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ECONOMIC CONTRIBUTION OF CRUISE TOURISM TO THE DESTINATION ECONOMIES

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

VOLUME I AGGREGATE ANALYSIS



Prepared for

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

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EXECUTIVE SUMMARY

Business Research and Economic Advisors (BREA) was engaged by the Florida-Caribbean Cruise Association (FCCA) and participating cruise destinations to conduct an analysis of cruise-related spending and its impact on the economies of the participating destinations. This is an update of similar projects undertaken in 2006, 2009, 2012 and 2015. A total of 36 destinations participated in this study. These destinations were located in the Caribbean, Mexico and Central and South America. The participating destinations and their sponsoring organizations are shown in **Table ES-1**.

Table ES-1 – Participating Destinations and Sponsoring Organizations

Destinations	Sponsoring Agencies
Antigua & Barbuda	Antigua & Barbuda Tourism Authority
Aruba	Aruba Ports Authority
The Bahamas	Ministry of Tourism
Barbados	Barbados Port Inc.
Belize	Belize Tourism Board
Bonaire	Tourism Corporation of Bonaire
British Virgin Islands	BVI Ports Authority
Cayman Islands	Cayman Islands Department of Tourism
Colombia	Sociedad Portuaria Regional de Cartagena / Proexport Colombia
Costa Maya	Promociones Turisticas Majahual SA de CV
Costa Rica	Instituto Costarricense de Turismo
Cozumel	Café Azul, Mexico
Curacao	Curacao Ports Authority
Dominican Republic	Ministry of Tourism
Ensenada	Administracion Portuaria Integral de Ensenada SA de CV
Grenada	Grenada Tourism Authority
Guadeloupe	Guadeloupe Islands Tourism Board
Guatemala	Inguat
Honduras	Port of Roatan
Jamaica	Jamaica Tourist Board
Manzanillo	Ministry of Tourism of Colima, Mexico
Martinique	Martinique Tourism Authority
Mazatlán	Administracion Portuaria Integral de Mazatlán SA de CV
Nicaragua	Nicaragua Tourism Board
Panama	Gobierno de Republica de Panama
Progreso	Administracion Portuaria Integral de Progreso SA de CV
Puerto Chiapas	Administración Portuaria Integral de Puerto Madero
Puerto Rico	Puerto Rico Tourism Company
Puerto Vallarta	Administracion Portuaria Integral de Puerto Vallarta SA de CV
St. Kitts & Nevis	St. Kitts Tourism Authority
St. Lucia	Ministry of Tourism, Heritage and Creative Industries
St. Maarten	Port St. Maarten Group of Companies
St. Vincent and the Grenadines	St. Vincent and the Grenadines Port Authority
Trinidad	Ministry of Tourism
Turks and Caicos	Ministry of Tourism
U. S. Virgin Islands	Department of Tourism

Economic Impacts

During the 2017/2018 cruise year¹ **cruise tourism generated nearly \$3.4 billion in direct expenditures, 79,000 jobs and \$903 million in employee wages** among the 36 destinations included in the study (see **Table ES-2**).²

¹ The economic contribution of cruise tourism to the 36 destinations was estimated for the 12-month period from May, 2017 through April, 2018 which is referred to as the 2017/2018 cruise year throughout this report.

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

Table ES-2 – Total Economic Contribution of Cruise Tourism by Destination, 2017/2018 Cruise Year

Destinations	Total Cruise Tourism Expenditures (\$US Millions)	Total Employment	Total Employee Wage Income (\$US Millions)
Antigua & Barbuda	\$77.74	1,466	\$14.41
Aruba	\$102.75	2,255	\$38.03
Bahamas	\$405.75	9,004	\$155.71
Barbados	\$71.03	2,351	\$25.36
Belize	\$86.12	2,530	\$27.68
Bonaire	\$30.15	525	\$8.77
British Virgin Islands	\$12.63	234	\$4.33
Cayman Islands	\$224.54	4,622	\$92.24
Colombia	\$59.85	1,186	\$8.56
Costa Maya	\$89.54	2,081	\$13.45
Costa Rica	\$29.24	825	\$5.17
Cozumel	\$474.07	11,945	\$78.21
Curacao	\$71.73	1,106	\$20.73
Dominican Republic	\$134.72	4,052	\$17.43
Ensenada	\$40.39	1,016	\$7.69
Grenada	\$19.25	529	\$3.65
Guadeloupe	\$52.94	994	\$8.56
Guatemala	\$11.08	345	\$1.66
Honduras	\$107.36	2,198	\$11.61
Jamaica	\$244.53	8,293	\$56.57
Manzanillo	\$2.71	58	\$0.45
Martinique	\$38.22	790	\$6.43
Mazatlán	\$15.87	420	\$2.56
Nicaragua	\$5.70	323	\$0.96
Panama	\$77.75	1,827	\$12.65
Progreso	\$32.72	807	\$5.02
Puerto Chiapas	\$1.59	38	\$0.25
Puerto Rico (San Juan)	\$151.17	3,644	\$56.00
Puerto Vallarta	\$42.50	1,027	\$7.27
St. Kitts & Nevis	\$149.28	2,065	\$17.64
St. Lucia	\$59.42	1,465	\$11.64
St. Maarten	\$143.24	3,499	\$72.34
St. Vincent	\$16.43	418	\$3.39
Trinidad	\$3.50	116	\$1.59
Turks and Caicos	\$86.47	1,461	\$26.76
U. S. Virgin Islands	\$184.69	3,439	\$77.89
All Destinations	\$3,356.65	78,954	\$902.68

Eleven (11) destinations had direct cruise tourism expenditures of \$100 million or more. Ten (10) destinations had direct expenditures between \$50 and \$100 million, five (5) had direct expenditures between \$20 and \$50 and ten (10) had direct expenditures less than \$20 million.

Cozumel led all destinations with \$474 million, followed by the Bahamas with \$406 million, Jamaica with \$245 million, the Cayman Islands with \$225 million and the USVI with \$185 million. Combined, these five destinations with \$1.5 billion in direct expenditures accounted for 46 percent of the total cruise tourism expenditures among the 36 destinations.

The next 6 destinations with \$100 million or more accounted for an additional \$789 million in cruise tourism expenditures, or 24 percent of the total. Among these were Puerto Rico (\$151 million), St. Kitts & Nevis (\$149 million), St. Maarten (\$143 million), Dominican Republic (\$135 million), Honduras (\$107 million) and Aruba (\$103 million).

The next ten destinations with expenditures between \$50 and \$100 million accounted for 22 percent of the total cruise tourism expenditures with a combined total of \$745 million in direct spending. Direct spending among these ten destinations ranged from \$52.9 million in Guadeloupe to \$89.5 million in Costa Maya. In addition to Costa Maya, Turks & Caicos (\$86.5 million) and Belize (\$86.1 million) each had total cruise tourism expenditures in excess of \$85 million.

The next six destinations with expenditures between \$20 and \$50 million accounted for 6.4 percent of the total cruise tourism expenditures and a combined total of \$213 million in direct spending. Direct spending among these six destinations ranged from \$29.2 million in Costa Rica to \$42.5 million in Puerto Vallarta. Ensenada (\$40.4 million), Martinique (\$38.2 million) and Progreso (\$32.7 million) each had total cruise tourism expenditures in excess of \$30 million.

The remaining nine destinations each had less than \$20 million in direct cruise tourism expenditures and had a combined total of nearly \$89 million in direct cruise tourism expenditures. This accounted for about three percent of the total among the 36 destinations. Cruise tourism expenditures among these destinations ranged from \$1.6 million in Puerto Chiapas to \$19.2 million in Grenada. In addition to Grenada, St. Vincent (\$16.4 million), Mazatlán (\$15.9 million), BVI (\$12.6 million), Guatemala (\$11.1 million) each had in excess of \$10 million in total cruise tourism expenditures.

The analysis of cruise tourism expenditures revealed the following economic impacts³ for the 11 destinations with more than \$100 million in total expenditures:

- Cozumel had the highest level of direct cruise sector expenditures with \$474 million in spending. In addition, Cozumel had the highest volume of onshore passenger and crew visits with 4.16 million total visits. As a result of these onshore visits, Cozumel had an average total expenditure of \$113.85 per passenger and crew visit⁴. The \$474 million in cruise tourism expenditures generated an estimated 11,945 jobs, the highest level among the 36 destinations, paying \$78.2 million in wage income during the 2017/2018 cruise year.
- The Bahamas, with 2.97 million combined passenger and crew visits, had the second highest volume of visits in the Caribbean. It also had the second highest level of direct expenditures with \$406 million. Thus, each visit generated an average total ex-

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

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

penditure of \$136.53 across all passenger and crew visits. As a result of the \$406 million in direct expenditures the Bahamas benefitted from the generation of 9,004 jobs paying wage income of \$155.7 million, the second highest totals for employment, and the highest for wages the Caribbean.

- Jamaica had the third highest level of direct expenditures with \$245 million in spending by cruise lines and their passengers and crew. The combined passenger and crew onshore visits totaled 2.05 million visits during the 2017/18 cruise year. On average each passenger and crew visit generated an average \$119.45 in total direct expenditures per visit. The \$245 million in cruise tourism spending in Jamaica generated an estimated 8,293 total jobs and \$56.6 million in wage income during the 2017/2018 cruise year.
- The Cayman Islands had the fourth highest number of passenger and crew onshore visits with 1.89 million visits and the fourth highest volume of direct expenditures, \$225 million. The Cayman Islands had an average total expenditure of \$119.10 per passenger and crew visit. The \$225 million in cruise tourism spending in the Cayman Islands generated 4,622 total jobs and \$92.2 million in wage income during the 2017/2018 cruise year.
- The U.S. Virgin Islands had the fifth highest level of direct cruise sector expenditures with \$185 million in spending. In addition, the U.S.V.I. had the eight highest volume of onshore passenger and crew visits with 1.12 million combined visits. It also had the second highest average total expenditure rate of \$165.09 per passenger and crew visit. The \$185 million in cruise tourism expenditures generated an estimated 3,439 jobs paying \$77.9 million in wage income, the fourth highest wage total in the Caribbean, during the 2017/2018 cruise year.
- Puerto Rico benefitted from \$151 million in total cruise tourism expenditures which, in turn, generated 3,644 jobs and \$56.0 million in wages during the 2017/2018 cruise year. The economic impacts of cruise tourism in Puerto Rico were generated by both homeport and port-of-call visits. In fact, Puerto Rico led the Caribbean in passenger embarkations during the 2017/2018 cruise year with over 361,000 embarkations. The island destination ranked fifth in passenger and crew onshore visits with 1.28 million visits. On average each passenger and crew visit generated \$118.31 in total direct expenditures.
- St. Kitts had the seventh highest cruise tourism expenditures, with \$149 million. It also ranked seventh in combined passenger and crew onshore visits with 1.14 million visits. These visits generated an average total expenditure of \$130.86 per visit across all passenger and crew visits. The \$149 million in direct expenditures, in turn, generated an estimated 2,065 jobs paying \$17.6 million in wage income during the 2017/2018 cruise year.
- St. Maarten, with \$143 million in cruise tourism expenditures placed eighth during the 2017/2018 cruise year. Due to the heavy damage from the hurricanes, St. Maarten fell from 3rd most, to out of the top 10 in terms of combined passenger and crew onshore visits. Its 933,900 combined visits are more than 40 percent below that of the 2014/2015 study. These visits generated an average total expenditure of \$153.38 per visit across all passenger and crew visits, fourth highest of the 36 destinations. The \$143 million in direct expenditures, in turn, generated an estimated 3,499 jobs paying \$72.3 million in wage income during the 2017/2018 cruise year. St. Maarten had the fifth highest spend on wage income among the 36 destinations in this study.
- The Dominican Republic had a total of nearly \$135 million in total cruise industry expenditures, ninth highest among the 36 destinations. Driven in large part to the opening of Amber Cove, the combined passenger and crew onshore visits in the Dominican Republic were up more than 80 percent from the 2014/2015 study to approximately 967,000. The \$135 million in cruise tourism spending in the Dominican Republic gen-

erated 4,052 total jobs and \$17.4 million in wage income during the 2017/2018 cruise year.

- Honduras had the tenth highest direct expenditures with \$107 million in spending by cruise lines and their passengers and crew. The combined passenger and crew onshore visits totaled just over 1.0 million visits during the 2017/18 cruise year. On average each passenger and crew visit generated \$105.53 in total direct expenditures. The \$107 million in cruise tourism spending in Honduras generated an estimated 2,198 total jobs and \$11.6 million in wages during the 2017/2018 cruise year.
- Aruba benefitted from nearly \$103 million in total cruise tourism expenditures in the 2017/2018 cruise year. Aruba had more than 780,000 combined passenger and crew onshore visits. On average, each passenger and crew visit generated \$131.68 in total direct expenditures. The \$103 million in total expenditures, in turn, generated 2,255 jobs paying more than \$38 million in wages.

Direct comparisons with earlier studies are not exact, as the number and mix of participating destinations (36) differs from prior studies. Nonetheless, some general comparisons with the 2014/2015 study are possible. First, average passenger and crew visitation rates, i.e., the percentage of arriving passengers and crew that disembark and make an onshore visit, has seen a slight decrease in passenger visits in the current study, dropping from 88 percent to 85 percent. Crew visits remained constant at 39%.

Total direct expenditures per passenger⁵ across all destinations remained virtually unchanged from \$133.78 during the 2014/2015 cruise year to \$133.25 during the 2017/2018 cruise year. The average per passenger spend⁶, including both transit and home port calls, decreased by 2.2 percent from \$103.83 in the last study to \$101.52 this year. The 2.2 percent decrease in the average per passenger spend is largely due to a decrease in the watches and jewelry category. While those who purchased watches and jewelry spent nearly \$25 more per passenger in 2017/2018 relative to 2014/2015, fewer actually made purchases (15.5% vs. 19.8%). This resulted in a \$4.26 overall reduction in average weighted spend per passenger. In addition, fewer passengers spent money on taxis and local transportation this year compared to 2014/15 (18.7% vs 23.7%), resulting in an overall weighted average decrease of about \$.61 per passenger. These decreases were only partially offset by increases in the average expenditure per passenger for shore excursions, and local crafts and souvenirs which increased by 8.3 percent and 11 percent, respectively. Finally, it should be noted that the damages from hurricanes Irma and Maria resulted in nearly 2,000,000 fewer passenger visits to St. Maarten and the USVI – the top two destinations in terms of average per passenger spend in both this study and the last. Had these two destinations received a similar number of onshore visits as in the 2014/2015 study, the overall year-over-year average per passenger spend would have actually increased.

Average expenditures by crew continued its multi-study drop, experiencing a 10 percent decline from \$67.10 in 2014/2015 to \$60.44 in 2017/2018. This decline resulted from reduced spending primarily in electronics, watches and jewelry, and clothing. The watches and jewelry category experienced a reduction in the number of crew members who made a purchase in these categories, a decrease from 12 percent to 5.5 percent. Although the share of crew members who purchased clothing increased from 11 percent to 14 percent, the average spend among those who

⁵ Includes the total cruise industry expenditures divided by the total transit and home port passenger visits.

⁶ Includes the total passenger spend divided by the total transit and home port passenger visits.

made a purchase dropped by about \$24. Combined these two categories resulted in an overall reduction of nearly \$2.95 from the average crew spend. The expenditure on electronics dropped due to a decrease in the average amount spent and the share of those making a purchase. The net result was a decrease of over \$3.00 in the overall weighted average spend.

Finally, expenditures by cruise lines for port fees and services and other goods and services increased to \$533.8 million, resulting in an average expenditure of about \$14.8 million per destination.

Passenger, Crew and Cruise Line Expenditures

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

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

To develop estimates of the typical or average expenditures of cruise passengers and crew during their onshore visit, surveys were conducted onboard ships of the FCCA member cruise lines.⁷ A total of **41,745** passenger surveys⁸ and **18,417** crew surveys were completed and returned for tabulation.

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

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

The survey schedule was designed to generate a representative sample of cruise passengers by cruise line at each destination. Thus, each FCCA member cruise line was scheduled to have its passengers and crew surveyed at least once at each destination at which it had a port call during the survey period. The survey period commenced in the beginning of October 2017 and concluded at the end of May 2018.

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

Passenger Visits and Expenditures

As shown in **Table ES-3**, data collected from the participating destinations and cruise lines indicated that 25.2 million cruise passengers disembarked cruise ships and visited the participating

⁷ Surveys were conducted on the ships of the following cruise lines: Aida Cruises, Carnival Cruise Lines, Celebrity Cruises, Costa Cruises, Disney Cruise Line, Holland America Line, Norwegian Cruise Line, Princess Cruises, P&O Cruises, Royal Caribbean International and TUI Cruises.

⁸ This includes both port-of-call (transit) and port-of-embarkation (homeport) passengers.

destinations or embarked on their cruise at one of the 7 homeports. These passengers spent \$2.56 billion for shore excursions and other goods and services during the 2017/2018 cruise year. The average per passenger spend ranged from a low of \$34.32 in Puerto Chiapas, Mexico to a high of \$165.42 in the USVI. St. Maarten saw its average spend decrease from a high in the last study of \$191.2 to \$142.23, the second highest in the 2017/18 study. The average per passenger spend was \$101.52 across all 36 destinations, down 2.2 percent from \$103.83 in the last study. This decrease is due, in large part, to the impact of hurricanes Irma and Maria on St. Maarten and the USVI – top two destinations in terms of average per passenger spend in both this study and the last study. The resulting damages led to nearly 2,000,000 fewer passenger visits at these two destinations compared to the last study.

Cozumel with \$378 million in total passenger expenditures led all destinations and accounted for 15 percent of total passenger spending among the 36 destinations. Seven additional destinations had passenger expenditures in excess of \$100 million. Passengers spent \$323 million in the Bahamas, \$206 million in Jamaica, \$172 million in the Cayman Islands, \$156 million in the U.S. Virgin Islands, \$133 million in St. Kitts, \$112 million in St. Maarten, and \$100 million in Puerto Rico. Combined, passenger onshore expenditures in these top eight destinations accounted for 62 percent of the onshore passenger expenditures among the 36 destinations and totaled nearly \$1.6 billion.

Only 5 of these top 8 destinations can be considered high volume destinations with more than one million passenger visits during the cruise year, Cozumel (3.5 million) the Bahamas (2.4 million), Jamaica (1.8 million), the Cayman Islands (1.6 million) and Puerto Rico (1.1 million). The remaining three - St Kitts (979k), USVI (944k) and St. Maarten (784k) each had under 1 million visitors in the 2017/18 cruise year.

The average per passenger spend across these top 8 ranged from \$90.78 per passenger in Puerto Rico to \$165.42 in the US Virgin Islands. Of the eight destinations, only Puerto Rico had average per passenger spend below the all destination average of \$101.90. Combined, the eight destinations had an average per passenger spend of \$120.1, 18 percent above the Caribbean average.

Another 16 destinations had passenger expenditures between \$25 and \$100 million. These were: Honduras; Aruba, Dominican Republic, Costa Maya, Belize, Turks and Caicos, Colombia, Barbados, Antigua, St. Lucia, Curacao, Guadeloupe, Puerto Vallarta, Martinique, Ensenada and Bonaire. Onshore passenger expenditures among these 16 destinations totaled \$847 million and accounted for 33 percent of total passenger expenditures among the 36 participating destinations. Total passenger onshore spending in this group of destinations ranged from a low of \$25.4 million in Bonaire to a high of \$92.1 million in Honduras. The average among these 16 destinations was nearly \$53 million.

For the most part, these 16 destinations are considered to be medium volume destinations with passenger onshore visits ranging from 400,000 to one million. The exceptions are Guadeloupe (396k), Bonaire (379k), Colombia (351K), and Puerto Vallarta (298k) which would be considered in the low volume spectrum, and Costa Maya (1.03 million) on the upper end. Among this group of 16 destinations the per passenger spending averaged \$85.07 per visit, ranging from \$54.69 in Ensenada to \$130.63 in Colombia. Among these 16 destinations, only 3, Colombia (\$122.43), Aruba (\$121.94) and Puerto Vallarta (\$118.09) had average per passenger spend above the Car-

ibbean average of \$101.52. Overall, the average per passenger spend for these 16 destinations was about 16 percent below the all destination average.

Table ES-3 – Passengers Onshore Visits and Expenditures by Destination, 2017/2018 Cruise Year

Destinations	Passenger Onshore Visits (Thousands)	Average Spend per Passenger	Total Passenger Expenditures (\$US Millions)
Antigua & Barbuda	663.0	\$73.55	\$48.76
Aruba	677.0	\$121.94	\$82.55
Bahamas^①	2,444.8	\$131.95	\$322.57
Barbados^②	630.8	\$83.12	\$52.43
Belize	877.3	\$77.88	\$68.33
Bonaire	378.6	\$67.19	\$25.44
British Virgin Islands	124.9	\$78.11	\$9.75
Cayman Islands	1,636.5	\$105.17	\$172.12
Colombia^②	351.4	\$122.43	\$43.02
Costa Maya	1,030.4	\$69.58	\$71.70
Costa Rica	301.2	\$70.06	\$21.11
Cozumel	3,487.8	\$108.37	\$377.96
Curacao	602.3	\$70.00	\$42.16
Dominican Republic^②	881.9	\$88.26	\$77.84
Ensenada	468.1	\$54.69	\$25.60
Grenada	298.3	\$51.57	\$15.38
Guadeloupe^②	396.2	\$100.29	\$39.73
Guatemala	120.3	\$71.03	\$8.54
Honduras	905.7	\$101.65	\$92.06
Jamaica^②	1,773.2	\$115.98	\$205.66
Manzanillo	29.0	\$42.10	\$1.22
Martinique^②	516.1	\$54.99	\$28.38
Mazatlán	166.8	\$68.57	\$11.44
Nicaragua	78.7	\$57.16	\$4.50
Panama	277.5	\$76.76	\$21.30
Progreso	407.7	\$57.31	\$23.36
Puerto Chiapas	26.2	\$34.32	\$0.90
Puerto Rico (San Juan)^②	1,105.0	\$90.78	\$100.32
Puerto Vallarta	297.7	\$118.09	\$35.16
St. Kitts & Nevis	978.5	\$135.94	\$133.02
St. Lucia	585.2	\$81.12	\$47.47
St. Maarten	784.2	\$142.23	\$111.54
St. Vincent	203.2	\$52.67	\$10.70
Trinidad	40.8	\$54.17	\$2.21
Turks and Caicos	699.6	\$95.51	\$66.82
U. S. Virgin Islands	943.9	\$165.42	\$156.14
All Destinations	25,189.9	\$101.52	\$2,557.21

① Only includes passenger visits at Nassau and Freeport.

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

Passenger onshore expenditures in the remaining 12 destinations totaled \$130.4 million and accounted for 5% of total passenger expenditures among the 36 participating destinations. Passenger spending in this group averaged \$11 million per destination, ranging from \$0.9 million in Puerto Chiapas to \$23.4 million in Progreso.

Other than Progreso, these 12 destinations are considered to be low volume destinations with cruise year passenger visits of less than 400,000. Among the remaining 11 destinations, passenger visits ranged from 26,200 in Puerto Chiapas to 301,200 in Grenada. Among these 11 low volume destinations the average per passenger spend was \$64.22 per visit, 37 percent below the Caribbean average. The average per passenger spend ranged from \$34.32 in Puerto Chiapas to \$78.11 in the British Virgin Islands. No destination in this group had an average per passenger spend above the Caribbean average of \$101.90.

Passenger Expenditures by Category

The passenger survey requested data on their cruise party (passengers in the same cabin) expenditures for a variety of categories as shown in **Table ES-4**. The per party expenditures in each category were divided by the average size of the expenditure party (average number of passengers per cabin) to arrive at the average per passenger spend. The average size of a cruise expenditure party across all destinations was 2.04 passengers and ranged from 1.93 to 2.34 passengers among the 36 destinations. The per passenger expenditure for each category was then multiplied by the percentage (share) of all onshore visitors who actually made a purchase in that category to arrive at the weighted average spend per passenger visit. This figure was multiplied by 25.19 million total passenger visits (transit visits + embarkations) to arrive at total passenger expenditures by category.

For example, those cruise parties that reported purchasing food and beverages in a restaurant or bar spent an average of \$34.31 during a single onshore visit. Since the average party size was 2.04 passengers, the average spend for food and beverages was \$16.82 per passenger ($\$34.31 \div 2.04$). However, not all cruise parties made such a purchase at each destination. The survey data indicated that at any individual cruise call an average of 47.1 percent of the cruise parties actually purchased food and beverages. Thus, the weighted spend per passenger across all onshore passenger visits was \$7.92 ($\$16.82 \times .471$). Finally, total estimated passenger purchases of food and beverages across all 36 destinations for the entire 2017/2018 cruise year was estimated by multiplying the weighted average spend per passenger (\$7.92) by the total number of onshore visits (25.19 million). Thus, total passenger purchases of food and beverages for the 2017/2018 cruise year across all 36 destinations were estimated to be \$199.5 million. Similar calculations were made for each category.

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

- The typical cruise passenger spent an average of \$101.52 at each destination call during their cruise vacation with total passenger expenditures in the 36 destinations reaching nearly \$2.6 billion during the 2017/2018 cruise year.
- Just under 75 percent of passenger expenditures were made in four categories: watches and jewelry (\$828 million), shore excursions (\$637 million), clothing (\$253 million), and local crafts and souvenirs (\$200 million). Combined, cruise passengers spent an estimated \$1.92 billion in these four categories.
- The most popular expenditure category was shore excursions with over half (53 percent) of all passengers making such a purchase at each destination. Local tour operators received an average of \$48.01 per passenger directly from cruise passengers and cruise lines (**see Note below table**). The weighted average expenditure was \$25.27

per passenger. Total payments to tour operators in the 36 participating destinations were an estimated \$637 million.

Table ES-4 – Average Passenger Expenditures by Category – All 36 Participating Destinations

Purchase Categories	Average Spend per Passenger (\$US)	Share of All Onshore Visits ^①	Weighted Average Spend per Passenger	Total Passenger Expenditures (\$US Millions)
Shore Excursions ^②	\$48.01	52.6%	\$25.27	\$636.6
F&B at Restaurants & Bars	\$16.82	47.1%	\$7.92	\$199.5
Local Crafts & Souvenirs	\$16.80	47.0%	\$7.89	\$198.8
Clothing	\$24.29	41.3%	\$10.04	\$252.8
Other Purchases	\$41.52	20.2%	\$8.39	\$211.4
Taxis/Ground Transportation	\$16.24	18.7%	\$3.03	\$76.4
Watches & Jewelry	\$212.25	15.5%	\$32.85	\$827.5
Retail Purchases of Liquor	\$23.08	10.9%	\$2.53	\$63.6
Perfumes & Cosmetics	\$35.12	2.9%	\$1.01	\$25.3
Telephone & Internet	\$15.31	1.3%	\$0.20	\$5.11
Entertainment/Night Clubs	\$52.76	1.3%	\$0.68	\$17.0
Lodging ^③	\$164.54	1.0%	\$1.61	\$40.6
Electronics	\$39.25	0.2%	\$0.10	\$2.4
Total			\$101.52	\$2,557.21

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

② This is the effective average onshore expenditure and is a weighted average of the onshore purchases and the portion of the onboard and travel agent purchases paid to local tour operators. Actual reported average spending for shore excursions by source is as follows: cruise lines - \$74.68 per passenger; travel agents/other - \$64.94; and onshore tour operators - \$32.47. The weighted average actual spend across all sources was \$45.29.

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

- Passengers who purchased watches and jewelry spent an average of \$212.25 on such purchases. Since only 16 percent of passengers purchased watches and jewelry the average jewelry expenditure per passenger was \$32.85. Total expenditures on watches and jewelry were an estimated \$828 million.
- On average, nearly half (47%) of cruise passengers purchased food and beverages. The typical passenger spent an average of \$16.80 when they purchased food resulting in a weighted average expenditure of \$7.89 per passenger. Purchases of food and beverages totaled \$199 million across all destinations.
- On average, about 2 in 5 (41%) of the cruise passengers purchased clothing and half (47%) purchased local crafts and souvenirs at each destination call. Visiting passengers spent a weighted average of \$10.04 on clothing and \$7.92 for local crafts and souvenirs at each port call. Combined, passengers spent an estimated total of \$451 million in these two categories, about 18 percent of total passenger expenditures.

Crew Visits and Expenditures

As shown in **Table ES-5**, the estimated 4.4 million crew members that visited the 36 participating destinations spent an estimated \$266 million for goods and services during the 2017/2018 cruise year. Average spend per crew ranged from a low of \$31.65 in Costa Rica to a high of \$130.63 in Puerto Rico and averaged \$60.44 across all destinations. Unlike passengers, shore excursions are not a focus of crew spending; rather, crew expenditures are more heavily weighted toward food and beverages, clothing, and watches and jewelry. These were followed by spending for transportation and local crafts and souvenirs.

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

- Crew visiting Cozumel spent an estimated \$45.5 million, the highest level of crew expenditures among the 36 participating destinations. Crew spent an average of \$67.24 per visit. Crew expenditures were concentrated in restaurants and bars, clothing and jewelry stores which accounted for more than half (54%) of their spending in Cozumel. A total of 676,300 crew were estimated to have made an onshore visit in Cozumel during the 2017/2018 cruise year, the highest among the 36 participating destinations.
- With the second highest number of onshore crew visits (527,200), the Bahamas had the second highest total expenditure among the 36 participating destinations, \$28.9 million. Crew spent an average of \$54.90 during their onshore visit in the Bahamas. Crew expenditures in the Bahamas were concentrated on food and beverages, followed by telephone and internet service, and clothing. These three categories accounted for 62 percent of total crew spending in the Bahamas.
- Crew visiting Puerto Rico spent an average of \$130.63 while onshore, highest among all 36 destinations. With an estimated 172,700 onshore visits, crew spent an estimated \$22.6 million during the 2017/2018 cruise year. Crew spending was concentrated in food and beverages, clothing, and electronics. Combined, these three categories accounted for 55 percent of total crew expenditures in the Cayman Islands.
- St. Maarten had the second highest average per crew spend rate of \$119.02 but dropped to having only the ninth highest number of estimated crew onshore visits, 149,700. As a

result, the crew visits to the island generated the fourth highest level of crew onshore expenditures of \$17.8 million during the 2017/2018 cruise year. In St. Maarten crew expenditures were concentrated on retail purchases of food and beverages, watches and jewelry, and clothing. These three categories accounted for 51 percent of the total crew expenditures in St. Maarten.

- The Cayman Islands rounds out the top five in terms of total crew spending, with \$17.5 million. The 248,600 crew who visited spent an average of \$70.30. As a result, the crew visits to the island generated the fifth highest level of crew spending. Crew expenditures in the Cayman Islands were concentrated on retail purchases of perfume & cosmetics, local crafts and souvenirs, and purchases of food and beverages. These three categories accounted for 52% of the total crew expenditures in the Caymans.

Among the remaining 31 destinations the total crew expenditures averaged \$4.3 million per destination. Seven destinations, Jamaica (\$12.8m), USVI (\$10.5m), Aruba (\$9.1m), St Kitts (\$8.7m), Costa Maya (\$8.3m), Turks & Caicos (\$7.4m), and Curacao (\$7.0m) each had crew expenditures of \$7 million or more.

Table ES-5 Crew Visits and Expenditures by Destination, 2017/2018 Cruise Year

Destinations	Crew Visits (Thousands)	Average Spend per Crew	Total Crew Expenditures (\$US Millions)
Antigua & Barbuda	128.9	\$39.76	\$5.12
Aruba	103.3	\$87.94	\$9.08
Bahamas^①	527.2	\$54.90	\$28.94
Barbados^②	127.8	\$54.26	\$6.94
Belize	109.4	\$46.17	\$5.05
Bonaire	67.0	\$44.61	\$2.99
British Virgin Islands	19.1	\$34.12	\$0.65
Cayman Islands	248.6	\$70.30	\$17.48
Colombia^②	50.5	\$70.10	\$3.54
Costa Maya	198.0	\$41.72	\$8.26
Costa Rica	52.2	\$31.65	\$1.65
Cozumel	676.3	\$67.24	\$45.47
Curacao	105.2	\$66.47	\$6.99
Dominican Republic^②	84.8	\$47.08	\$3.99
Ensenada	93.4	\$46.41	\$4.33
Grenada	39.7	\$47.78	\$1.90
Guadeloupe^②	84.3	\$36.60	\$3.09
Guatemala	21.4	\$38.35	\$0.82
Honduras	111.7	\$50.36	\$5.62
Jamaica^②	274.0	\$46.57	\$12.76
Manzanillo	6.40	\$41.06	\$0.26
Martinique^②	98.9	\$39.41	\$3.90
Mazatlán	35.7	\$49.16	\$1.76
Nicaragua	15.3	\$42.76	\$0.65
Panama	56.6	\$65.71	\$3.72
Progreso	67.0	\$42.19	\$2.83
Puerto Chiapas	5.0	\$42.19	\$0.21
Puerto Rico (San Juan)^②	172.7	\$130.63	\$22.57
Puerto Vallarta	34.6	\$37.94	\$1.31
St. Kitts & Nevis	162.3	\$53.72	\$8.72
St. Lucia	98.2	\$68.92	\$6.77
St. Maarten	149.7	\$119.02	\$17.82
St. Vincent	54.1	\$43.50	\$2.35
Trinidad	8.0	\$33.99	\$0.27
Turks and Caicos	133.8	\$54.98	\$7.36
U. S. Virgin Islands	174.8	\$60.12	\$10.51
All Destinations	4,395.9	\$60.44	\$265.68

① Only includes crew visits at Nassau and Freeport.

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

Cruise Line Expenditures

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

As shown in **Table ES-6**, total expenditures for port fees and local supplies varied considerably across destinations. This reflects the differences in the structure of port fees, the volume of cruise calls, and the availability of and need for ship supplies in each destination. In total, the cruise lines spent an estimated \$533.76 million in the 36 participating destinations during the 2017/2018 cruise year for port fees and taxes, utilities, navigation services and ship supplies.

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

- The Bahamas had the highest total of expenditures by cruise lines among the 36 participating destinations, \$54.2 million. The expenditures by cruise lines in the Bahamas were concentrated in port fees and services.
- The Dominican Republic had the second highest level of cruise line expenditures at \$52.9 million. As a major Caribbean homeport, the purchase of ship supplies is more important than in most other destinations accounting for 61 percent of the total expenditures made by cruise lines.

Table ES-6 –Total Expenditures by Cruise Lines by Destination, 2017/2018 Cruise Year

Destinations	Estimated Expenditures (\$US Millions)
Antigua & Barbuda	\$23.85
Aruba	\$11.11
Bahamas^①	\$54.23
Barbados^②	\$11.66
Belize	\$12.74
Bonaire	\$1.72
British Virgin Islands	\$2.23
Cayman Islands	\$34.93
Colombia^②	\$13.29
Costa Maya	\$9.58
Costa Rica	\$6.48
Cozumel	\$50.64
Curacao	\$22.58
Dominican Republic^②	\$52.89
Ensenada	\$10.45
Grenada	\$1.97
Guadeloupe^②	\$10.13
Guatemala	\$1.71
Honduras	\$9.68
Jamaica	\$26.11
Manzanillo	\$1.22
Martinique^②	\$5.94
Mazatlán	\$2.67
Nicaragua	\$0.55
Panama	\$52.73
Progreso	\$6.53
Puerto Chiapas	\$0.48
Puerto Rico (San Juan)^②	\$28.28
Puerto Vallarta	\$6.03
St. Kitts & Nevis	\$7.55
St. Lucia	\$5.18
St. Maarten	\$13.88
St. Vincent	\$3.37
Trinidad	\$1.02
Turks and Caicos	\$12.29
U. S. Virgin Islands	\$18.04
All Destinations	\$533.76

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

- Panama had the third highest level of cruise line expenditures at \$52.7 million.
- Cozumel was fourth with \$50.6 million in cruise line expenditures during the 2017/2018 cruise year.
- The Cayman Islands were fifth with \$34.9 million in cruise line expenditures during the 2017/2018 cruise year.
- Puerto Rico was sixth with \$28.3 million in cruise line expenditures during the 2017/2018 cruise year.
- Jamaica was seventh with \$26.1 million in cruise line expenditures during the 2017/2018 cruise year.

In each of the remaining 29 destinations expenditures by cruises lines during the 2017/2018 cruise year were under \$25 million, ranging from a low of just under \$500,000 in Puerto Chiapas to a high of \$23.9 million in Antigua & Barbuda. Overall, the cruise lines spent \$233.9 million in these remaining 29 destinations for an average of nearly \$8.0 million per destination.

Passenger Attributes and Satisfaction

A total of 40,783 transit passenger surveys were completed and returned for tabulation. While the characteristics of passenger visits varied by destination, **Table ES-7** shows the major attributes of the transit passenger visits across all destinations as derived from the passenger surveys.⁹

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

	Number	Percent
Total Respondents	40,783	
Number Making First Visit	26,039	63.8%
Number Ashore	38,739	95.0%
Number Making Onshore Purchases:	26,026	67.2%
Average Hours Ashore	4.42	
Average Size of Expenditure Party (Persons)	2.04	
Average Onshore Spend per Party[ⓐ]	\$130.42	
Purchased a Shore Excursion (Tour)	22,088	57.0%
Purchased Onshore Tour from:		
Cruise Line	17,024	77.1%
Onshore from Tour Operator	3,688	16.7%
Travel Agent/Other	1,375	6.2%
Average Cost of Shore Excursion per Party[ⓑ]	\$148.73	

[ⓐ]This figure excludes the purchases of shore excursions which are reported at the bottom of the table.

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

The major attributes of passenger visits are:

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

⁹ Homeport surveys were conducted on cruise ships embarking on their cruises from the respective homeport destinations. The attributes of these homeport passengers are discussed in the destination analyses.

¹⁰ These data are the unweighted results summed across all surveys collected. The passenger attributes and satisfaction scores for each destination are reported in Volume II of this study.

The passenger survey also asked the passengers to rate their satisfaction with their destination visit for a number of parameters, as shown in **Table ES-8**. These attributes have been expanded for the 2017/18 study. A 10-point scale was used with 10 being the highest score, i.e., extremely satisfied, and 1 being the lowest score, i.e., not at all satisfied.

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

Visit Attributes	Mean Score
Overall Visit	7.74
Visit Met Expectations	7.11
Likelihood of Return for Resort Vacation	4.59
Likelihood of Recommend Resort Vacation	5.41
Initial Shoreside Welcome	7.85
Guided Tour	8.47
Knowledge of Guide	8.85
Professionalism of Guide	8.81
Value of Tour	8.02
Historic Sites/Museums	7.71
Variety of Things to See and Do	7.08
Friendliness of Residents	8.12
Overall Shopping Experience	7.40
Courtesy of Employees	8.13
Variety of Shops	7.10
Quality of Goods	7.43
Overall Prices	7.16
Taxis/Local Transportation	8.08
Professionalism of Driver	8.53
Cleanliness of Transport	8.43

* Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows:

Extremely Satisfied: 10-9; Very Satisfied: 8-7; Somewhat Satisfied: 6-5; Not Too Satisfied: 4-3;

Not At All Satisfied: 2-1.

Among other key conclusions concerning visit satisfaction were the following:

- Cruise passengers were very satisfied with their overall destination visit with a mean score of 7.74. While destination visits did not score as high in terms of meeting expectations, the mean score for "Visit Met Expectations" of 7.11 still implies that the visit exceeded expectations.
- "Guided Tours" (or Shore Excursions) received the highest score of all major visit attributes with a mean score of 8.47. "Knowledge of Guide" (8.85), Professionalism of Guide (8.81) and "Value of Tour" (8.02) all received 'very satisfied' ratings. Thus, cruise passengers were very satisfied with their shore excursions.
- Passenger interactions with residents and store employees were very positive with "Friendliness of Residents" and "Courtesy of Employees" having respective mean scores of 8.12 and 8.13.
- "Taxis and Local Transportation" and its respective sub-categories each received scores of 8.0 or higher, indicating passengers are very satisfied with the local transportation.

- Overall Shopping Experience (7.40), including the Variety of Shops (7.10), Quality of Goods (7.43) and Overall Prices (7.16) all scored in the 'very satisfied' range.
- Categories with slightly lower scores but still above 7.0 (very satisfied range) were: Initial Shoreside Welcome (7.85), Historic Sites/Museums (7.71) and Variety to See and Do (7.08).

Comparison to the 2015 Study

While the current study has a similar number of destinations as the 2014/2015 study, 36 versus 35 destinations, the mix of destinations has changed somewhat. There were three destinations from the 2015 study that were not included in the 2018 study and four new destinations were included in the 2018 study that were not in 2015. In all, there are 32 common destinations which participated in both studies. As shown in **Table ES-9**, the total value of cruise tourism expenditures and their subsequent economic impacts have mixed results when compared to the previous study. As shown in the table, we have estimated that direct cruise tourism expenditures totaled \$3.36 billion during the 2017/2018 cruise year among the 36 participating destinations. This is about 6.3 percent higher than the \$3.16 billion in direct cruise tourism expenditures estimated for the 35 participating destinations during the 2014/2015 cruise year. Similarly, the number of passenger onshore visits and the number of jobs created are also higher for the current study, however, there was a decrease in the total wages paid. This overall wage decrease is primarily due to the impacts in the USVI and St. Maarten following the damage sustained during the hurricanes in the fall of 2017. The USVI and St. Maarten experienced a combined loss of nearly 2 million passenger visits from the 2014/2015 study due to the hurricanes. This led to a nearly 35 percent and 60 percent reduction in jobs across these two destinations, respectively. The average wages for USVI and St. Maarten's are nearly double the average across the 36 destinations

Normalizing the expenditures on a per passenger basis shows that per passenger spending across the 36 destinations included in the current study are virtually the same as the 35 destinations in the 2014/2015 study. The \$3.16 billion in total expenditures among the 35 destinations of the previous study equates to \$133.78 per onshore passenger visit; whereas, in the current study, the \$3.36 billion in total expenditures among the 36 destinations equated to \$133.25 per onshore passenger visit. In a similar manner as above, this is also impacted by the nearly the 2 million fewer passenger visits across the USVI and St. Maarten as a result of the hurricanes in the fall of 2017.

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

	2017/2018 Cruise Year	2014/2015 Cruise Year	Percent Difference
Number of Participating Destinations	36	35	--
Total Direct Cruise Tourism Spending (US \$ Billions)	\$3.36	\$3.16	6.3%
Total Passenger Onshore Visits (Millions)	25.19	23.62	6.6%
Total Expenditures per Passenger (US \$)¹¹	\$133.25	\$133.78	-0.4%
Total Employment Impact	78,954	75,050	5.2%
Total Income Impacts (US \$ Millions)	\$902.68	\$976.47	-7.6%
Average per Passenger Spend¹²	\$101.52	\$103.83	-2.2%
Average Per Crew Spend	\$60.44	\$67.10	-9.9%

¹¹ Includes the total cruise industry expenditures divided by the total transit and home port passenger visits.

¹² Includes the total passenger spend divided by the total transit and home port passenger visits.

Comparing the 32 destinations that are common to the two studies¹³, the total direct cruise tourism expenditures increased by about 4 percent from \$3.12 billion in 2014/2015 to \$3.26 billion in 2017/2018 (see **Table ES-10**). This was the combined result of a 6.1 percent increase in cruise passenger onshore visits coupled with a 2 percent decrease in the total expenditure per passenger¹⁴. The normalized total expenditure per passenger in the 32 common destinations dropped from \$134.59 in the 2014/2015 cruise year to \$132.16 in the 2017/2018 cruise year.

The average per passenger spend dropped by 2 percent from the last study, from \$104.62 to \$102.34 in this study. Once again, the impacts on the USVI and St. Maarten heavily weighed on the study over study comparisons on average per passenger spend and the income impacts.

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

	2017/2018 Cruise Year	2014/2015 Cruise Year	Percent Difference
Number of Participating Destinations	32	32	--
Total Direct Cruise Tourism Spending (US \$ Billions)	\$3.26	\$3.12	4.4%
Total Passenger Onshore Visits (Millions)	24.65	23.16	6.5%
Total Expenditures per Passenger (US \$)¹⁴	\$132.16	\$134.59	-1.8%
Total Employment Impact	76,613	73,966	3.6%
Total Income Impacts (US \$ Millions)	\$885.93	\$968.20	-8.5%
Average per Passenger Spend¹⁵	\$102.34	\$104.62	-2.2%
Average Per Crew Spend	\$60.63	\$67.67	-10.4%

Additionally, the average per passenger spend among the common destinations increased in 21 locations, decreased in only nine locations and remained effectively unchanged in two locations. This further illustrates the impact that the decline in passenger visits at these two locations contributed to the overall per passenger spend given their relatively high average passenger spends that were seen in the 2014/2015 study.

The overall average crew spend declined by 9.9 percent from the 2014/2015 study and by 10.4 percent among the common destinations. These declines are primarily due to there being several categories which experienced decreases in both the share of crew members who made purchases and the average amounts spent.

In conclusion, the change in the economic impacts during the 2017/2018 cruise year relative to the 2014/2015 cruise year is primarily the result of the increase in the overall passenger volume of participating destinations, but it was offset by a decrease in passenger volumes in locations that have a proportionally higher impact on the average per passenger spend rate and wages.

¹³ These destinations are: Antigua, Aruba, Bahamas, Barbados, Belize, Bonaire, BVI, Cayman Islands, Colombia, Costa Maya, Costa Rica, Cozumel, Curacao, Dominican Republic, Ensenada, Grenada, Guadeloupe, Guatemala, Honduras, Jamaica, Martinique, Mazatlán, Nicaragua, Progreso, Puerto Rico, Puerto Vallarta, St. Kitts, St. Lucia, St. Maarten, Trinidad, Turks and Caicos, and the USVI.

¹⁴ Includes the total cruise industry expenditures divided by the total transit and home port passenger visits

¹⁵ Includes the total passenger spend divided by the total transit and home port passenger visits

INTRODUCTION

This study analyzes the contribution of cruise tourism on the economies of 36 destinations located in the Caribbean, Mexico and Central and South America. The study was funded by the Florida-Caribbean Cruise Association (FCCA) and the 36 participating destinations. Utilizing onshore expenditure data collected from passenger and crew surveys, port service and navigation fees collected from the destinations and FCCA member cruise lines¹⁶, and expenditures for provisions and other stores in the Caribbean provided by the cruise lines, total cruise tourism expenditures were estimated for each of the participating destinations. The economic contribution of these expenditures for each destination was then estimated for the 12-month period beginning in May, 2017 and ending in April, 2018 utilizing economic data collected from local, regional and international sources.

¹⁶ The FCCA member lines that supplied onshore expenditure data are as follows: AIDA Cruises, Carnival Cruise Lines, Celebrity Cruises, Disney Cruise Line, Holland America Line, Norwegian Cruise Line, P&O Cruises, Princess Cruises, Royal Caribbean International and TUI Cruises.

The Caribbean, Mexico and Central and South American Cruise Market

The Caribbean is the most popular cruise destinations in the world. According to capacity data provided by Cruise Lines International Association (CLIA), the cruise industry had 59.3 million bed days deployed throughout the Caribbean in 2017 accounting for nearly 35 percent of the industry's global bed day capacity. The average cruise length remained at about 7 days. Thus, cruise ships operating in the region had sufficient capacity to carry nearly 8.5 million passengers in 2017.

Data provided by the 36 participating destinations shows that 29.5 million passengers and 11.3 million crew arrived at these cruise destinations during the 2017/2018 cruise year. Of these, just under 39 percent of the crew, 4.4 million, and 85% of the passengers, 25.2 million, disembarked and visited the destinations.

Both, the proximity of the Caribbean to the United States and its temperate climate during the winter months have been important factors in the growth of the cruise industry in the region. However, the region also has a strong appeal to cruisers from around the world. Data obtained from our survey of cruise passengers indicated that 76 percent of the surveyed passengers were residents of the United States, 13 percent were from Canada, 3 percent were citizens of the United Kingdom and 4 percent were residents of Germany. The remaining 4 percent of passengers arrived from a broad range of countries, including Australia, Italy, Spain, Mexico, the Philippines and South Africa to name a few.

Passenger and Crew Arrivals at Participating Destinations

Based upon data collected from the participating destinations, and other sources, an estimated 29.5 million passengers were onboard cruise ships (passenger arrivals) that called at the 36 participating destinations during the 2017/2018 cruise year (see **Table 1**). Adding the 11.3 million crew arrivals, the cruise industry brought 40.8 million passengers and crew to the 36 participating destinations during the 2017/2018 cruise year.

Sixteen of the participating destinations, Antigua & Barbuda, Aruba, the Bahamas, Barbados, Belize, the Cayman Islands, Costa Maya, Cozumel, Dominican Republic, Honduras, Jamaica, Puerto Rico, St. Kitts & Nevis, St. Maarten, Turks & Caicos and the U.S. Virgin Islands each had combined passenger and crew arrivals in excess of 1 million. Combined, these 16 destinations accounted for 77 percent of all passenger and crew arrivals among the 36 destinations. An estimated 14.5 million passengers and crew arrived at the 10 destinations comprising the Eastern Caribbean,¹⁷ 36 percent of the total arrivals among the 36 participating destinations. Another 6.5 million passengers and crew arrived at the nine Southern Caribbean¹⁸ destinations, 16 percent of the total arrivals. Finally, the nine destinations of the Western Caribbean¹⁹ accounted for 25 percent of total arrivals with 10.1 million passenger and crew arrivals, while 9.7 million passengers and crew arrived at the eight cruise destinations in Mexico,²⁰ 24 percent of all arrivals among the 36 participating destinations.

¹⁷ For the purposes of this study the Eastern Caribbean includes the following 10 destinations: Antigua, the Bahamas, the British Virgin Islands, the Dominican Republic, Guadeloupe, Puerto Rico, St. Kitts, St. Maarten, the Turks & Caicos and the U.S. Virgin Islands.

¹⁸ For the purposes of this report the Southern Caribbean includes the following 9 destinations: Aruba, Barbados, Bonaire, Curacao, Grenada, Martinique, St. Lucia, St. Vincent, and Trinidad.

¹⁹ For purposes of this report the Western Caribbean includes the following 9 destinations: Belize, the Cayman Islands, Colombia, Costa Rica, Guatemala, Honduras, Jamaica, Nicaragua and Panama.

²⁰ For purposes of this report the Mexico destinations includes the following 8 destinations: Costa Maya, Cozumel, Ensenada, Manzanillo, Mazatlán, Progreso, Puerto Chiapas and Puerto Vallarta.

Table 1– Estimated Passenger and Crew Arrivals (Thousands) at the Participating Destinations, 2017/2018 Cruise Year

Destinations	Passengers	Crew	Total
Antigua & Barbuda	790.2	316.1	1,106.3
Aruba	812.8	312.4	1,125.2
Bahamas^①	2,999.7	1,182.2	4,181.9
Barbados^②	730.9	330.0	1,060.9
Belize	1,024.9	391.9	1,416.7
Bonaire	481.1	190.5	671.6
British Virgin Islands	140.8	57.5	198.3
Cayman Islands	1,855.5	709.8	2,565.3
Colombia^②	417.5	170.5	588.0
Costa Maya	1,148.7	442.3	1,591.0
Costa Rica	371.9	153.6	525.5
Cozumel	4,117.9	1,629.0	5,746.9
Curacao	724.8	274.2	999.0
Dominican Republic^②	1,062.8	321.6	1,384.4
Ensenada	659.3	239.8	899.1
Grenada	343.6	120.9	464.5
Guadeloupe^②	417.1	200.7	617.8
Guatemala	149.4	62.1	211.5
Honduras	1,068.0	378.8	1,446.8
Jamaica^②	1,988.8	670.1	2,658.9
Manzanillo	40.5	16.3	56.7
Martinique^②	594.1	231.5	825.5
Mazatlán	210.9	83.1	294.0
Nicaragua	93.1	45.9	139.0
Panama	361.8	161.7	523.5
Progreso	453.0	199.1	652.1
Puerto Chiapas	29.3	12.6	41.9
Puerto Rico (San Juan)^②	1,187.7	419.7	1,607.3
Puerto Vallarta	343.4	103.0	446.4
St. Kitts & Nevis	1,120.8	435.1	1,555.9
St. Lucia	668.0	256.1	924.1
St. Maarten	896.2	324.2	1,220.4
St. Vincent	241.0	129.4	370.4
Trinidad	48.0	24.0	72.0
Turks and Caicos	813.5	316.2	1,129.7
U. S. Virgin Islands	1,115.7	414.2	1,529.9
All Destinations	29,522.4	11,326.2	40,848.6

① Only includes passenger arrivals at Nassau and Freeport.

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

Source: Port Authorities, Eastern Caribbean Central Bank, and the FCCA member cruise lines

DATA AND METHODS

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

- i. surveys be designed and distributed for the purpose of obtaining passenger and crew expenditure data at each of the destinations,
- ii. data on total passenger arrivals and port fees be collected for each of the destinations, and
- iii. data on passenger carryings; purchases from local businesses, including tour operators; and payment of fees and taxes for port and navigation services be obtained from the cruise lines.

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

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

Estimates of Total Cruise Tourism Expenditures

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

Surveys of Passengers and Crew

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

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

A slightly different survey was given to passengers who were embarking on their cruise from seven destinations in the Caribbean: Barbados, Cartagena (Colombia), the Dominican Republic, Guadeloupe, Jamaica, Martinique and San Juan (Puerto Rico). In addition to the information collected for port-of-call passengers, embarking passengers were asked to provide information on their

expenditures for lodging, type of accommodation and their length of stay prior to and after the cruise.

The survey schedule was designed to generate a representative sample of cruise passengers by cruise line at each destination. Thus, each FCCA member cruise line was scheduled to have its passengers and crew surveyed at least once at each destination at which it had a port call during the survey period. The survey period commenced in the beginning of October 2017 and concluded at the end of May 2018.

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

Over 500 survey distributions were conducted. A single survey distribution is counted as a distribution on a given day, on a single ship at a designated destination. Thus, the distribution of surveys on November 27th on the Holland America Oosterdam following its call in Puerto Chiapas and on the Coral Princess following its call in Panama would be considered two distributions. Thus, on any given day surveys might have been conducted aboard multiple ships at different destinations. A total of 41,745 passenger surveys and 18,417 crew surveys were returned for processing.

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

Destinations	Passengers	Crew	Total
Antigua & Barbuda	731	338	1,069
Aruba	1,616	479	2,095
Bahamas^①	902	651	1,553
Barbados^②	1,275	506	1,781
Belize	655	268	923
Bonaire	954	603	1,557
British Virgin Islands^③	470	796	1,266
Cayman Islands	1,290	331	1,621
Colombia^②	1,729	540	2,269
Costa Maya	654	736	1,390
Costa Rica	1,858	557	2,415
Cozumel	1,170	1,269	2,439
Curacao	1,626	458	2,084
Dominican Republic^②	1,341	462	1,803
Ensenada	690	349	1,039
Grenada	1,311	543	1,854
Guadeloupe^②	1,409	358	1,767
Guatemala	1,074	1,003	2,077
Honduras	1,101	831	1,932
Jamaica^②	1,536	604	2,140
Manzanillo	1,683	336	2,019
Martinique^②	1,639	287	1,926
Mazatlán	1,005	341	1,346
Nicaragua	1,392	208	1,600
Panama	1,389	497	1,886
Progreso	600	845	1,445
Puerto Chiapas	1,610	450	2,060
Puerto Rico (San Juan)^②	1,651	1,064	2,715
Puerto Vallarta	1,066	98	1,164
St. Kitts & Nevis	1,288	570	1,858
St. Lucia	773	502	1,275
St. Maarten	1,103	310	1,413
St. Vincent	513	400	913
Trinidad	978	230	1,208
Turks and Caicos	911	366	1,277
U. S. Virgin Islands	1,222	1027	2,249
All Destinations	41,745	18,417	60,162

① Only includes passenger arrivals at Nassau and Freeport.

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

③ No passenger or crew surveys were collected for the 2017/18 study, rather spend data from the prior study was used. As such these survey numbers were not included in the total counts.

Data Collected from Participating Destinations

Each participating destination was asked to provide the following data:

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

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

Data Collected from FCCA Member Cruise Lines

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

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

The FCCA member lines generally accounted for 90 percent or more of all passenger arrivals at each destination. Thus, the responses from the FCCA member lines were used to generate various ratios that could be used in the estimation of total activity at each port. The passenger and crew counts were used to create ratios of passengers to crew so that crew arrivals could be estimated for each destination. Each cruise line and ship has a slightly different ratio and consequently, each destination has a slightly different ratio based upon the mix of ships calling at each destination.

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

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

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

Estimates of the Economic Contribution

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

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

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

- Antigua: Ministry of Finance and the Economy
- Aruba: Central Bank of Aruba and Aruba Bureau of Statistics
- Bahamas: Central Bank of The Bahamas and The Bahamas Department of Statistics
- Barbados: Ministry of Labour and Government Information Network
- Belize: Statistical Institute of Belize
- Bonaire: Central Bureau of Statistics
- British Virgin Islands: Central Statistics Office
- Cayman Islands: Cayman Islands Compendium of Statistics 2013
- Colombia: Department of National Statistics
- Curacao: Central Bureau of Statistics
- Grenada: Ministry of Finance
- Jamaica: Government of Jamaica Information Network
- Mexico: Institute of National Statistics
- Puerto Rico: Puerto Rico Department of Planning and the U.S. Census Bureau
- St. Lucia: Central Statistics Office
- St. Maarten: Central Bureau of Statistics
- Trinidad: National Statistics Office
- Turks & Caicos: Department of Economic Planning & Statistics
- U.S. Virgin Islands: USVI Department of Labor and the U.S. Census Bureau.

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

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

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

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

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

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

An important aspect of these models is the role of imports. Imports act as a leakage to the multiplier process. Thus, the greater the relative importance of imports to an economy the smaller are the indirect impacts relative to the direct impacts. The size of the indirect economic impacts relative to the direct impacts is partially determined by the degree of economic development in a particular economy. This occurs because more developed economies import proportionately fewer goods which reduces leakages to other economies. For example, in BREA's recent analysis of the economic impact of the cruise industry in the United States, the indirect employment impacts were 46 percent higher than the direct impacts, resulting in an implicit employment multiplier of nearly 2.5. With the exception of one location (Aruba), each of the destinations analyzed for this study had indirect impacts that were smaller than the direct impacts. This is due to the relatively high proportion of imported goods and services in these economies. As a consequence, the implicit employment and wage multipliers for each destination were less than 2.0.

Appendix – Passenger & Crew Surveys

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

Jamaica - Transit

CONFIDENTIAL CRUISE PASSENGER SURVEY

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

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

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

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

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

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

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

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

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

Q5. How many tours did you purchase during your visit in Jamaica? 0 (If 0, Continue to Q6) 1 2 (Go to Q7)

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

- Not a good value Nothing new since last visit Prefer to tour on own Other _____ (Go To Q12)

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

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

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

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

Q9. How many hours did you spend on the first tour? 1 2 3 4 5 6 7 8 9 10+ Not Applicable

Q10. How many hours did you spend on the second tour? 1 2 3 4 5 6 7 8 9 10+ Not Applicable

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

- Beach Day Experience Soft Adventure Land Tour (Jeep/ATV, Zip Line, Hiking, etc.)

- Soft Adventure Water Tour (Kayak, Catamaran, Snorkeling, Power Boat, etc.) Other

Q12. Did you make any purchases (excluding your shore excursion) during your onshore visit in Jamaica today?

- Yes (Continue) No (If No, Go to Q15 on back)

Q13. How much in total (excluding shore excursions) did all persons in your cabin spend in Jamaica today (in US \$)?

\$ _____ (Whole dollars only)

Q14. Please record the value of all purchases (in US \$) that all persons in **your cabin** made during your **on-shore visit** to Jamaica today.

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

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

Please Go to Q15 on Back

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

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

Initial Shoreside Welcome:	<input type="checkbox"/> 10	<input type="checkbox"/> 9	<input type="checkbox"/> 8	<input type="checkbox"/> 7	<input type="checkbox"/> 6	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Overall Guided Tour:	<input type="checkbox"/> 10	<input type="checkbox"/> 9	<input type="checkbox"/> 8	<input type="checkbox"/> 7	<input type="checkbox"/> 6	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Tour - Knowledge of guide:	<input type="checkbox"/> 10	<input type="checkbox"/> 9	<input type="checkbox"/> 8	<input type="checkbox"/> 7	<input type="checkbox"/> 6	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Tour - Professionalism of guide:	<input type="checkbox"/> 10	<input type="checkbox"/> 9	<input type="checkbox"/> 8	<input type="checkbox"/> 7	<input type="checkbox"/> 6	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Tour - Value for the money:	<input type="checkbox"/> 10	<input type="checkbox"/> 9	<input type="checkbox"/> 8	<input type="checkbox"/> 7	<input type="checkbox"/> 6	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Historic Sites/Museums:	<input type="checkbox"/> 10	<input type="checkbox"/> 9	<input type="checkbox"/> 8	<input type="checkbox"/> 7	<input type="checkbox"/> 6	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Variety of Things to See and Do:	<input type="checkbox"/> 10	<input type="checkbox"/> 9	<input type="checkbox"/> 8	<input type="checkbox"/> 7	<input type="checkbox"/> 6	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Friendliness of the Residents:	<input type="checkbox"/> 10	<input type="checkbox"/> 9	<input type="checkbox"/> 8	<input type="checkbox"/> 7	<input type="checkbox"/> 6	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Overall Shopping Experience:	<input type="checkbox"/> 10	<input type="checkbox"/> 9	<input type="checkbox"/> 8	<input type="checkbox"/> 7	<input type="checkbox"/> 6	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Courtesy of employees:	<input type="checkbox"/> 10	<input type="checkbox"/> 9	<input type="checkbox"/> 8	<input type="checkbox"/> 7	<input type="checkbox"/> 6	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Variety of shops:	<input type="checkbox"/> 10	<input type="checkbox"/> 9	<input type="checkbox"/> 8	<input type="checkbox"/> 7	<input type="checkbox"/> 6	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Quality of goods	<input type="checkbox"/> 10	<input type="checkbox"/> 9	<input type="checkbox"/> 8	<input type="checkbox"/> 7	<input type="checkbox"/> 6	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Overall prices:	<input type="checkbox"/> 10	<input type="checkbox"/> 9	<input type="checkbox"/> 8	<input type="checkbox"/> 7	<input type="checkbox"/> 6	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Taxis/Local Transportation:	<input type="checkbox"/> 10	<input type="checkbox"/> 9	<input type="checkbox"/> 8	<input type="checkbox"/> 7	<input type="checkbox"/> 6	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Professionalism of driver	<input type="checkbox"/> 10	<input type="checkbox"/> 9	<input type="checkbox"/> 8	<input type="checkbox"/> 7	<input type="checkbox"/> 6	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Cleanliness of transport	<input type="checkbox"/> 10	<input type="checkbox"/> 9	<input type="checkbox"/> 8	<input type="checkbox"/> 7	<input type="checkbox"/> 6	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Overall Visit in Jamaica:	<input type="checkbox"/> 10	<input type="checkbox"/> 9	<input type="checkbox"/> 8	<input type="checkbox"/> 7	<input type="checkbox"/> 6	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable

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

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

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

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

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

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

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

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

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

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

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

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

Q22. Approximately, what is your annual gross (pre-tax) household income (in U.S. dollars)? (Income is only used for demographic analysis)

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

Please return the completed survey to the Guest Services Desk or give it to your Stateroom Steward.

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

Comments:

CONFIDENTIAL CRUISE PASSENGER SURVEY

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

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

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

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

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

Q3. Did you begin your cruise vacation in Grenada, or did you begin your cruise at some other port?

- Boarded in Grenada (**Continue**) Began at another Port (**If you boarded at another port, Go to Q7**)

Q4. Are you a resident of Grenada? Yes (**If Yes, Go to Q14**) No (**Continue to Q5**)

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

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

(If 0 to Both, Go to Q7)

Q6. In what type of accommodations are you staying while in Grenada?

- Hotel Other paid accommodation With friends or relatives Other arrangements

Q7. Is this your first visit to Grenada? Yes No

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

Q8. How many hours did you spend ashore during your cruise call at Grenada today?

- 0 1 2 3 4 5 6 7 8 9 10 11 12+ **(If 0, Go to Q21 on back)**

Q9. How many tours did you purchase during your visit in Grenada? 0 (**If 0, Go to Q14**) 1 2 3+ (**Continue to Q10**)

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

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

Q11. In total, how much did you pay for this/these tour(s) (in US\$)? \$ _____ (**Whole dollars only**)

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

Q12a. How many hours did you spend on the first tour? 1 2 3 4 5 6 7 8 9 10+ Not Applicable

Q12b. How many hours did you spend on the second tour? 1 2 3 4 5 6 7 8 9 10+ Not Applicable

Q13. Which of the following best describes this/these tour(s): Island Tour-Shopping Island Tour-Historical/Cultural

- Beach Day Experience Soft Adventure Land Tour (Jeep/ATV, Zip Line, Hiking, etc.)

- Soft Adventure Water Tour (Kayak, Catamaran, Snorkeling, Power Boat, etc.) Other

Q14. Did you make any purchases in Grenada during your onshore visit or prior to your cruise?

- Yes No (**If No, Go to Q18 on back**)

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

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

Q16. Please record the value of all purchases (in US\$) that all persons in **your cabin** made in Grenada during your **on-shore visit or** prior to your cruise. *** Do not include the cost of tours nor goods and services that were purchased onboard the cruise ship. (Whole \$USD).**

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

Please Go to Q17 on the Back

Q17. On a scale of 1 to 10, how satisfied were you with each of the following in Grenada?

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

Initial Shoreside Welcome:	<input type="checkbox"/> 10	<input type="checkbox"/> 9	<input type="checkbox"/> 8	<input type="checkbox"/> 7	<input type="checkbox"/> 6	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Overall Guided Tour:	<input type="checkbox"/> 10	<input type="checkbox"/> 9	<input type="checkbox"/> 8	<input type="checkbox"/> 7	<input type="checkbox"/> 6	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Tour: Knowledge of guide:	<input type="checkbox"/> 10	<input type="checkbox"/> 9	<input type="checkbox"/> 8	<input type="checkbox"/> 7	<input type="checkbox"/> 6	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Tour: Professionalism of guide:	<input type="checkbox"/> 10	<input type="checkbox"/> 9	<input type="checkbox"/> 8	<input type="checkbox"/> 7	<input type="checkbox"/> 6	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Tour: Value for the money:	<input type="checkbox"/> 10	<input type="checkbox"/> 9	<input type="checkbox"/> 8	<input type="checkbox"/> 7	<input type="checkbox"/> 6	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Historic Sites/Museums:	<input type="checkbox"/> 10	<input type="checkbox"/> 9	<input type="checkbox"/> 8	<input type="checkbox"/> 7	<input type="checkbox"/> 6	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Variety of things to see and do:	<input type="checkbox"/> 10	<input type="checkbox"/> 9	<input type="checkbox"/> 8	<input type="checkbox"/> 7	<input type="checkbox"/> 6	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Friendliness of the residents:	<input type="checkbox"/> 10	<input type="checkbox"/> 9	<input type="checkbox"/> 8	<input type="checkbox"/> 7	<input type="checkbox"/> 6	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Overall Shopping Experience:	<input type="checkbox"/> 10	<input type="checkbox"/> 9	<input type="checkbox"/> 8	<input type="checkbox"/> 7	<input type="checkbox"/> 6	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Courtesy of employees:	<input type="checkbox"/> 10	<input type="checkbox"/> 9	<input type="checkbox"/> 8	<input type="checkbox"/> 7	<input type="checkbox"/> 6	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Variety of shops:	<input type="checkbox"/> 10	<input type="checkbox"/> 9	<input type="checkbox"/> 8	<input type="checkbox"/> 7	<input type="checkbox"/> 6	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Quality of goods	<input type="checkbox"/> 10	<input type="checkbox"/> 9	<input type="checkbox"/> 8	<input type="checkbox"/> 7	<input type="checkbox"/> 6	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Overall prices:	<input type="checkbox"/> 10	<input type="checkbox"/> 9	<input type="checkbox"/> 8	<input type="checkbox"/> 7	<input type="checkbox"/> 6	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Taxis/Local Transportation:	<input type="checkbox"/> 10	<input type="checkbox"/> 9	<input type="checkbox"/> 8	<input type="checkbox"/> 7	<input type="checkbox"/> 6	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Professionalism of Driver	<input type="checkbox"/> 10	<input type="checkbox"/> 9	<input type="checkbox"/> 8	<input type="checkbox"/> 7	<input type="checkbox"/> 6	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Cleanliness of Transport	<input type="checkbox"/> 10	<input type="checkbox"/> 9	<input type="checkbox"/> 8	<input type="checkbox"/> 7	<input type="checkbox"/> 6	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Overall Visit in Grenada:	<input type="checkbox"/> 10	<input type="checkbox"/> 9	<input type="checkbox"/> 8	<input type="checkbox"/> 7	<input type="checkbox"/> 6	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable

Q18. Overall, and on a scale of 1 to 10, how did your visit to Grenada meet your prior expectations?

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

Q19. Based upon your experience in Grenada today, on a scale of 1 to 10 how likely are you to return to Grenada for a land-based or resort vacation within the next three years?

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

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

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

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

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

Q22. How many persons in your cabin are in each age group? (Leave Blank if "0")

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

Q23. Where is your permanent place of residence? US Canada UK Germany Australia France Other _____(specify)

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

Q24. Approximately, what is your annual gross (pre-tax) household income (in U.S. dollars)? (Income is only used for demographic analysis)

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

Please return the completed survey to the Guest Services Desk or give to your Stateroom Steward.

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

Comments:

CONFIDENTIAL CREW SURVEY

ST. MAARTEN

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

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

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

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

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

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

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

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

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

Q6. Please record the value of all purchases (in U.S. dollars) that you made during your on-shore visit to St. Maarten today or for the most recent visit to St. Maarten in the past month. * Do not include the cost of tours or goods and services that were purchased onboard the cruise ship. (Enter whole dollars).

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

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

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

Guided Tour:	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Variety of things to see and do:	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Friendliness of the residents:	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Overall shopping experience:	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Taxis/Local Transportation:	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Overall experience in terminal:	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable
Overall visit in St. Maarten:	<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0 Not applicable

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

Extremely likely 5 4 3 2 1 Not at all likely

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

Q9. What is your gender? Male Female

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

Thank you for your time and assistance.

Please write any comments concerning your onshore experience on the back of the survey.

ECONOMIC CONTRIBUTION ANALYSIS

The economic contribution analysis measures the direct and total employment and wages generated by the cruise tourism expenditures in each destination. The analysis begins with the estimation of direct expenditures by passengers, crew and cruise lines in each destination for the 2017/2018 cruise year. These expenditures are entered as inputs to the destination-specific economic impact models to generate the direct and total employment and wage contributions of cruise tourism. This section provides an overview of the expenditures and economic contribution for each destination while a more comprehensive analysis for each destination is presented in Volume II of this report.

Passenger and Crew Expenditures

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

Table 3 – Passenger and Crew Expenditure Categories

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

* Only applicable for homeport passengers.

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

As shown in **Table 4**, the cruise industry generated an estimated 29.6 million passenger and crew onshore visits during the 2017/2018 cruise year. It is these onshore visits that generate the local spending that creates employment and income in each destination. Visits to the Eastern Caribbean destinations accounted for 36 percent of all visits to the 36 destinations and totaled 10.7 million visits. Visits to the Southern Caribbean destinations totaled 4.6 million and accounted for 16 percent of total destination visits. The Western Caribbean destinations accounted for 25 percent with 7.3 million visits. Finally, Mexican destinations received a total of 7.0 million passenger and crew onshore visits, 24 percent of all visits at the 36 participating destinations.

Based upon data collected from the cruise lines, it was estimated that an average of 85 percent of cruise passengers disembarked at transit port calls across all destinations. This ranged from 80 percent or less in such destinations as the Bonaire, Ensenada, Guatemala, Manzanillo, Mazatlán and Panama to 90 percent or more in Costa Maya, Guadeloupe, Progreso, Puerto Chiapas and Puerto Rico. As a result, passenger onshore visits, which generate the local spending, are lower than passenger arrivals (passengers onboard cruise ships).

Table 4 – Estimated Passenger and Crew Onshore Visits (Thousands) at the Participating Destinations, 2017/2018 Cruise Year

Destinations	Passengers	Crew	Total
Antigua & Barbuda	663.0	128.9	792
Aruba	677.0	103.3	780
Bahamas ^①	2,444.8	527.2	2972
Barbados ^②	630.8	127.8	759
Belize	877.3	109.4	987
Bonaire	378.6	67.0	446
British Virgin Islands	124.9	19.1	144
Cayman Islands	1,636.5	248.6	1885
Colombia ^②	351.4	50.5	402
Costa Maya	1,030.4	198.0	1228
Costa Rica	301.2	52.2	353
Cozumel	3,487.8	676.3	4164
Curacao	602.3	105.2	708
Dominican Republic ^②	881.9	84.8	967
Ensenada	468.1	93.4	562
Grenada	298.3	39.7	338
Guadeloupe ^②	396.2	84.3	480
Guatemala	120.3	21.4	142
Honduras	905.7	111.7	1017
Jamaica ^②	1,773.2	274.0	2047
Manzanillo	29.0	6.40	35
Martinique ^②	516.1	98.9	615
Mazatlán	166.8	35.7	203
Nicaragua	78.7	15.3	94
Panama	277.5	56.6	334
Progreso	407.7	67.0	475
Puerto Chiapas	26.2	5.0	31
Puerto Rico (San Juan)	1,105.0	172.7	1278
Puerto Vallarta	297.7	34.6	332
St. Kitts & Nevis	978.5	162.3	1141
St. Lucia	585.2	98.2	683
St. Maarten	784.2	149.7	934
St. Vincent	203.2	54.1	257
Trinidad	40.8	8.0	49
Turks and Caicos	699.6	133.8	833
U. S. Virgin Islands	943.9	174.8	1119
All Destinations	25,190	4,396	29,586

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

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

Onshore crew visits were estimated by data provided by the cruise lines which tracks the number of passengers and crew that disembark at each destination call. These data indicated that a much smaller percentage of crew onboard cruise ships disembark at each port-of-call. The survey data indicated that this figure averaged about 39 percent across all destinations and ranged from 30 percent or lower in many of the smaller destinations, such as Belize, Colombia, the Dominican Republic, and Honduras, to 40 percent or more in the larger destinations, such as the Bahamas, Costa Maya, Cozumel, Jamaica, St. Maarten, Turks and Caicos and the U.S. Virgin Islands.

Passenger Shore Excursions

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

The passenger survey provided a breakdown on passenger purchases of tours or shore excursions. As indicated in **Table 5**, an average of 57 percent of all transit cruise passengers purchased shore excursions at each destination visit.²¹ The vast majority, 77 percent purchased their shore excursions from the cruise lines, 17 percent purchased their tour directly from local tour operators and 6 percent purchased their tour through a travel agent or some other means. The remaining 43 percent of transit passengers reported that they did not purchase a tour during their onshore visit.

The data in the table also shows a significant diversity in the percentage of passengers that purchase a formal tour across destinations and sales channel. For example, 80 percent of passengers visiting Costa Rica purchased a shore excursion while only 36 percent of passengers visiting Puerto Rico did so. In terms of sales channel, 87 percent of passengers visiting Puerto Chiapas purchased their tour through the cruise line while only about 62 percent of passengers visiting St. Lucia reported doing so.

Fewer than half of visiting passengers reported purchasing shore excursions in the following 11 destinations: Puerto Chiapas (49%), Costa Maya (47%), Bahamas (46%), USVI (46%), St. Maarten (43%), Ensenada (42%), Manzanillo (41%), Antigua & Barbuda (41%), Turks & Caicos (40%), Martinique (39%) and Puerto Rico (36%). This is a diversified group of destinations that includes three of the most popular or high-volume destinations (one million or more passenger arrivals), 6 medium volume destinations (between 400,000 and one million passenger arrivals) and 2 low volume destination (less than 400,000 passenger arrivals). In 11 destinations more than 60 percent of visiting passengers reported purchasing shore excursions. These included: Costa Rica (80%), Panama (78%), Colombia (76%), Guatemala (75%), Nicaragua (73%), St. Lucia (68%), Bonaire (65%), Trinidad (64%), Honduras (63%), Guadeloupe (63%), and Grenada (62%). This group consists of 3 medium volume and 8 low volume destinations with a heavy concentration of destinations in the Western and Southern Caribbean.

²¹ This is the unweighted share across all surveys. When adjusted for onshore visits in each destination, the share falls slightly to 53.1%.

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

Destinations	Purchased a Tour	Purchased a Tour from			Did Not Purchase a Tour
		Cruise Line	Onshore	Travel Agent/Other	
Antigua & Barbuda	41%	78%	16%	6%	59%
Aruba	53%	71%	22%	7%	47%
Bahamas ^①	46%	79%	14%	7%	54%
Barbados ^②	56%	75%	17%	7%	44%
Belize	57%	74%	16%	10%	43%
Bonaire	65%	70%	25%	5%	35%
British Virgin Islands	50%	75%	21%	5%	50%
Cayman Islands	54%	71%	22%	7%	46%
Colombia ^②	76%	82%	15%	4%	24%
Costa Maya	47%	83%	13%	3%	53%
Costa Rica	80%	84%	10%	6%	20%
Cozumel	54%	74%	20%	6%	46%
Curacao	58%	70%	24%	7%	42%
Dominican Republic ^②	55%	72%	21%	7%	45%
Ensenada	42%	69%	24%	8%	58%
Grenada	62%	71%	23%	7%	39%
Guadeloupe ^②	63%	82%	11%	6%	37%
Guatemala	75%	85%	8%	7%	26%
Honduras	63%	73%	20%	8%	37%
Jamaica	59%	77%	17%	6%	41%
Manzanillo	41%	85%	10%	5%	59%
Martinique ^②	39%	76%	17%	7%	61%
Mazatlán	55%	78%	15%	7%	45%
Nicaragua	73%	86%	7%	8%	28%
Panama	78%	84%	10%	7%	22%
Progreso	56%	64%	30%	6%	44%
Puerto Chiapas	49%	87%	6%	7%	51%
Puerto Rico (San Juan) ^②	36%	70%	25%	5%	64%
Puerto Vallarta	57%	80%	14%	6%	43%
St. Kitts & Nevis	59%	70%	25%	4%	41%
St. Lucia	68%	62%	31%	7%	32%
St. Maarten	43%	76%	19%	5%	57%
St. Vincent	55%	67%	24%	9%	45%
Trinidad	64%	75%	12%	13%	36%
Turks and Caicos	40%	75%	19%	6%	60%
U. S. Virgin Islands	46%	80%	16%	4%	55%
All Destinations	57%	77%	17%	6%	43%

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

As noted above the cruise lines dominated in the sale of shore excursions. More than 80 percent of shore excursions were purchased from the cruise lines in 11 destinations: Puerto Chiapas (87%), Nicaragua (86%), Guatemala (85%), Manzanillo (85%), Costa Rica (84%), Panama (84%), Costa Maya (83%), Puerto Colombia (82%), Guadeloupe (82%), Vallarta (80%), and the U.S. Virgin Islands (80%).

Finally, there were 15 destinations in which shore operators accounted for 20 percent or more of tour purchases. These were: St. Lucia (31%), Progreso (30%), St. Kitts (25%), Bonaire (25%), Puerto Rico (25%), St. Vincent (24%), Curacao (24%), Ensenada (24%), Grenada (23%), the Cayman Islands (22%), Aruba (22%), Dominican Republic (21%), British Virgin Islands (21%), Honduras (20%), and Cozumel (20%).

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

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

To estimate the local effective price of a shore excursion, data was collected from the cruise lines on the payments made to local tour operators for cruises purchased onboard their ships. These data indicated that the cruise lines paid between 60 percent and 80 percent of the price paid by passengers to the local tour operators. When averaged across all lines and all destinations, the average price paid by passengers for shore excursions purchased from cruise lines and travel agents was discounted by approximately 30 percent when calculating the local effective price. The discounts varied slightly across destinations, but the destination-specific discounts ranged between 25 and 45 percent with the discount in most destinations ranging between 25 percent and 35 percent. The purchase made directly from onshore operators was not discounted at all.

Thus, on average local tour operators received an average of \$45.29 for tours purchased by transit passengers. This figure is 39 percent higher than the average price paid directly to a tour operator and 39 percent lower than the average price received by the cruise lines. The effective local price for a shore excursion ranged from a low of \$18.84 in Puerto Chiapas to a high of \$69.47 in Guadeloupe. In addition to Guadeloupe, 8 destinations, Nicaragua (\$51.38), Cozumel (\$51.54), St. Vincent (\$52.99), Costa Rica (\$56.04), St. Kitts & Nevis (\$56.07), Trinidad (\$57.75), Panama (\$64.55), and Puerto Vallarta (65.20) had effective local prices in excess of \$50 per passenger.

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

Destinations	Average Price of Tour Purchased from			Local Effective Price of a Tour
	Cruise Line	Onshore	Other ^①	
Antigua & Barbuda	\$68.91	\$29.96	\$59.92	\$45.42
Aruba	\$70.37	\$30.59	\$61.19	\$41.24
Bahamas ^①	\$85.11	\$37.00	\$74.01	\$43.63
Barbados ^②	\$63.29	\$27.52	\$55.04	\$39.58
Belize	\$84.17	\$36.59	\$73.19	\$45.37
Bonaire	\$63.65	\$27.68	\$55.35	\$32.83
British Virgin Islands	\$68.93	\$29.97	\$59.94	\$41.73
Cayman Islands	\$80.13	\$36.23	\$69.68	\$40.15
Colombia ^②	\$58.66	\$25.50	\$51.01	\$31.49
Costa Maya	\$75.79	\$32.95	\$65.90	\$42.34
Costa Rica	\$97.32	\$42.31	\$84.63	\$56.04
Cozumel	\$78.50	\$34.13	\$68.26	\$51.54
Curacao	\$59.38	\$26.85	\$51.64	\$34.74
Dominican Republic ^②	\$59.85	\$27.06	\$52.04	\$47.40
Ensenada	\$52.59	\$23.78	\$45.73	\$31.18
Grenada	\$60.49	\$27.35	\$52.60	\$33.47
Guadeloupe ^②	\$74.74	\$33.79	\$64.99	\$69.47
Guatemala	\$88.50	\$40.02	\$76.96	\$49.30
Honduras	\$65.41	\$29.58	\$56.88	\$44.06
Jamaica ^②	\$78.00	\$35.27	\$67.82	\$48.09
Manzanillo	\$75.03	\$32.62	\$65.24	\$47.95
Martinique ^②	\$71.96	\$32.54	\$62.57	\$49.90
Mazatlán	\$58.87	\$26.62	\$51.19	\$37.90
Nicaragua	\$84.04	\$38.00	\$73.08	\$51.38
Panama	\$97.32	\$42.31	\$84.63	\$64.55
Progreso	\$60.08	\$27.17	\$52.25	\$43.32
Puerto Chiapas	\$91.56	\$41.40	\$79.61	\$18.84
Puerto Rico (San Juan) ^②	\$54.83	\$24.79	\$47.67	\$40.70
Puerto Vallarta	\$74.14	\$33.52	\$64.47	\$65.20
St. Kitts & Nevis	\$73.25	\$33.12	\$63.70	\$56.07
St. Lucia	\$77.13	\$34.88	\$67.07	\$49.07
St. Maarten	\$64.69	\$29.25	\$56.25	\$37.59
St. Vincent	\$69.13	\$31.26	\$60.11	\$52.99
Trinidad	\$68.31	\$30.89	\$59.40	\$57.75
Turks and Caicos	\$57.31	\$25.91	\$49.83	\$41.68
U. S. Virgin Islands	\$60.82	\$27.50	\$52.88	\$34.83
All Destinations	\$74.68	\$32.47	\$64.94	\$45.29

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

② Only includes passengers onboard cruise ships making transit calls.

Total Passenger Expenditures

As shown in **Table 7**, the 25.2 million cruise transit and home port passengers that visited the 36 participating destinations spent \$2.56 billion for shore excursions and other goods and services during the 2017/2018 cruise year. The average per passenger spend ranged from a low of \$34.32 in Puerto Chiapas to a high of \$165.42 in the U.S. Virgin Islands and averaged \$101.52 per passenger visit across the 36 destinations.

Cozumel, with nearly \$378 million in total passenger spending led all destinations and accounted for 15 percent of total passenger spending among the 36 destinations. Seven additional destinations had total passenger spending in excess of \$100 million. Passengers spent \$323 million in the Bahamas, \$206 million in the Jamaica, \$172 million in the Cayman Islands, \$156 million in the U.S. Virgin Islands, \$133 million in St. Kitts, \$112 million in St. Maarten, and \$100 million in Puerto Rico. Combined, these top eight destinations accounted for 62 percent of the total on-shore passenger spending among the 36 destinations and totaled \$1.58 billion.

Five of these seven destinations can be considered high volume destinations with more than one million passenger visits per cruise year, ranging from 1.1 million in Puerto Rico to 3.5 million in Cozumel. The U.S. Virgin Islands (944 million) and St Kitts (979 million) fell just short of the 1 million threshold, while St. Maarten's figures were well below at 784 million. Average spending per passenger in these eight locations ranged from \$90.78 per passenger in Puerto Rico to \$165.42 in the U. S. Virgin Islands. Of the eight destinations, only Puerto Rico had an average per passenger spend below the all destination average of \$101.90. Combined the eight destinations had an average per passenger spend of \$120.07, about 18 percent above the Caribbean average.

Another seven destinations had total passenger spending between \$50 and \$100 million. These were: Barbados, Turks & Caicos, Belize, Costa Maya, Dominican Republic, Aruba, and Honduras. Total onshore passenger spending among these eight destinations totaled \$567 million and accounted for 22% across the 36 participating destinations. Total passenger onshore spending in this group of destinations ranged from a low of \$52.4 million in Barbados to a high of \$92.1 million in Honduras and averaged nearly \$71 million among the eight destinations.

For the most part, these eight destinations are considered to be medium volume destinations with passenger onshore visits ranging from 400,000 to one million. The exception is Costa Maya, which at 1.03 million visits is considered in the high-volume spectrum. Among the seven medium volume destinations, passenger visits ranged from 420,000 in Colombia to 905,700 in Honduras. Among these seven medium volume destinations the average per passenger spend was \$97.19 per visit, ranging from \$77.88 in Belize to \$130.63 in Colombia. Among the eight destinations with total passenger expenditures between \$50 million and \$100 million, only Aruba and Colombia had an average per passenger spend above the Caribbean average. Thus, the average per passenger spending for this group of eight destinations was about 9% below the all destination average.

Table 7 – Passenger Onshore Visits and Expenditures by Destination, 2017/2018 Cruise Year

Destinations	Passenger Onshore Visits (Thousands)	Average Spend per Passenger	Total Passenger Expenditures (\$US Millions)
Antigua & Barbuda	663.0	\$73.55	\$48.76
Aruba	677.0	\$121.94	\$82.55
Bahamas^①	2,444.8	\$131.95	\$322.57
Barbados^②	630.8	\$83.12	\$52.43
Belize	877.3	\$77.88	\$68.33
Bonaire	378.6	\$67.19	\$25.44
British Virgin Islands	124.9	\$78.11	\$9.75
Cayman Islands	1,636.5	\$105.17	\$172.12
Colombia^②	351.4	\$122.43	\$43.02
Costa Maya	1,030.4	\$69.58	\$71.70
Costa Rica	301.2	\$70.06	\$21.11
Cozumel	3,487.8	\$108.37	\$377.96
Curacao	602.3	\$70.00	\$42.16
Dominican Republic^②	881.9	\$88.26	\$77.84
Ensenada	468.1	\$54.69	\$25.60
Grenada	298.3	\$51.57	\$15.38
Guadeloupe^②	396.2	\$100.29	\$39.73
Guatemala	120.3	\$71.03	\$8.54
Honduras	905.7	\$101.65	\$92.06
Jamaica^②	1,773.2	\$115.98	\$205.66
Manzanillo	29.0	\$42.10	\$1.22
Martinique^②	516.1	\$54.99	\$28.38
Mazatlán	166.8	\$68.57	\$11.44
Nicaragua	78.7	\$57.16	\$4.50
Panama	277.5	\$76.76	\$21.30
Progreso	407.7	\$57.31	\$23.36
Puerto Chiapas	26.2	\$34.32	\$0.90
Puerto Rico (San Juan)^②	1,105.0	\$90.78	\$100.32
Puerto Vallarta	297.7	\$118.09	\$35.16
St. Kitts & Nevis	978.5	\$135.94	\$133.02
St. Lucia	585.2	\$81.12	\$47.47
St. Maarten	784.2	\$142.23	\$111.54
St. Vincent	203.2	\$52.67	\$10.70
Trinidad	40.8	\$54.17	\$2.21
Turks and Caicos	699.6	\$95.51	\$66.82
U. S. Virgin Islands	943.9	\$165.42	\$156.14
All Destinations	25,189.9	\$101.52	\$2,557.21

① Only includes passenger visits at Nassau and Freeport.

② Includes passengers aboard both transit and homeport cruise ships.

The total passenger onshore spending in the remaining 21 destinations totaled \$466.1 million and accounted for 18% of total passenger expenditures among the 36 participating destinations. Passenger spending in this group averaged \$22.2 million per destination, ranging from \$0.9 million in Puerto Chiapas to \$48.8 million in Antigua & Barbuda.

Transit Passenger Expenditures by Category

Of the 25.2 million passenger visits 96%, or 24.2 million, were made by transit passengers. Utilizing data from the passenger surveys total transit passenger expenditures were calculated for each category. Total expenditures per category is equal to the weighted average spend per passenger multiplied by total transit passenger visits. For example, those cruise parties that reported purchasing food and beverages in a restaurant or bar spent an average of \$15.82 per passenger during a single onshore visit. However, not all cruise parties made such a purchase at each destination. The survey data indicated that at any individual cruise call 47.0 percent of the cruise passengers actually purchased food and beverages. Thus, the weighted spend per passenger across all onshore passengers was \$7.44 ($\$15.82 \times .470$). Finally, the total transit passenger expenditures for food and beverages across all 36 destinations for the entire 2017/2018 cruise year was estimated by multiplying the weighted average spend per passenger (\$7.44) by the total number of transit onshore visits (24.2 million). Thus, total transit passenger purchases of food and beverages for the 2017/2018 cruise year across all 36 destinations were estimated to be \$179.8 million. Similar calculations were made for each category.

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

Purchase Categories	Average Spend per Passenger (\$US)	Share of All Onshore Visits	Weighted Average Spend per Passenger	Total Passenger Expenditures (\$US Millions)
Shore Excursions ^①	\$45.42	53.4%	\$24.26	\$586.4
Local Crafts & Souvenirs	\$16.85	48.0%	\$8.09	\$195.6
F&B at Restaurants & Bars	\$15.82	47.0%	\$7.44	\$179.8
Clothing	\$24.05	42.1%	\$10.11	\$244.5
Other Purchases	\$41.34	20.4%	\$8.43	\$203.8
Taxis/Ground Transportation	\$15.29	17.7%	\$2.70	\$65.3
Watches & Jewelry	\$213.87	16.0%	\$34.21	\$827.0
Retail Purchases of Liquor	\$23.60	10.7%	\$2.52	\$61.0
Perfumes & Cosmetics	\$34.18	2.8%	\$0.95	\$23.1
Telephone & Internet	\$13.45	1.3%	\$0.18	\$4.3
Entertainment/Night Clubs/Casinos	\$53.77	1.3%	\$0.68	\$16.4
Electronics	\$41.19	53.4%	\$0.10	\$2.4
Total			\$99.69	\$2,409.6

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

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

- The typical transit cruise passenger spent an average of \$99.69 at each destination call during their cruise vacation with total transit passenger expenditures in the 36 destinations reaching \$2.4 billion during the 2017/2018 cruise year, 94 percent of total passenger expenditures.
- Seventy-seven percent (77%) of transit passenger expenditures were made in four categories: watches and jewelry (\$827 million), shore excursions (\$586 million), clothing (\$245 million), and local crafts & souvenirs (\$196 million). Combined, cruise passengers spent an estimated \$1.85 billion in these four categories.
- The most popular expenditure was for shore excursions with over half (53 percent) of all transit passengers making such a purchase. Local tour operators received an average of \$45.42 per passenger directly from cruise passengers and cruise lines for those passengers who purchased a shore excursion. The weighted average spend was \$24.26 per passenger. Total payments to tour operators in the 36 participating destinations were an estimated \$586 million.
- Transit passengers that purchased watches and jewelry spent an average of \$213.87 on such purchases. Since only 16.0 percent of passengers purchased watches and jewelry the average per passenger spend for such purchases was \$34.21. Total expenditures on watches and jewelry were estimated to total \$827 million.
- Slightly less than half of the transit cruise passengers purchased local crafts and souvenirs (48%), and clothing (42%) in each destination. On average, visiting passengers spent \$8.09 for local crafts and souvenirs and \$10.11 on clothing at each port call. Combined, passengers spent a total of \$440 million in these two categories.

Homeport Passenger Expenditures by Category

Of the total of 25.2 million passenger onshore visits in the 36 participating destinations during the 2017/2018 cruise year, 1.02 million visits were made by homeport passengers embarking on their cruises from: San Juan, Barbados, Cartagena, the Dominican Republic, Guadeloupe, Jamaica and Martinique. The total passenger spending was calculated for each category utilizing data from the passenger surveys. Total expenditures per category is equal to the weighted average spend per passenger multiplied by total homeport passenger visits.

For example, those homeport cruise parties²² that reported purchasing food and beverages in a restaurant or bar spent an average of \$41.10 per passenger during their pre- or post-cruise stay. However, not all cruise parties made such a purchase at each port of embarkation. The survey data indicated that at any individual embarkation 46 percent of the cruise passengers actually purchased food and beverages. Thus, the weighted spend per passenger across all homeport passengers was \$18.71 ($\$41.10 \times .46$). Finally, total passenger spending for food and beverages across all seven homeports for the entire 2017/2018 cruise year was estimated by multiplying the weighted average spend per passenger (\$18.71) by the total number of embarking passengers (1.02 million). Thus, total homeport passenger spending for food and beverages for the 2017/2018 cruise year across the seven destinations were estimated to be \$19.1 million. Similar calculations were made for each category.

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

Purchase Categories	Average Spend per Passenger (\$US)	Share of All Onshore Visits	Weighted Average Spend per Passenger	Total Passenger Expenditures (\$US Millions)
F&B at Restaurants & Bars	\$41.10	45.5%	\$18.71	\$19.1
Taxis/Ground Transportation	\$26.63	40.7%	\$10.83	\$11.0
Shore Excursions	\$138.87	35.5%	\$49.23	\$50.2
Local Crafts & Souvenirs	\$15.47	24.5%	\$3.79	\$3.9
Lodging	\$164.24	24.3%	\$39.86	\$40.6
Clothing	\$34.44	23.8%	\$8.21	\$8.4
Retail Purchases of Liquor	\$15.67	16.4%	\$2.57	\$2.6
Other Purchases	\$47.72	15.7%	\$7.49	\$7.6
Perfumes & Cosmetics	\$51.97	4.3%	\$2.22	\$2.3
Watches & Jewelry	\$17.77	3.1%	\$0.56	\$0.6
Telephone & Internet	\$46.96	1.8%	\$0.83	\$0.8
Entertainment/Night Clubs/Casinos	\$36.90	1.6%	\$0.58	\$0.6
Electronics	\$5.03	0.3%	\$0.02	\$0.0
Total			\$144.88	\$147.6

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

²² The average homeport cruise party consisted of 2.1 passengers. An estimated 22 percent of the cruise parties had a pre- and/or post-cruise stay that averaged about 2.5 nights.

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

- The typical homeport cruise passenger spent an average of \$144.88 at their homeport call during their cruise vacation with total passenger expenditures in the seven destinations reaching \$147.6 million during the 2017/2018 cruise year, 6 percent of total passenger expenditures.
- Eighty-two percent (82%) of homeport passenger expenditures were made in four categories: shore excursions (\$50.2 million), lodging (\$40.6 million), food and beverages (\$19.1 million), and taxis/ground transportation (\$11.0 million). Combined, cruise passengers spent an estimated \$120.9 million in these four categories.
- More than 40 percent of all homeport passengers reported purchasing food & beverages and Taxi/ground transportation. About a quarter (24%) of the passengers purchased accommodations and spent an average of \$164.24 for the pre- and/or post- cruise overnight stay. Those passengers who purchased shore excursions spent an average of \$138.87. The weighted average spend for accommodations and shore excursions was \$39.86 and \$49.23, respectively. Combined, total payments to hotels and tour operators in the seven destinations were estimated at nearly \$91 million, 61 percent of total expenditures by homeport passengers.

Total Crew Expenditures

Unlike passengers, shore excursions are not a focus of crew spending; rather, crew expenditures are more heavily weighted toward food and beverages and retail purchases. These were followed by spending for ground transportation and entertainment. As shown in **Table 10**, the 4.4 million crew members that visited the 36 participating destinations spent nearly \$266 million for goods and services during the 2017/2018 cruise year.

Crew purchasing focused on food and beverages, clothing, watches & jewelry, and ground transportation. Crew spent an estimated total of \$156.1 million in these four categories, 59 percent of total crew expenditures. Crew spent another \$12.7 million on local crafts and souvenirs and \$11.7 million on shore excursions. Combined these two categories accounted for an additional 9 percent of total crew spending during the 2017/2018 cruise year. Only 3.7 percent of crew purchased shore excursions in the 36 destinations; by comparison, 53 percent of transit passengers purchased shore excursions.

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

Purchase Categories	Average Spend per Crew (\$US)	Share of All Onshore Visits	Weighted Average Spend per Crew	Total Crew Expenditures (\$US Millions)
F&B at Restaurants & Bars	\$32.07	68.0%	\$21.81	\$95.9
Taxis/Ground Transportation	\$13.42	25.7%	\$3.44	\$15.1
Watches & Jewelry	\$72.20	5.5%	\$3.95	\$17.4
Clothing	\$44.61	14.1%	\$6.29	\$27.7
Entertainment/Night Clubs/Casinos	\$62.75	2.3%	\$1.44	\$6.3
Other Purchases	\$103.28	12.6%	\$13.00	\$57.1
Shore Excursions	\$72.71	3.7%	\$2.67	\$11.7
Perfumes & Cosmetics	\$31.16	5.7%	\$1.78	\$7.8
Local Crafts & Souvenirs	\$21.03	13.7%	\$2.88	\$12.7
Retail Purchases of Liquor	\$23.59	3.0%	\$0.70	\$3.1
Electronics	\$39.10	3.2%	\$1.25	\$5.5
Telephone & Internet	\$26.29	4.6%	\$1.22	\$5.4
Total			\$60.44	\$265.7

Table 11 shows the distribution of the \$265.7 million in crew expenditures across the 36 participating destinations. Average spend per crew ranged from a low of \$31.65 in Costa Rica to a high of \$130.63 in Puerto Rico. As indicated below, the total crew spend averaged \$60.60 across all destinations.

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

- Crew visiting Cozumel spent an estimated \$45.5 million, the highest level of spending among the 36 destinations. Over 676,000 crew were estimated to have made an on-shore visit during the 2017/2018 cruise year and spent an average of \$67.24 per visit to Cozumel.

Table 11 – Crew Expenditures by Destination, 2017/2018 Cruise Year

Destinations	Crew Onshore Visits (Thousands)	Average Spend per Crew	Total Crew Expenditures (\$US Millions)
Antigua & Barbuda	128.9	\$39.76	\$5.12
Aruba	103.3	\$87.94	\$9.08
Bahamas ^①	527.2	\$54.90	\$28.94
Barbados ^②	127.8	\$54.26	\$6.94
Belize	109.4	\$46.17	\$5.05
Bonaire	67.0	\$44.61	\$2.99
British Virgin Islands	19.1	\$34.12	\$0.65
Cayman Islands	248.6	\$70.30	\$17.48
Colombia ^②	50.5	\$70.10	\$3.54
Costa Maya	198.0	\$41.72	\$8.26
Costa Rica	52.2	\$31.65	\$1.65
Cozumel	676.3	\$67.24	\$45.47
Curacao	105.2	\$66.47	\$6.99
Dominican Republic ^②	84.8	\$47.08	\$3.99
Ensenada	93.4	\$46.41	\$4.33
Grenada	39.7	\$47.78	\$1.90
Guadeloupe ^②	84.3	\$36.60	\$3.09
Guatemala	21.4	\$38.35	\$0.82
Honduras	111.7	\$50.36	\$5.62
Jamaica ^②	274.0	\$46.57	\$12.76
Manzanillo	6.40	\$41.06	\$0.26
Martinique ^②	98.9	\$39.41	\$3.90
Mazatlán	35.7	\$49.16	\$1.76
Nicaragua	15.3	\$42.76	\$0.65
Panama	56.6	\$65.71	\$3.72
Progreso	67.0	\$42.19	\$2.83
Puerto Chiapas	5.0	\$42.19	\$0.21
Puerto Rico (San Juan) ^②	172.7	\$130.63	\$22.57
Puerto Vallarta	34.6	\$37.94	\$1.31
St. Kitts & Nevis	162.3	\$53.72	\$8.72
St. Lucia	98.2	\$68.92	\$6.77
St. Maarten	149.7	\$119.02	\$17.82
St. Vincent	54.1	\$43.50	\$2.35
Trinidad	8.0	\$33.99	\$0.27
Turks and Caicos	133.8	\$54.98	\$7.36
U. S. Virgin Islands	174.8	\$60.12	\$10.51
All Destinations	4,396	\$60.44	\$265.68

① Only includes crew visits at Nassau and Freeport.

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

- The Bahamas had the second highest total spend by crew, with \$28.9 million in purchases. The typical crew member spent an average of \$54.90 while in the Bahamas. Crew spending in the Bahamas was concentrated on food & beverages, phone & internet, and clothing.
- As noted above, Puerto Rico had the highest average per crew spend rate (\$130.63) and the seventh highest number of estimated crew onshore visits, 172,700. As a result, the crew visits to the island generated the third highest level of total crew onshore expenditures of \$22.6 million during the 2017/2018 cruise year. In Puerto Rico crew expenditures were concentrated on retail purchases of clothing and purchases of food and beverages.
- With the second highest average spend of \$119.02 per crew member and the ninth highest number of crew onshore visits, St. Maarten had the fourth highest total crew spending among the 36 participating destinations. In St. Maarten crew expenditures were concentrated on retail purchases of food and beverages, perfume clothing and jewelry. The 149,700 crew members that visited St. Maarten spent an estimated \$17.8 million during the 2017/2018 cruise year.
- Crew visiting the Cayman Islands spent an average of \$70.30. With an estimated 248,600 onshore visits, crew spent an estimated \$17.5 million during the 2017/2018 cruise year, fifth highest among the 36 destinations. Crew spending was concentrated in food and beverages and retail purchases of clothing and local crafts followed by purchases of shore excursions.
- Jamaica benefitted from \$12.8 million in crew onshore expenditures, sixth highest among the 36 destinations. On average the 274,000 crew that made an onshore visit in Jamaica spent \$46.57 per visit. Crew spending was concentrated in food and beverages and transportation.
- Crew visiting the U.S. Virgin Islands spent an average of \$60.12. With an estimated 174,800 onshore visits crew spent an estimated \$10.5 million during the 2017/2018 cruise year, the seventh highest total among the 36 destinations. Crew spending in the U.S.V.I. was concentrated in food and beverages, clothing and other purchases.

Among the remaining 29 destinations total crew expenditures averaged \$3.8 million per destination. Seven destinations, Aruba, Barbados, Costa Maya, Curacao, St. Kitts, St. Lucia, and Turks and Caicos had total crew expenditures of \$6 million or more.

Total Passenger and Crew Expenditures for a Transit Call

While passenger and crew spending obviously varies across destinations, we have estimated the average passenger and crew spending for a typical transit port call by one of the industry's 3,500 passenger ships with 1,400 crew (see **Table 12**).

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

	Arrivals	Onshore Visits	Average Spend	Total
Passengers	3,500	2,980	\$99.69	\$297,080
Crew	1,400	550	\$60.44	\$33,240
Total	4,900	3,530	\$93.57	\$330,320

During the typical transit call, such a cruise ship would generate approximately 2,980 passenger visits (85 percent of passenger arrivals) and 550 crew visits (39 percent of crew arrivals). Passengers are estimated to generate \$297,080 ($\$99.69 \times 2,980$) in onshore spending while crew are expected to add an additional \$33,240 ($\60.44×550) for total onshore spending of \$330,320. Thus, a 3,500-passenger cruise ship making a transit call would generate an average 3,530 passenger and crew visits and total expenditures of over \$330,000 per call, or nearly \$94 per visit.

Expenditures by Cruise Lines

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

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

As shown in **Table 13**, total expenditures for port fees and local supplies varied considerably across destinations. This reflects the differences in the structure of port fees, the volume of cruise calls, and the availability of and need for ship supplies in each destination. In total, the cruise lines spent an estimated \$533.8 million in the 36 participating destinations during the 2017/2018 cruise year for port fees and taxes, utilities, navigation services and ship supplies.

The analysis of cruise line expenditures revealed the following impacts for the top 7 destinations which had cruise line expenditures above \$25 million and combined accounted for 56 percent of cruise line spending among the 36 destinations.

- The Bahamas had the highest total expenditures by cruise lines among the 36 participating destinations, \$54.2 million. The expenditures by cruise lines in the Bahamas were concentrated in port fees and services which accounted for nearly 90 percent of total cruise line expenditures.²³
- The Dominican Republic was second with \$52.9 million in cruise line expenditures during the 2017/2018 cruise year. Benefitting from both home port and transit calls, the purchase of ship supplies accounted for almost 60 percent of the expenditures made by cruise lines.
- Panama was third with \$52.7 million in cruise line expenditures during the 2017/2018 cruise year. The expenditures by cruise lines in Panama were concentrated in port fees and services, however, the purchase of ship supplies accounted for about 22 percent of all cruise line expenditures.
- Cozumel has the fourth highest level of cruise line expenditures at \$50.6 million. Virtually all of these expenditures were for port and navigation fees.

²³ This figure includes passenger head taxes paid for passenger arrivals at the private islands of the cruise lines.

Table 13 – Total Cruise Line Expenditures by Destination, 2017/2018 Cruise Year

Destinations	Estimated Expenditures (\$US Millions)
Antigua & Barbuda	\$23.85
Aruba	\$11.11
Bahamas ^①	\$54.23
Barbados ^②	\$11.66
Belize	\$12.74
Bonaire	\$1.72
British Virgin Islands	\$2.23
Cayman Islands	\$34.93
Colombia ^②	\$13.29
Costa Maya	\$9.58
Costa Rica	\$6.48
Cozumel	\$50.64
Curacao	\$22.58
Dominican Republic ^②	\$52.89
Ensenada	\$10.45
Grenada	\$1.97
Guadeloupe ^②	\$10.13
Guatemala	\$1.71
Honduras	\$9.68
Jamaica ^②	\$26.11
Manzanillo	\$1.22
Martinique ^②	\$5.94
Mazatlán	\$2.67
Nicaragua	\$0.55
Panama	\$52.73
Progreso	\$6.53
Puerto Chiapas	\$0.48
Puerto Rico (San Juan) ^②	\$28.28
Puerto Vallarta	\$6.03
St. Kitts & Nevis	\$7.55
St. Lucia	\$5.18
St. Maarten	\$13.88
St. Vincent	\$3.37
Trinidad	\$1.02
Turks and Caicos	\$12.29
U. S. Virgin Islands	\$18.04
All Destinations	\$533.76

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

- The Cayman Islands were fifth with \$34.9 million in cruise line expenditures during the 2017/2018 cruise year. Port and navigation fees, including passenger-based fees, accounted for almost 90 percent of cruise line spending in the Cayman Islands.
- Puerto Rico had the sixth highest level of cruise line expenditures at \$28.3 million. As the major Caribbean homeport, the purchase of ship supplies is more important than in most other destinations accounting for more than a quarter of the total expenditures made by cruise lines.
- Jamaica rounds out the top 7 destinations, with \$26.1 million in cruise line expenditures. Port and navigation fees, including passenger-based fees, accounted for nearly all of cruise line spending in the Cayman Islands.

For 11 of the remaining 29 destinations, expenditures by cruises lines during the 2017/2018 cruise year were between \$10 million and \$24 million. The remaining 18 destinations all had cruise line expenditures under \$10 million. This ranged from a low of \$500,000 in Puerto Chiapas to a high of \$9.7 million in Honduras.

Direct Cruise Tourism Expenditures

As shown in **Table 14**, the 29.6 million passenger and crew visits generated an estimated \$2.8 billion in spending for local goods and services in the 36 destinations. The cruise lines added another \$533.8 million in spending for port services and other local goods and services, bringing total cruise tourism expenditures to nearly \$3.4 billion during the 2017/2018 cruise year.

Eleven (11) of the 36 destinations had direct cruise tourism expenditures of \$100 million or more. Ten (10) destinations had direct expenditures between \$50 and \$100 million, six (6) had direct expenditures between \$20 and \$50 and nine (9) had direct expenditures less than \$20 million.

Cozumel led all destinations with \$474 million, followed by the Bahamas with \$406 million, Jamaica with \$245 million, the Cayman Islands with \$225 million, the U.S. Virgin Islands with \$185 million, Puerto Rico with \$151 million, St. Kitts with \$149 million, St. Maarten with \$143 million, Dominican Republic with \$135 million, Honduras with \$107 million, and Aruba with \$103 million. Combined, these 11 destinations with \$2.3 billion in direct expenditures accounted for 69 percent of the total cruise tourism expenditures among the 36 destinations.

The next 10 destinations with expenditures between \$50 and \$100 million accounted for 22 percent of the total cruise tourism expenditures with a combined total of \$745.3 million in direct spending. Direct spending among these ten destinations ranged from \$52.9 million in Guadeloupe to \$89.5 million in Costa Maya. In addition to Costa Maya, Turks & Caicos (\$86.5 million), Belize (\$86.1 million), Panama (\$77.8 million), and Antigua & Barbuda (\$77.7 million) each had total cruise tourism expenditures in excess of \$75 million.

The six destinations with expenditures between \$20 and \$50 million accounted for about 6 percent of the total cruise tourism expenditures with a combined total of \$213.2 million in direct spending. Direct spending among these six destinations ranged from \$29.2 million in Costa Rica to \$42.5 million in Puerto Vallarta.

The remaining nine destinations with less than \$20 million in direct cruise tourism expenditures had a combined total of \$88.8 million in direct cruise tourism expenditures and accounted for about three percent of the total among the 36 destinations. Cruise tourism expenditures among these destinations ranged from \$1.6 million in Puerto Chiapas to \$19.3 million in Grenada.

Table 14 – Total Cruise Tourism Expenditures (\$US Millions) by Destination, 2017/2018 Cruise Year*

Destinations	Passengers	Crew	Cruise Lines	Total
Antigua & Barbuda	\$48.76	\$5.12	\$23.85	\$77.74
Aruba	\$82.55	\$9.08	\$11.11	\$102.75
Bahamas^①	\$322.57	\$28.94	\$54.23	\$405.75
Barbados^②	\$52.43	\$6.94	\$11.66	\$71.03
Belize	\$68.33	\$5.05	\$12.74	\$86.12
Bonaire	\$25.44	\$2.99	\$1.72	\$30.15
British Virgin Islands	\$9.75	\$0.65	\$2.23	\$12.63
Cayman Islands	\$172.12	\$17.48	\$34.93	\$224.54
Colombia^②	\$43.02	\$3.54	\$13.29	\$59.85
Costa Maya	\$71.70	\$8.26	\$9.58	\$89.54
Costa Rica	\$21.11	\$1.65	\$6.48	\$29.24
Cozumel	\$377.96	\$45.47	\$50.64	\$474.07
Curacao	\$42.16	\$6.99	\$22.58	\$71.73
Dominican Republic^②	\$77.84	\$3.99	\$52.89	\$134.72
Ensenada	\$25.60	\$4.33	\$10.45	\$40.39
Grenada	\$15.38	\$1.90	\$1.97	\$19.25
Guadeloupe^②	\$39.73	\$3.09	\$10.13	\$52.94
Guatemala	\$8.54	\$0.82	\$1.71	\$11.08
Honduras	\$92.06	\$5.62	\$9.68	\$107.36
Jamaica^②	\$205.66	\$12.76	\$26.11	\$244.53
Manzanillo	\$1.22	\$0.26	\$1.22	\$2.71
Martinique^②	\$28.38	\$3.90	\$5.94	\$38.22
Mazatlán	\$11.44	\$1.76	\$2.67	\$15.87
Nicaragua	\$4.50	\$0.65	\$0.55	\$5.70
Panama	\$21.30	\$3.72	\$52.73	\$77.75
Progreso	\$23.36	\$2.83	\$6.53	\$32.72
Puerto Chiapas	\$0.90	\$0.21	\$0.48	\$1.59
Puerto Rico (San Juan)^②	\$100.32	\$22.57	\$28.28	\$151.17
Puerto Vallarta	\$35.16	\$1.31	\$6.03	\$42.50
St. Kitts & Nevis	\$133.02	\$8.72	\$7.55	\$149.28
St. Lucia	\$47.47	\$6.77	\$5.18	\$59.42
St. Maarten	\$111.54	\$17.82	\$13.88	\$143.24
St. Vincent	\$10.70	\$2.35	\$3.37	\$16.43
Trinidad	\$2.21	\$0.27	\$1.02	\$3.50
Turks and Caicos	\$66.82	\$7.36	\$12.29	\$86.47
U. S. Virgin Islands	\$156.14	\$10.51	\$18.04	\$184.69
All Destinations	\$2,557.21	\$265.68	\$533.76	\$3,356.65

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

① Only includes crew visits at Nassau and Freeport.

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

Economic Contribution of Cruise Tourism Expenditures

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

Direct Economic Contribution of Cruise Tourism Expenditures

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

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

The analysis of cruise tourism's direct expenditures shows that the cruise ship calls that brought 29.6 million passenger and crew visits to the 36 participating destinations during the 2017/2018 cruise year generated nearly \$3.4 billion in direct spending by the cruise lines and their passengers and crew. As shown in **Table 15** the businesses that directly supplied the shore excursions and other goods and services employed an estimated 47,876 employees throughout the Caribbean and paid annual wages of \$533.6 million. While the impacts vary across destinations, on average every \$70,000 in cruise tourism expenditures generated a direct job in a destination and that 16 percent of direct cruise tourism expenditures ended up as income for the directly impacted workers. The 7 destinations with the highest direct employment impacts are discussed below:

Cozumel had the highest number of passenger and crew onshore visits with 4.2 million visits. Combined with average per passenger spend of \$108.37 per visit and an average per crew spend of \$67.24, Cozumel ranked first in direct cruise tourism expenditures. The \$474 million in cruise tourism spending in Cozumel generated 7,375 direct jobs and \$48.48 million in wage income during the 2017/2018 cruise year. Thus, one direct job was created for every \$64,300 in direct cruise tourism expenditures and wages accounted for 10 percent of the direct expenditures.

Jamaica had the third highest number of passenger and crew onshore visits with 2.0 million visits. Combined with average per passenger spend of \$115.98 per visit and an average per crew spend of \$46.57, Jamaica ranked third in direct cruise tourism expenditures. The \$244.5 million in cruise tourism spending in Jamaica generated 5,270 direct jobs and \$35.9 million in wage income during the 2017/2018 cruise year. Thus, one direct job was created for every \$46,400 in direct cruise tourism expenditures and wages accounted for 15 percent of the direct expenditures.

The Bahamas was second of all Caribbean destinations with just nearly 2.9 million onshore passenger and crew visits. With an average per passenger spend of \$131.95, The Bahamas had the second highest total of passenger spending, \$322.6 million. The Bahamas also had the second highest level of total crew spending, \$28.9 million, and the highest level of cruise line spending (\$54.2 million). Combining all direct expenditures, the cruise sector generated \$405.8 million in cruise tourism expenditures. These expenditures, in turn, generated an estimated 5,256 direct jobs paying \$91.30 million in direct wage income during the 2017/2018 cruise year.

The Dominican Republic had only the eleventh highest number of passenger and crew onshore visits with 967,000 visits. Combined with average per passenger spend of \$88.26 per visit and an average crew spend of \$47.08, the Dominican Republic ranked ninth in direct cruise tourism expenditures. The \$134.7 million in cruise tourism spending in the Dominican Republic generated 2,514 direct jobs and \$11.3 million in wage income during the 2017/2018 cruise year. Thus, one direct job was created for every \$53,600 in direct cruise tourism expenditures and wages accounted for 8 percent of the direct expenditures.

The Cayman Islands, with the tenth highest average per passenger spend of just over \$105.17 and the fourth highest volume of onshore passenger and crew visits with 1.9 million visits, had the fourth highest level of direct cruise sector expenditures with \$224.5 million in spending. These total cruise tourism expenditures generated an estimated 2,507 direct jobs paying \$49.9 million in wage income during the 2017/2018 cruise year. It required approximately \$89,600 in cruise tourism expenditures to create a direct job. The direct wage income accounted for 22 percent of the direct expenditures.

Table 15 – Direct Economic Impact of Cruise Tourism by Destination, 2017/2018 Cruise Year*

Destinations	Direct Cruise Tourism Expenditures (\$US Millions)	Direct Employment	Direct Employee Wage Income (\$US Millions)
Antigua & Barbuda	\$77.74	912	\$8.60
Aruba	\$102.75	1,111	\$19.47
Bahamas^①	\$405.75	5,256	\$91.30
Barbados^②	\$71.03	1,227	\$14.09
Belize	\$86.12	1,724	\$18.87
Bonaire	\$30.15	311	\$5.18
British Virgin Islands	\$12.63	146	\$2.47
Cayman Islands	\$224.54	2,507	\$49.86
Colombia^②	\$59.85	747	\$5.54
Costa Maya	\$89.54	1,306	\$8.36
Costa Rica	\$29.24	601	\$3.78
Cozumel	\$474.07	7,375	\$48.48
Curacao	\$71.73	636	\$11.91
Dominican Republic^②	\$134.72	2,514	\$11.28
Ensenada	\$40.39	665	\$4.91
Grenada	\$19.25	330	\$2.36
Guadeloupe^②	\$52.94	638	\$5.53
Guatemala	\$11.08	231	\$1.12
Honduras	\$107.36	1,455	\$7.86
Jamaica	\$244.53	5,270	\$35.92
Manzanillo	\$2.71	35	\$0.27
Martinique^②	\$38.22	517	\$4.23
Mazatlán	\$15.87	283	\$1.71
Nicaragua	\$5.70	224	\$0.68
Panama	\$77.75	1,288	\$9.00
Progreso	\$32.72	584	\$3.63
Puerto Chiapas	\$1.59	26	\$0.17
Puerto Rico (San Juan)^②	\$151.17	1,947	\$28.57
Puerto Vallarta	\$42.50	636	\$4.43
St. Kitts & Nevis	\$149.28	1,261	\$10.77
St. Lucia	\$59.42	972	\$7.72
St. Maarten	\$143.24	1,987	\$42.82
St. Vincent	\$16.43	265	\$2.18
Trinidad	\$3.50	81	\$1.01
Turks and Caicos	\$86.47	939	\$17.10
U. S. Virgin Islands	\$184.69	1,869	\$42.45
All Destinations	\$3,356.65	47,876	\$533.64

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

① Only includes crew visits at Nassau and Freeport.

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

St. Maarten had the sixth highest direct jobs impact across the 36 destinations. St. Maarten ranked second in average per passenger spend of \$142.23 per passenger visit. It also had the second highest average crew spend of \$119 per visit. With an estimated 934,000 million on-shore passenger and crew visits St. Maarten fell out of the top 10 in total visits. The spending by the cruise lines and their passengers and crew generated \$143.24 million in total cruise tourism expenditures in St. Maarten, eighth highest among the 36 destinations. This spending then resulted in the direct employment of 1,987 residents and wage income of \$42.8 million. Thus one direct job was generated for every \$72,000 in cruise tourism expenditures in this destination. St. Maarten has an above average wage structure and, consequently, the wage income of the impacted workers accounted for 30 percent of the direct expenditures.

The economic impacts of cruise tourism in Puerto Rico were generated by both homeport and port-of-call visits. In fact, Puerto Rico led the Caribbean in passenger embarkations during the 2017/2018 cruise year with just over 361,000 embarkations. The island destination ranked fifth in passenger and crew onshore visits with nearly 1.3 million visits. The spending by the cruise lines and their passenger and crew resulted in \$151.2 million in total cruise tourism expenditures which, in turn, generated 1,947 direct jobs and \$28.57 million in wages during the 2017/2018 cruise year. Thus, one direct job was created for every \$77,600 in direct cruise tourism expenditures and wages accounted for 19 percent of the direct expenditures.

Total Economic Contribution of Cruise Tourism Expenditures

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

The estimated indirect economic contribution was developed by destination by utilizing the economic impact models discussed previously. The size of the economic impacts relative to the direct impacts is primarily determined by the degree of economic development in a particular economy. This occurs because more developed economies import proportionately fewer goods and services which reduce leakages to other economies. For example, in BREA's 2016 analysis of the economic impact of the cruise industry in the United States, the indirect employment impacts were 46 percent higher than the direct impacts, resulting in an implicit employment multiplier of nearly 2.5. With the exception of one location (Aruba), each of the destinations analyzed for this study had indirect impacts that were smaller than the direct impacts. This is due to the relatively high proportion of imported goods and services in these economies. As a consequence, the implicit employment and wage multipliers for the respective destinations were less than 2.0.

As shown in **Table 16**, the nearly \$3.4 billion in direct cruise tourism expenditures generated total employment of 78,954 residents of the 36 destinations and \$903 million in employee wages during the 2017/2018 cruise year. The top 11 destinations, all with \$100 million or more in direct cruise industry expenditures accounted for \$2.3 billion in expenditures, or 69 percent of the total across the 36 destinations.

Table 16 – Total Economic Impact of Cruise Tourism by Destination, 2017/2018 Cruise Year*

Destinations	Direct Cruise Tourism Expenditures (\$US Millions)	Total Employment	Total Employee Wage Income (\$US Millions)
Antigua & Barbuda	\$77.74	1,466	\$14.41
Aruba	\$102.75	2,255	\$38.03
Bahamas ^①	\$405.75	9,004	\$155.71
Barbados ^②	\$71.03	2,351	\$25.36
Belize	\$86.12	2,530	\$27.68
Bonaire	\$30.15	525	\$8.77
British Virgin Islands	\$12.63	234	\$4.33
Cayman Islands	\$224.54	4,622	\$92.24
Colombia ^②	\$59.85	1,186	\$8.56
Costa Maya	\$89.54	2,081	\$13.45
Costa Rica	\$29.24	825	\$5.17
Cozumel	\$474.07	11,945	\$78.21
Curacao	\$71.73	1,106	\$20.73
Dominican Republic ^②	\$134.72	4,052	\$17.43
Ensenada	\$40.39	1,016	\$7.69
Grenada	\$19.25	529	\$3.65
Guadeloupe ^②	\$52.94	994	\$8.56
Guatemala	\$11.08	345	\$1.66
Honduras	\$107.36	2,198	\$11.61
Jamaica	\$244.53	8,293	\$56.57
Manzanillo	\$2.71	58	\$0.45
Martinique ^②	\$38.22	790	\$6.43
Mazatlán	\$15.87	420	\$2.56
Nicaragua	\$5.70	323	\$0.96
Panama	\$77.75	1,827	\$12.65
Progreso	\$32.72	807	\$5.02
Puerto Chiapas	\$1.59	38	\$0.25
Puerto Rico (San Juan) ^②	\$151.17	3,644	\$56.00
Puerto Vallarta	\$42.50	1,027	\$7.27
St. Kitts & Nevis	\$149.28	2,065	\$17.64
St. Lucia	\$59.42	1,465	\$11.64
St. Maarten	\$143.24	3,499	\$72.34
St. Vincent	\$16.43	418	\$3.39
Trinidad	\$3.50	116	\$1.59
Turks and Caicos	\$86.47	1,461	\$26.76
U. S. Virgin Islands	\$184.69	3,439	\$77.89
All Destinations	\$3,356.65	78,954	\$902.68

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

① Only includes crew visits at Nassau and Freeport.

② Includes crew aboard both transit and homeport cruise ships.

Cozumel had the highest level of direct cruise sector expenditures with \$474 million in spending. In addition, Cozumel had the highest volume of onshore passenger and crew visits with 4.2 million visits. As a result of these onshore visits, Cozumel had an average total expenditure of \$114 per passenger and crew visit. The \$474 million in cruise tourism expenditures generated an estimated 11,945 jobs, the highest level among the 36 destinations, paying over \$78 million in wage income during the 2017/2018 cruise year. Thus, in Cozumel every \$1 million in direct cruise tourism expenditures generated 25 jobs throughout the local economy which paid an average annual wage of about US\$6,500.

The Bahamas, with nearly 3.0 million passenger and crew visits, had the second highest volume of visits in the Caribbean. It also had the second highest level of direct expenditures with \$405.8 million. Thus, each visit generated an average total expenditure of \$137 across all passenger and crew visits. As a result of the \$405.8 million in direct expenditures the Bahamas benefitted from the generation of 9,004 jobs paying wage income of \$155.7 million, with total wages being the highest among the 36 destinations. Thus, in the Bahamas every \$1 million in direct cruise tourism expenditures generated 22 jobs throughout the island's economy which paid an average annual wage of about US\$17,300.

Jamaica had the third highest level of direct expenditures with \$244.5 million in spending by cruise lines and their passengers and crew. Passenger and crew totaled more than 2 million onshore visits during the 2017/18 cruise year. On average each passenger and crew visit generated \$119 in total onshore spending. The \$244.5 million in cruise tourism spending in Jamaica generated an estimated 8,293 total jobs, the third highest total among the 36 destinations, and \$56.6 million in wage income during the 2017/2018 cruise year. Thus, in Jamaica every \$1 million in direct cruise tourism expenditures generated nearly 34 jobs throughout the island's economy which paid an average annual wage of about US\$6,800.

The Cayman Islands had the fourth highest number of passenger and crew onshore visits with nearly 1.9 million visits and the fourth highest volume of direct expenditures, \$224.5 million. The Cayman Islands had an average total expenditure of \$119 per passenger and crew visit. The \$224.5 million in cruise tourism spending in the Cayman Islands generated 4,622 total jobs and \$92.2 million in wage income during the 2017/2018 cruise year. Thus, in the Cayman Islands every \$1 million in direct cruise tourism expenditures generated about 21 jobs throughout the economy which paid an average annual wage of about US\$20,000.

The U.S. Virgin Islands had the fifth highest level of direct cruise sector expenditures with \$184.7 million in spending. In addition, the U.S.V.I. had the eighth highest volume of onshore passenger and crew visits with 1.1 million visits. It also had the second highest average total expenditure rate of \$165 per passenger and crew visit. The \$184.7 million in cruise tourism expenditures generated an estimated 3,439 jobs paying \$77.9 million in wage income, the fourth highest wage total in the Caribbean, during the 2017/2018 cruise year. These direct expenditures generated nearly 19 jobs throughout the economy of the U.S.V.I. for every \$1 million in spending. These jobs, in turn, paid an average annual wage of nearly US\$22,700.

Puerto Rico benefitted from \$151.2 million in total cruise tourism expenditures which, in turn, generated 3,644 jobs and \$56 million in wages during the 2017/2018 cruise year. The economic impacts of cruise tourism in Puerto Rico were generated by both homeport and port-of-call visits. In fact, Puerto Rico led the Caribbean in passenger embarkations during the 2017/2018 cruise year with over 361,000 embarkations. The island destination ranked fifth in passenger and crew onshore visits with 1.3 million visits. On average each passenger and crew visit generated \$118 in onshore expenditures. These direct expenditures generated approximately 24 jobs throughout the island's economy for every \$1 million in expenditures. These jobs also paid an average annual wage of about US\$15,400

St. Kitts had the seventh highest number of passenger and crew onshore visits with 1.1 million visits and the seventh highest volume of direct expenditures, \$149.3 million. St. Kitts also had the eighth highest average total expenditure of \$131 per passenger and crew visit. The \$149.3 million in cruise tourism spending in the Cayman Islands generated 2,065 total jobs and \$17.6 million in wage income during the 2017/2018 cruise year. Thus, in St. Kitts every \$1 million in direct cruise tourism expenditures generated 14 jobs throughout the economy which paid an average annual wage of about US\$8,500.

The 10 destinations with expenditures between \$50 and \$100 million accounted for 22 percent of the total cruise tourism expenditures with a combined total of \$732.6 million in direct spending. Direct spending among these ten destinations ranged from \$52.9 million in Guadeloupe to \$89.5 million in Costa Maya. In addition to Costa Maya, Turks & Caicos (\$86.5 million), Belize (\$86.1 million), Panama (\$77.8 million), and Antigua & Barbuda (\$77.7 million) had total cruise tourism expenditures in excess of \$75 million.

Among these 10 destinations, the total employment impacts exceeded one thousand jobs in all but one, ranging from 994 total jobs in Guadeloupe to 2,530 jobs in Belize. Belize, Barbados, and Costa Maya had employment impacts in excess of 2,000 full- and part-time jobs. In Belize every \$1 million in direct spending generated just over 29 jobs with an average annual wage of US\$10,900. In Barbados, with both transit and homeport calls, \$1 million of direct spending generated 33 jobs for a total employment impact of 2,351 jobs paying US\$10,800 in annual wage income. Thus, 33 jobs were generated for every \$1 million in direct spending. In Costa Maya \$1 million of direct spending generated 23 jobs for a total employment impact of 2,081 jobs paying US\$6,500 in annual wage income.

The next six destinations with expenditures between \$20 and \$50 million accounted for just over 6 percent of the total cruise tourism expenditures with a combined total of \$213.2 million in direct spending. Direct spending among these six destinations ranged from \$29.2 million in Costa Rica to \$42.5 million in Puerto Vallarta.

Among these 6 destinations, the total employment impacts exceeded 500 full- and part-time jobs in all and ranged from 525 total jobs in Bonaire to 1,027 jobs in Puerto Vallarta. In Puerto Vallarta every \$1 million in direct spending generated 24 jobs with an average annual wage of

US\$7,100. Bonaire benefitted from 525 jobs and \$30.2 million in direct expenditures. Thus, 17 jobs were generated for every \$1 million of direct spending. These jobs paid an average of US\$16,700 in annual wage income.

The remaining nine destinations with less than \$20 million in direct cruise tourism expenditures had a combined total of \$88.8 million in direct cruise tourism expenditures and accounted for about three percent of the total among the 36 destinations. Cruise tourism expenditures among these destinations ranged from \$1.6 million in Puerto Chiapas to \$19.2 million in Grenada. Of these nine, only 4 had direct expenditures below \$10 million.

Among these nine destinations, the total employment impacts ranged from 38 total jobs in Puerto Chiapas to 529 jobs in Grenada. In Grenada every \$1 million in direct spending generated nearly 28 jobs with an average annual wage of US\$6,900. In Puerto Chiapas \$1 million of direct spending generated about 24 jobs for a total employment impact of 38 jobs paying US\$6,700 in annual wage income.

Comparison to 2015 Study

While the overall number of participating destinations has only changed by one (35 vs. 36), the current study has a different mix of destinations compared with the 2014/2015 study. As shown in **Table 17**, we have estimated that direct cruise tourism expenditures totaled \$3.36 billion during the 2017/2018 cruise year among the 36 participating destinations. This is about 6 percent higher than the \$3.16 billion in direct cruise tourism expenditures estimated for the 35 participating destinations during the 2014/2015 cruise year. Similarly, the number of passenger onshore visits and the employment impacts are also higher for the current study.

Normalizing the total expenditures on a per passenger basis shows that total expenditures per passenger across the 36 destinations in the current study are virtually unchanged when compared to the 35 destinations in the 2015 study. The \$3.36 billion in total expenditures among the 36 destinations of the current study equates to \$133.25 per onshore passenger visit; whereas, in the 2014/2015 study, the \$3.16 billion in total expenditures among the 35 destinations equated to \$133.78 per onshore passenger visit.

Table 17 – Comparison of Cruise Tourism Expenditures – All Destinations

	2017/2018 Cruise Year	2014/2015 Cruise Year	Percent Difference
Number of Participating Destinations	36	35	--
Total Direct Cruise Tourism Spending (US \$ Billions)	\$3.36	\$3.16	6.2%
Total Passenger Onshore Visits (Millions)	25.19	23.62	6.6%
Total Expenditures per Passenger (US \$)	\$133.25	\$133.78	-0.4%
Total Employment Impact	78,954	75,050	5.2%
Total Income Impacts (US \$ Millions)	\$902.68	\$976.47	-7.6%
Average per Passenger Spend	\$101.52	\$103.83	-2.2%
Average Per Crew Spend	\$60.44	\$67.10	-9.9%

Looking at just the 32 destinations that are common to the two studies²⁴ the total direct cruise tourism expenditures increased by over 4 percent from \$3.12 billion in 2014/2015 to \$3.26 billion in 2017/2018 (see **Table 18**). This was the combined result of a 6.6 percent increase in cruise passenger onshore visits and a 2 percent decrease in the total direct expenditure per passenger. The normalized total direct expenditures per passenger in the 32 common destinations dropped from \$134.59 in the 2014/2015 cruise year to \$132.16 in the 2017/2018 cruise year. The net result was a 4.4 percent increase in total direct cruise tourism expenditures among the 32 destinations. This led to a slight increase in employment (3.6%), but a decrease of almost 9 percent in wages. Passenger arrivals shifting away from the two highest wage destinations (USVI and St. Maarten) to other locations caused downward pressure in overall income among the common destinations.

Table 18 – Comparison of Cruise Tourism Expenditures – Common Destinations

	2017/2018 Cruise Year	2014/2015 Cruise Year	Percent Difference
Number of Participating Destinations	32	32	--
Total Direct Cruise Tourism Spending (US \$ Billions)	\$3.26	\$3.12	4.4%
Total Passenger Onshore Visits (Millions)	24.65	23.16	6.6%
Total Expenditures per Passenger (US \$)	\$132.16	\$134.59	-1.8%
Total Employment Impact	76,613	73,966	3.6%
Total Income Impacts (US \$ Millions)	\$885.93	\$968.20	-8.5%
Average per Passenger Spend	\$102.34	\$104.62	-2.2%
Average Per Crew Spend	\$60.63	\$67.67	-10.4%

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

Finally, average per crew spending among all destinations declined by 9.9% from 2014/2015 to 2017/2018 and 10.4% among the common destinations. The decline was primarily the result of significant declines in

²⁴ These destinations are Antigua, Aruba, Bahamas, Barbados, Belize, Bonaire, British Virgin Islands, Cayman Islands, Colombia, Costa Maya, Costa Rica, Cozumel, Curacao, Dominican Republic, Ensenada, Grenada, Guadeloupe, Guatemala, Honduras, Jamaica, Martinique, Mazatlán, Nicaragua, Progreso, Puerto Rico, Puerto Vallarta, St. Kitts, St. Lucia, St. Maarten, Trinidad, Turks & Caicos, U. S. Virgin Islands.

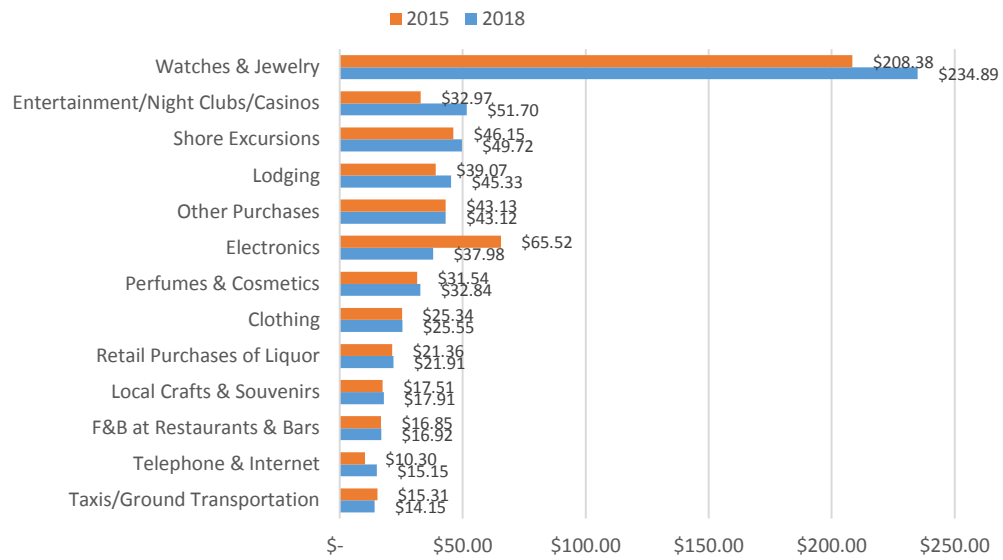
the percentage of crew making retail purchases which was augmented by an equally significant decline in the value of retail purchases made by crew. This decline in retail purchases by crew was only partially offset by an increase in the share of crew who made purchases of food and beverages.

Thus, the changes in the economic impacts during the 2017/2018 cruise year relative to the 2014/2015 cruise year is primarily the result of the increase in the volume of arriving passengers at the participating destinations, but it was depressed by a decrease in both the average per passenger and average per crew spends. The relatively flat change in the economic impacts during the 2017/2018 cruise year relative to the 2014/2015 cruise year among the 32 common destinations is primarily the result of the increase in passenger onshore visits which was tempered by the decrease in average spend rates of both passengers and crew. Some of the negative changes are driven by the fact that nearly 2 million fewer passengers arrived at the ports in St. Maarten and the U.S. Virgin Islands, two destinations with the highest average per passenger spend rates in the 2014/2015 study.

Because passenger expenditures account for more than 75 percent of total direct cruise tourism expenditures we have provided a more detailed analysis of the change in passenger spending between the current and previous study. The increase in unweighted average expenditure by category is shown in **Figure 1**. These are the unweighted expenditures per passenger, that is, the average passenger expenditure made by those passengers that actually purchased goods in a particular category. For example, in the 2014/2015 cruise year passengers that purchased jewelry in the 32 common Caribbean destinations spent an average of \$208.38 while in the 2017/2018 cruise year, passengers in these destinations purchasing jewelry spent \$234.89.

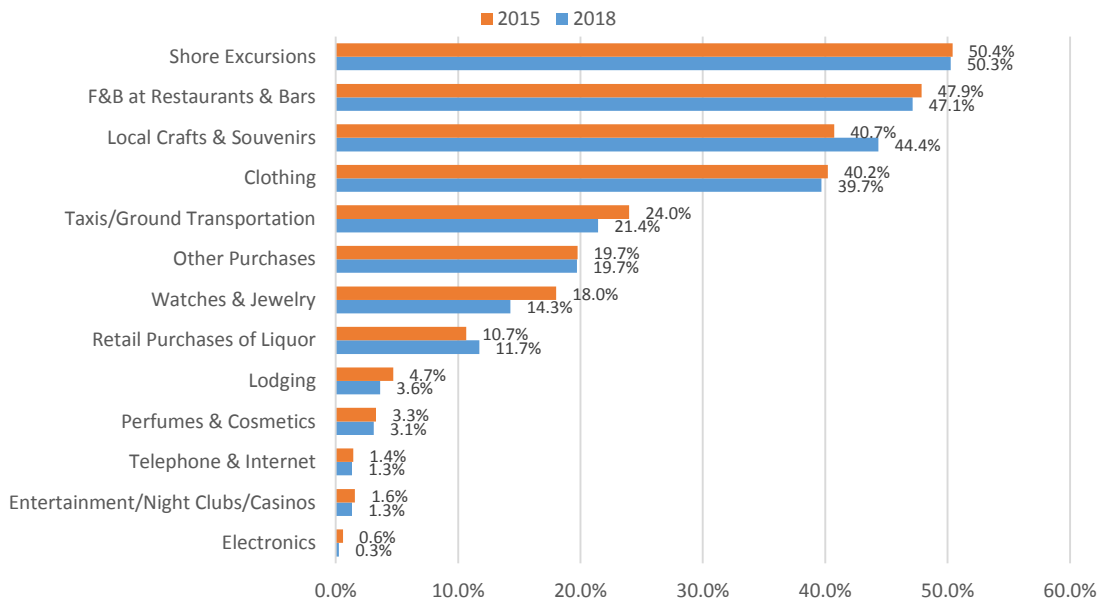
As shown in the Figure 1, the average value of passenger purchases was higher in the 2017/2018 cruise year in 11 of the 13 categories, with only electronics, and taxi/ground transportation being lower in this study. The highest percentage increases occurred in entertainment (57%), telephone & internet (47%) lodging (16%) and watches and jewelry (13%).

Figure 1 – Unweighted Average Passenger Expenditures by Category



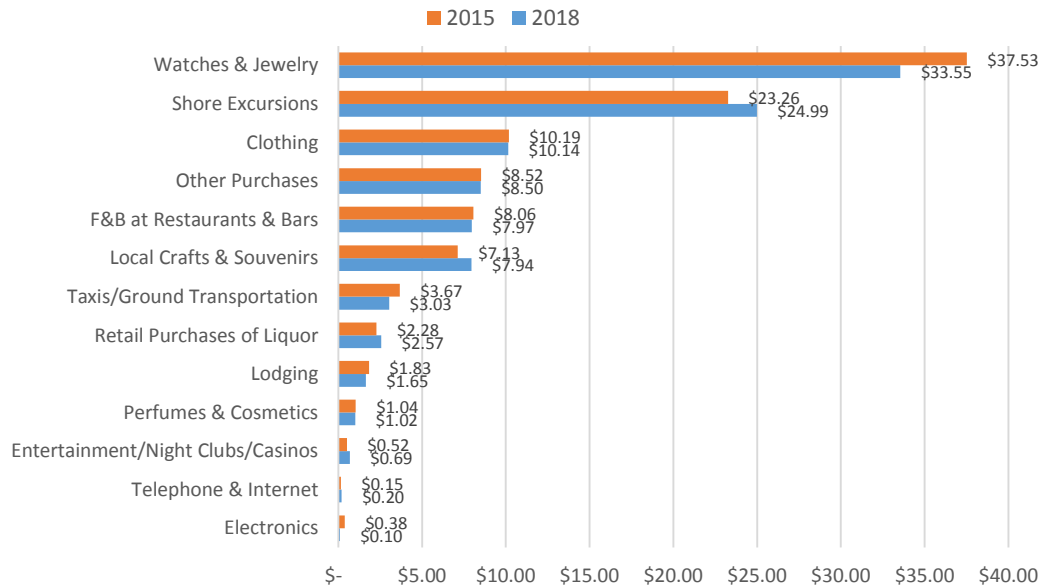
However, as stated above this increase in the average expenditure was offset by a decrease in the percentage of passengers making onshore purchases. As shown in **Figure 2** a smaller percentage of passengers made an onshore purchase during the 2017/2018 cruise year in 10 of the 13 categories. For example, during the 2014/2015 cruise year, 18.0% of passengers reported purchasing jewelry. This percentage declined to 14.3% during the 2017/2018 cruise year. Similarly, those taking taxis dropped from 24 percent in the last study to 21.4 percent this year. Thus, it appears that cruise passengers were more selective in making purchases during the most recent period; but, when they did make a purchase they were willing to spend more.

Figure 2 – Average Percentage of Passengers Making Purchases



Thus, when the unweighted average per passenger expenditures were weighted by the share of onshore purchasers, the weighted expenditure increased in 5 of the 13 categories (see **Figure 3**). The weighted average expenditure rose for shore excursions by 7 percent as the increase in unweighted spending for tours was augmented by the slight decrease in the percentage of passengers purchasing tours.

Figure 3 – Average Weighted Expenditure by Category



The weighted average expenditure fell for watches and jewelry (-11%) and taxis (-17%). The increase in unweighted spending for jewelry was offset by the decrease in the share of passengers purchasing these goods. The net result was a 2 percent decrease in the average weighted expenditure of cruise passengers

during the 2017/2018 year to \$102.34 per passenger visit from \$104.62 per passenger visit in the 2014/2015

On a destination basis, there was considerable variability in the change in the average per passenger and crew spend from the 2014/2015 study (see **Table 19**). The change in the average per passenger spend ranged from an increase of 59 percent in the Bahamas – heavily driven by watches & jewelry purchases - to an decrease of 26 percent in St. Maarten. Among the 32 destinations common to both studies, 23 showed an increase or no change (Belize) in the average per passenger spend while nine showed a decrease.

Table 19 – Passenger and Crew Expenditures – Average per Visit – 2018 and 2015 Cruise Tourism Studies – Common Destinations

Destinations	2018		2015		Change: 2018/2015	
	Average Spend per Visit (Pax)	Average Spend per Visit (Crew)	Average Spend per Visit (Pax)	Average Spend per Visit (Crew)	Average Spend per Visit (Pax)	Average Spend per Visit (Crew)
Antigua	\$73.55	\$39.76	\$64.88	\$54.17	13.4%	-26.6%
Aruba	\$121.94	\$87.94	\$112.10	\$71.99	8.8%	22.2%
Bahamas	\$131.95	\$54.90	\$82.83	\$60.00	59.3%	-8.5%
Barbados ①	\$83.12	\$54.26	\$78.03	\$40.35	6.5%	34.5%
Belize	\$77.88	\$46.17	\$77.87	\$52.34	0.0%	-11.8%
Bonaire	\$67.19	\$44.61	\$54.22	\$30.40	23.9%	46.7%
British Virgin Islands	\$78.11	\$34.12	\$69.43	\$44.90	12.5%	-24.0%
Cayman Islands	\$105.17	\$70.30	\$115.60	\$47.94	-9.0%	46.6%
Colombia ①	\$122.43	\$70.01	\$120.70	\$59.36	1.4%	17.9%
Costa Maya	\$69.58	\$41.72	\$61.47	\$44.35	13.2%	-5.9%
Costa Rica	\$70.06	\$31.65	\$82.84	\$36.21	-15.4%	-12.6%
Cozumel	\$108.37	\$67.24	\$119.89	\$52.02	-9.6%	29.3%
Curacao	\$70.00	\$66.47	\$77.55	\$70.15	-9.7%	-5.2%
Dominican Republic ①	\$88.26	\$47.08	\$66.41	\$42.38	32.9%	11.1%
Ensenada	\$54.69	\$46.41	\$65.10	\$40.37	-16.0%	14.9%
Grenada	\$51.57	\$47.78	\$46.55	\$47.18	10.8%	1.3%
Guadeloupe ①	\$100.29	\$36.60	\$90.06	\$45.04	11.4%	-18.7%
Guatemala	\$71.03	\$38.35	\$63.62	\$29.01	11.7%	32.2%
Honduras	\$101.65	\$50.36	\$86.51	\$32.37	17.5%	55.6%
Jamaica ①	\$115.98	\$46.57	\$119.29	\$50.58	-2.8%	-7.9%
Martinique ①	\$54.99	\$39.41	\$68.99	\$46.45	-20.3%	-15.2%
Mazatlán	\$68.57	\$49.16	\$64.85	\$42.70	5.7%	15.1%
Nicaragua	\$57.16	\$42.76	\$54.94	\$24.15	4.0%	77.1%
Progreso	\$57.31	\$42.19	\$57.88	\$44.35	-1.0%	-4.9%
Puerto Rico (San Juan) ①	\$90.78	\$130.63	\$88.95	\$149.44	2.1%	-12.6%
Puerto Vallarta	\$118.09	\$37.94	\$95.43	\$51.46	23.7%	-26.3%
St. Kitts	\$135.94	\$53.72	\$111.30	\$41.55	22.1%	29.3%
St. Lucia	\$81.12	\$68.92	\$78.44	\$44.89	3.4%	53.5%
St. Maarten	\$142.23	\$119.02	\$191.26	\$119.13	-25.6%	-0.1%
Trinidad	\$54.17	\$33.99	\$42.58	\$21.50	27.2%	58.1%
Turks & Caicos	\$95.51	\$54.98	\$88.75	\$50.41	7.6%	9.1%
U. S. Virgin Islands	\$165.42	\$60.12	\$150.21	\$110.27	10.1%	-45.5%

① Includes transit and homeport cruise ships.

The change in the average per crew spend is somewhat more negative than the passengers, with 17 destinations showing an increase and 15 showing a decrease. In those destinations in which the change was negative, crew tended to spend less when they made onshore purchases and a smaller percentage of crew made onshore purchases.

Table 20 shows estimated total expenditures for the 2017/2018 and 2014/2015 cruise years for those 32 destinations common to both studies. As indicated in the table, 26 destinations had an increase in total passenger expenditures and six had a decrease. Of the 26 destinations with an increase in total passenger expenditures six (the Cayman Islands, Cozumel, Curacao, Jamaica, Martinique and Progreso) experienced a decline in average per passenger spend as shown in Table 19. However, in all cases the decline in average spend was more than offset by an increase in total visits.

Among the six destinations with a decline in total passenger expenditures, four (Turks & Caicos, Puerto Rico, U.S. Virgin Islands, British Virgin Islands) experienced an increase in the average per passenger spend as shown in Table 19. Thus, the increase in average passenger spending was not sufficient to offset the decline in passenger visits. Ensenada and St. Maarten both experienced both fewer passenger onshore visits and lower per passenger spending leading to their lower total passenger expenditures.

Table 20 – Passenger and Crew Expenditures – Total Spend During Cruise Year – 2018 and 2015 Cruise Tourism Studies – Millions US \$ - Common Destinations

Destinations	2018 Study		2015 Study		Ratio: 2018/2015	
	Total Spend (Pax)	Total Spend (Crew)	Total Spend (Pax)	Total Spend (Crew)	Total Spend (Pax)	Total Spend (Crew)
Antigua	\$48.76	\$5.12	\$34.20	\$4.60	42.6%	11.4%
Aruba	\$82.55	\$9.08	\$61.30	\$6.00	34.7%	51.4%
Bahamas	\$322.57	\$28.94	\$243.50	\$59.70	32.5%	-51.5%
Barbados^①	\$52.43	\$6.94	\$43.30	\$4.50	21.1%	54.1%
Belize	\$68.33	\$5.05	\$67.60	\$4.60	1.1%	9.8%
Bonaire	\$25.44	\$2.99	\$7.96	\$0.53	219.6%	464.2%
British Virgin Islands	\$9.75	\$0.65	\$21.40	\$2.10	-54.4%	-69.0%
Cayman Islands	\$172.12	\$17.48	\$167.20	\$10.80	2.9%	61.9%
Colombia^①	\$43.02	\$3.54	\$37.00	\$2.10	16.3%	68.4%
Costa Maya	\$71.70	\$8.26	\$22.23	\$3.44	222.5%	140.1%
Costa Rica	\$21.11	\$1.65	\$15.60	\$1.40	35.3%	18.1%
Cozumel	\$377.96	\$45.47	\$304.29	\$27.75	24.2%	63.9%
Curacao	\$42.16	\$6.99	\$37.00	\$5.80	13.9%	20.6%
Dominican Republic^①	\$77.84	\$3.99	\$31.90	\$2.10	144.0%	90.1%
Ensenada	\$25.60	\$4.33	\$39.76	\$3.84	-35.6%	12.9%
Grenada	\$15.38	\$1.90	\$9.40	\$1.60	63.6%	18.5%
Guadeloupe^①	\$39.73	\$3.09	\$27.75	\$2.03	43.2%	52.0%
Guatemala	\$8.54	\$0.82	\$4.67	\$0.37	82.9%	121.9%
Honduras	\$92.06	\$5.62	\$63.80	\$2.70	44.3%	108.3%
Jamaica^①	\$205.66	\$12.76	\$160.94	\$12.36	27.8%	3.2%
Martinique^①	\$28.38	\$3.90	\$18.19	\$1.76	56.0%	121.6%
Mazatlan	\$11.44	\$1.76	\$7.09	\$0.75	61.3%	134.3%
Nicaragua	\$4.50	\$0.65	\$2.40	\$0.20	87.4%	227.0%
Progreso	\$23.36	\$2.83	\$16.75	\$1.78	39.5%	58.7%
Puerto Rico^①	\$100.32	\$22.57	\$124.00	\$35.00	-19.1%	-35.5%
Puerto Vallarta	\$35.16	\$1.31	\$21.36	\$1.60	64.6%	-17.9%
St. Kitts	\$133.02	\$8.72	\$75.30	\$3.90	76.6%	123.6%
St. Lucia	\$47.47	\$6.77	\$47.31	\$4.83	0.3%	40.1%
St. Maarten	\$111.54	\$17.82	\$354.70	\$45.00	-68.6%	-60.4%
Trinidad	\$2.21	\$0.27	\$0.46	\$0.54	380.4%	-49.8%
Turks & Caicos	\$66.82	\$7.36	\$78.00	\$7.10	-14.3%	3.6%
U. S. Virgin Islands	\$156.14	\$10.51	\$276.30	\$38.70	-43.5%	-72.8%

① Includes transit and homeport cruise ships.

With respect to the change in total crew expenditures, 25 destinations showed an increase in the 2017/2018 cruise year from the 2014/2015 cruise year while seven destinations experienced a decline in total crew spending. Among the seven destinations with a decline in total crew expenditures six also experienced a decline in the average per crew spend.

Among the 25 destinations with an increase in total crew expenditures 16 also experienced an increase in the average per crew spend. The remaining 8 destinations, (Antigua & Barbuda, Belize, Costa Maya, Curacao, Guadeloupe, Jamaica, Martinique and Progreso) all experienced a decrease in the average per crew spend but an increase in total crew visits.

APPENDIX B – DATA AND RANKING TABLES

This appendix contains data and ranking tables that include data on expenditures, economic impacts, satisfaction and other data derived from the passenger surveys for all destinations. The scale for the satisfaction and related questions is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows:

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

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

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

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

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

Table B-1 - Total Economic Contribution of Cruise Tourism by Destination, 2017/2018 Cruise Year

Destinations	Total Cruise Tourism Expenditures (\$US Millions)	Rank	Total Employment	Rank	Total Employee Wage Income (\$US Millions)	Rank
Cozumel	\$474.07	1	11,945	1	\$78.21	3
Bahamas	\$405.75	2	9,004	2	\$155.71	1
Jamaica	\$244.53	3	8,293	3	\$56.57	6
Cayman Islands	\$224.54	4	4,622	4	\$92.24	2
U. S. Virgin Islands	\$184.69	5	3,439	8	\$77.89	4
Puerto Rico (San Juan)	\$151.17	6	3,644	6	\$56.00	7
St. Kitts & Nevis	\$149.28	7	2,065	14	\$17.64	13
St. Maarten	\$143.24	8	3,499	7	\$72.34	5
Dominican Republic	\$134.72	9	4,052	5	\$17.43	14
Honduras	\$107.36	10	2,198	12	\$11.61	19
Aruba	\$102.75	11	2,255	11	\$38.03	8
Costa Maya	\$89.54	12	2,081	13	\$13.45	16
Turks and Caicos	\$86.47	13	1,461	18	\$26.76	10
Belize	\$86.12	14	2,530	9	\$27.68	9
Panama	\$77.75	15	1,827	15	\$12.65	17
Antigua & Barbuda	\$77.74	16	1,466	16	\$14.41	15
Curacao	\$71.73	17	1,106	20	\$20.73	12
Barbados	\$71.03	18	2,351	10	\$25.36	11
Colombia	\$59.85	19	1,186	19	\$8.56	22
St. Lucia	\$59.42	20	1,465	17	\$11.64	18
Guadeloupe	\$52.94	21	994	23	\$8.56	21
Puerto Vallarta	\$42.50	22	1,027	21	\$7.27	24
Ensenada	\$40.39	23	1,016	22	\$7.69	23
Martinique	\$38.22	24	790	26	\$6.43	25
Progreso	\$32.72	25	807	25	\$5.02	27
Bonaire	\$30.15	26	525	28	\$8.77	20
Costa Rica	\$29.24	27	825	24	\$5.17	26
Grenada	\$19.25	28	529	27	\$3.65	29
St. Vincent	\$16.43	29	418	30	\$3.39	30
Mazatlan	\$15.87	30	420	29	\$2.56	31
British Virgin Islands	\$12.63	31	234	33	\$4.33	28
Guatemala	\$11.08	32	345	31	\$1.66	32
Nicaragua	\$5.70	33	323	32	\$0.96	34
Trinidad	\$3.50	34	116	34	\$1.59	33
Manzanillo	\$2.71	35	58	35	\$0.45	35
Puerto Chiapas	\$1.59	36	38	36	\$0.25	36
All Destinations	\$3,356.65		78,954		\$902.68	

Table B-2 - Passengers Onshore Visits and Expenditures by Destination, 2017/2018 Cruise Year

Destinations	Passenger Onshore Visits (Thousands)	Rank	Average Expenditure per Passenger	Rank	Total Passenger Expenditures (\$US Millions)	Rank
Cozumel	3,487.8	1	\$108.37	9	\$377.96	1
Bahamas	2,444.8	2	\$131.95	4	\$322.57	2
Jamaica	1,773.2	3	\$115.98	8	\$205.66	3
Cayman Islands	1,636.5	4	\$105.17	10	\$172.12	4
Puerto Rico (San Juan)	1,105.0	5	\$90.78	14	\$100.32	8
Costa Maya	1,030.4	6	\$69.58	25	\$71.70	12
St. Kitts & Nevis	978.5	7	\$135.94	3	\$133.02	6
U. S. Virgin Islands	943.9	8	\$165.42	1	\$156.14	5
Honduras	905.7	9	\$101.65	11	\$92.06	9
Dominican Republic	881.9	10	\$88.26	15	\$77.84	11
Belize	877.3	11	\$77.88	19	\$68.33	13
St. Maarten	784.2	12	\$142.23	2	\$111.54	7
Turks and Caicos	699.6	13	\$95.51	13	\$66.82	14
Aruba	677.0	14	\$121.94	6	\$82.55	10
Antigua & Barbuda	663.0	15	\$73.55	21	\$48.76	16
Barbados	630.8	16	\$83.12	16	\$52.43	15
Curacao	602.3	17	\$70.00	24	\$42.16	19
St. Lucia	585.2	18	\$81.12	17	\$47.47	17
Martinique	516.1	19	\$54.99	30	\$28.38	22
Ensenada	468.1	20	\$54.69	31	\$25.60	23
Progreso	407.7	21	\$57.31	28	\$23.36	25
Guadeloupe	396.2	22	\$100.29	12	\$39.73	20
Bonaire	378.6	23	\$67.19	27	\$25.44	24
Colombia	351.4	24	\$122.43	5	\$43.02	18
Costa Rica	301.2	25	\$70.06	23	\$21.11	27
Grenada	298.3	26	\$51.57	34	\$15.38	28
Puerto Vallarta	297.7	27	\$118.09	7	\$35.16	21
Panama	277.5	28	\$76.76	20	\$21.30	26
St. Vincent	203.2	29	\$52.67	33	\$10.70	30
Mazatlán	166.8	30	\$68.57	26	\$11.44	29
British Virgin Islands	124.9	31	\$78.11	18	\$9.75	31
Guatemala	120.3	32	\$71.03	22	\$8.54	32
Nicaragua	78.7	33	\$57.16	29	\$4.50	33
Trinidad	40.8	34	\$54.17	32	\$2.21	34
Manzanillo	29.0	35	\$42.10	35	\$1.22	35
Puerto Chiapas	26.2	36	\$34.32	36	\$0.90	36
All Destinations	25,189.9		\$101.52		\$2,557.21	

Table B-3 - Crew Visits and Expenditures by Destination, 2017/2018 Cruise Year

Destinations	Crew Visits (Thousands)	Rank	Average Expenditure per Crew	Rank	Total Crew Expenditures (\$US Millions)	Rank
Cozumel	676.3	1	\$67.24	7	\$45.47	1
Bahamas ^①	527.2	2	\$54.90	12	\$28.94	2
Puerto Rico (San Juan) ^②	172.7	7	\$130.63	1	\$22.57	3
St. Maarten	149.7	9	\$119.02	2	\$17.82	4
Cayman Islands	248.6	4	\$70.30	4	\$17.48	5
Jamaica	274.0	3	\$46.57	19	\$12.76	6
U. S. Virgin Islands	174.8	6	\$60.12	10	\$10.51	7
Aruba	103.3	16	\$87.94	3	\$9.08	8
St. Kitts & Nevis	162.3	8	\$53.72	14	\$8.72	9
Costa Maya	198.0	5	\$41.72	27	\$8.26	10
Turks and Caicos	133.8	10	\$54.98	11	\$7.36	11
Curacao	105.2	15	\$66.47	8	\$6.99	12
Barbados ^②	127.8	12	\$54.26	13	\$6.94	13
St. Lucia	98.2	18	\$68.92	6	\$6.77	14
Honduras	111.7	13	\$50.36	15	\$5.62	15
Antigua & Barbuda	128.9	11	\$39.76	29	\$5.12	16
Belize	109.4	14	\$46.17	21	\$5.05	17
Ensenada	93.4	19	\$46.41	20	\$4.33	18
Dominican Republic ^②	84.8	20	\$47.08	18	\$3.99	19
Martinique ^②	98.9	17	\$39.41	30	\$3.90	20
Panama	56.6	24	\$65.71	9	\$3.72	21
Colombia ^②	50.5	27	\$70.01	5	\$3.54	22
Guadeloupe ^②	84.3	21	\$36.60	33	\$3.09	23
Bonaire	67.0	22	\$44.61	22	\$2.99	24
Progreso	67.0	23	\$42.19	25	\$2.83	25
St. Vincent	54.1	25	\$43.50	23	\$2.35	26
Grenada	39.7	28	\$47.78	17	\$1.90	27
Mazatlán	35.7	29	\$49.16	16	\$1.76	28
Costa Rica	52.2	26	\$31.65	36	\$1.65	29
Puerto Vallarta	34.6	30	\$37.94	32	\$1.31	30
Guatemala	21.4	31	\$38.35	31	\$0.82	31
Nicaragua	15.3	33	\$42.76	24	\$0.65	32
British Virgin Islands	19.1	32	\$34.12	34	\$0.65	33
Trinidad	8.0	34	\$33.99	35	\$0.27	34
Manzanillo	6.40	35	\$41.06	28	\$0.26	35
Puerto Chiapas	5.0	36	\$42.19	26	\$0.21	36
All Destinations	4,395.9		\$60.44		\$265.68	

Table B-4 - Total Expenditures by Cruise Lines by Destination, 2017/2018 Cruise Year

Destinations	Estimated Expenditures (\$US Millions)	Rank
Bahamas ^①	\$54.23	1
Dominican Republic ^②	\$52.89	2
Panama	\$52.73	3
Cozumel	\$50.64	4
Cayman Islands	\$34.93	5
Puerto Rico (San Juan) ^②	\$28.28	6
Jamaica	\$26.11	7
Antigua & Barbuda	\$23.85	8
Curacao	\$22.58	9
U. S. Virgin Islands	\$18.04	10
St. Maarten	\$13.88	11
Colombia ^②	\$13.29	12
Belize	\$12.74	13
Turks and Caicos	\$12.29	14
Barbados ^②	\$11.66	15
Aruba	\$11.11	16
Ensenada	\$10.45	17
Guadeloupe ^②	\$10.13	18
Honduras	\$9.68	19
Costa Maya	\$9.58	20
St. Kitts & Nevis	\$7.55	21
Progreso	\$6.53	22
Costa Rica	\$6.48	23
Puerto Vallarta	\$6.03	24
Martinique ^②	\$5.94	25
St. Lucia	\$5.18	26
St. Vincent	\$3.37	27
Mazatlán	\$2.67	28
British Virgin Islands	\$2.23	29
Grenada	\$1.97	30
Bonaire	\$1.72	31
Guatemala	\$1.71	32
Manzanillo	\$1.22	33
Trinidad	\$1.02	34
Nicaragua	\$0.55	35
Puerto Chiapas	\$0.48	36
All Destinations	\$533.76	

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

Destinations	First Visit	Rank	Avg. Visits
Puerto Chiapas	91.6%	1	2.20
Guadeloupe	89.1%	2	1.87
Nicaragua	86.0%	3	1.61
Trinidad	84.7%	4	2.29
St. Vincent	83.2%	5	1.97
Manzanillo	80.5%	6	2.19
Guatemala	79.6%	7	2.24
Costa Maya	77.0%	8	2.02
Bonaire	75.1%	9	2.02
Progreso	72.8%	10	3.10
Curacao	71.4%	11	2.34
Colombia	70.9%	12	1.83
Belize	70.5%	13	2.12
Martinique	69.5%	14	2.03
Panama	68.9%	15	2.64
Grenada	67.8%	16	1.96
Costa Rica	65.3%	17	1.95
Dom. Rep.	65.1%	18	2.49
British Virgin Islands	63.9%	19	2.69
St. Kitts	62.8%	20	2.48
Honduras	62.6%	21	2.73
St. Lucia	62.2%	22	2.49
Turks & Caicos	59.1%	23	2.58
Ensenada	56.7%	24	4.02
Caymans	56.0%	25	2.82
Jamaica	51.9%	26	2.77
Barbados	51.6%	27	3.05
Aruba	51.4%	28	2.81
Puerto Vallarta	50.9%	29	3.34
Mazatlán	50.8%	30	3.50
Antigua	46.9%	31	2.49
Cozumel	46.7%	32	3.75
Bahamas	39.1%	33	3.70
St. Maarten	38.7%	34	3.68
Puerto Rico	33.8%	35	3.87
USVI	31.4%	36	4.86
Mexico	67.9%	1	3.25
Western	67.8%	2	2.38
Southern	67.1%	3	2.44
Eastern	52.4%	4	3.46

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

Destinations	Avg. Hours Ashore	Rank
Nicaragua	5.82	1
Colombia	5.49	2
Caymans	5.29	3
Puerto Vallarta	5.29	4
Jamaica	5.26	5
Cozumel	4.97	6
Guatemala	4.88	7
Guadeloupe	4.85	8
Aruba	4.70	9
Curacao	4.68	10
St. Lucia	4.65	11
St. Kitts	4.41	12
Bahamas	4.34	13
Belize	4.34	14
Mazatlán	4.26	15
Dom. Rep.	4.26	16
Bonaire	4.25	17
Panama	4.23	18
Honduras	4.19	19
Grenada	4.16	20
St. Maarten	4.14	21
Costa Rica	4.14	22
Manzanillo	4.11	23
Barbados	4.02	24
Progreso	3.96	25
Costa Maya	3.83	26
St. Vincent	3.78	27
Trinidad	3.77	28
Martinique	3.73	29
Puerto Rico	3.70	30
Turks & Caicos	3.69	31
Puerto Chiapas	3.65	32
Antigua	3.54	33
Ensenada	3.48	34
Western	4.92	1
Southern	4.24	2
Mexico	4.23	3
Eastern	4.18	4

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

Destinations	Mean Score	Rank	Extremely Satisfied	Very Satisfied	Somewhat Satisfied	Not Too Satisfied	Not At All Satisfied	Satisfied	Not Satisfied
Cozumel	8.54	1	62%	26%	9%	2%	1%	97%	3%
Puerto Vallarta	8.48	2	62%	25%	8%	3%	1%	96%	4%
Curacao	8.41	3	59%	28%	9%	3%	1%	96%	4%
Aruba	8.39	4	58%	28%	9%	3%	1%	95%	5%
St. Kitts	8.28	5	58%	25%	10%	4%	2%	94%	6%
Mazatlán	8.26	6	58%	26%	11%	3%	2%	95%	5%
Barbados	8.20	7	54%	29%	10%	5%	2%	93%	7%
Honduras	8.19	8	57%	24%	10%	5%	3%	92%	8%
Bonaire	8.17	9	57%	25%	11%	4%	3%	93%	7%
Costa Rica	8.16	10	57%	25%	10%	4%	4%	92%	8%
St. Maarten	8.13	11	52%	29%	13%	4%	2%	94%	6%
Caymans	8.13	12	54%	28%	11%	4%	3%	93%	7%
St. Lucia	8.06	13	53%	28%	10%	5%	4%	92%	8%
Belize	7.93	14	52%	28%	11%	5%	4%	91%	9%
USVI	7.93	15	47%	33%	13%	5%	2%	93%	7%
Colombia	7.89	16	51%	29%	11%	5%	5%	90%	10%
Guatemala	7.81	17	50%	27%	13%	5%	5%	89%	11%
St. Vincent	7.64	18	51%	23%	12%	6%	8%	86%	14%
Panama	7.61	19	42%	33%	15%	6%	4%	90%	10%
Dom. Rep.	7.59	20	48%	26%	14%	5%	7%	88%	13%
Puerto Rico	7.59	21	48%	26%	13%	7%	7%	86%	14%
Nicaragua	7.58	22	42%	34%	12%	7%	5%	88%	12%
Manzanillo	7.57	23	43%	32%	13%	5%	6%	88%	12%
Bahamas	7.54	24	43%	28%	18%	7%	4%	89%	11%
Turks & Caicos	7.39	25	40%	30%	17%	8%	5%	86%	14%
British Virgin Islands	7.36	26	42%	31%	12%	8%	7%	85%	15%
Puerto Chiapas	7.30	27	44%	25%	15%	7%	9%	84%	16%
Guadeloupe	7.18	28	37%	34%	15%	7%	8%	85%	15%
Ensenada	7.13	29	39%	27%	16%	8%	10%	82%	18%
Grenada	7.12	30	42%	26%	13%	8%	11%	81%	19%
Jamaica	7.09	31	40%	26%	16%	9%	10%	81%	19%
Martinique	6.97	32	36%	29%	16%	9%	10%	81%	19%
Antigua	6.88	33	35%	25%	21%	10%	9%	81%	19%
Progreso	6.87	34	40%	23%	13%	9%	15%	77%	23%
Costa Maya	6.72	35	37%	24%	15%	11%	13%	76%	24%
Trinidad	6.55	36	32%	26%	18%	8%	15%	77%	23%
All Destinations	7.74		49%	28%	13%	6%	5%	89%	11%
Eastern Caribbean	7.66		46%	28%	14%	6%	5%	89%	11%
Western Caribbean	7.82		49%	28%	12%	6%	5%	90%	10%
Southern Caribbean	7.75		49%	27%	12%	5%	6%	89%	11%
Mexico	7.72		49%	27%	12%	6%	6%	88%	12%

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

Destinations	Mean Score	Rank	Greatly Exceeded	Exceeded	Met	Fell Short	Fell Far Short	Met or Exceeded	Did Not Meet
Cozumel	7.94	1	48%	31%	14%	3%	4%	93%	7%
Puerto Vallarta	7.86	2	46%	34%	14%	4%	3%	93%	7%
Aruba	7.82	3	43%	35%	16%	4%	3%	93%	7%
Curacao	7.79	4	43%	36%	15%	4%	3%	93%	7%
St. Kitts	7.77	5	48%	28%	15%	5%	4%	91%	9%
Honduras	7.73	6	47%	28%	14%	6%	6%	89%	11%
Bonaire	7.63	7	44%	31%	15%	6%	5%	90%	10%
Barbados	7.60	8	42%	32%	16%	5%	5%	91%	9%
Mazatlán	7.58	9	41%	33%	17%	6%	3%	91%	9%
Caymans	7.53	10	41%	33%	17%	5%	5%	90%	10%
St. Lucia	7.49	11	40%	34%	16%	5%	6%	90%	10%
Costa Rica	7.38	12	40%	32%	15%	6%	7%	88%	12%
Colombia	7.38	13	42%	30%	14%	6%	8%	86%	14%
St. Maarten	7.28	14	35%	34%	18%	7%	5%	87%	13%
Belize	7.26	15	41%	28%	16%	7%	9%	85%	15%
USVI	7.16	16	30%	39%	18%	7%	5%	88%	12%
Guatemala	7.15	17	36%	31%	17%	7%	8%	85%	15%
St. Vincent	7.08	18	38%	29%	17%	5%	11%	84%	16%
Panama	7.01	19	30%	36%	19%	9%	6%	85%	15%
Nicaragua	7.00	20	32%	32%	20%	7%	8%	85%	15%
Puerto Rico	7.00	21	38%	27%	17%	9%	10%	81%	19%
Manzanillo	6.96	22	32%	33%	19%	8%	8%	84%	16%
Dom. Rep.	6.95	23	37%	28%	18%	6%	12%	82%	18%
Bahamas	6.89	24	30%	33%	23%	8%	7%	85%	15%
British Virgin Islands	6.68	25	28%	33%	20%	8%	11%	81%	19%
Turks & Caicos	6.66	26	27%	32%	19%	11%	9%	79%	21%
Ensenada	6.58	27	32%	26%	21%	8%	13%	79%	21%
Jamaica	6.52	28	30%	28%	19%	9%	14%	77%	23%
Grenada	6.49	29	30%	28%	17%	9%	15%	75%	25%
Puerto Chiapas	6.48	30	30%	28%	18%	7%	16%	77%	23%
Guadeloupe	6.45	31	22%	37%	22%	9%	11%	80%	20%
Martinique	6.38	32	26%	31%	20%	9%	15%	77%	23%
Progreso	6.24	33	32%	22%	18%	8%	20%	72%	28%
Antigua	6.23	34	24%	27%	25%	11%	13%	76%	24%
Costa Maya	6.19	35	29%	26%	17%	10%	18%	72%	28%
Trinidad	5.81	36	24%	25%	20%	9%	22%	69%	31%
All Destinations	7.11		36%	31%	17%	7%	9%	85%	15%
Eastern Caribbean	6.97		33%	32%	19%	8%	8%	84%	16%
Western Caribbean	7.22		38%	31%	17%	7%	8%	86%	14%
Southern Caribbean	7.14		37%	32%	17%	6%	9%	85%	15%
Mexico	7.06		36%	30%	17%	7%	10%	84%	16%

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

Destinations	Mean Score	Rank	Extremely Likely	Very Likely	Somewhat Likely	Not Too Likely	Not At All Likely	Likely	Not Likely
Cozumel	6.36	1	35%	21%	16%	7%	21%	72%	28%
Caymans	5.80	2	31%	18%	16%	9%	26%	65%	35%
Honduras	5.76	3	31%	19%	13%	9%	28%	63%	37%
Aruba	5.74	4	29%	19%	16%	9%	27%	64%	36%
Puerto Vallarta	5.64	5	27%	20%	16%	9%	28%	64%	36%
St. Kitts	5.56	6	28%	17%	17%	9%	29%	62%	38%
USVI	5.48	7	24%	20%	17%	11%	28%	61%	39%
Bahamas	5.37	8	24%	18%	17%	12%	29%	59%	41%
St. Maarten	5.37	9	26%	18%	15%	10%	31%	59%	41%
Dom. Rep.	5.33	10	25%	18%	17%	11%	30%	59%	41%
Belize	5.28	11	21%	22%	17%	8%	32%	61%	39%
Barbados	5.22	12	22%	20%	15%	12%	30%	57%	43%
St. Lucia	5.06	13	21%	19%	16%	11%	33%	56%	44%
Puerto Rico	5.04	14	23%	16%	17%	8%	36%	56%	44%
Mazatlán	4.98	15	20%	17%	18%	10%	34%	56%	44%
Curacao	4.92	16	19%	16%	20%	9%	35%	56%	44%
Bonaire	4.89	17	21%	17%	15%	9%	38%	53%	47%
British Virgin Islands	4.86	18	19%	17%	16%	9%	39%	52%	48%
Turks & Caicos	4.62	19	19%	14%	16%	11%	39%	49%	51%
Costa Rica	4.54	20	15%	17%	19%	10%	39%	51%	49%
Ensenada	4.42	21	19%	14%	15%	8%	45%	48%	52%
Jamaica	4.34	22	18%	13%	14%	11%	44%	45%	55%
Progreso	4.30	23	19%	15%	13%	6%	48%	46%	54%
St. Vincent	3.99	24	13%	15%	13%	11%	48%	41%	59%
Colombia	3.93	25	12%	14%	15%	10%	48%	41%	59%
Manzanillo	3.90	26	12%	14%	16%	12%	47%	41%	59%
Grenada	3.90	27	15%	12%	11%	12%	50%	38%	62%
Martinique	3.77	28	10%	14%	15%	10%	50%	39%	61%
Guatemala	3.76	29	9%	14%	16%	13%	48%	39%	61%
Costa Maya	3.73	30	13%	11%	12%	13%	51%	36%	64%
Nicaragua	3.63	31	8%	13%	17%	11%	51%	38%	62%
Antigua	3.62	32	11%	12%	13%	12%	53%	36%	64%
Guadeloupe	3.47	33	6%	13%	16%	15%	50%	35%	65%
Trinidad	3.36	34	9%	11%	13%	11%	56%	33%	67%
Panama	3.20	35	6%	9%	13%	15%	56%	29%	71%
Puerto Chiapas	2.79	36	6%	7%	13%	9%	66%	26%	74%
All Destinations	4.59		18%	15%	16%	10%	40%	49%	51%
Eastern Caribbean	4.91		21%	16%	16%	11%	36%	54%	46%
Western Caribbean	4.39		16%	15%	16%	11%	42%	47%	53%
Southern Caribbean	4.59		18%	16%	15%	10%	40%	49%	51%
Mexico	4.46		18%	14%	15%	9%	43%	48%	52%

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

Destinations	Mean Score	Rank	Extremely Likely	Very Likely	Somewhat Likely	Not Too Likely	Not At All Likely	Likely	Not Likely
Cozumel	6.92	1	40%	23%	17%	6%	14%	80%	20%
Aruba	6.74	2	38%	23%	16%	7%	16%	77%	23%
Puerto Vallarta	6.56	3	36%	23%	18%	8%	16%	76%	24%
Caymans	6.42	4	35%	21%	17%	8%	19%	73%	27%
Curacao	6.32	5	30%	25%	18%	8%	18%	74%	26%
Honduras	6.30	6	38%	18%	13%	9%	22%	69%	31%
Barbados	6.17	7	30%	24%	16%	10%	19%	70%	30%
St. Kitts	6.13	8	32%	21%	16%	9%	22%	69%	31%
St. Lucia	6.10	9	30%	23%	17%	10%	20%	70%	30%
Costa Rica	6.00	10	28%	24%	18%	8%	22%	70%	30%
USVI	5.97	11	27%	23%	20%	10%	21%	70%	30%
Bahamas	5.94	12	28%	20%	19%	12%	20%	67%	33%
Belize	5.85	13	27%	24%	17%	6%	26%	68%	32%
Dom. Rep.	5.81	14	27%	21%	17%	10%	24%	65%	35%
Bonaire	5.79	15	28%	21%	17%	9%	26%	65%	35%
St. Maarten	5.62	16	26%	21%	17%	9%	28%	63%	37%
Mazatlán	5.62	17	25%	20%	20%	10%	25%	65%	35%
Puerto Rico	5.56	18	27%	20%	15%	9%	30%	62%	38%
British Virgin Islands	5.50	19	25%	21%	14%	9%	31%	60%	40%
Colombia	5.10	20	21%	19%	17%	9%	34%	57%	43%
Jamaica	4.95	21	22%	17%	16%	11%	35%	54%	46%
Guatemala	4.93	22	18%	21%	18%	10%	34%	56%	44%
Turks & Caicos	4.92	23	19%	16%	19%	11%	34%	55%	45%
St. Vincent	4.90	24	20%	20%	14%	9%	37%	54%	46%
Manzanillo	4.83	25	16%	20%	19%	11%	34%	55%	45%
Guadeloupe	4.77	26	14%	20%	19%	13%	33%	54%	46%
Ensenada	4.76	27	20%	16%	17%	9%	39%	53%	47%
Panama	4.73	28	16%	18%	18%	15%	34%	52%	48%
Nicaragua	4.69	29	16%	17%	21%	11%	36%	53%	47%
Grenada	4.57	30	19%	15%	15%	10%	42%	48%	52%
Martinique	4.50	31	15%	18%	16%	10%	40%	50%	50%
Progreso	4.45	32	22%	13%	11%	7%	46%	47%	53%
Costa Maya	4.28	33	15%	16%	13%	12%	44%	44%	56%
Antigua	4.26	34	15%	16%	14%	10%	45%	45%	55%
Trinidad	3.82	35	10%	13%	17%	11%	49%	40%	60%
Puerto Chiapas	3.72	36	11%	12%	15%	9%	52%	39%	61%
All Destinations	5.41		24%	20%	17%	10%	30%	61%	39%
Eastern Caribbean	5.49		24%	20%	17%	10%	28%	62%	38%
Western Caribbean	5.42		24%	20%	17%	10%	29%	61%	39%
Southern Caribbean	5.50		25%	20%	16%	9%	29%	62%	38%
Mexico	5.17		23%	18%	17%	9%	33%	58%	42%

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

Destinations	Mean Score	Rank	Extremely Satisfied	Very Satisfied	Somewhat Satisfied	Not Too Satisfied	Not At All Satisfied	Satisfied	Not Satisfied
Puerto Chiapas	8.57	1	63%	24%	10%	2%	2%	96%	4%
Mazatlán	8.48	2	62%	21%	11%	3%	2%	95%	5%
Puerto Vallarta	8.42	3	59%	26%	11%	3%	2%	95%	5%
Cozumel	8.42	4	61%	23%	11%	2%	3%	95%	5%
Nicaragua	8.42	5	60%	25%	10%	3%	2%	95%	5%
Honduras	8.38	6	61%	22%	11%	3%	3%	94%	6%
Guatemala	8.25	7	60%	23%	10%	3%	4%	93%	7%
Belize	8.24	8	56%	25%	13%	2%	3%	94%	6%
Manzanillo	8.14	9	53%	27%	14%	3%	3%	94%	6%
St. Vincent	8.12	10	53%	28%	11%	5%	3%	92%	8%
Dom. Rep.	8.11	11	56%	22%	13%	3%	5%	92%	8%
British Virgin Islands	7.64	12	45%	30%	15%	7%	3%	90%	10%
Colombia	8.07	13	54%	25%	13%	4%	4%	92%	8%
USVI	8.07	14	53%	25%	15%	3%	4%	93%	7%
Aruba	7.90	15	51%	26%	14%	5%	5%	91%	9%
Bonaire	7.87	16	50%	26%	14%	5%	5%	90%	10%
Curacao	7.86	17	49%	27%	15%	5%	4%	91%	9%
St. Maarten	7.80	18	49%	25%	15%	5%	5%	90%	10%
St. Kitts	7.78	19	47%	27%	16%	5%	5%	90%	10%
Caymans	7.74	20	49%	24%	17%	6%	5%	89%	11%
St. Lucia	7.72	21	45%	28%	16%	5%	5%	90%	10%
Ensenada	7.70	22	50%	21%	17%	5%	7%	88%	12%
Puerto Rico	7.67	23	48%	23%	16%	5%	7%	88%	12%
Trinidad	7.62	24	50%	23%	14%	5%	8%	87%	13%
Turks & Caicos	7.61	25	46%	26%	16%	5%	7%	88%	12%
Costa Rica	7.61	26	49%	23%	15%	5%	8%	87%	13%
Panama	7.58	27	44%	27%	17%	5%	6%	89%	11%
Progreso	7.52	28	48%	24%	13%	7%	8%	85%	15%
Barbados	7.48	29	43%	25%	21%	6%	5%	89%	11%
Grenada	7.47	30	45%	25%	16%	7%	7%	86%	14%
Martinique	7.47	31	49%	21%	14%	6%	9%	85%	15%
Guadeloupe	7.28	32	37%	32%	18%	6%	7%	87%	13%
Bahamas	7.23	33	41%	24%	18%	9%	8%	83%	17%
Costa Maya	7.19	34	40%	26%	19%	7%	8%	85%	15%
Antigua	7.14	35	39%	25%	20%	6%	10%	84%	16%
Jamaica	7.12	36	41%	23%	16%	9%	10%	81%	19%
All Destinations	7.85		51%	25%	14%	5%	5%	90%	10%
Western Caribbean	7.90		52%	24%	14%	5%	5%	90%	10%
Eastern Caribbean	7.67		47%	26%	16%	5%	6%	89%	11%
Southern Caribbean	7.70		48%	25%	15%	5%	6%	89%	11%
Mexico	8.19		56%	24%	13%	3%	4%	93%	7%

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

Destinations	Mean Score	Rank	Extremely Satisfied	Very Satisfied	Somewhat Satisfied	Not Too Satisfied	Not At All Satisfied	Satisfied	Not Satisfied
Cozumel	9.15	1	80%	12%	4%	1%	2%	97%	3%
St. Kitts	8.93	2	75%	16%	4%	2%	2%	96%	4%
Bonaire	8.86	3	74%	15%	6%	2%	3%	95%	5%
Puerto Vallarta	8.81	4	75%	14%	5%	1%	4%	95%	5%
Costa Rica	8.80	5	72%	17%	6%	2%	3%	95%	5%
Barbados	8.79	6	71%	17%	9%	2%	1%	97%	3%
Mazatlán	8.78	7	73%	17%	5%	3%	3%	95%	5%
St. Vincent	8.77	8	73%	18%	3%	2%	5%	94%	6%
Guatemala	8.76	9	71%	19%	6%	1%	3%	96%	4%
Aruba	8.74	10	72%	17%	6%	2%	3%	95%	5%
Puerto Chiapas	8.74	11	72%	17%	7%	1%	3%	95%	5%
Progreso	8.74	12	72%	14%	8%	2%	4%	95%	5%
Caymans	8.74	13	72%	17%	5%	3%	4%	94%	6%
Honduras	8.73	14	71%	16%	7%	3%	3%	94%	6%
St. Lucia	8.68	15	70%	18%	7%	2%	3%	95%	5%
Belize	8.64	16	72%	13%	9%	1%	4%	94%	6%
Curacao	8.64	17	67%	22%	7%	2%	2%	96%	4%
Puerto Rico	8.63	18	71%	15%	8%	1%	5%	94%	6%
Ensenada	8.60	19	69%	17%	6%	3%	4%	93%	7%
St. Maarten	8.59	20	69%	18%	6%	3%	4%	92%	8%
Nicaragua	8.47	21	64%	22%	8%	2%	3%	94%	6%
Turks & Caicos	8.46	22	64%	22%	6%	4%	3%	92%	8%
Jamaica	8.43	23	65%	18%	8%	3%	5%	92%	8%
USVI	8.40	24	64%	21%	8%	2%	5%	93%	7%
Manzanillo	8.37	25	64%	21%	6%	4%	4%	91%	9%
Colombia	8.28	26	59%	25%	8%	4%	4%	92%	8%
Bahamas	8.28	27	60%	22%	10%	4%	4%	92%	8%
Dom. Rep.	8.19	28	64%	16%	9%	4%	8%	89%	11%
Grenada	8.10	29	62%	18%	9%	4%	7%	89%	11%
Antigua	8.08	30	61%	19%	8%	3%	9%	88%	12%
Martinique	7.93	31	56%	22%	10%	4%	7%	88%	12%
Panama	7.89	32	48%	29%	15%	5%	3%	92%	8%
British Virgin Islands	7.86	33	55%	24%	10%	6%	5%	89%	11%
Costa Maya	7.79	34	61%	16%	6%	5%	13%	83%	17%
Guadeloupe	7.54	35	42%	32%	13%	7%	6%	88%	12%
Trinidad	7.38	36	48%	22%	12%	5%	12%	83%	17%
All Destinations	8.47		66%	20%	8%	3%	4%	93%	7%
Eastern Caribbean	8.30		62%	21%	8%	4%	5%	91%	9%
Western Caribbean	8.49		65%	21%	8%	3%	4%	94%	6%
Southern Caribbean	8.42		65%	19%	8%	3%	5%	92%	8%
Mexico	8.70		72%	16%	6%	2%	4%	94%	6%

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

Destinations	Mean Score	Rank	Extremely Satisfied	Very Satisfied	Somewhat Satisfied	Not Too Satisfied	Not At All Satisfied	Satisfied	Not Satisfied
Cozumel	9.31	1	82%	14%	2%	1%	1%	98%	2%
Belize	9.23	2	84%	11%	2%	0%	3%	97%	3%
Costa Rica	9.22	3	82%	13%	2%	1%	1%	97%	3%
St. Kitts	9.21	4	81%	14%	3%	2%	1%	97%	3%
Guatemala	9.15	5	79%	15%	3%	2%	1%	97%	3%
Ensenada	9.13	6	78%	17%	3%	1%	1%	98%	2%
Barbados	9.12	7	78%	14%	6%	1%	1%	98%	2%
Bonaire	9.11	8	79%	14%	3%	2%	2%	97%	3%
Puerto Vallarta	9.11	9	81%	12%	3%	2%	2%	96%	4%
Puerto Rico	9.09	10	80%	11%	6%	0%	3%	97%	3%
Progreso	9.07	11	82%	9%	4%	2%	3%	95%	5%
Curacao	9.07	12	78%	15%	5%	1%	1%	98%	2%
Puerto Chiapas	9.03	13	78%	15%	4%	1%	2%	97%	3%
St. Vincent	9.01	14	77%	16%	3%	1%	3%	96%	4%
Mazatlán	9.01	15	77%	14%	5%	2%	1%	97%	3%
Caymans	9.00	16	76%	15%	5%	2%	2%	96%	4%
Aruba	8.99	17	75%	17%	4%	1%	2%	97%	3%
Honduras	8.99	18	76%	15%	5%	2%	2%	96%	4%
Nicaragua	8.95	19	75%	17%	5%	1%	2%	97%	3%
Turks & Caicos	8.94	20	76%	16%	4%	3%	2%	96%	4%
St. Maarten	8.86	21	74%	16%	4%	2%	3%	95%	5%
St. Lucia	8.82	22	74%	15%	6%	2%	2%	95%	5%
Jamaica	8.78	23	73%	15%	6%	2%	3%	94%	6%
Colombia	8.77	24	69%	20%	6%	2%	2%	96%	4%
Manzanillo	8.65	25	68%	20%	7%	2%	3%	95%	5%
USVI	8.64	26	70%	19%	7%	2%	4%	95%	5%
Panama	8.59	27	65%	22%	9%	2%	2%	96%	4%
Bahamas	8.59	28	67%	19%	7%	3%	3%	94%	6%
Martinique	8.47	29	68%	18%	6%	4%	4%	92%	8%
Grenada	8.44	30	67%	15%	9%	4%	4%	91%	9%
Dom. Rep.	8.43	31	69%	16%	6%	3%	6%	91%	9%
Antigua	8.42	32	68%	17%	6%	3%	6%	91%	9%
Costa Maya	8.26	33	70%	12%	6%	1%	12%	88%	12%
Guadeloupe	8.18	34	57%	26%	8%	4%	4%	92%	8%
Trinidad	7.80	35	58%	19%	7%	5%	11%	85%	15%
British Virgin Islands	n/a								
All Destinations	8.85		74%	16%	5%	2%	3%	95%	5%
Eastern Caribbean	8.70		71%	17%	6%	2%	3%	94%	6%
Western Caribbean	8.95		75%	16%	5%	2%	2%	96%	4%
Southern Caribbean	8.75		73%	16%	6%	2%	3%	94%	6%
Mexico	8.98		77%	15%	4%	1%	3%	96%	4%

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

Destinations	Mean Score	Rank	Extremely Satisfied	Very Satisfied	Somewhat Satisfied	Not Too Satisfied	Not At All Satisfied	Satisfied	Not Satisfied
Cozumel	9.32	1	83%	12%	3%	0%	2%	98%	2%
Costa Rica	9.21	2	83%	12%	2%	1%	2%	97%	3%
Belize	9.14	3	83%	10%	4%	0%	3%	97%	3%
St. Kitts	9.13	4	80%	14%	4%	1%	1%	97%	3%
Guatemala	9.12	5	79%	15%	3%	2%	1%	97%	3%
Barbados	9.10	6	79%	13%	6%	1%	1%	97%	3%
Puerto Vallarta	9.10	7	81%	12%	3%	2%	2%	96%	4%
Bonaire	9.07	8	77%	15%	5%	1%	2%	97%	3%
Ensenada	9.06	9	75%	18%	5%	1%	1%	98%	2%
Puerto Chiapas	9.05	10	79%	13%	4%	1%	2%	96%	4%
St. Vincent	9.05	11	78%	16%	1%	1%	3%	96%	4%
Puerto Rico	9.04	12	77%	15%	4%	1%	3%	96%	4%
Mazatlán	9.02	13	78%	13%	5%	2%	2%	96%	4%
Curacao	8.97	14	76%	16%	5%	2%	2%	97%	3%
Progreso	8.96	15	80%	10%	5%	2%	4%	94%	6%
Honduras	8.96	16	78%	12%	5%	3%	3%	95%	5%
Nicaragua	8.94	17	77%	14%	6%	1%	3%	96%	4%
Caymans	8.93	18	75%	15%	6%	2%	2%	96%	4%
Aruba	8.91	19	73%	18%	5%	1%	3%	96%	4%
St. Maarten	8.85	20	75%	14%	6%	2%	4%	95%	5%
St. Lucia	8.83	21	74%	16%	4%	3%	3%	94%	6%
Turks & Caicos	8.81	22	71%	17%	8%	2%	2%	96%	4%
Manzanillo	8.75	23	70%	20%	6%	2%	3%	96%	4%
Jamaica	8.72	24	72%	15%	6%	3%	4%	93%	7%
Colombia	8.70	25	68%	21%	5%	2%	3%	95%	5%
USVI	8.60	26	68%	20%	6%	2%	4%	94%	6%
Bahamas	8.57	27	68%	18%	8%	3%	4%	94%	6%
Dom. Rep.	8.46	28	69%	16%	6%	3%	6%	91%	9%
Antigua	8.45	29	69%	16%	6%	3%	6%	91%	9%
Grenada	8.44	30	67%	18%	7%	4%	5%	91%	9%
Panama	8.43	31	62%	22%	10%	4%	2%	94%	6%
Martinique	8.38	32	66%	18%	7%	4%	5%	91%	9%
Costa Maya	8.25	33	67%	13%	8%	2%	10%	88%	12%
Guadeloupe	7.94	34	53%	27%	9%	6%	5%	89%	11%
Trinidad	7.94	35	60%	18%	7%	4%	10%	86%	14%
British Virgin Islands	n/a								
All Destinations	8.81		73%	16%	5%	2%	3%	95%	5%
Eastern Caribbean	8.63		69%	18%	6%	3%	4%	94%	6%
Western Caribbean	8.89		75%	16%	5%	2%	2%	96%	4%
Southern Caribbean	8.73		72%	17%	5%	3%	4%	94%	6%
Mexico	8.99		77%	14%	5%	1%	3%	96%	4%

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

Destinations	Mean Score	Rank	Extremely Satisfied	Very Satisfied	Somewhat Satisfied	Not Too Satisfied	Not At All Satisfied	Satisfied	Not Satisfied
Cozumel	8.73	1	68%	20%	8%	2%	2%	96%	4%
Puerto Vallarta	8.51	2	66%	19%	7%	3%	4%	92%	8%
Barbados	8.47	3	62%	22%	10%	4%	2%	94%	6%
Bonaire	8.47	4	64%	21%	9%	4%	2%	93%	7%
Mazatlán	8.45	5	64%	21%	8%	3%	4%	93%	7%
St. Vincent	8.45	6	64%	22%	7%	3%	5%	92%	8%
St. Kitts	8.43	7	65%	18%	10%	3%	4%	93%	7%
Aruba	8.42	8	63%	22%	8%	4%	3%	93%	7%
Progreso	8.33	9	64%	18%	9%	3%	6%	91%	9%
Honduras	8.33	10	63%	20%	8%	3%	6%	91%	9%
Ensenada	8.31	11	61%	23%	6%	5%	5%	91%	9%
Puerto Rico	8.29	12	63%	19%	10%	2%	6%	92%	8%
St. Maarten	8.28	13	60%	22%	10%	3%	5%	92%	8%
Caymans	8.27	14	61%	22%	8%	3%	6%	91%	9%
Belize	8.26	15	64%	18%	8%	5%	5%	90%	10%
Curacao	8.24	16	60%	21%	11%	5%	3%	92%	8%
Costa Rica	8.21	17	58%	25%	9%	5%	4%	91%	9%
Guatemala	8.17	18	58%	24%	9%	6%	4%	91%	9%
St. Lucia	8.12	19	59%	20%	11%	5%	6%	89%	11%
Colombia	8.06	20	57%	23%	10%	4%	6%	90%	10%
Manzanillo	8.03	21	56%	24%	11%	4%	5%	91%	9%
Puerto Chiapas	8.02	22	55%	23%	12%	5%	5%	91%	9%
Jamaica	7.97	23	56%	22%	10%	6%	7%	88%	12%
Nicaragua	7.94	24	51%	25%	13%	6%	5%	90%	10%
Bahamas	7.92	25	54%	23%	11%	7%	6%	88%	12%
Turks & Caicos	7.90	26	56%	20%	12%	6%	6%	88%	12%
USVI	7.83	27	52%	25%	12%	5%	6%	89%	11%
Grenada	7.74	28	54%	20%	12%	6%	8%	86%	14%
Antigua	7.73	29	55%	20%	12%	4%	10%	87%	13%
Dom. Rep.	7.62	30	51%	22%	12%	4%	11%	85%	15%
Martinique	7.50	31	48%	23%	15%	6%	9%	86%	14%
Panama	7.29	32	39%	30%	16%	10%	6%	84%	16%
Costa Maya	7.13	33	48%	20%	9%	6%	17%	77%	23%
Trinidad	7.08	34	42%	24%	13%	8%	13%	79%	21%
Guadeloupe	6.79	35	28%	33%	19%	11%	8%	80%	20%
British Virgin Islands	n/a	36							
All Destinations	8.02		56%	23%	11%	5%	6%	89%	11%
Eastern Caribbean	7.81		52%	23%	12%	6%	7%	88%	12%
Western Caribbean	8.02		55%	24%	10%	5%	5%	89%	11%
Southern Caribbean	8.04		57%	22%	11%	5%	6%	89%	11%
Mexico	8.24		61%	21%	9%	4%	5%	91%	9%

Table B-15 – How satisfied were you with historic sites/museums that you visited?

Destinations	Mean Score	Rank	Extremely Satisfied	Very Satisfied	Somewhat Satisfied	Not Too Satisfied	Not At All Satisfied	Satisfied	Not Satisfied
Cozumel	8.51	1	66%	19%	10%	1%	4%	95%	5%
Puerto Rico	8.41	2	61%	24%	8%	4%	2%	93%	7%
Belize	8.39	3	64%	23%	9%	0%	5%	95%	5%
Progreso	8.28	4	67%	16%	7%	3%	8%	89%	11%
Barbados	8.12	5	55%	24%	13%	4%	4%	92%	8%
Mazatlán	8.12	6	54%	28%	11%	3%	4%	93%	7%
St. Kitts	8.11	7	56%	24%	11%	5%	4%	91%	9%
Colombia	8.06	8	53%	29%	10%	4%	4%	92%	8%
Caymans	7.99	9	54%	24%	11%	5%	6%	90%	10%
Guatemala	7.97	10	50%	31%	11%	4%	4%	91%	9%
Puerto Vallarta	7.92	11	53%	28%	10%	4%	6%	90%	10%
Curacao	7.90	12	49%	30%	13%	5%	4%	91%	9%
Aruba	7.86	13	49%	29%	12%	3%	6%	91%	9%
St. Lucia	7.86	14	52%	24%	13%	5%	6%	89%	11%
Puerto Chiapas	7.71	15	50%	26%	12%	5%	7%	88%	12%
St. Vincent	7.71	16	49%	29%	11%	4%	8%	88%	12%
Panama	7.71	17	45%	30%	14%	6%	4%	89%	11%
Nicaragua	7.69	18	45%	33%	13%	5%	5%	90%	10%
Bonaire	7.67	19	47%	28%	13%	6%	6%	88%	12%
Honduras	7.63	20	57%	15%	11%	8%	10%	82%	18%
Manzanillo	7.61	21	46%	29%	12%	5%	7%	88%	12%
Costa Rica	7.61	22	51%	24%	11%	3%	11%	86%	14%
Ensenada	7.60	23	51%	26%	8%	4%	11%	85%	15%
Bahamas	7.58	24	43%	30%	15%	4%	8%	88%	12%
Costa Maya	7.53	25	56%	18%	6%	6%	14%	79%	21%
Jamaica	7.27	26	48%	23%	8%	8%	14%	79%	21%
Martinique	7.24	27	38%	31%	16%	7%	7%	85%	15%
Dom. Rep.	7.21	28	46%	22%	13%	6%	12%	82%	18%
Turks & Caicos	7.19	29	37%	30%	19%	7%	7%	86%	14%
Trinidad	7.18	30	38%	32%	13%	7%	10%	83%	17%
Grenada	7.14	31	39%	29%	15%	9%	9%	82%	18%
St. Maarten	7.07	32	40%	27%	17%	5%	12%	83%	17%
USVI	6.92	33	41%	21%	19%	5%	14%	81%	19%
Antigua	6.69	34	39%	21%	18%	6%	17%	77%	23%
Guadeloupe	6.62	35	28%	31%	19%	11%	10%	78%	22%
British Virgin Islands	6.30	36	37%	18%	13%	12%	20%	68%	32%
All Destinations	7.71		49%	27%	12%	5%	7%	88%	12%
Eastern Caribbean	7.49		46%	26%	14%	6%	8%	86%	14%
Western Caribbean	7.82		50%	28%	11%	5%	6%	89%	11%
Southern Caribbean	7.59		45%	29%	14%	6%	7%	88%	12%
Mexico	7.92		54%	25%	10%	4%	7%	89%	11%

Table B-17 – How satisfied were you with the variety of things to see and do in “destination”?

Destinations	Mean Score	Rank	Extremely Satisfied	Very Satisfied	Somewhat Satisfied	Not Too Satisfied	Not At All Satisfied	Satisfied	Not Satisfied
Cozumel	8.14	1	53%	26%	14%	4%	3%	94%	6%
Puerto Vallarta	8.05	2	52%	28%	12%	4%	3%	92%	8%
Aruba	7.76	3	45%	30%	16%	6%	3%	91%	9%
Colombia	7.75	4	45%	33%	13%	6%	4%	90%	10%
Curacao	7.65	5	43%	32%	16%	6%	4%	90%	10%
Mazatlán	7.63	6	42%	29%	19%	7%	3%	91%	9%
St. Kitts	7.54	7	42%	29%	17%	8%	4%	88%	12%
St. Lucia	7.51	8	43%	29%	14%	8%	6%	86%	14%
Costa Rica	7.51	9	44%	30%	14%	6%	6%	87%	13%
Honduras	7.46	10	43%	25%	17%	8%	6%	86%	14%
Barbados	7.44	11	37%	34%	19%	5%	5%	90%	10%
Caymans	7.44	12	41%	27%	19%	8%	5%	87%	13%
Guatemala	7.15	13	36%	32%	16%	9%	8%	83%	17%
Puerto Rico	7.15	14	40%	28%	13%	10%	10%	80%	20%
Belize	7.12	15	36%	29%	18%	10%	7%	83%	17%
Panama	7.12	16	33%	31%	21%	9%	5%	85%	15%
St. Maarten	7.07	17	34%	28%	23%	9%	6%	85%	15%
Bonaire	7.06	18	33%	30%	23%	10%	5%	86%	14%
Bahamas	7.03	19	33%	29%	21%	11%	6%	83%	17%
USVI	6.88	20	30%	30%	24%	11%	6%	83%	17%
Dom. Rep.	6.87	21	37%	24%	18%	11%	11%	79%	21%
Nicaragua	6.83	22	28%	34%	21%	9%	9%	83%	17%
Puerto Chiapas	6.71	23	35%	25%	16%	11%	13%	76%	24%
St. Vincent	6.69	24	31%	29%	19%	11%	11%	78%	22%
Manzanillo	6.65	25	27%	31%	22%	11%	10%	80%	20%
Jamaica	6.62	26	34%	24%	18%	11%	13%	75%	25%
Grenada	6.60	27	32%	24%	20%	13%	11%	76%	24%
Martinique	6.53	28	27%	30%	21%	11%	11%	78%	22%
Ensenada	6.37	29	30%	22%	21%	14%	13%	73%	27%
Guadeloupe	6.37	30	23%	33%	20%	12%	12%	76%	24%
Progreso	6.33	31	34%	19%	20%	10%	17%	73%	27%
Turks & Caicos	6.19	32	23%	25%	24%	15%	12%	73%	27%
Antigua	6.00	33	23%	23%	25%	13%	15%	71%	29%
Costa Maya	5.96	34	22%	26%	21%	14%	17%	69%	31%
Trinidad	5.93	35	23%	25%	21%	13%	18%	69%	31%
British Virgin Islands	5.82	36	24%	16%	29%	14%	17%	69%	31%
All Destinations	7.08		36%	29%	18%	9%	8%	83%	17%
Eastern Caribbean	6.86		33%	28%	20%	11%	9%	80%	20%
Western Caribbean	7.26		38%	30%	17%	8%	7%	85%	15%
Southern Caribbean	7.07		36%	29%	19%	9%	8%	83%	17%
Mexico	7.10		38%	27%	18%	9%	9%	82%	18%

Table B-18 –you with the friendliness of the residents of “destination”?

Destinations	Mean Score	Rank	Extremely Satisfied	Very Satisfied	Somewhat Satisfied	Not Too Satisfied	Not At All Satisfied	Satisfied	Not Satisfied
Cozumel	8.65	1	66%	22%	8%	2%	2%	96%	4%
Costa Rica	8.64	2	66%	23%	6%	2%	2%	95%	5%
Puerto Vallarta	8.62	3	64%	24%	7%	2%	2%	96%	4%
Honduras	8.61	4	66%	21%	8%	3%	2%	95%	5%
Belize	8.54	5	66%	19%	8%	2%	5%	94%	6%
St. Kitts	8.53	6	64%	21%	9%	3%	2%	95%	5%
St. Maarten	8.48	7	62%	24%	9%	3%	2%	95%	5%
Bonaire	8.48	8	63%	23%	8%	3%	3%	94%	6%
Aruba	8.46	9	61%	26%	7%	3%	3%	95%	5%
Mazatlán	8.46	10	59%	28%	9%	2%	2%	96%	4%
Barbados	8.45	11	61%	26%	9%	2%	3%	95%	5%
Caymans	8.43	12	61%	24%	9%	4%	2%	94%	6%
Curacao	8.42	13	61%	25%	8%	3%	2%	95%	5%
Guatemala	8.41	14	60%	26%	9%	3%	3%	94%	6%
St. Vincent	8.41	15	64%	20%	9%	4%	3%	92%	8%
Puerto Chiapas	8.28	16	59%	22%	12%	3%	3%	93%	7%
USVI	8.25	17	57%	25%	12%	4%	2%	93%	7%
Puerto Rico	8.16	18	58%	22%	11%	5%	4%	91%	9%
Nicaragua	8.14	19	54%	28%	12%	3%	3%	94%	6%
Manzanillo	8.13	20	52%	30%	12%	4%	3%	94%	6%
St. Lucia	8.12	21	55%	26%	10%	4%	4%	92%	8%
Dom. Rep.	8.05	22	59%	19%	11%	5%	6%	89%	11%
British Virgin Islands	8.04	23	53%	30%	10%	5%	2%	93%	7%
Panama	7.98	24	52%	28%	13%	4%	4%	92%	8%
Turks & Caicos	7.95	25	53%	24%	12%	6%	4%	89%	11%
Bahamas	7.70	26	48%	26%	14%	7%	5%	88%	12%
Grenada	7.68	27	52%	22%	12%	7%	7%	86%	14%
Jamaica	7.62	28	49%	24%	12%	6%	8%	86%	14%
Ensenada	7.61	29	48%	26%	13%	8%	6%	86%	14%
Antigua	7.60	30	49%	23%	14%	8%	6%	86%	14%
Guadeloupe	7.55	31	42%	33%	13%	5%	7%	88%	12%
Colombia	7.52	32	46%	27%	14%	6%	8%	87%	13%
Trinidad	7.51	33	46%	27%	12%	6%	9%	85%	15%
Progreso	7.49	34	48%	23%	13%	6%	10%	84%	16%
Costa Maya	7.47	35	47%	24%	13%	9%	7%	84%	16%
Martinique	7.10	36	42%	25%	13%	8%	11%	81%	19%
All Destinations	8.12		56%	25%	10%	4%	4%	91%	9%
Eastern Caribbean	8.07		55%	24%	11%	5%	4%	91%	9%
Western Caribbean	8.18		57%	25%	10%	4%	4%	92%	8%
Southern Caribbean	8.03		55%	25%	10%	5%	5%	90%	10%
Mexico	8.20		57%	25%	11%	4%	4%	92%	8%

Table B-19 – How satisfied were you with your overall shopping experience in “destination”?

Destinations	Mean Score	Rank	Extremely Satisfied	Very Satisfied	Somewhat Satisfied	Not Too Satisfied	Not At All Satisfied	Satisfied	Not Satisfied
Cozumel	8.20	1	53%	29%	12%	3%	3%	94%	6%
Aruba	8.14	2	54%	28%	13%	3%	3%	94%	6%
St. Kitts	8.08	3	52%	28%	14%	4%	3%	94%	6%
Honduras	8.02	4	54%	26%	13%	4%	4%	92%	8%
Curacao	8.02	5	51%	30%	12%	4%	3%	93%	7%
Caymans	7.92	6	49%	28%	14%	5%	4%	91%	9%
St. Maarten	7.89	7	51%	25%	15%	5%	3%	91%	9%
Puerto Vallarta	7.83	8	48%	29%	13%	5%	5%	90%	10%
Bonaire	7.78	9	48%	26%	16%	4%	5%	91%	9%
USVI	7.74	10	47%	28%	15%	6%	4%	90%	10%
Mazatlán	7.71	11	45%	30%	14%	6%	5%	90%	10%
Costa Rica	7.65	12	46%	31%	13%	4%	6%	90%	10%
Belize	7.63	13	47%	30%	11%	5%	8%	87%	13%
Guatemala	7.50	14	45%	27%	14%	6%	7%	86%	14%
Puerto Rico	7.46	15	49%	21%	14%	6%	10%	84%	16%
Bahamas	7.45	16	42%	29%	17%	7%	6%	87%	13%
Dom. Rep.	7.41	17	42%	29%	15%	5%	9%	87%	13%
Manzanillo	7.41	18	41%	30%	15%	7%	7%	86%	14%
St. Lucia	7.39	19	41%	27%	20%	6%	6%	88%	12%
Turks & Caicos	7.38	20	39%	30%	19%	7%	5%	88%	12%
Barbados	7.36	21	41%	27%	20%	5%	7%	88%	12%
Puerto Chiapas	7.23	22	41%	26%	16%	9%	8%	83%	17%
Colombia	7.18	23	39%	28%	17%	7%	9%	84%	16%
Ensenada	7.16	24	40%	26%	18%	6%	10%	84%	16%
Nicaragua	7.01	25	36%	29%	18%	8%	9%	83%	17%
Jamaica	6.81	26	34%	28%	17%	10%	11%	79%	21%
Grenada	6.75	27	34%	26%	19%	7%	13%	80%	20%
Martinique	6.70	28	34%	28%	16%	8%	15%	77%	23%
Costa Maya	6.66	29	32%	28%	17%	12%	11%	77%	23%
Panama	6.62	30	31%	27%	21%	8%	12%	80%	20%
Progreso	6.53	31	35%	22%	15%	12%	16%	73%	27%
Antigua	6.47	32	32%	24%	21%	9%	15%	76%	24%
Guadeloupe	6.44	33	25%	32%	21%	9%	13%	78%	22%
St. Vincent	6.39	34	30%	27%	17%	9%	17%	74%	26%
Trinidad	6.04	35	29%	21%	18%	11%	21%	69%	31%
British Virgin Islands	5.90	36	23%	22%	24%	14%	17%	69%	31%
All Destinations	7.40		43%	28%	16%	6%	8%	86%	14%
Eastern Caribbean	7.43		43%	27%	16%	6%	7%	87%	13%
Western Caribbean	7.37		42%	28%	16%	6%	8%	86%	14%
Southern Caribbean	7.33		42%	27%	16%	6%	9%	85%	15%
Mexico	7.46		43%	28%	15%	7%	7%	86%	14%

Table B-20 – How satisfied were you with the courtesy of store employees in “destination”

Destinations	Mean Score	Rank	Extremely Satisfied	Very Satisfied	Somewhat Satisfied	Not Too Satisfied	Not At All Satisfied	Satisfied	Not Satisfied
Aruba	8.50	1	62%	24%	9%	2%	2%	95%	5%
Cozumel	8.49	2	62%	23%	9%	3%	2%	95%	5%
Honduras	8.48	3	65%	20%	9%	3%	3%	94%	6%
St. Kitts	8.45	4	61%	24%	10%	3%	2%	95%	5%
St. Maarten	8.44	5	60%	25%	10%	3%	2%	95%	5%
Belize	8.44	6	65%	22%	6%	4%	4%	92%	8%
Mazatlán	8.43	7	60%	27%	7%	3%	2%	95%	5%
Bonaire	8.43	8	62%	24%	9%	3%	3%	94%	6%
Curacao	8.43	9	62%	24%	9%	3%	2%	95%	5%
Costa Rica	8.43	10	62%	23%	9%	3%	3%	94%	6%
USVI	8.41	11	60%	25%	8%	4%	2%	94%	6%
Puerto Vallarta	8.39	12	59%	27%	8%	3%	3%	94%	6%
Caymans	8.35	13	61%	23%	10%	3%	3%	94%	6%
Guatemala	8.29	14	61%	22%	9%	3%	4%	93%	7%
Puerto Chiapas	8.28	15	59%	24%	10%	4%	3%	93%	7%
Manzanillo	8.25	16	56%	28%	10%	3%	3%	94%	6%
Puerto Rico	8.22	17	61%	20%	10%	4%	5%	91%	9%
Dom. Rep.	8.18	18	58%	25%	9%	3%	6%	92%	8%
Nicaragua	8.17	19	56%	27%	9%	3%	4%	93%	7%
Barbados	8.07	20	55%	26%	10%	4%	4%	92%	8%
St. Vincent	8.05	21	54%	28%	8%	3%	6%	91%	9%
Colombia	8.04	22	55%	25%	10%	5%	5%	90%	10%
Turks & Caicos	7.99	23	50%	29%	14%	5%	3%	92%	8%
British Virgin Islands	7.98	24	52%	29%	9%	4%	6%	90%	10%
Panama	7.95	25	51%	29%	12%	3%	4%	93%	7%
St. Lucia	7.94	26	50%	28%	12%	4%	5%	91%	9%
Bahamas	7.92	27	52%	24%	14%	5%	5%	90%	10%
Ensenada	7.84	28	52%	23%	14%	5%	6%	89%	11%
Guadeloupe	7.79	29	49%	29%	12%	4%	6%	90%	10%
Antigua	7.73	30	49%	25%	14%	6%	6%	88%	12%
Trinidad	7.72	31	51%	26%	10%	6%	8%	86%	14%
Grenada	7.71	32	51%	24%	13%	5%	7%	88%	12%
Jamaica	7.61	33	46%	28%	12%	7%	7%	86%	14%
Costa Maya	7.32	34	42%	27%	16%	8%	7%	85%	15%
Martinique	7.31	35	44%	26%	13%	7%	10%	83%	17%
Progreso	7.21	36	46%	20%	14%	8%	11%	81%	19%
All Destinations	8.13		56%	25%	10%	4%	4%	92%	8%
Eastern Caribbean	8.16		56%	25%	11%	4%	4%	92%	8%
Western Caribbean	8.17		58%	25%	10%	4%	4%	92%	8%
Southern Caribbean	8.04		55%	25%	11%	4%	5%	91%	9%
Mexico	8.15		56%	25%	10%	4%	4%	92%	8%

Table B-21 – How satisfied were you with the variety of shops in “destination”?

Destinations	Mean Score	Rank	Extremely Satisfied	Very Satisfied	Somewhat Satisfied	Not Too Satisfied	Not At All Satisfied	Satisfied	Not Satisfied
Cozumel	8.10	1	55%	23%	14%	5%	3%	92%	8%
Curacao	7.99	2	52%	28%	13%	5%	3%	92%	8%
Aruba	7.99	3	52%	27%	14%	5%	3%	92%	8%
St. Kitts	7.79	4	48%	25%	17%	6%	4%	90%	10%
Honduras	7.71	5	47%	27%	15%	7%	4%	89%	11%
Mazatlán	7.71	6	44%	31%	15%	6%	4%	90%	10%
Caymans	7.65	7	47%	25%	16%	7%	5%	88%	12%
Puerto Vallarta	7.63	8	45%	27%	17%	6%	5%	89%	11%
Bonaire	7.37	9	39%	31%	17%	7%	6%	87%	13%
St. Maarten	7.35	10	40%	26%	21%	7%	6%	87%	13%
Bahamas	7.33	11	42%	25%	17%	9%	7%	84%	16%
St. Lucia	7.24	12	36%	31%	18%	9%	6%	85%	15%
Barbados	7.23	13	38%	29%	19%	7%	8%	85%	15%
USVI	7.22	14	38%	27%	18%	10%	7%	84%	16%
Puerto Rico	7.12	15	43%	22%	15%	9%	11%	80%	20%
Colombia	7.11	16	37%	28%	19%	7%	9%	84%	16%
Guatemala	7.08	17	38%	26%	20%	7%	9%	84%	16%
Manzanillo	7.02	18	35%	29%	19%	9%	9%	83%	17%
Costa Rica	7.02	19	35%	31%	17%	7%	10%	83%	17%
Belize	7.00	20	37%	25%	17%	10%	10%	80%	20%
Dom. Rep.	6.98	21	36%	27%	20%	8%	10%	82%	18%
Turks & Caicos	6.94	22	33%	29%	18%	13%	7%	80%	20%
Ensenada	6.93	23	37%	25%	17%	9%	12%	80%	20%
Puerto Chiapas	6.82	24	33%	27%	21%	10%	9%	81%	19%
Grenada	6.63	25	30%	27%	20%	10%	12%	78%	22%
Progreso	6.61	26	38%	20%	17%	10%	15%	75%	25%
Jamaica	6.57	27	31%	25%	20%	13%	12%	76%	24%
Costa Maya	6.54	28	33%	24%	19%	12%	12%	76%	24%
Antigua	6.42	29	26%	29%	21%	13%	11%	75%	25%
Martinique	6.42	30	28%	29%	19%	11%	14%	75%	25%
Nicaragua	6.41	31	26%	28%	23%	11%	12%	77%	23%
Guadeloupe	6.24	32	21%	30%	25%	13%	11%	76%	24%
Panama	6.17	33	23%	27%	24%	12%	14%	74%	26%
St. Vincent	5.73	34	19%	26%	21%	14%	19%	67%	33%
Trinidad	5.49	35	21%	20%	21%	13%	25%	63%	37%
British Virgin Islands	5.34	36	19%	17%	23%	19%	22%	59%	41%
All Destinations	7.10		38%	27%	18%	9%	9%	83%	17%
Eastern Caribbean	7.09		37%	27%	19%	9%	8%	83%	17%
Western Caribbean	7.00		36%	27%	19%	9%	9%	82%	18%
Southern Caribbean	7.11		38%	28%	17%	8%	9%	83%	17%
Mexico	7.25		40%	26%	18%	8%	8%	84%	16%

Table B-22 – How satisfied were you with quality of goods in “destination”?

Destinations	Mean Score	Rank	Extremely Satisfied	Very Satisfied	Somewhat Satisfied	Not Too Satisfied	Not At All Satisfied	Satisfied	Not Satisfied
Aruba	8.06	1	50%	32%	13%	3%	2%	94%	6%
Cozumel	8.04	2	51%	27%	16%	4%	2%	94%	6%
Curacao	7.98	3	51%	28%	13%	5%	2%	92%	8%
Honduras	7.97	4	51%	28%	13%	5%	3%	92%	8%
Caymans	7.89	5	47%	30%	16%	4%	3%	93%	7%
Bonaire	7.89	6	46%	32%	14%	4%	3%	92%	8%
St. Kitts	7.87	7	47%	29%	16%	5%	3%	92%	8%
Guatemala	7.85	8	49%	29%	11%	5%	5%	90%	10%
Puerto Vallarta	7.81	9	47%	30%	15%	5%	4%	92%	8%
USVI	7.77	10	44%	31%	16%	5%	3%	92%	8%
St. Maarten	7.72	11	42%	32%	16%	5%	4%	91%	9%
Costa Rica	7.66	12	45%	30%	15%	5%	5%	90%	10%
Mazatlán	7.62	13	40%	35%	18%	4%	4%	92%	8%
Puerto Rico	7.48	14	45%	26%	15%	7%	7%	86%	14%
Colombia	7.47	15	41%	31%	17%	6%	6%	88%	12%
Belize	7.39	16	41%	33%	10%	7%	8%	84%	16%
Dom. Rep.	7.38	17	40%	30%	19%	5%	6%	88%	12%
Barbados	7.37	18	39%	33%	15%	8%	6%	86%	14%
Bahamas	7.37	19	41%	28%	18%	9%	5%	86%	14%
St. Lucia	7.37	20	36%	35%	17%	7%	5%	88%	12%
Panama	7.36	21	36%	34%	17%	7%	6%	87%	13%
Puerto Chiapas	7.32	22	36%	32%	20%	6%	5%	88%	12%
Turks & Caicos	7.32	23	36%	32%	18%	9%	5%	87%	13%
Manzanillo	7.14	24	34%	33%	18%	8%	7%	85%	15%
Nicaragua	7.10	25	35%	30%	20%	8%	7%	86%	14%
Ensenada	7.04	26	36%	27%	22%	6%	9%	85%	15%
Grenada	6.92	27	32%	29%	22%	9%	7%	84%	16%
Martinique	6.80	28	29%	35%	17%	9%	10%	81%	19%
Jamaica	6.79	29	31%	30%	20%	10%	10%	80%	20%
Progreso	6.72	30	35%	24%	20%	10%	11%	79%	21%
Antigua	6.67	31	29%	28%	23%	11%	9%	80%	20%
Costa Maya	6.48	32	26%	30%	20%	12%	12%	76%	24%
Trinidad	6.36	33	27%	28%	20%	11%	14%	74%	26%
Guadeloupe	6.30	34	27%	27%	20%	10%	15%	74%	26%
St. Vincent	6.12	35	24%	29%	19%	9%	19%	72%	28%
British Virgin Islands	n/a	36							
All Destinations	7.43		40%	30%	17%	7%	6%	88%	12%
Eastern Caribbean	7.46		41%	29%	17%	7%	5%	88%	12%
Western Caribbean	7.50		42%	30%	16%	6%	6%	88%	12%
Southern Caribbean	7.35		39%	31%	16%	7%	6%	87%	13%
Mexico	7.38		39%	30%	18%	6%	6%	88%	12%

Table B-23 – How satisfied were you with overall prices in “destination”?

Destinations	Mean Score	Rank	Extremely Satisfied	Very Satisfied	Somewhat Satisfied	Not Too Satisfied	Not At All Satisfied	Satisfied	Not Satisfied
Cozumel	7.77	1	44%	29%	19%	6%	2%	92%	8%
St. Kitts	7.75	2	44%	31%	16%	6%	3%	91%	9%
Guatemala	7.66	3	44%	30%	15%	6%	4%	90%	10%
St. Maarten	7.63	4	41%	32%	18%	5%	3%	91%	9%
Mazatlán	7.63	5	40%	36%	15%	5%	4%	91%	9%
Aruba	7.59	6	42%	30%	18%	6%	4%	90%	10%
Manzanillo	7.50	7	40%	33%	16%	6%	5%	89%	11%
Puerto Rico	7.50	8	43%	29%	16%	7%	6%	87%	13%
Puerto Vallarta	7.48	9	42%	29%	17%	6%	5%	89%	11%
Bonaire	7.45	10	39%	32%	17%	6%	5%	89%	11%
Honduras	7.45	11	41%	29%	18%	8%	4%	88%	12%
Curacao	7.43	12	36%	35%	17%	7%	4%	88%	12%
Costa Rica	7.42	13	39%	33%	16%	6%	6%	88%	12%
Nicaragua	7.39	14	39%	32%	17%	7%	5%	88%	12%
USVI	7.37	15	36%	33%	19%	7%	4%	88%	12%
Colombia	7.31	16	37%	32%	17%	8%	6%	86%	14%
Puerto Chiapas	7.30	17	38%	31%	20%	6%	6%	88%	12%
Ensenada	7.27	18	39%	28%	19%	8%	7%	85%	15%
Caymans	7.12	19	35%	31%	18%	10%	6%	84%	16%
St. Lucia	7.10	20	32%	35%	19%	8%	7%	86%	14%
Dom. Rep.	7.10	21	33%	32%	20%	7%	7%	86%	14%
Bahamas	6.98	22	32%	30%	22%	9%	8%	84%	16%
Belize	6.90	23	36%	28%	17%	10%	10%	80%	20%
Progreso	6.87	24	36%	26%	16%	8%	12%	79%	21%
Turks & Caicos	6.84	25	29%	33%	20%	12%	7%	81%	19%
Barbados	6.77	26	29%	31%	19%	14%	7%	79%	21%
Grenada	6.71	27	30%	30%	22%	8%	10%	82%	18%
Trinidad	6.64	28	31%	29%	19%	9%	13%	78%	22%
Panama	6.55	29	25%	30%	24%	13%	8%	79%	21%
Jamaica	6.44	30	25%	30%	20%	13%	11%	76%	24%
Antigua	6.42	31	25%	29%	23%	12%	10%	78%	22%
British Virgin Islands	6.34	32	20%	33%	27%	9%	11%	80%	20%
Martinique	6.32	33	26%	30%	18%	10%	16%	74%	26%
St. Vincent	6.31	34	29%	25%	20%	11%	15%	74%	26%
Guadeloupe	6.21	35	18%	34%	25%	14%	9%	77%	23%
Costa Maya	6.11	36	22%	30%	20%	15%	14%	72%	28%
All Destinations	7.16		36%	31%	18%	8%	7%	85%	15%
Eastern Caribbean	7.16		34%	32%	19%	8%	6%	85%	15%
Western Caribbean	7.16		36%	31%	18%	9%	7%	85%	15%
Southern Caribbean	7.01		33%	31%	19%	8%	8%	83%	17%
Mexico	7.36		39%	31%	18%	7%	6%	87%	13%

Table B-24 – How satisfied were you with taxis and/or local transportation in “destination”?

Destinations	Mean Score	Rank	Extremely Satisfied	Very Satisfied	Somewhat Satisfied	Not Too Satisfied	Not At All Satisfied	Satisfied	Not Satisfied
Cozumel	8.79	1	71%	19%	6%	2%	3%	95%	5%
Costa Rica	8.69	2	75%	13%	4%	1%	7%	92%	8%
St. Kitts	8.58	3	69%	19%	5%	2%	5%	93%	7%
Mazatlán	8.56	4	67%	21%	6%	2%	5%	94%	6%
Puerto Vallarta	8.56	5	68%	20%	6%	3%	4%	93%	7%
Aruba	8.47	6	69%	18%	4%	2%	7%	91%	9%
St. Maarten	8.42	7	65%	21%	7%	3%	5%	93%	7%
Belize	8.37	8	70%	13%	10%	0%	8%	92%	8%
Barbados	8.31	9	62%	24%	6%	2%	6%	92%	8%
St. Vincent	8.26	10	65%	19%	4%	4%	8%	88%	12%
Honduras	8.26	11	65%	16%	8%	4%	7%	89%	11%
St. Lucia	8.23	12	63%	19%	9%	2%	7%	91%	9%
USVI	8.19	13	59%	24%	8%	3%	6%	91%	9%
Guatemala	8.15	14	63%	20%	7%	1%	10%	89%	11%
Ensenada	8.13	15	63%	16%	10%	5%	6%	89%	11%
Dom. Rep.	8.12	16	61%	18%	10%	4%	7%	89%	11%
Colombia	8.10	17	59%	22%	8%	3%	8%	89%	11%
Caymans	8.09	18	56%	25%	9%	3%	7%	90%	10%
Puerto Rico	8.08	19	63%	15%	9%	5%	8%	87%	13%
Curacao	8.03	20	59%	22%	9%	2%	8%	90%	10%
Panama	8.02	21	60%	18%	13%	3%	7%	90%	10%
Puerto Chiapas	7.96	22	60%	18%	10%	2%	10%	88%	12%
Manzanillo	7.88	23	61%	18%	8%	2%	12%	86%	14%
Nicaragua	7.87	24	61%	18%	6%	2%	12%	85%	15%
Bonaire	7.86	25	60%	17%	10%	3%	11%	86%	14%
Bahamas	7.83	26	52%	24%	14%	3%	7%	90%	10%
Progreso	7.72	27	53%	21%	11%	3%	11%	86%	14%
British Virgin Islands	7.72	28	53%	28%	7%	1%	11%	88%	12%
Jamaica	7.70	29	56%	19%	8%	3%	13%	84%	16%
Costa Maya	7.66	30	56%	19%	8%	4%	12%	84%	16%
Turks & Caicos	7.59	31	47%	28%	12%	5%	9%	87%	13%
Grenada	7.55	32	56%	17%	10%	6%	12%	83%	17%
Trinidad	7.40	33	52%	21%	9%	4%	14%	82%	18%
Antigua	7.24	34	52%	18%	10%	3%	17%	80%	20%
Martinique	6.93	35	45%	23%	7%	5%	20%	76%	24%
Guadeloupe	6.89	36	33%	35%	12%	7%	13%	80%	20%
All Destinations	8.08		61%	20%	8%	3%	8%	89%	11%
Eastern Caribbean	7.99		57%	22%	9%	4%	8%	89%	11%
Western Caribbean	8.14		63%	19%	8%	2%	9%	89%	11%
Southern Caribbean	7.92		59%	20%	7%	3%	10%	87%	13%
Mexico	8.25		64%	19%	8%	3%	7%	90%	10%

Table B-25 – How satisfied were you with professionalism of the driver in “destination”?

Destinations	Mean Score	Rank	Extremely Satisfied	Very Satisfied	Somewhat Satisfied	Not Too Satisfied	Not At All Satisfied	Satisfied	Not Satisfied
Costa Rica	9.18	1	83%	11%	2%	1%	3%	96%	4%
Cozumel	9.00	2	77%	14%	6%	1%	2%	97%	3%
St. Kitts	8.92	3	77%	14%	4%	1%	3%	95%	5%
Mazatlán	8.84	4	73%	17%	5%	2%	3%	96%	4%
Belize	8.81	5	79%	12%	3%	0%	7%	93%	7%
Guatemala	8.81	6	74%	16%	4%	2%	4%	94%	6%
St. Vincent	8.78	7	77%	14%	2%	2%	6%	92%	8%
Puerto Vallarta	8.76	8	72%	17%	6%	2%	3%	95%	5%
Honduras	8.76	9	75%	14%	5%	2%	4%	93%	7%
Aruba	8.74	10	75%	15%	3%	1%	6%	93%	7%
St. Maarten	8.72	11	72%	17%	6%	2%	4%	94%	6%
Nicaragua	8.71	12	74%	15%	4%	1%	6%	93%	7%
Barbados	8.67	13	71%	16%	8%	1%	4%	95%	5%
Puerto Chiapas	8.62	14	70%	17%	7%	1%	5%	93%	7%
St. Lucia	8.62	15	72%	14%	5%	3%	5%	92%	8%
Caymans	8.55	16	68%	19%	5%	3%	5%	92%	8%
Ensenada	8.54	17	69%	17%	7%	3%	4%	93%	7%
Curacao	8.51	18	67%	20%	6%	2%	5%	93%	7%
Colombia	8.49	19	67%	19%	8%	2%	5%	93%	7%
Manzanillo	8.48	20	69%	18%	5%	2%	7%	92%	8%
Panama	8.45	21	62%	26%	7%	2%	3%	95%	5%
Bonaire	8.44	22	70%	15%	7%	2%	7%	91%	9%
Puerto Rico	8.41	23	69%	16%	5%	3%	8%	90%	10%
Dom. Rep.	8.37	24	69%	15%	6%	3%	7%	90%	10%
Jamaica	8.30	25	66%	15%	8%	3%	7%	90%	10%
USVI	8.27	26	61%	23%	7%	3%	6%	91%	9%
Progreso	8.20	27	64%	16%	8%	3%	7%	89%	11%
Guadeloupe	8.17	28	56%	28%	8%	5%	4%	92%	8%
Bahamas	8.15	29	58%	23%	10%	3%	6%	91%	9%
Grenada	8.14	30	63%	18%	7%	4%	8%	88%	12%
Trinidad	8.08	31	66%	16%	5%	3%	11%	86%	14%
Turks & Caicos	8.08	32	59%	24%	5%	3%	8%	89%	11%
Antigua	7.95	33	63%	16%	7%	2%	12%	86%	14%
Martinique	7.89	34	59%	20%	6%	5%	10%	85%	15%
Costa Maya	7.85	35	59%	18%	9%	4%	10%	86%	14%
British Virgin Islands	n/a								
All Destinations	8.53		69%	17%	6%	2%	5%	92%	8%
Eastern Caribbean	8.39		65%	20%	6%	3%	6%	91%	9%
Western Caribbean	8.67		71%	17%	5%	2%	5%	93%	7%
Southern Caribbean	8.43		68%	17%	6%	2%	7%	91%	9%
Mexico	8.61		70%	17%	6%	2%	5%	93%	7%

Table B-26 – How satisfied were you with cleanliness of the transport in “destination”?

Destinations	Mean Score	Rank	Extremely Satisfied	Very Satisfied	Somewhat Satisfied	Not Too Satisfied	Not At All Satisfied	Satisfied	Not Satisfied
Costa Rica	9.10	1	81%	13%	3%	1%	3%	96%	4%
Cozumel	8.96	2	74%	18%	5%	1%	2%	97%	3%
St. Kitts	8.92	3	76%	15%	5%	1%	2%	96%	4%
Aruba	8.80	4	74%	17%	4%	1%	4%	95%	5%
Nicaragua	8.69	5	75%	13%	5%	2%	5%	93%	7%
St. Vincent	8.68	6	73%	16%	4%	1%	6%	93%	7%
Mazatlán	8.67	7	68%	20%	8%	3%	1%	95%	5%
St. Maarten	8.65	8	68%	20%	6%	1%	4%	95%	5%
Guatemala	8.63	9	72%	16%	5%	2%	5%	93%	7%
Puerto Vallarta	8.58	10	68%	19%	7%	4%	3%	94%	6%
Barbados	8.54	11	66%	21%	7%	2%	3%	94%	6%
Dom. Rep.	8.52	12	69%	18%	7%	2%	4%	93%	7%
St. Lucia	8.49	13	67%	19%	6%	4%	4%	92%	8%
Manzanillo	8.48	14	67%	19%	7%	2%	6%	93%	7%
Honduras	8.47	15	66%	19%	8%	2%	5%	93%	7%
Puerto Rico	8.47	16	70%	15%	5%	3%	7%	91%	9%
Puerto Chiapas	8.46	17	67%	18%	7%	3%	5%	92%	8%
Colombia	8.43	18	64%	22%	8%	2%	4%	94%	6%
Belize	8.40	19	70%	16%	6%	1%	7%	92%	8%
Curacao	8.39	20	63%	22%	8%	3%	4%	93%	7%
Caymans	8.37	21	64%	20%	6%	4%	5%	91%	9%
Trinidad	8.29	22	65%	18%	7%	2%	7%	90%	10%
Jamaica	8.26	23	63%	20%	7%	5%	6%	89%	11%
Panama	8.26	24	59%	25%	9%	4%	3%	93%	7%
Ensenada	8.21	25	62%	20%	8%	5%	5%	90%	10%
Guadeloupe	8.11	26	52%	33%	8%	5%	3%	92%	8%
Bonaire	8.08	27	62%	17%	9%	5%	7%	88%	12%
USVI	8.06	28	55%	26%	9%	4%	6%	90%	10%
Grenada	8.02	29	59%	19%	10%	5%	7%	88%	12%
Progreso	7.95	30	58%	19%	11%	5%	7%	88%	12%
Martinique	7.90	31	60%	18%	8%	5%	8%	86%	14%
Antigua	7.87	32	60%	18%	8%	3%	11%	86%	14%
Costa Maya	7.78	33	58%	18%	8%	5%	11%	84%	16%
Turks & Caicos	7.77	34	49%	28%	12%	5%	6%	89%	11%
Bahamas	7.72	35	49%	25%	15%	5%	7%	88%	12%
British Virgin Islands	n/a	36							
All Destinations	8.43		66%	20%	7%	3%	5%	92%	8%
Eastern Caribbean	8.30		62%	22%	8%	3%	5%	92%	8%
Western Caribbean	8.54		68%	18%	6%	3%	4%	93%	7%
Southern Caribbean	8.36		65%	19%	7%	3%	5%	92%	8%
Mexico	8.47		66%	19%	7%	3%	4%	92%	8%



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

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

BREA has provided specialized consulting support, including market research, economic impact studies and demand analyses, to the cruise lines, port service providers and industry associations. Among BREA's recent clients are: Port of New York, Port of New Orleans, Tampa Port Authority, Port of San Diego, Royal Caribbean Cruises Ltd., Carnival Corp., and the Cruise Lines international Association (CLIA). Since studies are designed to meet the specific needs of each client, they can incorporate many dimensions of the market and include a variety of ancillary services.

BREA provides the following services:

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

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

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

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