.

Passenger Surveys

Cozumel Chart 4 shows the major attributes of passenger visits to Cozumel as derived from the passenger surveys. Of those who completed the survey:

- 42 percent stated this was their first visit to Cozumel.
- three-quarters (76%) of those who went ashore made at least one purchase while ashore other than a tour.
- the typical cruise party consisted of two passengers (Average: 2.2) and spent an average of 4.7 hours ashore.

Cozumel Chart 4 – Major Attributes of Passenger Surveys

	Percent
Number Making First Visit	42%
Number Making Any Onshore Purchases:	76%
Average Hours Ashore	4.7
Purchased a Shore Excursion (Tour)	57%
How Purchased Tour:	
Cruise Line	69%
Onshore Tour Operator	12%
Other	20%
Tour Type:	
Historical/Cultural	20%
Beach Day	35%
Land-Based	13%
Water-Based	22%
Other	22%
Reason for No Tour	
Prefer to Tour on Own	47%
Poor Value	10%
Didn't Like Any	8%
Too Similar to Other Dest	5%
Weather	3%
Prefer to Stay on Ship	3%
Other	33%

- More than half (57%) of the passengers that went ashore purchased a shore excursion. Sixty-nine percent of passengers who purchased a tour did so through their cruise line, 12 percent purchased their tour on shore and 20 percent purchased their tour through some other means (travel agent, travel site, etc.).
- More than a third (35%) of the tours purchased were for “beach day activities”, while 20 percent were to “historical or cultural sites”.
- The key reasons why some did not purchase a tour include they prefer to tour on their own (47%), or they thought the excursions were a poor value (10%).

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Cozumel Chart 5**. 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 purposes, the satisfaction data from the prior study is also shown in the chart below.

- Cruise passengers were very satisfied with their “overall visit” to Cozumel (8.2) and the visit “meeting expectations” (7.9).
- “Guided Tours” (or Shore Excursions) received a ‘very satisfied’ mean score of 8.8; Additionally, the high ratings in “knowledge of guide” (9.2), and “value of tours” (8.4) indicates visitors to Cozumel were very satisfied with their onshore excursions.

Cozumel Chart 5 – Passenger Visit Satisfaction*

Visit Attributes	2024 Mean Score	2018 Mean Score
Overall Visit	8.2	8.5
Visit Met Expectations	7.9	7.9
Likelihood of a Return Visit	6.0	6.4
Likelihood of Recommending	6.4	6.9
Initial Shoreside Welcome	8.3	8.4
Overall Guided Tour	8.8	9.2
Knowledge of Guide	9.2	9.3
Value of Tour	8.4	8.7
Historic Sites/Museums	8.1	8.5
Variety of Things to See and Do	8.0	8.1
Friendliness of Residents	8.5	8.7
Overall Shopping Experience	7.8	8.2
Courtesy of Employees	8.7	8.5
Overall Prices	7.4	7.8
Taxis/Local Transportation	8.5	8.8

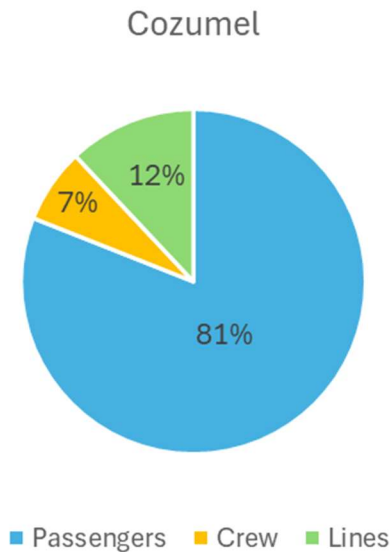
* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows:
 Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3;
 Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Passenger interactions with residents and store employees were very positive as the mean scores for “friendliness of residents” (8.5) and “courtesy of employees” (8.7) were high.
- Passengers were also very satisfied with the “historic sites” (8.1), a “variety of things to see and do” (8.0) and the “overall shopping experience” (7.8).
- As observed across all destinations, Cozumel scored lowest passengers saying they are “likely to return for a land-based visit” (6.0), and their “likelihood of recommending to a friend” (6.4), however, both ratings are above those of other destinations.

Cozumel Chart 6 – Overall Spending

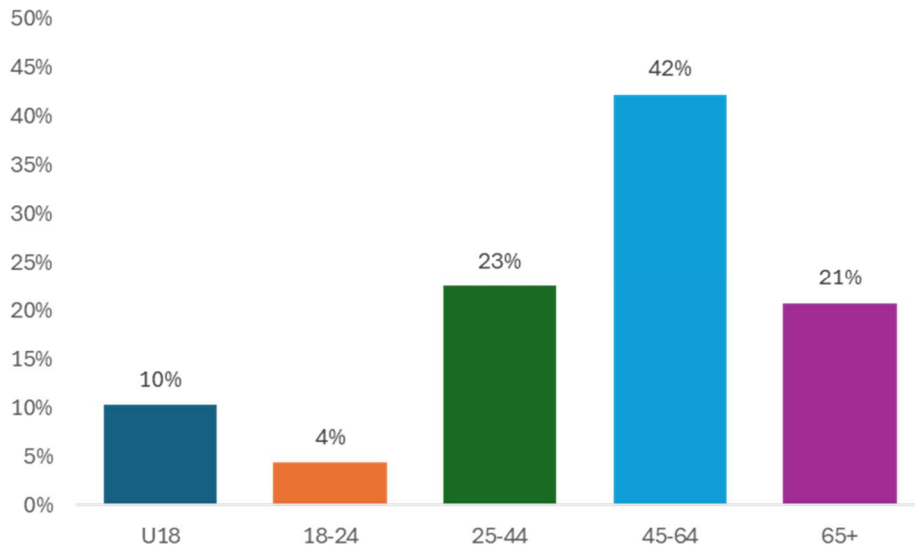
4 in 5 (81%) of the cruise related spending in Cozumel was made by passengers, 12 percent was made by the cruise lines and the port itself, and the remaining 7 percent was spending made by crew members.



Passenger Demographics

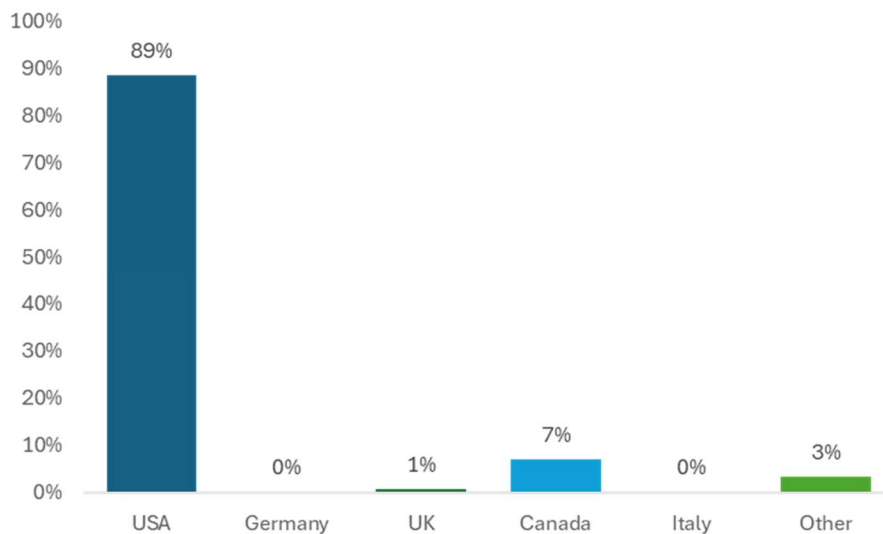
Consistent with the overall industry trends, the average age is down from 50 years old in the last study to 47 years old in this study. About 65 percent of the respondents are between the ages of 25 and 64.

Cozumel Chart 7 – Passenger Age Cohorts



Cozumel Chart 8 – Passenger Residence

The majority (89%) of the responding passengers to Cozumel are residents of the US, 7 percent are from Canada.



Ensenada

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.⁹⁹ The surveys were undertaken during the eight-month period beginning in October 2023 and ending in May 2024. The surveys were distributed onboard the ships via QR codes, and the guests and crew completed the surveys online. Passengers and crew were only surveyed once during a cruise itinerary.

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 excursions, food & beverages, clothing, etc.;
- visit satisfaction, including shore excursions, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation (passengers only); and
- demographic characteristics, including country of residence, age group, etc.

Combining the expenditure data collected from the passenger and crew surveys with revenue and wage data received directly from the destinations, and destination specific expenditure data by the cruise lines for items such as port fees, provisions and services leads to estimates of the total cruise tourism expenditures for each participating destination.

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

⁹⁹ Surveys were conducted on the ships of the following cruise lines: Aida, 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.

Cruise Tourism Expenditures

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

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

Based on data collected from the API de Ensenada, 902,895 cruise passengers arrived aboard cruise ships during the 2023/2024 cruise year.¹⁰⁰ This is up about 37 percent from the 2017/2018 study. Of these, an estimated 662,725 passengers (73%) disembarked and visited Ensenada. Utilizing additional data provided by the Ensenada and visiting cruise lines, 310,970 crew were aboard the cruise ships and an estimated 30 percent, or 94,535 crew, disembarked and visited the destination.

These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **\$74.9** million (\$US) in cruise tourism expenditures in Ensenada during the 2023/2024 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Passenger Spending

Per passenger spending estimates were derived from more than 775 surveys completed by passengers during the survey period. As shown in **Ensenada Chart 1**, each passenger cruise party spent an average of \$144.53. The average spend per cruise party is the sum of the weighted spending in each of the 8 spending categories. For example, 51 percent of the survey respondents reported spending an average of \$49.40 for food and beverages. Spread across the cruise parties that visited Ensenada, this represented an average of \$24.91 per cruise party ($\$49.40 \times 51\% = \24.91). On a per passenger basis, the average total expenditure was \$63.68. This represents the sum of the per cruise party expenditures, divided by the average size of a cruise party in Ensenada, 2.3 passengers.

Shore excursions, food & beverages, and clothing account for 66 percent of cruise passenger expenditures in Ensenada.

About half (46%) of the passengers reported that their cruise party purchased a shore excursion. The effective price of the shore excursion was about \$51 per party to the local economy.

¹⁰⁰ The 2023/2024 cruise year includes the twelve months beginning in May 2023 and ending in April 2024.

Ensenada Chart 1 – Estimated Passenger Spending (\$US), 2023/2024 cruise year¹⁰¹

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	\$110.20	46.0%	\$50.68
F&B at Restaurants & Bars	\$49.40	50.5%	\$24.91
Taxis/Ground Transportation	\$26.50	21.9%	\$5.79
Watches & Jewelry	\$75.40	12.6%	\$9.51
Clothing	\$62.60	32.0%	\$20.03
Other Purchases	\$71.50	19.0%	\$13.56
Local Crafts & Souvenirs	\$42.70	31.8%	\$13.58
Retail Purchases of Liquor	\$63.90	10.1%	\$6.47
Avg. Spend per Cruise Party			\$144.53
Average Size of Cruise Party			2.27
Avg. Spend per Passenger Visit			\$63.68
Passenger Onshore Visits			662,725
Total Passenger Expenditures			\$42,203,531

For the entire 2023/2024 cruise year, the estimated 662,725 cruise passengers who disembarked and visited Ensenada spent a total of **\$42.2 million** (\$US) in Ensenada.

Crew Spending

Crew spending estimates were derived from more than 500 surveys completed by crew members during the survey period. As shown in **Ensenada Chart 2**, each crew member who disembarked the ship and visited Ensenada spent an average of \$47.84. Like the passenger spending, the average expenditure per crew member is the sum of the weighted spending in each of the spending categories.

Expenditures on food and beverages, other purchases account for 72 percent of the crew members’ onshore spending in Ensenada.

¹⁰¹ The average shore excursion expenditure is a weighted average of the onshore and travel agent/other purchases and the portion of the onboard purchases paid to local tour operators.

For the entire 2023/2024 cruise year, the estimated 94,535 crew who went ashore and visited Ensenada spent an estimated total of **\$4.5 million** (\$US).

Ensenada Chart 2 – Estimated Crew Spending (\$US), 2023/2024 cruise year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	\$24.90	81.0%	\$20.18
Taxis/Ground Transportation	\$9.00	30.9%	\$2.78
Watches & Jewelry	\$38.60	4.4%	\$1.68
Clothing	\$27.20	10.7%	\$2.91
Other Purchases	\$47.80	29.9%	\$14.30
Shore Excursions	\$34.30	3.6%	\$1.22
Personal Products	\$20.90	9.9%	\$2.07
Local Crafts & Souvenirs	\$14.20	10.1%	\$1.43
Retail Purchases of Liquor	\$26.50	4.8%	\$1.26
Avg. Spend per Crew Ashore			\$47.84
Number of Crew Onshore Visits			94,535
Total Crew Expenditures			\$4,522,122

Cruise Line/Destination Spending

Cruise lines made payments to local businesses for a variety of goods and services, including payments for port fees and taxes, navigation services, utilities and other supplies. The destinations themselves had employees and employee wages related to cruise operations. Based upon data provided by the FCCA member cruise lines and the destination, we estimate that cruise lines and ports were responsible for approximately **\$28.1 million** (\$US) in direct spending in Ensenada during the 2023/2024 cruise year.

Economic Contribution of Cruise Tourism Expenditures

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

As shown in **Ensenada Chart 3**, the **\$74.9** million in total cruise tourism expenditures in Ensenada supported direct employment of 1,114 residents of Ensenada paying \$9.1 million in annual wages. Adding the indirect contribution that results from the spending by those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures supported a total employment contribution of 1,654 jobs and \$13.7 million in wage income in Ensenada during the 2023/2024 cruise year.

Ensenada Chart 3 –Total Economic Contribution of Cruise Tourism, 2023/2024 cruise year

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	1,114	\$9.1
Total Economic Contribution	1,654	\$13.7

The lodging & food services, and transportation & warehousing sectors account for about 56% of the total job impacts.

Passenger Surveys

Ensenada Chart 4 shows the major attributes of passenger visits to Ensenada as derived from the passenger surveys. Of those who completed the survey:

- Fifty-six percent stated this was their first visit to Ensenada.
- nearly three-quarters (73%) of those who went ashore made at least one purchase while ashore other than a tour.
- the typical cruise party consisted of two passengers (Average: 2.3) and spent an average of 4.3 hours ashore.

Ensenada Chart 4 – Major Attributes of Passenger Surveys

	Percent
Number Making First Visit	56%
Number Making Any Onshore Purchases:	73%
Average Hours Ashore	
Purchased a Shore Excursion (Tour)	46%
How Purchased Tour:	
Cruise Line	70%
Onshore Tour Operator	3%
Other	27%
Tour Type:	
Historical/Cultural	34%
Beach Day	4%
Land-Based	31%
Water-Based	4%
Other	34%
Reason for No Tour	
Prefer to Tour on Own	52%
Poor Value	15%
Didn't Like Any	17%
Too Similar to Other Dest	1%
Weather	3%
Prefer to Stay on Ship	3%
Other	26%

- About half (46%) of the passengers that went ashore purchased a shore excursion. Seventy percent of passengers who purchased a tour did so through their cruise line, 3 percent purchased their tour on shore and 27 percent purchased their tour through some other means (travel agent, travel site, etc.).
- An equal number of tours purchased were visits to “historical or cultural sites” (34%) or “land-based activities” (31%).
- Key reasons why some did not purchase a tour include they prefer to tour on their own (52%); or they didn’t like any (17%).

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Ensenada Chart 5**. 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 purposes, the satisfaction data from the prior study is also shown in the chart below.

- Cruise passengers were ‘very satisfied’ with their “Overall Visit” to Ensenada (7.6) as well as the visit “Meeting Expectations” (7.4).
- “Guided Tours” (or Shore Excursions) received a ‘very satisfied’ mean score of 8.6. Additionally, the high ratings in “Knowledge of Guide” (9.0), and “Value of Tours” (8.3) indicates visitors to Ensenada were very satisfied with their onshore excursions.

Ensenada Chart 5 – Passenger Visit Satisfaction*

Visit Attributes	2024 Mean Score	2018 Mean Score
Overall Visit	7.6	7.1
Visit Met Expectations	7.4	6.6
Likelihood of a Return Visit	5.6	4.4
Likelihood of Recommending	5.5	4.8
Initial Shoreside Welcome	8.0	7.7
Overall Guided Tour	8.6	8.6
Knowledge of Guide	9.0	9.1
Value of Tour	8.3	8.3
Historic Sites/Museums	7.6	7.6
Variety of Things to See and Do	7.1	6.4
Friendliness of Residents	8.1	7.6
Overall Shopping Experience	7.3	7.2
Courtesy of Employees	8.6	7.8
Overall Prices	7.3	7.3
Taxis/Local Transportation	7.9	8.1

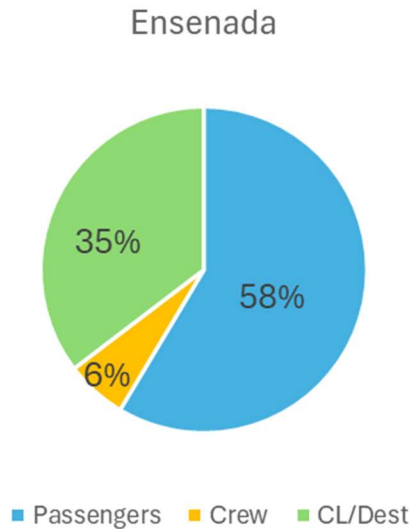
* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows:
 Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3;
 Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Passenger interactions with residents and store employees were very positive as the mean scores for “friendliness of residents” (8.1) and “courtesy of employees” (8.6) were high.
- Passengers were also very satisfied with a “variety of things to see and do” (7.1) and the “overall shopping experience” (7.3). They recorded similar satisfaction ratings for satisfaction with the “overall prices” (7.3).
- Ensenada scored lowest passengers saying they are “likely to return for a land-based visit” (5.6), and their “likelihood of recommending to a friend” (5.5), however, both ratings are similar to those of other Mexico destinations.

Ensenada Chart 6 – Overall Spending

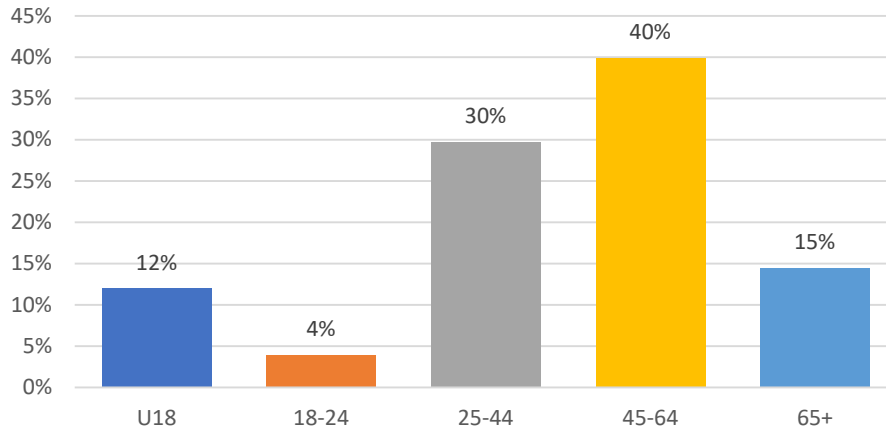
Just over half (58%) of the cruise related spending in Ensenada was made by passengers, 35 percent was made by the cruise lines and the port itself, and the remaining 6 percent was spending made by crew members.



Passenger Demographics

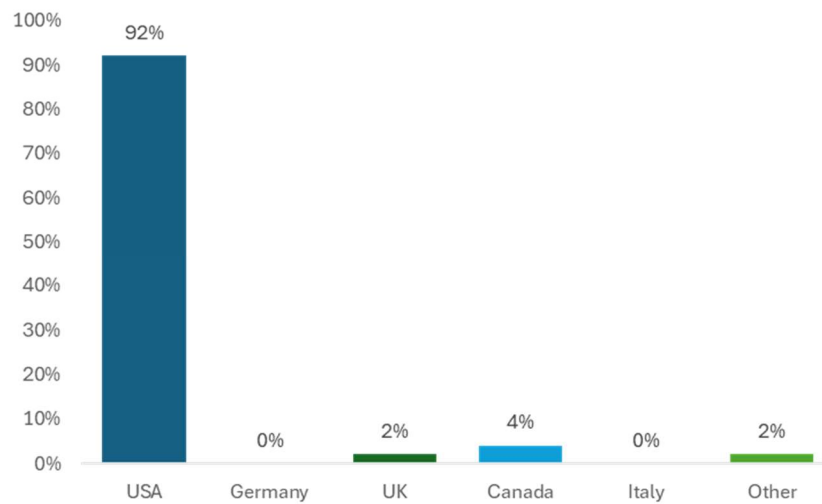
Consistent with the overall industry trends, the average age is down significantly from 53 years old in the last study to 44 years old in this study. About 69 percent of the respondents are between the ages of 25 and 64.

Ensenada Chart 7 – Passenger Age Cohorts



Residents of the United States account for 92 percent of the responding passengers.

Ensenada Chart 8 – Passenger Residence



Mazatlán

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.¹⁰² The surveys were undertaken during the eight-month period beginning in October 2023 and ending in May 2024. The surveys were distributed onboard the ships via QR codes, and the guests and crew completed the surveys online. Passengers and crew were only surveyed once during a cruise itinerary.

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 excursions, food & beverages, clothing, etc.;
- visit satisfaction, including shore excursions, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation (passengers only); and
- demographic characteristics, including country of residence, age group, etc.

Combining the expenditure data collected from the passenger and crew surveys with revenue and wage data received directly from the destinations, and destination specific expenditure data by the cruise lines for items such as port fees, provisions and services leads to estimates of the total cruise tourism expenditures for each participating destination.

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

¹⁰² Surveys were conducted on the ships of the following cruise lines: Aida, 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.

Cruise Tourism Expenditures

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

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

Based on data collected from the Administracion Del Sistema Portuaria National Mazatlán, 417,450 cruise passengers arrived aboard cruise ships during the 2023/2024 cruise year.¹⁰³ Of these, an estimated 348,155 passengers (83%) disembarked and visited Mazatlán. Utilizing additional data provided by Mazatlán and visiting cruise lines, 141,935 crew were aboard the cruise ships and 30 percent, or 43,150 crew, disembarked and visited the destination. Passenger arrivals are virtually double the 210,880 passengers reported in the 2017/18 study.

These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **\$34.1** million (\$US) in cruise tourism expenditures in Mazatlán during the 2023/2024 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Passenger Spending

Per passenger spending estimates were derived from more than 1,000 surveys completed by passengers during the survey period. As shown in **Mazatlán Chart 1**, each passenger cruise party spent an average of \$151.87. The average spend per cruise party is the sum of the weighted spending in each of the 8 purchase categories. For example, 44 percent of the survey respondents reported spending an average of \$52.40 for food and beverages. Spread across all cruise parties that visited Mazatlán, this represented an average of \$22.96 per cruise party ($\$52.40 \times 44\% = \22.96). On a per passenger basis, the average total expenditure was \$75.94. This represents the sum of the per cruise party expenditures, \$151.87, divided by the average size of a cruise party in Mazatlán, 2.0 passengers.

Shore excursions, food & beverages, and watches & jewelry account for 66 percent of cruise passenger expenditures in Mazatlán.

About half (52%) of the passengers reported that their cruise party purchased a shore excursion. The effective price of the shore excursion was about \$59 per party to the local economy.

¹⁰³ The 2023/2024 cruise year includes the twelve months beginning in May 2023 and ending in April 2024.

Mazatlán Chart 1 – Estimated Passenger Spending (\$US), 2023/2024 cruise year¹⁰⁴

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	\$112.50	52.4%	\$58.95
F&B at Restaurants & Bars	\$52.40	43.8%	\$22.96
Taxis/Ground Transportation	\$50.70	23.8%	\$12.06
Watches & Jewelry	\$147.00	12.4%	\$18.22
Clothing	\$50.20	33.8%	\$16.96
Other Purchases	\$47.20	14.6%	\$6.91
Local Crafts & Souvenirs	\$37.40	34.6%	\$12.95
Retail Purchases of Liquor	\$62.50	4.6%	\$2.86
Avg. Spend per Cruise Party			\$151.87
Average Size of Cruise Party			2.0
Avg. Spend per Passenger Visit			\$75.94
Passenger Onshore Visits			348,155
Total Passenger Expenditures			\$26,437,907

For the entire 2023/2024 cruise year, the estimated 348,155 cruise passengers who disembarked and visited Mazatlán spent a total of **\$26.4 million** (\$US) in Mazatlán.

Crew Spending

Crew spending estimates were derived from more than 1,500 surveys completed by crew members during the survey period. As shown in **Mazatlán Chart 2**, each crew member who disembarked the ship and visited Mazatlán spent an average of \$54.14. Like the passenger spending, the average expenditure per crew member is the sum of the weighted spending in each of the purchase categories.

Expenditures on food and beverages, and other purchases accounted for 72 percent of the crew members’ onshore spending.

¹⁰⁴ The average shore excursion expenditure is a weighted average of the onshore and travel agent/other purchases and the portion of the onboard purchases paid to local tour operators.

For the entire 2023/2024 cruise year, the estimated 43,150 crew who went ashore and visited Mazatlán spent an estimated total of **\$2.3 million** (\$US).

Mazatlán Chart 2 – Estimated Crew Spending (\$US), 2023/2024 cruise year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	\$27.30	80.0%	\$21.87
Taxis/Ground Transportation	\$14.40	43.5%	\$6.25
Watches & Jewelry	\$46.30	3.5%	\$1.61
Clothing	\$46.50	13.0%	\$6.06
Other Purchases	\$36.20	20.9%	\$7.55
Shore Excursions	\$38.30	5.2%	\$2.00
Personal Products	\$46.30	7.0%	\$3.22
Local Crafts & Souvenirs	\$24.90	20.9%	\$5.19
Retail Purchases of Liquor	\$15.00	2.6%	\$0.39
Avg. Spend per Crew Ashore			\$54.14
Number of Crew Onshore Visits			43,150
Total Crew Expenditures			\$2,335,995

Cruise Line & Destination Spending

Cruise lines made payments to local businesses for a variety of goods and services, including payments for port fees and taxes, navigation services, utilities and other supplies. The destination itself had employee wages related to cruise operations. Based upon data provided by the FCCA member cruise lines and the destination, we estimate that cruise lines and the destination were responsible for approximately **\$5.3 million** (\$US) in direct spending in Mazatlán during the 2023/2024 cruise year.

Economic Contribution of Cruise Tourism Expenditures

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

As shown in **Mazatlán Chart 3**, the **\$34.1** million in total cruise tourism expenditures in Mazatlán supported direct employment of 551 residents of Mazatlán paying \$4.5 million in annual wages. Adding the indirect contribution that results from the spending by those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures supported a total employment contribution of 758 jobs and \$6.3 million in wage income in Mazatlán during the 2023/2024 cruise year.

Mazatlán Chart 3 –Total Economic Contribution of Cruise Tourism, 2023/2024 cruise year

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	551	\$4.5
Total Economic Contribution	758	\$6.3

The Lodging & Food Services, Wholesale & Retail Trade, and Transportation & Warehousing sectors account for about 75% of the total job impacts.

Passenger Surveys

Mazatlán Chart 4 shows the major attributes of passenger visits to Mazatlán as derived from the passenger surveys. Of those who completed the survey:

- 64 percent stated this was their first visit to Mazatlán.
- three-quarters (73%) of those who went ashore made at least one purchase while ashore other than a tour.
- the typical cruise party consisted of two passengers (Average: 2.0) and spent an average of 4.7 hours ashore.

Mazatlán Chart 4 – Major Attributes of Passenger Surveys

	Percent
Number Making First Visit	64%
Number Making Any Onshore Purchases:	73%
Average Hours Ashore	4.7
Purchased a Shore Excursion (Tour)	52%
How Purchased Tour:	
Cruise Line	66%
Onshore Tour Operator	10%
Other	25%
Tour Type:	
Historical/Cultural	41%
Beach Day	16%
Land-Based	18%
Water-Based	9%
Other	27%
Reason for No Tour	
Prefer to Tour on Own	58%
Poor Value	11%
Didn't Like Any	17%
Too Similar to Other Dest	3%
Weather	2%
Prefer to Stay on Ship	5%
Other	19%

- About half (52%) of the passengers that went ashore purchased a shore excursion. Sixty-six percent of passengers who purchased a tour did so through their cruise line, 10 percent purchased their tour on shore and 25 percent purchased their tour through some other means (travel agent, travel site, etc.).
- 2 in 5 (41%) of the tours purchased were visits to “historical or cultural sites”, while nearly 1 in 5 were “land-based activities” (18%).
- The key reasons why some did not purchase a tour include they prefer to tour on their own (58%) and they simply did not like any (17%).

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Mazatlán Chart 5**. 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 purposes, the satisfaction data from the prior study is also shown in the chart below.

- Cruise passengers were very satisfied with their “overall visit” to Mazatlán (7.9) and the visit “meeting expectations” (7.7).
- “Guided Tours” (or Shore Excursions) received a ‘very satisfied’ mean score of 8.5; Additionally, the high ratings in “knowledge of guide” (9.0), and “value of tours” (8.4) indicates visitors to Mazatlán were very satisfied with their onshore excursions.

Mazatlán Chart 5 – Passenger Visit Satisfaction*

Visit Attributes	2024 Mean Score	2018 Mean Score
Overall Visit	7.9	8.3
Visit Met Expectations	7.7	7.6
Likelihood of a Return Visit	5.5	5.0
Likelihood of Recommending	5.8	5.6
Initial Shoreside Welcome	8.0	8.5
Overall Guided Tour	8.5	8.8
Knowledge of Guide	9.0	9.0
Value of Tour	8.4	8.5
Historic Sites/Museums	8.0	8.1
Variety of Things to See and Do	7.5	7.6
Friendliness of Residents	8.5	8.5
Overall Shopping Experience	7.5	7.7
Courtesy of Employees	8.7	8.4
Overall Prices	7.6	7.6
Taxis/Local Transportation	8.2	8.6

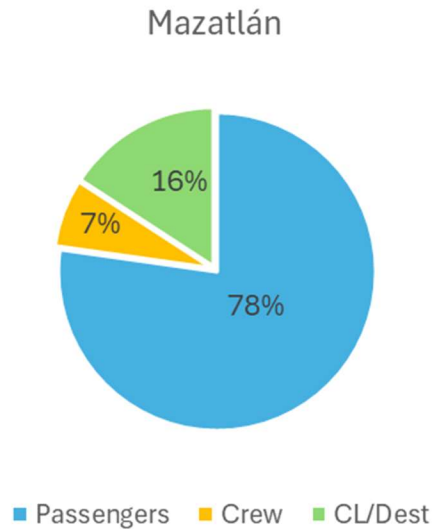
* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows:
 Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3;
 Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Passenger interactions with residents and store employees were very positive as the mean scores for “friendliness of residents” (8.5) and “courtesy of employees” (8.7) were high.
- Passengers were also very satisfied with the “historic sites” (8.0), a “variety of things to see and do” (7.5) and the “overall shopping experience” (7.5).
- As was observed by every destination, Mazatlán scored lowest passengers saying they are “likely to return for a land-based visit” (5.5) and their “likelihood of recommending to a friend” (5.8). These ratings are similar to the ratings of other destinations.

Mazatlán Chart 6 – Overall Spending

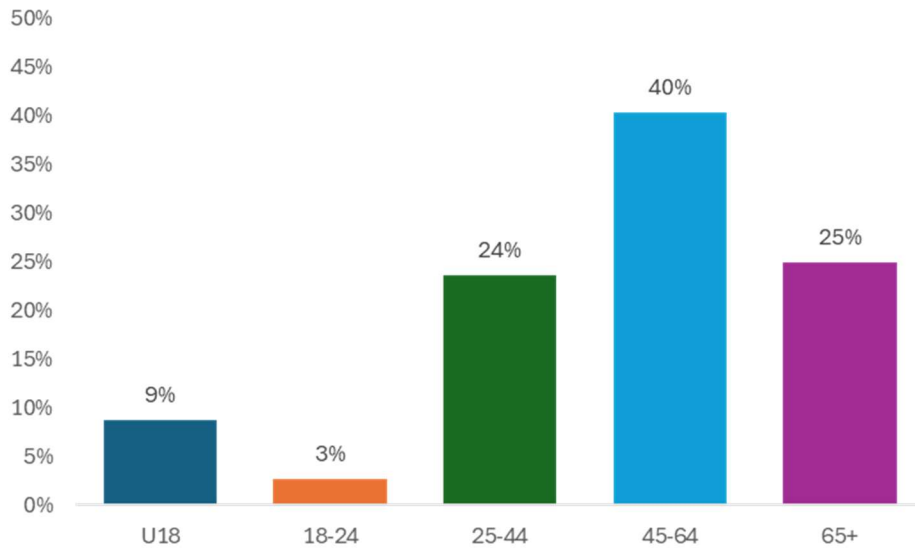
Nearly 4 in 5 (78%) of the cruise related spending in Mazatlán was made by passengers, 16 percent was made by the cruise lines and the port itself, and the remaining 7 percent was spending made by crew members.



Passenger Demographics

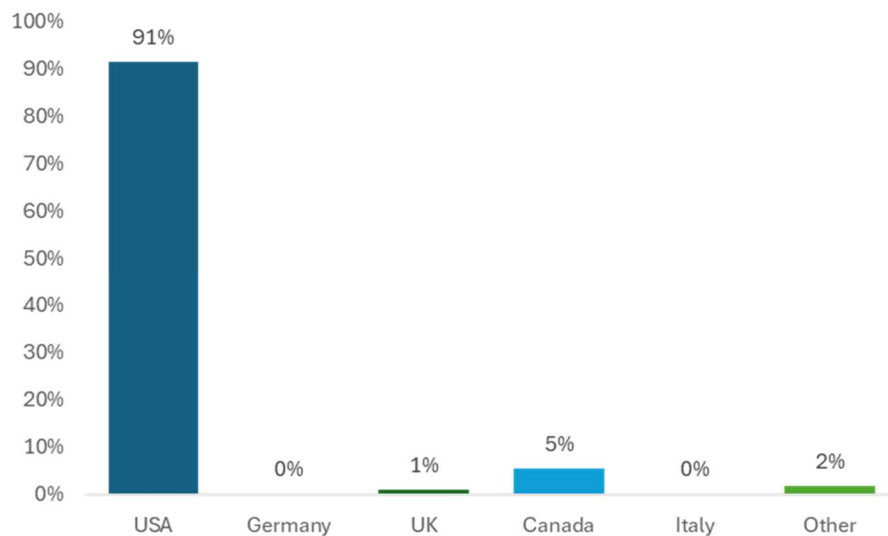
Consistent with the overall industry trends, the average age is down from 61 years old in the last study to 48 years old in this study. About 64 percent of the respondents are between the ages of 25 and 64.

Mazatlán Chart 7 – Passenger Age Cohorts



Mazatlán Chart 8 – Passenger Residence

Most (91%) of the responding passengers to Mazatlán are residents of the US, and 5 percent are from Canada.



Progreso

At the core of the analysis of the economic contribution of cruise tourism were a set of passenger and crew surveys that were conducted onboard ships of the FCCA member cruise lines.¹⁰⁵ The surveys were undertaken during the eight-month period beginning in October 2023 and ending in May 2024. The surveys were distributed onboard the ships via QR codes, and the guests and crew completed the surveys online. Passengers and crew were only surveyed once during a cruise itinerary.

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 excursions, food & beverages, clothing, etc.;
- visit satisfaction, including shore excursions, friendliness of residents, prices, shopping, etc.;
- likelihood of returning for a land-based vacation (passengers only); and
- demographic characteristics, including country of residence, age group, etc.

Combining the expenditure data collected from the passenger and crew surveys with revenue and wage data received directly from the destinations, and destination specific expenditure data by the cruise lines for items such as port fees, provisions and services leads to estimates of the total cruise tourism expenditures for each participating destination.

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

¹⁰⁵ Surveys were conducted on the ships of the following cruise lines: Aida, 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.

Cruise Tourism Expenditures

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

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

Based on data collected from the Gobierno del Estado de Yucatan, 317,310 cruise passengers arrived aboard cruise ships during the 2023/2024 cruise year.¹⁰⁶ Of these, an estimated 267,490 passengers (84%) disembarked and visited Progreso. Utilizing additional data provided by the Gobierno del Estado de Yucatan and visiting cruise lines, 105,770 crew were aboard the cruise ships and 30 percent, or 32,155 crew, disembarked and visited the destination.

These passenger and crew visits along with additional expenditures by the cruise lines generated a total of **\$25.8** million (\$US) in cruise tourism expenditures in Progreso during the 2023/2024 cruise year. The contribution of expenditures by passengers, crew and cruise lines to this total is discussed below.

Passenger Spending

Per passenger spending estimates were derived from more than 925 surveys completed by passengers during the survey period. As shown in **Progreso Chart 1**, each passenger cruise party spent an average of \$131.47. The average spend per cruise party is the sum of the weighted spending in each of the 8 purchase categories. For example, 33 percent of the survey respondents reported spending an average of \$30.20 for food and beverages. Spread across all cruise parties that visited Progreso, this represented an average of \$10.05 per cruise party ($\$30.20 \times 33\% = \10.05). On a per passenger basis, the average total expenditure was \$62.87. This represents the sum of the per cruise party expenditures, \$131.47, divided by the average size of a cruise party in Progreso, 2.1 passengers.

Shore excursions, clothing and local crafts & souvenirs accounted for 76 percent of cruise passenger expenditures in Progreso.

Just over half (60%) of the passengers reported that their cruise party purchased a shore excursion. The effective price of the shore excursion was about \$69 per party to the local economy.

¹⁰⁶ The 2023/2024 cruise year includes the twelve months beginning in May 2023 and ending in April 2024.

Progreso Chart 1 – Estimated Passenger Spending (\$US), 2023/2024 cruise year¹⁰⁷

Purchase Categories	Average Spend per Party	Share of All Onshore Visits	Weighted Average Spend per Party
Shore Excursions	\$115.10	60.2%	\$69.31
F&B at Restaurants & Bars	\$30.20	33.3%	\$10.05
Taxis/Ground Transportation	\$27.00	3.7%	\$0.99
Watches & Jewelry	\$69.70	8.7%	\$6.08
Clothing	\$40.40	29.1%	\$11.74
Other Purchases	\$41.70	24.2%	\$10.08
Local Crafts & Souvenirs	\$43.30	42.8%	\$18.52
Retail Purchases of Liquor	\$70.60	6.6%	\$4.69
Avg. Spend per Cruise Party			\$131.47
Average Size of Cruise Party			2.1
Avg. Spend per Passenger Visit			\$62.87
Passenger Onshore Visits			267,490
Total Passenger Expenditures			\$16,816,566

For the entire 2023/2024 cruise year, the estimated 267,490 cruise passengers who disembarked and visited Progreso spent a total of **\$16.8 million** (\$US) in Progreso.

Crew Spending

Crew spending estimates were derived from more than 900 surveys completed by crew members during the survey period. As shown in **Progreso Chart 2**, each crew member who disembarked the ship and visited Progreso spent an average of \$38.69. Like the passenger spending, the average expenditure per crew member is the sum of the weighted spending in each of the purchase categories.

Expenditures on food and beverages, and other purchases accounted for 72 percent of the crew members’ onshore spending.

¹⁰⁷ The average shore excursion expenditure is a weighted average of the onshore and travel agent/other purchases and the portion of the onboard purchases paid to local tour operators.

For the entire 2023/2024 cruise year, the estimated 32,155 crew who went ashore and visited Progreso spent an estimated total of **\$1.2 million** (\$US).

Progreso Chart 2 – Estimated Crew Spending (\$US), 2023/2024 cruise year

Purchase Categories	Average Spend per Crew	Share of All Onshore Visits	Weighted Average Spend per Crew
F&B at Restaurants & Bars	\$24.60	76.5%	\$18.82
Taxis/Ground Transportation	\$13.30	10.2%	\$1.36
Watches & Jewelry	\$72.40	2.5%	\$1.78
Clothing	\$34.60	6.7%	\$2.31
Other Purchases	\$29.20	30.5%	\$8.91
Shore Excursions	\$30.00	4.6%	\$1.37
Personal Products	\$0.00	0.0%	\$0.00
Local Crafts & Souvenirs	\$23.00	14.4%	\$3.31
Retail Purchases of Liquor	\$40.00	2.1%	\$0.84
Avg. Spend per Crew Ashore			\$38.69
Number of Crew Onshore Visits			32,155
Total Crew Expenditures			\$1,243,965

Cruise Line Spending

Cruise lines made payments to local businesses for a variety of goods and services, including payments for port fees and taxes, navigation services, utilities and other supplies. The destination itself had employee wages related to cruise operations. Based upon data provided by the FCCA member cruise lines and the destination, we estimate that cruise lines and the port were responsible for approximately **\$7.7 million** (\$US) in direct spending in Progreso during the 2023/2024 cruise year.

Economic Contribution of Cruise Tourism Expenditures

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

As shown in **Progreso Chart 3**, the **\$25.8** million in total cruise tourism expenditures in Progreso supported direct employment of 368 residents of Progreso paying \$3.4 million in annual wages. Adding the indirect contribution that results from the spending by those local businesses that are the direct recipients of passenger, crew and cruise line expenditures, the direct cruise tourism expenditures supported a total employment contribution of 555 jobs and \$4.8 million in wage income in Progreso during the 2023/2024 cruise year.

Progreso Chart 3 –Total Economic Contribution of Cruise Tourism, 2023/2024 cruise year

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	368	\$3.4
Total Economic Contribution	555	\$4.8

The Wholesale & Retail Trade, Lodging & Food Services, and Transportation & Warehousing sectors account for about 75% of the total job impacts.

Passenger Surveys

Progreso Chart 4 shows the major attributes of passenger visits to Progreso as derived from the passenger surveys. Of those who completed the survey:

- 70 percent stated this was their first visit to Progreso.
- nearly three-quarters (74%) of those who went ashore made at least one purchase while ashore other than a tour.
- the typical cruise party consisted of two passengers (Average: 2.1) and spent an average of 4.4 hours ashore.

Progreso Chart 4 – Major Attributes of Passenger Surveys

	Percent
Number Making First Visit	70%
Number Making Any Onshore Purchases:	74%
Average Hours Ashore	4.4
Purchased a Shore Excursion (Tour)	60%
How Purchased Tour:	
Cruise Line	67%
Onshore Tour Operator	5%
Other	28%
Tour Type:	
Historical/Cultural	67%
Beach Day	24%
Land-Based	7%
Water-Based	2%
Other	8%
Reason for No Tour	
Prefer to Tour on Own	45%
Poor Value	1%
Didn't Like Any	0%
Too Similar to Other Dest	12%
Weather	0%
Prefer to Stay on Ship	0%
Other	42%

- More than half (60%) of the passengers that went ashore purchased a shore excursion. Sixty-seven percent of passengers who purchased a tour did so through their cruise line, 5 percent purchased their tour on shore and 28 percent purchased their tour through some other means (travel agent, travel site, etc.).
- Two in three (67%) of the tours purchased were visits to “historical or cultural sites”, while 1 in 4 were “beach day activities” (24%).
- Key reason why some did not purchase a tour include they prefer to tour on their own (45%).

Passenger Satisfaction

The passenger survey also asked the passengers to rate their satisfaction with their destination visit along a number of parameters, as shown in **Progreso Chart 5**. 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 purposes, the satisfaction data from the prior study is also shown in the chart below.

- Cruise passengers were very satisfied with their “overall visit” to Progreso (7.9) and the visit “meeting expectations” (7.4).
- “Guided Tours” (or Shore Excursions) received a ‘very satisfied’ mean score of 9.2; Additionally, the high ratings in “knowledge of guide” (9.4), and “value of tours” (8.9) indicates visitors to Progreso were extremely satisfied with their onshore excursions.

Progreso Chart 5 – Passenger Visit Satisfaction*

Visit Attributes	2024 Mean Score	2018 Mean Score
Overall Visit	7.9	6.9
Visit Met Expectations	7.4	6.2
Likelihood of a Return Visit	5.6	4.3
Likelihood of Recommending	5.1	4.5
Initial Shoreside Welcome	8.3	7.5
Overall Guided Tour	9.2	8.7
Knowledge of Guide	9.4	9.1
Value of Tour	8.9	8.3
Historic Sites/Museums	8.9	8.3
Variety of Things to See and Do	7.3	6.3
Friendliness of Residents	8.3	7.5
Overall Shopping Experience	7.5	6.5
Courtesy of Employees	8.1	7.2
Overall Prices	7.7	6.9
Taxis/Local Transportation	8.6	7.7

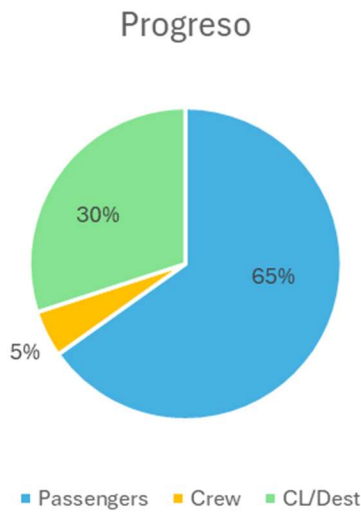
* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows:
 Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3;
 Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Passenger interactions with residents and store employees were very positive as the mean scores for “friendliness of residents” (8.3) and “courtesy of employees” (8.1) were high.
- Passengers were also very satisfied with the “historic sights” (8.9), a “variety of things to see and do” (7.3) and the “overall shopping experience” (7.5). They recorded similar satisfaction ratings for the “overall prices” (7.7).
- Consistent with all other destinations, Progreso scored lowest passengers saying they are “likely to return for a land-based visit” (5.6), and their “likelihood of recommending to a friend” (5.1), however, both ratings are similar to the ratings of other destinations.

Progreso Chart 6 – Overall Spending

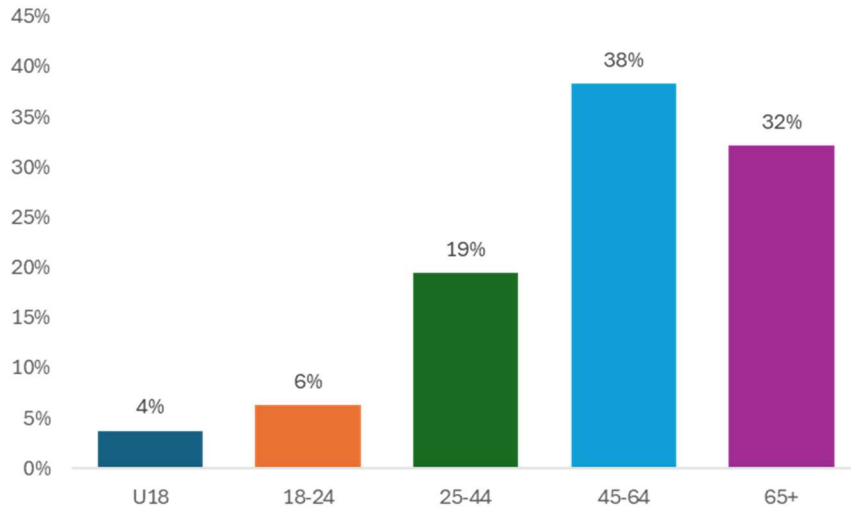
Two in three (65%) of the cruise related spending in Progreso was made by passengers, 30 percent was made by the cruise lines and Progreso itself, and the remaining 5 percent was spending made by crew members.



Passenger Demographics

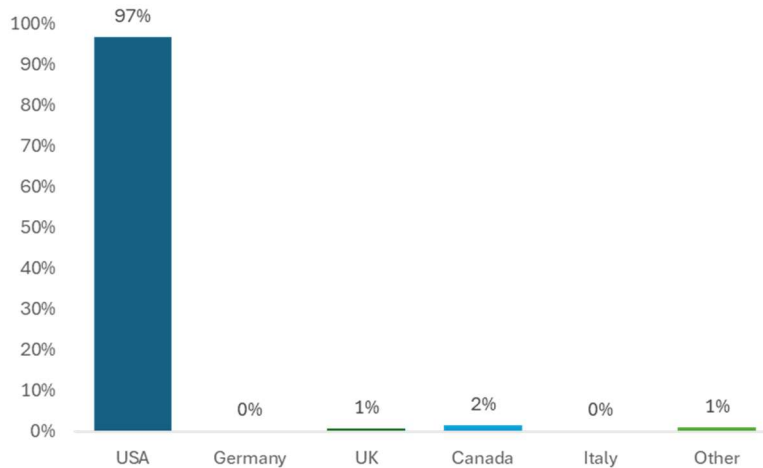
Consistent with the overall industry trends, the average age is down from 56 years old in the last study to 51 years old in this study. About 58 percent of the respondents are between the ages of 25 and 64.

Progresso Chart 7 – Passenger Age Cohorts



Progresso Chart 8 – Passenger Residence

Virtually all (97%) of the responding passengers to Progresso are residents of the US.





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

Dr. Moody, President of BREA, has more than 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.

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 15 years Rich's focus has been on the travel and tourism industry. Prior to joining BREA, Rich ran his own marketing research firm, The Princeton Research Group, Inc.

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 clients are: Florida Caribbean Cruise Association, Port of Philadelphia, Port Canaveral, Tampa Port Authority, CLIA, Port of San Diego, Royal Caribbean Cruises Ltd. And Carnival Corp. 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.).