

**CRUISE EXPENDITURE SURVEY BROCHURE
NASSAU/PARADISE ISLAND**



**RESEARCH AND STATISTICS DEPARTMENT
MINISTRY OF TOURISM
2015**

1. Cruise Ships in the Cruise Expenditure Survey 2015

NAMES OF SHIP IN SURVEY 2015

| | | Nassau |
|-------------------------|-----------|-------------|
| Ship Name | Sensation | Count 105 |
| | | Col % 12.3% |
| Enchantment of the Seas | | Count 100 |
| | | Col % 11.7% |
| Norwegian Sky | | Count 91 |
| | | Col % 10.6% |
| Majesty of the Seas | | Count 80 |
| | | Col % 9.3% |
| Norwegian Getaway | | Count 68 |
| | | Col % 7.9% |
| Carnival Fascination | | Count 61 |
| | | Col % 7.1% |
| Carnival Fantasy | | Count 51 |
| | | Col % 6.0% |
| Disney Dream | | Count 36 |
| | | Col % 4.2% |
| Ecstasy | | Count 27 |
| | | Col % 3.2% |
| Oasis of the Seas | | Count 27 |
| | | Col % 3.2% |
| Norwegian Gem | | Count 20 |
| | | Col % 2.3% |
| Norwegian Breakaway | | Count 20 |
| | | Col % 2.3% |
| Carnival Valor | | Count 19 |
| | | Col % 2.2% |
| Carnival Sunshine | | Count 17 |
| | | Col % 2.0% |
| Carnival Freedom | | Count 16 |
| | | Col % 1.9% |
| Carnival Breeze | | Count 15 |
| | | Col % 1.8% |
| Carnival Dream | | Count 14 |
| | | Col % 1.6% |
| Carnival Victory | | Count 11 |
| | | Col % 1.3% |
| Explorer of the Seas | | Count 10 |
| | | Col % 1.2% |
| Carnival Splendor | | Count 9 |
| | | Col % 1.1% |
| Seven Seas Navigator | | Count 9 |
| | | Col % 1.1% |

NAMES OF SHIP IN SURVEY 2015

| | | Nassau |
|---------------------------------|-------|---------------|
| Ship Name Carnival Pride | Count | 8 |
| | Col % | 0.9% |
| Ruby Princess | Count | 8 |
| | Col % | 0.9% |
| Disney Wonder | Count | 7 |
| | Col % | 0.8% |
| Allure of the Seas | Count | 7 |
| | Col % | 0.8% |
| Norwegian Spirit | Count | 5 |
| | Col % | 0.6% |
| Costa Luminosa | Count | 5 |
| | Col % | 0.6% |
| Carnival Conquest | Count | 3 |
| | Col % | 0.4% |
| Emerald Princess | Count | 3 |
| | Col % | 0.4% |
| Costa Riviera | Count | 3 |
| | Col % | 0.4% |
| Silver Shadow | Count | 1 |
| | Col % | 0.1% |
| Count | | 856 |
| TOTAL | | 100.0% |

2. How Much Money Did Cruise Visitors Spend In Nassau/Paradise Island In 2015?

In 2015, Cruise Visitors to Nassau/Paradise Island spent \$242.46 million compared to \$269.01 million in 2014, a decline of -9.9%.

3. What Was The Average Expenditure Per Cruise Visitor In Nassau/Paradise Island In 2015?

The average expenditure of a cruise visitor to Nassau/Paradise Island has trended downward since 2013. In 2015, the average expenditure for a Cruise Visitor to Nassau/P.I. was \$79.92 compared to \$82.34 in 2014 and \$98.66 in 2013.

4. Did The Average Expenditure Per Cruise Visitor In Nassau/Paradise Island Differ By Cruise Line?

- Yes, the average expenditure did differ by Cruise line. In 2015, the average expenditure of a cruise visitor to Nassau/Paradise Island on the Carnival fleet of ships was \$81.71, compared to \$76.04 in 2014 and \$90.65 in 2013.
- In 2015, the average expenditure of a cruise visitor on the Royal Caribbean ships was \$82.38 compared to \$92.83 in 2014 and \$102.84 in 2013.
- In 2015, the average expenditure for a cruise visitor who came to the island on the Norwegian Cruises' fleet of ships was \$78.75 compared to \$87.22 in 2014 and \$111.14 in 2013.
- In 2015, the average expenditure for a cruise visitor who came on the Disney Cruise Line ships was \$92.34 compared to \$72.88 in 2014 and \$104.70 in 2013.

5. How Many Cruise Visitors to Nassau/Paradise Island Spent Under \$20.00 When they Got off the Ship?

Approximately two in every ten (18%) cruise visitors spent under \$20.00 while they were off the ship in Nassau/Paradise Island.

6. How Many Cruise Visitors To Nassau/Paradise Island Spent Under \$50.00 When They Got Off The Ship?

More than half (44%) the cruise visitors on average spent under \$50.00.

7. How Many Cruise Visitors to Nassau/Paradise Island Spent \$50 or More When they Got off the Ship?

Roughly, six in ten (56%) cruise visitors on average spent \$50.00 or more during their visit to Nassau/Paradise Island but a smaller percentage of them spent over the \$200.00 price point in 2015 (9%) compared to 2014 (10%).

8. Did Any Cruise Visitors To Nassau/Paradise Island Spend \$200 Or More Off The Ship During Their Visit?

Yes, approximately one in every ten (9%) cruise visitor spent on average \$200.00 or more when they got off the ship.

9. What Did Cruise Visitors Spend Their Money On While in Nassau/Paradise Island?

**CRUISE VISITORS
EXPENDITURE BY MAJOR CATEGORY 2015 & 2014**

| Expenditure by Category | 2015 | | 2014 | | 15/14 |
|-----------------------------|---------------------|---------------|---------------------|---------------|--------------|
| | Expenditure (\$mln) | % SHR | Expenditure (\$mln) | % SHR | % CHG |
| Shopping | \$127.38 | 52.5% | \$132.60 | 49.3% | -3.9% |
| Activities/Tours/Excursions | \$57.35 | 23.7% | \$72.80 | 27.1% | -21.2% |
| Meals and Drinks off Ship | \$29.11 | 12.0% | \$33.95 | 12.6% | -14.3% |
| Transportation | \$16.31 | 6.7% | \$14.98 | 5.6% | 8.9% |
| Casino | \$12.30 | 5.1% | \$14.68 | 5.5% | -16.2% |
| Nightlife | \$0.00 | 0.0% | \$0.00 | 0.0% | 0.0% |
| Total New Providence | \$242.46 | 100.0% | \$269.01 | 100.0% | -9.9% |

Source: Cruise Expenditure Survey, Research & Statistics Dept., Bahamas Ministry of Tourism

Cruise visitors spent most of their money on shopping and activities/tours/excursions. Approximately half (53%) of the money spent by cruise visitors in Nassau/P.I. was on shopping. Approximately one quarter (24%) of the money spent by cruise visitors was on activities/tours/excursions.

Cruise Visitors to Nassau/Paradise Island spent the rest of their money on meals and drinks they bought off the ship (12% on this), transportation (7% on this), and playing in the on island casino (5% of expenditure was on this).

10. What Were Some of the Reasons for the Decline In Total Cruise Expenditure Between 2015 And 2014?

- Festival Place located at the major entry port of Nassau/Paradise Island on Prince George Wharf was closed from July 30, 2014.¹ The closure of Festival Place would have impacted expenditures that would have been made by persons who wanted to go shopping but wanted to stay close to the ship and not venture far from the cruise port.
- The number of cruise arrivals (all ports of call) to Nassau/Paradise Island declined between 2015 (3.32 million) and 2014 (3.57 million).
- The average expenditure per person declined by -2.9% in 2015 compared to 2014, however the biggest slide occurred in 2014, the same year of the closure of Festival Place. The average expenditure per person declined by -16.5% in 2014 compared to 2013.
- Cruise Visitors to Nassau/Paradise Island spent less money on shopping, activities/tours/excursions, meals and drinks off the ship, and in the on-island casinos.
- The percentage of cruise visitors that went shopping while in Nassau/Paradise Island has been in decline since 2012 i.e., 61% in 2012, 56% in 2013, 54% in 2014 and 54% in 2015. Although the same percentage of cruise visitors went shopping in 2015 as in 2014, they spent less of their money on this venture because a higher percentage of them bought the cheaper priced items like t-shirts in 2015 (76%) than in 2014 (68%).
- The amount of money spent by cruise visitors on doing an Activity/Tour/Excursion in Nassau/Paradise Island has been on the decline since 2013. In 2012, cruise visitors spent \$108.44 million on Activities/Tours/Excursions compared to \$99.85 million in 2013, \$72.80 million in 2014, and \$57.35 million in 2015. With cruise visitors spending less money purchasing Activities/Tours/Excursions, total expenditure by cruise visitors in the destination would have been significantly impacted. The decline in the amount spent on Activities/Tours/Excursions was in part due to the fact that the percentage of cruise visitors that were repeat visitors increased between 2014 (45%) and 2015 (53%). This meant that cruise visitors were less likely to purchase Activities/Tours/Excursions that they had done before on a previous trip to the island. Activities/Tours/Excursions make up a large percentage of the visitor spend of a cruise visitor.
- Cruise expenditure also declined in Nassau/Paradise Island because cruise visitors spent less of their money gambling in the on-island casino in 2015 (\$12.30 million) than they had in 2014 (\$14.68 million) despite the fact that the percentage of cruise visitors gambling in the on-island casinos did not change much (4.6% in 2015 vs. 4.5% in 2014).

10. How Many Cruise Visitors To Nassau/Paradise Island Went Shopping?

In 2015, more than half (54%) the cruise visitors who got off the ship did some form of shopping while they were in Nassau/Paradise Island compared to roughly nine in ten (89%) in Grand Bahama. The percentage of cruise visitors that did some form of shopping while in Nassau/Paradise Island has been trending downwards since 2012. In 2012, 61% of the cruise visitors to the island went shopping compared to 56% in 2013, 54% in 2014, and 54% in 2015.

¹ Source: Mrs. Erica Ingraham, Cruise Development Department, Bahamas Ministry of Tourism

11. How Much Did Cruise Visitors Spend On Shopping In Nassau/Paradise Isl.?

In 2015, Cruise Visitors spent \$127.38 million on shopping in Nassau/P.I. compared to \$132.60 million in 2014.

12. What Did Cruise Visitors To Nassau/Paradise Island Buy When They Went Shopping?

CRUISE VISITORS THE BAHAMAS SHOPPING SUMMARY

| | % of Cruise Visitors Who Said Yes | | | | | | | | | |
|------------------------------|-----------------------------------|-------|-------|-------|-------|--------------|-------|-------|-------|-------|
| | Nassau/Paradise Isl. | | | | | Grand Bahama | | | | |
| | 2015 | 2014 | 2013 | 2012 | 2011 | 2015 | 2014 | 2013 | 2012 | 2011 |
| Did Shopping? | 53.5% | 53.6% | 55.7% | 60.6% | 53.0% | 88.9% | 87.8% | 87.2% | 80.5% | 73.6% |
| Bought T-shirts | 76.4% | 67.8% | 75.4% | 69.1% | 79.4% | 64.2% | 67.4% | 62.6% | 50.3% | 48.6% |
| Bought Other Clothing | 9.2% | 12.5% | 10.2% | 12.2% | 13.6% | 21.0% | 23.0% | 23.0% | 24.9% | 21.5% |
| Bought Other Souvenirs | 36.7% | 44.7% | 45.8% | 46.1% | 47.0% | 40.4% | 39.4% | 37.7% | 35.5% | 37.6% |
| Bought Other Items | 38.6% | 28.7% | 20.1% | 34.7% | 42.9% | 31.5% | 38.2% | 28.7% | 35.1% | 27.2% |
| Bought Jewelry | 34.3% | 31.8% | 31.2% | 33.2% | 40.4% | 30.6% | 37.0% | 38.8% | 40.8% | 38.7% |
| Bought Straw Work | 29.5% | 22.2% | 29.0% | 26.8% | 39.4% | 18.5% | 20.7% | 16.7% | 13.7% | 16.5% |
| Bought Perfumes or Cosmetics | 24.2% | 19.5% | 25.0% | 21.4% | 32.2% | 2.7% | 4.6% | 5.2% | 2.0% | 4.5% |
| Bought Liquor | 26.9% | 22.4% | 26.5% | 25.3% | 31.0% | 5.5% | 8.7% | 8.0% | 4.3% | 2.0% |
| Did Hair Braiding | 20.3% | 11.4% | 12.7% | 9.9% | 21.1% | 2.0% | 2.7% | 3.6% | 2.7% | 2.7% |
| Bought Linen | 0.2% | 1.0% | 0.2% | 2.7% | 6.8% | 0.8% | 0.9% | 1.2% | 0.9% | 1.1% |
| Bought Tobacco | 4.1% | 3.5% | 2.1% | 3.0% | 3.3% | 0.5% | 1.0% | 1.2% | 1.9% | 0.7% |
| Bought Leather Goods | 4.6% | 4.0% | 2.9% | 2.7% | 3.1% | 0.5% | 0.4% | 0.4% | 0.9% | 0.7% |
| Bought China/Crystal | 0.0% | 0.2% | 0.6% | 1.6% | 1.6% | 0.5% | 0.6% | 0.9% | 1.8% | 1.8% |

Source: Cruise Expenditure Exit Survey 2015, Bahamas Ministry of Tourism Research & Statistics Dept.

In 2015, more than half of the cruise visitors (54%) who got off the ship in Nassau/Paradise Island went shopping. Cruise Visitors to Nassau/Paradise Island bought T-shirts, clothing, jewelry, straw work, perfumes and cosmetics, liquor, linen, tobacco, leather goods and china/crystal and a host of other goods.

13. How Many Cruise Visitors Bought T-Shirts While In Nassau/Paradise Island?

Of the 54% of the cruise visitors who had done some form of shopping in Nassau/Paradise Island, approximately three in every four (76%) cruise visitors bought t-shirts while on the island in 2015 compared to approximately seven in ten (68%) in 2014 and three in every four (75%) in 2013.

14. How Many Cruise Visitors Bought Jewelry While In Nassau/Paradise Island?

In 2015, approximately one in three (34%) cruise visitors who got off the ship bought jewelry and this percentage did not change much since 2014 (32%) or 2013 (31%).

15. How Many Cruise Visitors Bought Straw Work While In Nassau/Paradise Island?

In 2015, three in ten (30%) cruise visitors to Nassau/P.I. bought straw work, compared to approximately two in ten (22%) in 2014 three in ten (29%) in 2013.

16. How Many Cruise Visitors Bought Liquor While In Nassau/Paradise Island?

In 2015, approximately three in ten (27%) cruise visitors who got off the ship and shopped, bought liquor compared to two in ten (22%) in 2014 and approximately three in ten (27%) in 2013.

17. How Many Cruise Visitors Bought Perfumes And Cosmetics While In Nassau/Paradise Island?

In 2015, approximately one in every four (24%) cruise visitors who got off the ship in Nassau/Paradise Island and shopped bought perfumes or cosmetics during their visit, compared to two in ten (20%) in 2014 and one in four (25%) in 2013.

18. How Many Cruise Visitors Bought Linen While In Nassau/Paradise Island?

In 2015, less than one percent (0.2%) of cruise visitors who got off the ship and shopped bought linen.

19. How Many Cruise Visitors Bought Tobacco While In Nassau/Paradise Island?

One in every twenty-five (4%) cruise visitors who got off the ship bought tobacco products.

20. How Many Cruise Visitors bought Leather Goods while in Nassau/Paradise Island?

One in every twenty (5%) of them bought leather goods.

21. What Other Goods Did Cruise Visitors To Nassau/Paradise Island Purchase?

Of the cruise visitors who purchased other goods the most popular item was rum cake/cake purchased by roughly four in ten (44%) cruise visitors who had bought other items. Some of the cruise visitors also bought other items like hand bags/purses/wallets/tote bags (23% of the cruise visitors purchased this item), hats/caps (15%), beach towel/towels (6%), sea shells/conch shells (5%), postcards (4%), shot glasses (3%), sunglasses (2%), and wooden carvings (2%).

Less popular items purchased by cruise visitors to Nassau/Paradise Island included cane/walking cane, mugs/cups, shoes/slippers/tennis shoes, tea/coffee, candy, fans (handmade), magnets, pens/pencils, posters, ornaments, table cloth, jam, toiletries, toys, key chains, and hair accessories, etc.

22. How Many Cruise Visitors Got Their Hair Braided While In Nassau/Paradise Island?

Approximately two in ten (20%) cruise visitors to Nassau/Paradise Island got their hair braided compared to one in ten (11%) in 2014. Only 2% of cruise visitors to Grand Bahama got their hair braided in 2015 compared to 3% in 2014. There is a hair braiding center right in front of the Cruise Docking area at Festival Place, this is not the case in Grand Bahama.

23. How Much Did Cruise Visitors Spend On Activities/Tours/Excursions?

In 2015, Cruise Visitors spent \$57.35 million on Activities/Tours/Excursions in Nassau/Paradise Island compared to \$72.80 million in 2014, and \$99.85 million in 2013.

24. How Did Cruise Visitors book Their Activities/Tours/Excursions?

HOW DID YOU BOOK YOUR ACTIVITIES/TOURS/EXCURSIONS THE BAHAMAS 2015

| How Activity/Tour Booked | Nassau/P.I. | | | | | Grand Bahama | | | | |
|-----------------------------|-------------|------|------|------|------|--------------|------|------|------|------|
| | 2015 | 2014 | 2013 | 2012 | 2011 | 2015 | 2014 | 2013 | 2012 | 2011 |
| Booked on Board Ship Booked | 29% | 37% | 35% | 44% | 47% | 59% | 62% | 70% | 61% | 73% |
| Independently | 39% | 28% | 34% | 33% | 37% | 29% | 28% | 22% | 31% | 21% |
| Booked On shore | 33% | 36% | 31% | 22% | 16% | 13% | 11% | 9% | 7% | 6% |
| Non-Response | 0% | 0% | 0% | 3% | 2% | 0% | 0% | 0% | 2% | 1% |

Source: Cruise Expenditure Survey 2015, 2014, 2013, 2012 and 2011, Research and Statistics Dept. Bahamas Ministry of Tourism
Some visitors would have booked some of their activities one way and their other activity another way.

The percentage of cruise visitors to Nassau/Paradise Island booking their activities/tours/excursions on board the cruise ship has been trending downwards since 2011. In 2011, approximately half (47%) of the cruise visitors who got off the ship in Nassau/Paradise Island booked their activity/tour/excursion on board the ship compared to roughly four in ten (44%) in 2012, one in three (35%) in 2013 and three in ten (29%) in 2015.

The percentage of cruise visitors to Nassau/Paradise Island booking on shore has trended upwards since 2011 except in 2015.

25. How Much Did Cruise Visitors Spend On Transportation?

In 2015, Cruise Visitors to Nassau/Paradise Island spent more on Transportation than they had in 2014. In 2015, they spent \$16.31 million on transportation compared to \$14.98 million in 2014.

26. How Much Did Cruise Visitors Spend On Playing In The On Island Casino?

The amount that cruise visitors spent in the on island casino has declined over the years even though the percentage of them playing in the casinos has remained stable. This decline in the amount spent in the casino is no doubt due to the fact that all of the cruise lines have their own on-board casino where the cruise visitors could gamble at will. In 2015, cruise visitors spent \$12.30 million playing in the on-island casino in Nassau/Paradise Island compared to \$14.68 million in 2014, \$15.26 in 2013, and \$32.09 million in 2012.

27. How Much Did Cruise Visitors Spend On Meals And Drinks Off The Ship?

The amount of money cruise visitors spent on purchasing food and drinks off the ship declined over the last few years. In 2015, cruise visitors to Nassau/Paradise Island spent \$29.11 million on meals and drinks that they had purchased when they got off the ship compared to \$33.95 million in 2014, and \$42.07 million that they had spent in 2013.

28. How Many Cruise Visitors Bought Food And Drinks When They Got Off The Ship In Nassau/Paradise Island?

Some of the cruise visitors while they were off the ship bought full meals or snacks while others just bought water, soda/juice/drink, ice cream, or snacks.

The percentage of cruise visitors that purchased food and drinks while they were off the ship increased between 2011 and 2014 but fell in 2015. In 2011, roughly
Cruise Expenditure Survey 2015 Research & Statistics Dept. Ministry of Tourism

four in ten (40%) cruise visitors who got off the ship in Nassau/Paradise Island bought food or drink on the island compared to six in ten (60%) in 2012, two in every three (64%) in 2013, seven in ten (71%) in 2014, and six in ten (62%) in 2015.

29.What Were Some Of The Most Popular Restaurants Where Cruise Visitors Ate In Nassau/Paradise Island?

In 2015 and 2014, Señor Frogs was the most popular restaurant where cruise visitors dined while they were in Nassau/Paradise Island. The next most popular restaurants in both of these years were Sharkeez Bar and Grill, and Via Caffè. In 2013, the Hard Rock Café was the 2nd most popular restaurant but not in 2014 or 2015.

The other popular restaurants where cruise visitors ate or drank while they were in Nassau/Paradise Island were: Burger King, Dunkin Donuts, Fish Fry (e.g. Big Yard, Curly's Restaurant & Bar, Goldie's Conch House, Oh Andros, Twin Brothers, Seafood Haven, etc.), Fat Tuesday, Hard Rock Café, Jimmy's Takeaway, Johnny Rockets, Lucianos of Chicago, McDonalds, Olives Mediterranean Café & Bar, Pepper Pot, Pirate's Pub, Poop Deck, Shark Bites, Starbucks, Subway, Tart Frozen Yogurt, etc. *(Listed in alphabetical order, all restaurants are not listed.)*

30.How Many Cruise Visitors To Nassau/P.I. Bought Water On The Island?

In 2015, approximately four in every ten (38%) cruise visitors who got off the ship in Nassau/Paradise Island and bought food or drinks bought water during their time ashore on the island. The percentage of cruise visitors who purchased water in 2015 remained unchanged from its 2014 level of 38%, but this percentage was higher than the 2013 percentage of 33%.

31.How Many Cruise Visitors To Nassau/Paradise Island Bought Soda/Juice/Drinks On The Island?

The percentage of cruise visitors that came ashore and purchased soda/juice/drinks has trended down since 2013. In 2015, approximately one in every ten (9%) cruise visitors who got off the ship and bought food or drinks in Nassau/Paradise Island bought soda/juice or some kind of drink compared to 13% in 2014 and 17% of them who did this in 2013.

32.How Many Cruise Visitors To Nassau/P.I. Bought Ice Cream On The Island?

In 2015, approximately one in every sixteen (6%) cruise visitors who got off the ship bought ice cream while ashore in Nassau/Paradise Island compared to approximately one in ten (8%) in 2014.

33.How Many Cruise Visitors To Nassau/P.I. Were Repeat Visitors?

In 2015, more than half (53%) of the cruise visitors who visited Nassau/Paradise Island had visited The Bahamas before compared to 45% in 2014 and 48% of them in 2013.

34. How Many Times Had Cruise Visitors To Nassau/Paradise Island Visited The Bahamas Before?

Of the cruise visitors that had visited The Bahamas before, one in every three (33%) had visited one time before. Approximately three in ten (29%) cruise visitors had visited The Bahamas two times before, and roughly four in ten (37%) had visited three or more times before.

35. When Cruise Visitors Came To The Bahamas Before, Did They Also Come On A Cruise Ship Or Did They Stay On Shore?

**WHEN YOU CAME BEFORE WAS THAT ALSO ON A CRUISE SHIP
OR DID YOU STAY ON SHORE?**

| | | | Nassau |
|-----------------------------|-----------------|-------|--------|
| When You Came Before | Cruise | Count | 192 |
| Was it on a Cruise Visit or | | Col % | 42.5% |
| Did You Stay On-shore | Stayed on shore | Count | 114 |
| | | Col % | 25.2% |
| | Both | Count | 146 |
| | | Col % | 32.3% |
| Total | Count | | 452 |
| | Col % | | 100.0% |

- The percentage of cruise visitors to Nassau/Paradise Island that came to the Bahamas before on a cruise ship trended down in the years 2012, 2013 and 2014. In 2015, the percentage of cruise visitors that had come to the Bahamas before on a cruise ship remained unchanged from that of 2014. The percentage of cruise visitors that had done both: i.e., cruised to The Bahamas or stayed on shore at one time or another, has increased over the years.
- In 2015 and 2014, four in ten (43%) cruise visitors to Nassau/Paradise Island indicated that they had come to The Bahamas before on a cruise ship compared to six in ten (59%) in 2013, and two in every three (66%) in 2012.
- In 2015, one in every four (25%) cruise visitors to Nassau/Paradise Island indicated that they had come to The Bahamas before and stayed on shore compared to 20% of them in 2014, 16% in 2013, and 18% in 2012.
- Approximately three in ten (32%) cruise visitors to Nassau/Paradise Island who had visited The Bahamas before had done both: i.e., cruised to The Bahamas or stayed on shore at one time or another, compared to four in ten (37%) of them in 2014, one in four (25%) in 2013 and 15% in 2012.

36. Did Cruise Visitors To Nassau/Paradise Island Say That They Would Return To The Bahamas Again As A Vacation Destination, Either As Part Of A Cruise Or For A Land Based Vacation?

Nine in ten (90% i.e., 61.7% definitely would & 28.5% probably would) cruise visitors who came ashore in Nassau/Paradise Island indicated that they would return to The Bahamas as a vacation destination either as part of a cruise or for a longer land based stay in a hotel.

37. How Many Cruise Visitors To Nassau/Paradise Island Who Indicated That They Would Return, Said That They Would Come Back On A Cruise?

Of the cruise visitors to Nassau/Paradise Island who came ashore and indicated that they would definitely or probably return, approximately three in ten (29%) of them indicated that they would come back on a cruise ship again.

38. How Many Cruise Visitors To Nassau/Paradise Island Who Indicated That They Would Return Said That They Would Come Back And Stay In A Hotel?

Of the cruise visitors to Nassau/Paradise Island who came ashore and indicated that they would definitely or probably return, more than half (52%) indicated that they would stay in a hotel when they returned.

39. How Many Cruise Visitors To Nassau/Paradise Island Who Indicated That They Would Return, Said That They Would Do Both: Come Back And Stay In A Hotel And Come Back On A Cruise?

Of the cruise visitors to Nassau/Paradise Island who came ashore and indicated that they would definitely or probably return, approximately one in ten (9%) of indicated that they would do both, come back and stay in a hotel or come back on a cruise.

40. How Many Cruise Visitors To Nassau/Paradise Island Who Came Ashore Said That They Would Recommend The Bahamas To Their Friends And Relatives As A Place To Visit?

The majority (99% i.e., 62.6% definitely would & 36.1% probably would) of cruise visitors who had come ashore in Nassau/Paradise Island indicated that they would recommend The Bahamas as a place for their friends/relatives to visit.

41. Did Cruise Visitors To Nassau/Paradise Island Say That They Had Attended A Talk Or Lecture About The Island?

BEFORE YOU GOT OFF THE SHIP, DID YOU ATTEND A TALK OR LECTURE ABOUT WHAT THERE WAS TO SEE AND DO WHILE HERE?

| | | | Nassau |
|-----------------------------|-----|-------|--------|
| Before Getting off Ship Did | Yes | Count | 465 |
| You Attend a talk/lecture | | Col % | 54.3% |
| About What to See or Do | No | Count | 391 |
| While Here? | | Col % | 45.7% |
| Total | | Count | 856 |
| | | Col % | 100.0% |

More than half (54%) of the cruise visitors to Nassau/Paradise Island who had gotten off the ship indicated that yes they had attended a talk or lecture about what there was to see and do while they were on the island before they got off the ship.

42. Did Cruise Visitors To Nassau/Paradise Island Say That They Had Obtained Other Information About What To See And Do While They Were On Island?

DID YOU GET ANY OTHER INFORMATION ABOUT WHAT TO SEE AND DO HERE?

| | | | Nassau |
|--|-----|-------|--------|
| Did You Get Any Other Information About What to See and Do Here? | Yes | Count | 427 |
| | | Col % | 49.9% |
| | No | Count | 429 |
| | | Col % | 50.1% |
| Total | | Count | 856 |
| | | Col % | 100.0% |

In 2015, half (50%) the cruise visitors to Nassau/Paradise Island indicated that they did get information other than a talk/lecture about what there was to see and do while they were on the island before they got off the ship.

43. Where Did The Other Information About What To Do And See While On Nassau/Paradise Island Come From?

The most popular means for cruise visitors to find out information on what to see or do while in Nassau/Paradise Island other than a talk/lecture on the ships included: Brochures/pamphlets/flyers, maps, the Internet, television on board the ship, cruise directors and tour directors. Many cruise visitors used more than one of these means to obtain information.

WHERE DID THE OTHER INFORMATION ABOUT WHAT TO SEE AND DO HERE COME FROM?

| | | Nassau | |
|-------------------|-------------------------------------|--------|-------|
| | | Count | Col % |
| Other Information | Brochures/Pamphlets/Flyers/Booklets | 251 | 58.8% |
| | Maps | 236 | 55.3% |
| | Internet | 83 | 19.4% |
| | Television on board ship | 77 | 18.0% |
| | Cruise Director | 28 | 6.6% |
| | Tour Director | 24 | 5.6% |
| | Other people/neighbours | 4 | .9% |
| | Non Response | 11 | 2.6% |

Approximately six in ten cruise visitors obtained information on what to see and do while in Nassau/Paradise Island from the brochures/pamphlets/flyers/booklets (59%) or maps (55%).

44. How Many Times Did Cruise Passengers Get Off The Ship When They Were Docked In Nassau/Paradise Island?

Approximately seven in ten (71%) cruise passengers who got off the ship did so one time and approximately three in ten (28%) got off two times.

45. What Did Cruise Visitors To Nassau/P.I. Say Would Have Made Their Trip Better?

Length of Stay: Approximately four in ten (38%) negative comments received from cruise visitors to Nassau/P.I. about what would have made their trip more enjoyable were about length of stay. These cruise visitors thought that their length of stay in Nassau/P.I. was not long enough i.e. they needed more time, more time to shop, more time to enjoy the island, more time at the beach, more time to explore, more time to play in the casino, more time to do a tour, etc. Length of stay was a negative for them but a positive for Nassau/Paradise Island as it is desired that the cruise visitors would want a longer stay.

46.Cruise Visitor Demographics:

**DEMOGRAPHICS
NASSAU/PARADISE ISLAND
CRUISE VISITORS
2015**

| | 2015 | 2014 |
|---|-------------|-------------|
| CRUISE VISITORS LIKELY TO RETURN | 90% | 89% |
| Those Who Would Return and Stay in a Hotel | 52% | 32% |
| Those Who Would Return by Cruise ship | 29% | 49% |
| Those Who Would Return & Do a Cruise or a Land Stay | 9% | 15% |
| CRUISE VISITORS LIKELY TO RECOMMEND | 99% | 99% |
| REPEAT VISITORS | 53% | 45% |
| AGE | | |
| 18-24 | 2% | 2% |
| 25-34 | 11% | 12% |
| 35-44 | 24% | 23% |
| 45-54 | 35% | 31% |
| 55-64 | 18% | 20% |
| 65 yrs. & over | 10% | 13% |
| AGE OF CHILD TRAVELLING | | |
| Under 12 months | 1% | 6% |
| Age 1 to 5 | 13% | 18% |
| Age 6 to 11 | 39% | 37% |
| Age 12 to 17 | 38% | 28% |
| Over 17 yrs. | 9% | 12% |
| SEX | | |
| Male | 22% | 20% |
| Female | 78% | 80% |
| TRAVELLING PARTY SIZE | | |
| One | 1% | 1% |
| Two | 59% | 59% |
| Three | 10% | 10% |
| Four or More | 30% | 31% |
| AVERAGE TRAVELLING PARTY SIZE | 3.0 | 4.0 |
| HOW VISITORS WERE TRAVELLING (Travel Type) | | |
| Alone | 1% | 1% |
| As a couple | 56% | 55% |
| As a family | 38% | 36% |
| As a group | 5% | 9% |

**DEMOGRAPHICS
NASSAU/PARADISE ISLAND
CRUISE VISITORS
2015**

| | 2015 | 2014 |
|-----------------------------------|-------------|-------------|
| HOUSEHOLD INCOME* | | |
| \$25,001-\$50,000 | 25% | 24% |
| \$50,001-\$75,000 | 17% | 22% |
| \$75,001 and Over | 27% | 17% |
| TOP STATES: WHERE YOU LIVE | | |
| Florida | 16% | 19% |
| New York | 7% | 7% |
| Ohio | 6% | 7% |
| Georgia | 6% | 8% |
| Pennsylvania | 6% | 6% |
| Illinois | 5% | 6% |
| Texas | 5% | 3% |
| Tennessee | 4% | 4% |
| Virginia | 4% | 3% |
| South Carolina | 4% | 3% |
| North Carolina | 4% | 4% |
| Massachusetts | 4% | 4% |
| California | 3% | 5% |
| New Jersey | 3% | 2% |
| COUNTRY OF RESIDENCE | | |
| USA | 97% | 94% |
| Canada | 1% | 3% |
| Europe | 2% | 1% |
| Other | 1% | 1% |

Source: Cruise Expenditure Survey 2015 and 2014, Research and Statistics Dept. Bahamas Ministry of Tourism

47. What is Tourism?

Tourism: The “activities of persons traveling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated (i.e. without receiving a salary/wage for said activity/activities) from within the place visited”. (Source: United Nations World Tourism Organization UNWTO, & *Wikipedia, The Free Encyclopedia*).

TYPE OF VISITORS

Visitors to the Islands of The Bahamas can come to the Bahamas by air or by sea.

Air arrivals are visitors who come to the destination by air and may include stopover visitors, day visitors, and transit visitors.

Sea arrivals are visitors who come to the destination by sea, i.e. cruise arrivals. Sea arrivals also include stopover visitors like boaters/yachters.

Main Types of Visitors

Stopovers defined as persons staying for 24 hours or more, hotel visitors help to make up the stopover visitors. Boaters/yachters are also stopover visitors even though they may come to the islands by sea.

Cruise Stopover Visitors are a special category of visitors that we have for Grand Bahama primarily. These visitors come to The Bahamas on a cruise ship but stay in land based accommodations and stay 24 hours or more.

Cruise Visitors defined as persons visiting The Islands of The Bahamas by cruise ship and using the cruise ship for their accommodation.

Day Visitors defined as persons visiting The Islands of The Bahamas for less than 24 hours

Transits defined as persons in transit from one country to another.

Information in this brochure is based on the Nassau/Paradise Island Cruise Expenditure Exit Surveys 2015, 2013, and 2012. If you have any questions about this report, you may contact the Director, Research and Statistics Department using the following information below:



Ms. Georgina Delancy
Research and Statistics Department
Bahamas Ministry of Tourism
P.O. Box N-3701
Nassau, Bahamas
Tel: 242-302-2094 Fax: 242-328-7991
gdelancy@bahamas.com
www.Tourismtoday.com and www.bahamas.com