

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



**RESEARCH AND STATISTICS DEPARTMENT
MINISTRY OF TOURISM
2016**

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1. Cruise Ships in the Cruise Expenditure Survey 2016

NAMES OF SHIP IN SURVEY 2016

| | | Nassau |
|-------------------------|---------------|-------------|
| Ship Name | Norwegian Sky | Count 101 |
| | | Col % 13.4% |
| Enchantment of the Seas | | Count 92 |
| | | Col % 12.3% |
| Majesty of the Seas | | Count 68 |
| | | Col % 9.1% |
| Carnival Victory | | Count 63 |
| | | Col % 8.4% |
| Norwegian Escape | | Count 51 |
| | | Col % 6.8% |
| Disney Dream | | Count 47 |
| | | Col % 6.3% |
| Ecstasy | | Count 43 |
| | | Col % 5.7% |
| Carnival Valor | | Count 40 |
| | | Col % 5.3% |
| Elation | | Count 32 |
| | | Col % 4.3% |
| Carnival Sunshine | | Count 23 |
| | | Col % 3.1% |
| MSC Divina | | Count 23 |
| | | Col % 3.1% |
| Carnival Conquest | | Count 19 |
| | | Col % 2.5% |
| Carnival Fascination | | Count 16 |
| | | Col % 2.1% |
| Norwegian Gem | | Count 14 |
| | | Col % 1.9% |
| Disney Magic | | Count 13 |
| | | Col % 1.7% |
| Sensation | | Count 13 |
| | | Col % 1.7% |
| Carnival Fantasy | | Count 12 |
| | | Col % 1.6% |
| Norwegian Breakaway | | Count 12 |
| | | Col % 1.6% |
| Allure of the Seas | | Count 11 |
| | | Col % 1.5% |
| Carnival Pride | | Count 9 |
| | | Col % 1.2% |
| Harmony of the Seas | | Count 6 |
| | | Col % 0.8% |

NAMES OF SHIP IN SURVEY 2016

| | | Nassau |
|--------------------------------------|-------|--------|
| Ship Name Empress of the Seas | Count | 5 |
| | Col % | 0.7% |
| Infinity | Count | 5 |
| | Col % | 0.7% |
| Oasis of the Seas | Count | 5 |
| | Col % | 0.7% |
| Norwegian Getaway | Count | 5 |
| | Col % | 0.7% |
| Carnival Freedom | Count | 4 |
| | Col % | 0.5% |
| Carnival Glory | Count | 4 |
| | Col % | 0.5% |
| Grandeur of the Seas | Count | 4 |
| | Col % | 0.5% |
| Disney Wonder | Count | 3 |
| | Col % | 0.4% |
| Insignia | Count | 3 |
| | Col % | 0.4% |
| AidaMar | Count | 2 |
| | Col % | 0.3% |
| Celebrity Reflection | Count | 1 |
| | Col % | 0.1% |
| Costa Deliziosa | Count | 1 |
| | Col % | 0.1% |
| M/S Riviera | Count | 1 |
| | Col % | 0.1% |
| Count | | 751 |
| TOTAL Col % | | 100.0% |

2. How Much Money Did Cruise Visitors Spend In Nassau/Paradise Island In 2016?

In 2016, Cruise Visitors to Nassau/Paradise Island spent \$235.09 million compared to \$242.46 million in 2015, a decline of -3.0%.

3. What Was The Average Expenditure Per Cruise Visitor In Nassau/Paradise Island In 2016?

The average expenditure of a cruise visitor to Nassau/Paradise Island has trended downward since 2013. In 2016, the average expenditure for a Cruise Visitor to Nassau/P.I. was \$73.08 compared to \$79.92 in 2015, \$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. The average expenditure made by cruise visitors in Nassau/Paradise Island has trended down since 2013 on all of the major cruise lines.
- In 2016, the average expenditure of a cruise visitor to Nassau/Paradise Island on the Carnival fleet of ships was \$74.40, compared \$81.71 in 2015, \$76.04 in 2014, and \$90.65 in 2013.
- In 2016, the average expenditure of a cruise visitor on the Royal Caribbean ships was \$79.48 compared to \$82.38 in 2015, \$92.83 in 2014, and \$102.84 in 2013.
- In 2016, the average expenditure for a cruise visitor who came to the island on the Norwegian Cruises' fleet of ships was \$73.79 compared to \$78.75 in 2015, \$87.22 in 2014, and \$111.14 in 2013.
- In 2016, the average expenditure for a cruise visitor who came on the Disney Cruise Line ships was \$62.67 compared to \$92.34 in 2015, \$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?

Two in every ten (20%) cruise visitors on average 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 (53%) 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?

Approximately half (47%) the 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 2016 (7%) compared to 2015 (9%), and 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 (7%) cruise visitors 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 2016 & 2015

| Expenditure by Category | 2016 | | 2015 | | 16/15 |
|-----------------------------|-------------------|---------------|-------------------|---------------|--------------|
| | Expenditure (mln) | % SHR | Expenditure (mln) | % SHR | % CHG |
| Shopping | \$108.47 | 46.1% | \$127.38 | 52.5% | -14.9% |
| Activities/Tours/Excursions | \$51.95 | 22.1% | \$57.35 | 23.7% | -9.4% |
| Meals and Drinks off Ship | \$25.64 | 10.9% | \$29.11 | 12.0% | -11.9% |
| Transportation | \$20.78 | 8.8% | \$16.31 | 6.7% | 27.4% |
| Casino | \$28.25 | 12.0% | \$12.30 | 5.1% | 129.6% |
| Nightlife | \$0.00 | 0.0% | \$0.00 | 0.0% | 0.0% |
| Total New Providence | \$235.09 | 100.0% | \$242.46 | 100.0% | -3.0% |

Source: Cruise Expenditure Survey 2016 and 2015, Research & Statistics Dept., Bahamas Ministry of Tourism

Cruise visitors spent most of their money on shopping and activities/tours/excursions. Roughly half (46%) of the money spent by cruise visitors in Nassau/P.I. was on shopping. Approximately twenty-two percent (22%) 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 (11% on this), transportation (9% on this), and playing in the on island casino (12% of expenditure was on this).

10. Some of the Reasons for the Decline In Total Cruise Expenditure Between 2014 to 2016?

- 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.
- Although the number of cruise arrivals (all ports of call) to Nassau/Paradise Island increased between 2016 (3.53 million) and 2015 (3.32 million), the passengers that got off the ship did not on average spend more money.
- The average expenditure per person declined by -8.6% in 2016 compared to 2015, 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.
- With the closure of Festival Place, the vendors were placed on the outside of the building in the front area near the hair braiding center in booths.
- When the slide in average expenditure was first noticed, the vendors were interviewed to find out what they were experiencing. They said that the closure of Festival Place had impacted them greatly.
 - The vendors indicated that the cruise visitors looked at the goods from a distance and did not spend time browsing the booths because they were outside and avoided shopping when the sun was really hot or it rained.

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

- The vendors also felt that the cruise visitors preferred to be in an air conditioned environment like Festival Place rather than shop in the outdoors with weather that was not always predictable.
 - In addition, the vendors felt that being outside caused their products to be devalued in the minds of the cruise visitors who appeared to now not want to spend the price that was being asked.
 - The vendors at Festival Place also felt that the environment in the front of the building was not conducive enough to entice the cruise visitors to shop because there was too much inappropriate behavior nearby (e.g. cussing by Bahamians nearby) that scared away the cruise visitors.
 - The vendors also mentioned that the nearby unpleasant smell of the area (surreys are located nearby and cruise visitors have often themselves complained about the area not smelling good) caused them to lose business.
- Cruise Visitors to Nassau/Paradise Island spent less money on shopping, activities/tours/excursions, and meals and drinks off the ship.
 - The percentage of cruise visitors that went shopping has declined over the years and this helped to cause a decline in overall cruise expenditure in the destination. 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 and 47% in 2016.
 - 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, \$57.35 million in 2015, and \$51.95 million in 2016. With cruise visitors spending less money purchasing Activities/Tours/Excursions, total expenditure by cruise visitors in the destination would have been significantly impacted.
 - Cruise expenditure also declined in Nassau/Paradise Island because cruise visitors spent less of their money eating off the ship in 2016 (\$25.64 million) than they had in 2015 (\$29.11 million).
 - In October 2016, Hurricane Matthew passed through the Islands of the Bahamas and caused a lot of destruction to some of the islands. Ships that were scheduled to come to Nassau/Paradise Island were re-routed to other destinations.

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

In 2016, approximately half (47%) 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 (86%) 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 and 47% in 2016.

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

In 2016, Cruise Visitors spent \$108.47 million on shopping in Nassau/P.I. compared to \$127.38 million in 2015.

13. 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 | | | | | |
| | 2016 | 2015 | 2014 | 2013 | 2012 | 2011 | 2016 | 2015 | 2014 | 2013 | 2012 | 2011 |
| Did Shopping? | 46.6% | 53.5% | 53.6% | 55.7% | 60.6% | 53.0% | 85.8% | 88.9% | 87.8% | 87.2% | 80.5% | 73.6% |
| Bought T-shirts | 82.3% | 76.4% | 67.8% | 75.4% | 69.1% | 79.4% | 56.0% | 64.2% | 67.4% | 62.6% | 50.3% | 48.6% |
| Bought Other Clothing | 8.6% | 9.2% | 12.5% | 10.2% | 12.2% | 13.6% | 22.3% | 21.0% | 23.0% | 23.0% | 24.9% | 21.5% |
| Bought Other Souvenirs | 37.4% | 36.7% | 44.7% | 45.8% | 46.1% | 47.0% | 42.7% | 40.4% | 39.4% | 37.7% | 35.5% | 37.6% |
| Bought Other Items | 38.6% | 38.6% | 28.7% | 20.1% | 34.7% | 42.9% | 27.2% | 31.5% | 38.2% | 28.7% | 35.1% | 27.2% |
| Bought Jewelry | 32.9% | 34.3% | 31.8% | 31.2% | 33.2% | 40.4% | 24.2% | 30.6% | 37.0% | 38.8% | 40.8% | 38.7% |
| Bought Straw Work | 40.3% | 29.5% | 22.2% | 29.0% | 26.8% | 39.4% | 17.6% | 18.5% | 20.7% | 16.7% | 13.7% | 16.5% |
| Bought Perfumes or Cosmetics | 24.6% | 24.2% | 19.5% | 25.0% | 21.4% | 32.2% | 2.1% | 2.7% | 4.6% | 5.2% | 2.0% | 4.5% |
| Bought Liquor | 30.3% | 26.9% | 22.4% | 26.5% | 25.3% | 31.0% | 4.0% | 5.5% | 8.7% | 8.0% | 4.3% | 2.0% |
| Did Hair Braiding | 22.0% | 20.3% | 11.4% | 12.7% | 9.9% | 21.1% | 3.2% | 2.0% | 2.7% | 3.6% | 2.7% | 2.7% |
| Bought Linen | 0.6% | 0.2% | 1.0% | 0.2% | 2.7% | 6.8% | 0.0% | 0.8% | 0.9% | 1.2% | 0.9% | 1.1% |
| Bought Tobacco | 4.3% | 4.1% | 3.5% | 2.1% | 3.0% | 3.3% | 0.6% | 0.5% | 1.0% | 1.2% | 1.9% | 0.7% |
| Bought Leather Goods | 6.6% | 4.6% | 4.0% | 2.9% | 2.7% | 3.1% | 0.3% | 0.5% | 0.4% | 0.4% | 0.9% | 0.7% |
| Bought China/Crystal | 0.6% | 0.0% | 0.2% | 0.6% | 1.6% | 1.6% | 0.3% | 0.5% | 0.6% | 0.9% | 1.8% | 1.8% |

Source: Cruise Expenditure Exit Survey 2011 to 2016, Bahamas Ministry of Tourism Research & Statistics Dept.

In 2016, roughly half (47%) of the cruise visitors 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.

14. How Many Cruise Visitors Bought T-Shirts While In Nassau/Paradise Island? Of the 47% of the cruise visitors who had done some form of shopping in Nassau/Paradise Island, approximately eight in ten (82%) bought t-shirts while on the island in 2016 compared to approximately three in every four (76%) in 2015, 68% in 2014, and 75% in 2013.

15. How Many Cruise Visitors Bought Jewelry While In Nassau/Paradise Island? In 2016, one in three (33%) cruise visitors who got off the ship bought jewelry compared to 2015 (34%), 2014 (32%) or 2013 (31%).

16. How Many Cruise Visitors Bought Straw Work While In Nassau/Paradise Island? In 2016, the percentage of persons that bought straw work went back up to the 2011 levels. In December 2011, the new straw market opened up in downtown Nassau. The percentage of cruise visitors that purchased straw work began to trend back up in 2015. In 2016, four in ten (40%) cruise visitors purchased straw work compared to three in ten (30%) in 2015, two in ten (22%) in 2014 and approximately three in ten (29%) in 2013.

17. How Many Cruise Visitors Bought Liquor While In Nassau/Paradise Island? In 2016, three in ten (30%) cruise visitors who got off the ship and shopped, bought liquor; this percentage did not change significantly from 2015 (27%). In 2014, approximately two in ten (22%) cruise visitors bought liquor compared to approximately three in ten (27%) in 2013.

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

In 2016, approximately one in every four (25%) cruise visitors who got off the ship in Nassau/Paradise Island and shopped, bought perfumes or cosmetics during their visit, and this percentage did not change much from 2015 (24%).

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

In 2016, approximately one percent (0.6%) of cruise visitors who got off the ship and shopped bought linen.

20. 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.

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

Approximately one in every ten (7%) of them bought leather goods.

22. 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 approximately one in every three (32%) cruise visitors who had bought other items. Some of the cruise visitors also bought other items like hand bags/purses/wallets/tote bags (22% of the cruise visitors purchased this item), hats/caps (19%), beach towel/towels (10%), sea shells/conch shells (7%), mugs/cups (7%), key chains (4%), books/magazines (4%), shoes/slippers/tennis shoes (4%), soaps/toiletries (4%) and sunglasses (4%).

Less popular items purchased by cruise visitors to Nassau/Paradise Island included beach bags, cane/walking cane, fans (handmade), pens/pencils, magnets, masks/wooden masks, hair accessories, postcards, shot glasses, and tea/coffee, toys, etc.

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

In 2016, approximately two in ten (22%) cruise visitors that got off the ship got their hair braided; this percentage did not change much from 2015. In 2015, approximately two in ten (20%) cruise visitors to Nassau/Paradise Island got their hair braided compared to one in ten (11%) in 2014. Only 3% of cruise visitors to Grand Bahama got their hair braided in 2016. 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.

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

In 2016, Cruise Visitors spent \$51.95 million on Activities/Tours/Excursions in Nassau/Paradise Island compared to \$57.35 million in 2015, \$72.80 million in 2014, and \$99.85 million in 2013.

25. How Did Cruise Visitors Book Their Activities/Tours/Excursions?

HOW DID YOU BOOK YOUR ACTIVITIES/TOURS/EXCURSIONS THE BAHAMAS 2016

| How Activity/Tour Booked | Nassau/P.I. | | | | | | Grand Bahama | | | | | |
|--------------------------|-------------|------|------|------|------|------|--------------|------|------|------|------|------|
| | 2016 | 2015 | 2014 | 2013 | 2012 | 2011 | 2016 | 2015 | 2014 | 2013 | 2012 | 2011 |
| Booked on Board Ship | 18% | 29% | 37% | 35% | 44% | 47% | 61% | 59% | 62% | 70% | 61% | 73% |
| Booked Independently | 52% | 39% | 28% | 34% | 33% | 37% | 28% | 29% | 28% | 22% | 31% | 21% |
| Booked On shore | 31% | 33% | 36% | 31% | 22% | 16% | 11% | 13% | 11% | 9% | 7% | 6% |
| Non-Response | 0% | 0% | 0% | 0% | 3% | 2% | 0% | 0% | 0% | 0% | 2% | 1% |

Source: Cruise Expenditure Survey 2016, 2015, 2014, 2013, 2012 and 2011, Research and Statistics Dept. Bahamas Ministry of Tourism
Some cruise 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 that booked their activities/tours/excursions on board the cruise ship has trended downwards since 2011 except in 2014. 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, approximately one in three (35%) in 2013, three in ten (29%) in 2015 and two in ten (18%) in 2016.

The percentage of cruise visitors to Nassau/Paradise Island that booked their activities/tours/excursions on shore trended upwards between 2011 to 2014, before it fell again in 2015 and 2016.

26. How Much Did Cruise Visitors Spend On Transportation?

In 2016, Cruise Visitors to Nassau/Paradise Island spent more on Transportation than they had in 2015. In 2016, they spent \$20.78 million on transportation compared to \$16.31 million in 2015 and \$14.98 million in 2014.

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

Cruise visitors spent less money in the on island casino in 2013 to 2015 than they did in 2016. In 2016, cruise visitors spent \$28.25 million playing in the on-island casino in Nassau/Paradise Island compared to \$12.30 million in 2015, \$14.68 million in 2014, \$15.26 in 2013, and \$32.09 million in 2012.

28. 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 has trended downwards since 2013. In 2013, cruise visitors to Nassau/Paradise Island spent \$42.07 million compared to \$33.95 million in 2014, \$29.11 million in 2015, and \$25.64 million in 2016.

29. 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 again in 2015 and 2016. In 2011, roughly four in ten (40%) cruise visitors who got off the ship in Nassau/Paradise Island bought food or drink on the island compared to 60% in 2012, 64% in 2013, 71% in 2014, 62% in 2015 and 57% in 2016.

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

In 2016, 2015 and 2014, Señor Frogs was the most popular restaurant where cruise visitors dined while they were in Nassau/Paradise Island. In 2016, the next most popular restaurants were Subway, Via Caffe, and Sharkeez Bar and Grill.

In 2013, the Hard Rock Café was the 2nd most popular restaurant but not in 2014, 2015, or 2016.

The other popular restaurants where cruise visitors ate or drank while they were in Nassau/Paradise Island were: Anthony's Grill, Bahama Jammers Restaurant Bar, Bearded Clam Sports Bar, Burger King, Dunkin Donuts, Fish Fry (e.g. Big Yard, Goldie's Conch House, Oh Andros, Twin Brothers, etc.), Fat Tuesday, Hard Rock Café, Ichiban Restaurant, Jimmy's Takeaway, Johnny Rockets, McDonald's, Olives Mediterranean Café & Bar, Pirate Republic Brewing Company, Poop Deck, Shark Bites, Starbucks, Tart Frozen Yogurt, etc. *(Listed in alphabetical order, all restaurants are not listed.)*

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

In 2016, approximately three in every ten (31%) 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 compared to four in ten (38%) in 2015.

32. 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 2013, approximately two in ten (17%) cruise visitors who got off the ship and bought food or drinks while in Nassau/Paradise Island bought soda/juice or some kind of drink compared to 13% in 2014, 9% in 2015, and 7% in 2016.

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

In 2016, approximately one in every sixteen (6%) cruise visitors who got off the ship bought ice cream while ashore in Nassau/Paradise Island compared to 6% in 2015, and 8% in 2014.

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

In 2016, half (49%) the cruise visitors who visited Nassau/Paradise Island had visited The Bahamas before compared to 53% in 2015, 45% in 2014, and 48% of them in 2013.

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

In 2016, of the cruise visitors that had visited The Bahamas before, four in ten (39%) had visited one time before. Approximately one in three (34%) cruise visitors had visited The Bahamas two times before, and approximately three in ten (27%) had visited three or more times before.

36. 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 | 162 |
| Was it on a Cruise Visit or | | Col % | 44.5% |
| Did You Stay On-shore | Stayed on shore | Count | 98 |
| | | Col % | 26.9% |
| | Both | Count | 102 |
| | | Col % | 28.0% |
| | Non Response | Count | 2 |
| | | Col % | .5% |
| Total | Count | | 364 |
| | 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 but in 2016, this percentage began to climb back up again.
- In 2012, two in every three (66%) cruise visitors that came to Nassau/Paradise Island had come before on a cruise ship compared to 59% in 2013, 43% in 2014, and 43% in 2015. In 2016 roughly half (45%) of the cruise visitors to Nassau/Paradise Island who had visited before had come on a cruise ship.
- The percentage of cruise visitors to Nassau/Paradise Island that came to the Bahamas before and stayed on shore has trended up over the years. In 2012, two in ten (18%) cruise visitors that had come to the Bahamas before stayed on shore compared to 20% in 2014, 25% in 2015, and 27% in 2016.
- The percentage of cruise visitors that had done both: i.e., cruised to The Bahamas before or stayed on shore at one time or another, trended up between 2012 and 2014 but fell again in 2015 and 2016. In 2012, 15% of cruise visitors that came to the Bahamas before had done both: i.e., cruised to The Bahamas before or stayed on shore at one time or another, compared to 25% in 2013, and 37% in 2014. In 2015 however, 32% of cruise visitors that had visited the Bahamas before had cruised to The Bahamas or stayed on shore at one time or another compared to 28% in 2016.

37. 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., 59.3% definitely would & 30.4% 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.

38. 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 one in four (24%) of them indicated that they would come back on a cruise ship again.

39. 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 said that they would definitely or probably return, approximately half (51%) indicated that they would stay in a hotel when they returned.

40. 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 said that they would definitely or probably return, approximately one in ten (13%) indicated that they would do both, come back and stay in a hotel or come back on a cruise.

41. 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., 53.7% definitely would & 45.4% 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.

42. 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 | 390 |
| | | Col % | 51.9% |
| About What to See or Do | No | Count | 359 |
| While Here? | | Col % | 47.8% |
| | Non Response | Count | 2 |
| | | Col % | .3% |
| Total | | Count | 751 |
| | | Col % | 100.0% |

Approximately half (52%) the cruise visitors to Nassau/Paradise Island 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.

43. 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 | 436 |
| | | Col % | 58.1% |
| | No | Count | 315 |
| | | Col % | 41.9% |
| Total | | Count | 751 |
| | | Col % | 100.0% |

In 2016, approximately six in ten (58%) 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.

44. 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: Maps, brochures/pamphlets/flyers, the Internet, cruise directors, television on board the ship, 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 | Maps | 229 | 52.5% |
| | Brochures/Pamphlets/Flyers/Booklets | 214 | 49.1% |
| | Internet | 146 | 33.5% |
| | Cruise Director | 76 | 17.4% |
| | Television on board ship | 66 | 15.1% |
| | Tour Director | 36 | 8.3% |
| | Other people/neighbours | 4 | 0.9% |
| | Found on own/at home | 2 | 0.5% |
| | Non Response | 21 | 4.8% |

Approximately half the cruise visitors that got other information on what to see and do while in Nassau/Paradise Island got it from the maps (53%) and brochures/pamphlets/flyers/booklets (49%).

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

Approximately six in ten (57%) cruise visitors got off the ship one time and approximately four in ten (38%) got off two times.

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

Length of Stay: Approximately four in ten (43%) negative comments received from cruise visitors to Nassau/P.I. about what would have made their trip more enjoyable were about length of stay in port. 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 enjoy the island, more time at the beach, more time to see and do more, more time to explore, more time to play in the casino, 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.

47. Cruise Visitor Demographics:

**DEMOGRAPHICS
NASSAU/PARADISE ISLAND
CRUISE VISITORS
2016**

| | 2016 | 2015 |
|---|-------------|-------------|
| CRUISE VISITORS LIKELY TO RETURN | 90% | 90% |
| Those Who Would Return and Stay in a Hotel | 51% | 52% |
| Those Who Would Return by Cruise ship | 24% | 29% |
| Those Who Would Return & Do a Cruise or a Land Stay | 13% | 9% |
| CRUISE VISITORS LIKELY TO RECOMMEND | 99% | 99% |
| REPEAT VISITORS | 49% | 53% |
| AGE | | |
| 18-24 | 5% | 2% |
| 25-34 | 15% | 11% |
| 35-44 | 25% | 24% |
| 45-54 | 33% | 35% |
| 55-64 | 17% | 18% |
| 65 yrs. & over | 6% | 10% |
| AGE OF CHILD TRAVELLING | | |
| Under 12 months | 6% | 1% |
| Age 1 to 5 | 11% | 13% |
| Age 6 to 11 | 37% | 39% |
| Age 12 to 17 | 41% | 38% |
| Over 17 yrs. | 5% | 9% |
| SEX | | |
| Male | 21% | 22% |
| Female | 79% | 78% |
| TRAVELLING PARTY SIZE | | |
| One | 2% | 1% |
| Two | 59% | 59% |
| Three | 10% | 10% |
| Four or More | 29% | 30% |
| AVERAGE TRAVELLING PARTY SIZE | 3.0 | 3.0 |
| HOW VISITORS WERE TRAVELLING (Travel Type) | | |
| Alone | 1% | 1% |
| As a couple | 55% | 56% |
| As a family | 37% | 38% |
| As a group | 7% | 5% |

DEMOGRAPHICS
NASSAU/PARADISE ISLAND
CRUISE VISITORS
2016

| | 2016 | 2015 |
|-----------------------------------|------|------|
| HOUSEHOLD INCOME* | | |
| \$25,001-\$50,000 | 20% | 25% |
| \$50,001-\$75,000 | 16% | 17% |
| \$75,001 to \$100,000 | 6% | 5% |
| \$100,001 and over | 30% | 21% |
| TOP STATES: WHERE YOU LIVE | | |
| Florida | 19% | 16% |
| New York | 7% | 7% |
| Georgia | 6% | 6% |
| Texas | 6% | 5% |
| Illinois | 6% | 5% |
| Ohio | 5% | 6% |
| North Carolina | 5% | 4% |
| New Jersey | 5% | 3% |
| Pennsylvania | 4% | 6% |
| Tennessee | 4% | 4% |
| California | 3% | 3% |
| South Carolina | 3% | 4% |
| Connecticut | 3% | 1% |
| Virginia | 3% | 4% |
| Massachusetts | 3% | 4% |
| COUNTRY OF RESIDENCE | | |
| USA | 96% | 97% |
| Canada | 1% | 1% |
| Europe | 1% | 2% |
| Other | 1% | 1% |

Source: Cruise Expenditure Survey 2016 and 2015, Research and Statistics Dept. Bahamas Ministry of Tourism

48. 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 persons who come to the destination by air and may include stopover visitors, day visitors, and transit visitors.

Sea arrivals are persons 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 2016, 2015, 2014, 2013, 2012, 2011. If you have any questions about this report, you may contact the Director of the Research and Statistics Department using the following information below:



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