

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



**RESEARCH AND STATISTICS DEPARTMENT  
MINISTRY OF TOURISM  
2017**

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## 1. Cruise Ships in the Cruise Expenditure Survey 2017

### NAMES OF SHIP IN SURVEY

			Nassau
Ship Name	Carnival Liberty	Count	141
		Col %	14.0%
	Elation	Count	98
		Col %	9.7%
	Enchantment of the Seas	Count	78
		Col %	7.7%
	Majesty of the Seas	Count	72
		Col %	7.1%
	Ecstasy	Count	52
		Col %	5.2%
	MSC Divina	Count	52
		Col %	5.2%
	Disney Dream	Count	45
		Col %	4.5%
	Norwegian Gem	Count	43
		Col %	4.3%
	Carnival Magic	Count	43
		Col %	4.3%
	Carnival Freedom	Count	35
		Col %	3.5%
	Anthem of the Seas	Count	33
		Col %	3.3%
	Norwegian Breakaway	Count	32
		Col %	3.2%
	Norwegian Sky	Count	31
		Col %	3.1%
	Carnival Breeze	Count	28
		Col %	2.8%
	Carnival Victory	Count	26
		Col %	2.6%
	Norwegian Escape	Count	23
		Col %	2.3%
	Carnival Conquest	Count	22
		Col %	2.2%
	Sensation	Count	21
		Col %	2.1%
	Carnival Splendor	Count	20
		Col %	2.0%
	Navigator of the Seas	Count	14
		Col %	1.4%

**NAMES OF SHIP IN SURVEY**

			Nassau
Ship Name	Carnival Glory	Count	13
		Col %	1.3%
	Carnival Pride	Count	13
		Col %	1.3%
	Norwegian Epic	Count	13
		Col %	1.3%
	Empress of the Seas	Count	11
		Col %	1.1%
	Disney Wonder	Count	8
		Col %	0.8%
	Allure of the Seas	Count	8
		Col %	0.8%
	Oasis of the Seas	Count	7
		Col %	0.7%
	Harmony of the Seas	Count	6
		Col %	0.6%
	Disney Magic	Count	4
		Col %	0.4%
	Grandeur of the Seas	Count	4
		Col %	0.4%
	Norwegian Pearl	Count	3
		Col %	0.3%
	Carnival Sunshine	Count	2
		Col %	0.2%
	Costa Deliziosa	Count	2
		Col %	0.2%
	Amadea	Count	2
		Col %	0.2%
	Lirica	Count	1
		Col %	0.1%
	Nieuw Amsterdam	Count	1
		Col %	0.1%
	Ocean Dream	Count	1
		Col %	0.1%
Total	Count		1008
	Col %		100.0%

Source: Cruise Expenditure Survey 2017, Research Dept. Ministry of Tourism

## **2. How Much Money Did Cruise Visitors Spend In Nassau/Paradise Island In 2017?**

In 2017, cruise visitors to Nassau/Paradise Island spent \$258.20 million compared to \$235.09 million in 2016, an increase of 9.8%. The significant increase in cruise visitor expenditure to Nassau/Paradise Island in 2017 was in part due to an increase in the amount of cruise visitors to the island and an increase in the average expenditure that they made. These increases occurred primarily in the 4<sup>th</sup> qtr. of 2017 after the region was hit by two devastating hurricanes in the 3<sup>rd</sup> Qtr. In September 2017, Hurricanes Irma and Maria passed through the Caribbean islands and the Southern Bahamas and caused significant damage to many cruise ports in the region. Many ships that had been destined for other ports, were re-routed to Nassau/P.I. as a result of these devastating hurricanes. The re-routed ships had a significant impact on cruise expenditure during the 4th qtr. 2017.

In 2017, cruise visitors increased their expenditure on: shopping, activities/tours/excursions, meals and drinks off the ship and transportation. The increase in expenditure to the island of New Providence in 2017, did propel overall cruise visitor expenditure to the Bahamas up by 6.6%.

## **3. What Was The Average Expenditure Per Cruise Visitor In Nassau/Paradise Island In 2017?**

The average expenditure of a cruise visitor to Nassau/Paradise Island trended downward between the years of 2013 to 2016 before it climbed again in 2017. In 2013, the average expenditure of a cruise visitor in Nassau/Paradise Island was \$98.66, compared to \$82.34 in 2014, \$79.92 in 2015, and \$73.08 in 2016. In 2017, however, the average expenditure for a cruise visitor to Nassau/P.I. climbed to \$78.53.

## **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 trended down between the years of 2013 to 2016 on the major cruise lines but in 2017, it went back up again for both Carnival Cruises and Royal Caribbean Int'l. In 2017, one third (33%) of the Carnival Cruise Line passengers that got off the ship in Nassau/Paradise Island had incomes of \$100,001 and over and more than one third (36%) of those that got off the Royal Caribbean Fleet of ships boasted this level of income per household.
- In 2017, the average expenditure of a cruise visitor to Nassau/Paradise Island on the Carnival fleet of ships was \$76.60 compared to \$74.40 in 2016, \$81.71 in 2015, \$76.04 in 2014, and \$90.65 in 2013.
- In 2017, the average expenditure of a cruise visitor on the Royal Caribbean ships was \$92.73 compared to \$79.48 in 2016, \$82.38 in 2015, \$92.83 in 2014, and \$102.84 in 2013.
- In 2017, the average expenditure for a cruise visitor who came to the island on the Norwegian Cruises' fleet of ships was \$68.80 compared to \$73.79 in 2016, \$78.75 in 2015, \$87.22 in 2014, and \$111.14 in 2013.
- In 2017, the average expenditure for a cruise visitor who came on the Disney Cruise Line ships was \$63.69 compared to \$62.67 in 2016, \$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?**

Approximately two in every ten (23%) 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?**

In 2017, roughly 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 between 2014 to 2017. In 2017, approximately one in every fifteen (6%) cruise visitors to Nassau/Paradise Island spent over \$200 while onshore compared to 7% in 2016, 9% in 2015, and 10% in 2014.

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

Yes, approximately one in every fifteen (6%) 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 2017 & 2016**

Expenditure by Category	2017		2016		17/16
	Expenditure (mln)	% SHR	Expenditure (mln)	% SHR	% CHG
Shopping	\$115.21	44.6%	\$108.47	46.1%	6.2%
Activities/Tours/Excursions	\$80.07	31.0%	\$51.95	22.1%	54.1%
Meals and Drinks off Ship	\$26.75	10.4%	\$25.64	10.9%	4.3%
Transportation	\$22.90	8.9%	\$20.78	8.8%	10.2%
Casino	\$13.11	5.1%	\$28.25	12.0%	-53.6%
Nightlife	\$0.16	0.1%	\$0.00	0.0%	0.0%
<b>Total New Providence</b>	<b>\$258.20</b>	<b>100.0%</b>	<b>\$235.09</b>	<b>100.0%</b>	<b>9.8%</b>

Source: Cruise Expenditure Survey 2017 and 2016, Research & Statistics Dept., Bahamas Ministry of Tourism

In 2017, there were some ships that overnighted.

Cruise visitors spent most of their money on shopping and activities/tours/excursions. In 2017, cruise visitors to Nassau/Paradise Island spent significantly more of their money doing activities/tours/excursions in the destination than they had in 2016.

Forty-five percent (45%) of the money spent by cruise visitors in Nassau/P.I. was on shopping and 31% was spent 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 (10% on this), transportation (9% on this), and playing in the on island casino (5% of expenditure was on this).

**10. Cruise Expenditure in 2017 Grew by 9.8% in Nassau/Paradise Island. However, the Years 2014 to 2016 Were Not Without Challenges. Some of These Challenges Are Still in Existence Now and Will Have an Impact on Future Expenditure in the Island until they are resolved:**

- Festival Place located at the major entry port of Nassau/Paradise Island on Prince George Wharf was closed from July 30, 2014.<sup>1</sup> 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. Despite the closure of Festival Place, it was and still is being used as a “walk through” for cruise passengers that get off the ship that want to go into town.
- The biggest decline in average expenditure occurred in 2014, the same year as 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.
  - 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.

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

In 2017, approximately two thirds (66%) of 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 (87%) in Grand Bahama.

The percentage of cruise visitors that did some form of shopping while in Nassau/Paradise Island trended downwards between the years of 2012 to 2016 before

<sup>1</sup> Source: Mrs. Erica Ingraham, Cruise Development Department, Bahamas Ministry of Tourism



climbing back up in 2017. In 2012, 61% of the cruise visitors to the island went shopping compared to 56% in 2013, 54% in 2014, and 54% in 2015, 47% in 2016 and 66% in 2017.

In 2017, Hurricane Irma raged through the Caribbean, the Southern Bahamas, and the Florida Keys, and caused major damage to many of the cruise ports in these areas. Hurricane Maria also charged through the Caribbean and caused further damage to cruise ports in the region. As a result of these hurricanes many ships that had been destined for other ports, were re-routed to Nassau/Paradise Island. These unscheduled ships to the island would have impacted shopping and visitor expenditure on the whole in the destination. Much of the increase in the cruise expenditure in 2017 occurred in the 4<sup>th</sup> qtr. after the passage of the hurricanes.

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

In 2017, cruise visitors spent \$115.21 million on shopping in Nassau/P.I. compared to \$108.47 million in 2016 and \$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						
	2017	2016	2015	2014	2013	2012	2011	2017	2016	2015	2014	2013	2012	2011
<b>Did Shopping?</b>	65.8%	46.6%	53.5%	53.6%	55.7%	60.6%	53.0%	87.2%	85.8%	88.9%	87.8%	87.2%	80.5%	73.6%
Bought T-shirts	59.4%	82.3%	76.4%	67.8%	75.4%	69.1%	79.4%	59.6%	56.0%	64.2%	67.4%	62.6%	50.3%	48.6%
Bought Other Clothing	16.1%	8.6%	9.2%	12.5%	10.2%	12.2%	13.6%	23.4%	22.3%	21.0%	23.0%	23.0%	24.9%	21.5%
Bought Other Souvenirs	38.2%	37.4%	36.7%	44.7%	45.8%	46.1%	47.0%	41.3%	42.7%	40.4%	39.4%	37.7%	35.5%	37.6%
Bought Other Items	25.6%	38.6%	38.6%	28.7%	20.1%	34.7%	42.9%	24.7%	27.2%	31.5%	38.2%	28.7%	35.1%	27.2%
Bought Jewelry	18.3%	32.9%	34.3%	31.8%	31.2%	33.2%	40.4%	23.4%	24.2%	30.6%	37.0%	38.8%	40.8%	38.7%
Bought Straw Work	18.6%	40.3%	29.5%	22.2%	29.0%	26.8%	39.4%	17.7%	17.6%	18.5%	20.7%	16.7%	13.7%	16.5%
Bought Perfumes or Cosmetics	5.6%	24.6%	24.2%	19.5%	25.0%	21.4%	32.2%	2.9%	2.1%	2.7%	4.6%	5.2%	2.0%	4.5%
Bought Liquor	11.2%	30.3%	26.9%	22.4%	26.5%	25.3%	31.0%	5.2%	4.0%	5.5%	8.7%	8.0%	4.3%	2.0%
Did Hair Braiding	4.7%	22.0%	20.3%	11.4%	12.7%	9.9%	21.1%	2.1%	3.2%	2.0%	2.7%	3.6%	2.7%	2.7%
Bought Linen	1.1%	0.6%	0.2%	1.0%	0.2%	2.7%	6.8%	0.8%	0.0%	0.8%	0.9%	1.2%	0.9%	1.1%
Bought Tobacco	3.3%	4.3%	4.1%	3.5%	2.1%	3.0%	3.3%	0.3%	0.6%	0.5%	1.0%	1.2%	1.9%	0.7%
Bought Leather Goods	1.4%	6.6%	4.6%	4.0%	2.9%	2.7%	3.1%	0.2%	0.3%	0.5%	0.4%	0.4%	0.9%	0.7%
Bought China/Crystal	0.9%	0.6%	0.0%	0.2%	0.6%	1.6%	1.6%	0.1%	0.3%	0.5%	0.6%	0.9%	1.8%	1.8%

Source: Cruise Expenditure Exit Survey 2011 to 2017, Bahamas Ministry of Tourism Research & Statistics Dept.

In September 2017, Hurricanes Irma and Maria passed through the Caribbean islands and the Southern Bahamas and caused significant damage to many cruise ports in the region. Many ships that had been destined for other ports, were re-routed to Nassau/P.I. as a result of these devastating Hurricanes. Fourth quarter cruise expenditure in Nassau/P.I. increased significantly as a result of the increase in cruise arrivals and average expenditure of the cruise visitors to the island during this period. The re-routed ships had a significant impact on cruise expenditure during the 4th qtr. 2017.

In 2017, there was a significant increase in the percentage of cruise visitors to Nassau/P.I. that went shopping than in 2016 and the hurricanes heavily influenced this increase.

In 2017, two thirds (66%) 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. The percentage of cruise visitors that went shopping did increase in 2017 compared to 2016, but not every area of shopping reaped the benefits. In 2017, cruise visitors to Nassau/Paradise Island that came ashore and went shopping increased their expenditure on the following items: T-shirts, other

Cruise Expenditure Survey 2017 Research & Statistics Dept. Ministry of Tourism

clothing, jewelry/watches, china/crystal and other souvenirs, but they decreased their expenditures on straw work, perfumes/cosmetics, liquor to take home, leather goods, linen, tobacco, hair braiding and other goods.

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

The percentage of cruise visitors that purchased t-shirts went down in 2017 (59%) compared to 2016 (82%), but the amount of money spent on this item increased. In 2017, the cruise visitors that purchased t-shirts spent more of their money on this item than the cruise visitors that made these purchases in 2016, and that is the reason for the increase in expenditure for this item.

Of the 66% of the cruise visitors who got off the ship and did some form of shopping in Nassau/Paradise Island, approximately six in ten (59%) bought t-shirts while on the island in 2017 compared to approximately eight in ten (82%) in 2016, 76% in 2015, 68% in 2014, and 75% in 2013.

#### **15. How Many Cruise Visitors Bought Jewelry While In Nassau/Paradise Island?**

In 2017, approximately two in ten (18%) cruise visitors who got off the ship bought jewelry compared to 2016 (33%), 2015 (34%), 2014 (32%) or 2013 (31%). However, in 2017 the cruise visitors that purchased jewelry/watches spent more of their money on this item than the cruise visitors that made these purchases in 2016, and that is the reason for the increase in expenditure for this item.

#### **16. How Many Cruise Visitors Bought Straw Work While In Nassau/Paradise Island?**

In December 2011, the new straw market opened up in downtown Nassau. It is important to note that the main straw market located in downtown Nassau, is not the only straw market on Nassau/Paradise Island.

The percentage of cruise visitors that purchased straw work trended up in the years 2015 and 2016 before it declined again in 2017. In 2017, the percentage of persons that bought straw work went back down to the 2014 levels. In 2017, approximately two in ten (19%) cruise visitors purchased straw work compared to four in ten (40%) in 2016, three in ten (30%) in 2015, two in ten (22%) in 2014, and approximately three in ten (29%) in 2013. In 2017, the cruise visitors that purchased straw work spent less of their money on this item than the cruise visitors that made these purchases in 2016, and so expenditure for this item declined.

#### **17. How Many Cruise Visitors Bought Liquor While In Nassau/Paradise Island?**

In 2017, there was a decline in the percentage of cruise visitors that got off the ship and purchased liquor to take home when they shopped in Nassau/Paradise Island. In 2017, approximately one in ten (11%) cruise visitors bought liquor to take home compared to 30% in 2016, 27% in 2015, 22% in 2014, and 27% in 2013.

In 2017, expenditure by cruise visitors on liquor to take home declined because a smaller percentage of cruise visitors purchased this item than in 2016, and the ones that did make this purchase spent less of their money on this item.

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

In 2017, there was a decline in the percentage of cruise visitors that got off the ship, and shopped for perfumes and cosmetics compared to previous years. In 2017, one in every sixteen (6%) cruise visitors that shopped bought perfumes and cosmetics compared to 25% in 2016 and 24% in 2015.

In 2017, expenditure by cruise visitors on perfumes and cosmetics declined because a smaller percentage of cruise visitors purchased this item than in 2016, and the ones that did make this purchase spent less of their money on this item.

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

In 2017, approximately one percent (1%) 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 thirty (3%) cruise visitors who got off the ship bought tobacco products.

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

One percent (1%) 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 bags/purses/wallets/tote bags purchased by approximately two in ten (19%) cruise visitors who had bought other items. Some of the cruise visitors also bought other items like hats/caps (18% of the cruise visitors purchased this item), rum cake (13%), sunglasses (10%), sea shells/conch shells (9%), key chains (9%), beach bags (7%), beach towel/towels (5%), magnets (5%), mugs/cups (5%), and shot glasses (4%).

Less popular items purchased by cruise visitors to Nassau/Paradise Island included: cane/walking cane, fans (handmade), masks/wooden masks, hair accessories, postcards, shoes/slippers/tennis shoes, soaps/toiletries, tea/coffee, and toys, wood carvings, etc.

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

In 2017, cruise visitors to Nassau/Paradise Island spent less of their money on hair braiding than they had in 2016. In 2017, cruise visitors to the island spent an estimated \$3 million on hair braiding compared to \$5.6 million in 2016.

The percentage of cruise visitors that got their hair braided in 2017 trended downwards to 2012 levels and as a result, the amount spent on this item declined as well. In 2017, approximately one in twenty (5%) cruise visitors to Nassau/Paradise Island got their hair braided compared to 22% in 2016, 20% in 2015, and 11% in 2014.

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

The amount of money spent by cruise visitors on Activities/Tours/Excursions declined between the years of 2013 to 2016 before it climbed back up in 2017. In 2017, cruise visitors spent \$80.07 million on Activities/Tours/Excursions in Nassau/Paradise Island

Cruise Expenditure Survey 2017 Research & Statistics Dept. Ministry of Tourism

compared to \$51.95 million in 2016, \$57.35 million in 2015, \$72.80 million in 2014, and \$99.85 million in 2013.

The percentage of cruise visitors to Nassau/Paradise Island that booked their activities/tours/excursions on board the ship went back up in 2017 after falling steadily between the years of 2014 to 2016.

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

### HOW DID YOU BOOK YOUR ACTIVITIES/TOURS/EXCURSIONS THE BAHAMAS 2017

How Activity/Tour Booked	Nassau/P.I.							Grand Bahama						
	2017	2016	2015	2014	2013	2012	2011	2017	2016	2015	2014	2013	2012	2011
Booked on Board Ship	29%	18%	29%	37%	35%	44%	47%	66%	61%	59%	62%	70%	61%	73%
Booked Independently	49%	52%	39%	28%	34%	33%	37%	27%	28%	29%	28%	22%	31%	21%
Booked On shore	22%	31%	33%	36%	31%	22%	16%	7%	11%	13%	11%	9%	7%	6%
Non-Response	3%	0%	0%	0%	0%	3%	2%	0%	0%	0%	0%	0%	2%	1%

Source: Cruise Expenditure Surveys 2017, 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 trended downwards between the years of 2011 to 2016 (with the exception of 2014) but in 2017, it went back up. 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, 35% in 2013, 37% in 2014, 29% in 2015, 18% in 2016 and 29% in 2017.

## 26. How Much Did Cruise Visitors Spend On Transportation?

The amount of money spent by cruise visitors on transportation while they were in Nassau/Paradise Island has steadily increased since 2014. In 2017, cruise visitors spent \$22.90 million on transportation compared to \$20.78 million in 2016, \$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 to Nassau/Paradise Island spent less money in the on island casino in 2013 to 2015 than they did in 2016, but in 2017, the amount spent in the casinos significantly fell again. In 2017, cruise visitors spent \$13.11 million playing in the on-island casino in Nassau/Paradise Island compared to \$28.25 million in 2016, \$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 trended downwards between the years 2013 to 2016, but went back up in 2017. In 2013, cruise visitors to Nassau/Paradise Island spent \$42.07 million compared to \$33.95 million in 2014, \$29.11 million in 2015, \$25.64 million in 2016, and \$26.75 million in 2017.

### **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 the years of 2011 to 2014, but fell again between the years of 2015 to 2017. 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, 57% in 2016 and 56% in 2017.

In 2017, the cruise visitors that did purchase food and drinks off the ship spent more of their money on this item than the cruise visitors that made these purchases in 2016, and for this reason expenditure for this item increased.

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

In 2017, 2016, 2015, and 2014, Señor Frogs was the most popular restaurant where cruise visitors dined while they were in Nassau/Paradise Island. In 2017, the next most popular restaurants were Fat Tuesday, Starbucks, Subway, and Hard Rock Café.

The other popular restaurants where cruise visitors ate or drank while they were in Nassau/Paradise Island were: Athena's Café, Atlantis, Bahama Grill, Bahamas Rum Cake Factory, Bearded Clam Sports Bar, Burger King, Dunkin Donuts, Fish Fry (e.g. Frankie's Gone Bananas, Goldie's Conch House, Oh Andros, Twin Brothers, etc.), Frozen Palace, Imperial Café, John Watlings Distillery, Linda's Place, Lukka Kairi, Margaritaville, McDonald's, Nassau Cricket Club, Olives Mediterranean Café & Bar, Pepper Pot, Pirate Republic Brewing Company, Poop Deck, Rum Cake Factory, Sharkeez Bar and Grill, Shark Bites, Tiki Bikini Hut, Via Caffe, 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 2017, one in every four (25%) 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 three in ten (31%) in 2016 and 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 trended down between the years of 2013 to 2016 before it went back up again in 2017.

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, 7% in 2016, and 11% in 2017.

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

In 2017, one in every thirty (3%) cruise visitors who got off the ship bought ice cream while ashore in Nassau/Paradise Island compared to 6% in 2016, 6% in 2015, and 8% in 2014.

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

In 2017, more than half (54%) the cruise visitors who visited Nassau/Paradise Island had visited The Bahamas before compared to 49% in 2016, 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 2017, of the cruise visitors that had visited The Bahamas before, one in four (25%) had visited one time before. Approximately three in ten (30%) cruise visitors had visited The Bahamas two times before, and approximately four in ten (42%) 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 Was it on a Cruise Visit or Did You Stay	Cruise	Count	383
		Col %	70.3%
On-shore	Stayed on shore	Count	59
		Col %	10.8%
	Both	Count	100
		Col %	18.3%
	Non Response	Count	3
		Col %	0.6%
Total		Count	545
		Col %	100.0%

- The percentage of cruise visitors to Nassau/Paradise Island that came to the Bahamas before on a cruise ship trended down between the years of 2012 to 2015 before it began to trend back up in 2016: 2012 (66%), 2013 (59%), 2014 (43%) and 2015 (43%) but in 2016 (45%) and 2017 (70%).
- The percentage of cruise visitors to Nassau/Paradise Island that came to the Bahamas before and stayed on shore trended up between the years of 2012 to 2016 before it fell in 2017. 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, 27% in 2016, and 11% in 2017.
- 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 steadily trended downwards after 2015. 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, 37% in 2014, 32% in 2015, 28% in 2016 and 18% in 2017.

**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?**

The majority (92% i.e., 65.7% definitely would & 26.3% probably would) of 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.

DO YOU THINK YOU WOULD STAY IN A HOTEL OR COME ON A CRUISE SHIP			Nassau
Would You Stay in a Hotel or Come on a Cruise Ship?	Would stay in a hotel	Count	312
		Col %	33.6%
	Would come by cruise ship	Count	342
		Col %	36.8%
	Both	Count	194
		Col %	20.9%
	Don't Know	Count	79
		Col %	8.5%
	Non Response/No Answer	Count	2
		Col %	0.2%
Total		Count	929
		Col %	100.0%

**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?**

The percentage of cruise visitors that got off the ship that indicated that they would return and just stay in a hotel declined in 2017. In 2017, of the cruise passengers that came ashore who said that they would definitely or probably return, approximately one in three (34%) cruise visitors to Nassau/Paradise Island indicated that they would stay in a hotel when they returned compared to approximately half (51%) of them that indicated this in 2016.

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

The percentage of cruise visitors to Nassau/Paradise Island that came ashore and indicated that they would come back to the Bahamas again on a cruise ship trended up in 2017 (37%) compared to 2016 (24%).

**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?**

In 2017, of the cruise visitors to Nassau/Paradise Island who came ashore and said that they would definitely or probably return, approximately two in ten (21%) indicated that

they would do both, come back and stay in a hotel and come back on a cruise compared to approximately one in ten (13%) of them in 2016.

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

The majority (98% i.e., 71.8% definitely will & 26.2% probably will) 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 You Attend a talk/lecture About What to See or Do While Here?	Yes	Count	293
		Col %	29.1%
	No	Count	703
		Col %	69.7%
	Don't Know	Count	11
		Col %	1.1%
	Non Response	Count	1
		Col %	0.1%
	Total	Count	1008
		Col %	100.0%

In 2017, there was a decline in the percentage of cruise visitors attending a talk or lecture about what to see or do in the island when they got off the ship. In 2017, approximately three in ten (29%) 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 compared to half (52%) of them in 2016. This decline was in part due to the fact that more than half (54%) of the cruise visitors to Nassau/Paradise Island in 2017 were repeat visitors to the destination compared to 49% in 2016.



#### 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	506
		Col %	50.2%
	No	Count	492
		Col %	48.8%
	Don't Know	Count	10
		Col %	1.0%
Total	Count	1008	
	Col %	100.0%	

In 2017, 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.

#### 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: Brochures/pamphlets/flyers, the Internet, maps, 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	254	51.4%
	Internet	178	36.0%
	Maps	142	28.7%
	Television on board ship	112	22.7%
	Cruise Director	97	19.6%
	Tour Director	86	17.4%
	Other people/neighbours	2	0.4%
	Obtained information off the ship	1	0.2%
	Obtained from past trip	1	0.2%
	Non Response	12	2.4%

Approximately half the cruise visitors that got other information on what to see and do while in Nassau/Paradise Island got it from the brochures/pamphlets/flyers/booklets (51%) and roughly one in every three (36%) got the other information from the Internet. Approximately three in ten (29%) got the other information on what to see and do on island from maps, and two in ten got it from the television on board the ship (23%) and/or the Cruise Director (20%).

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

Approximately six in ten (61%) cruise visitors got off the ship one time and approximately three in ten (28%) 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 (37%) 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, 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  
2017**

	<b>2017</b>	<b>2016</b>
<b>CRUISE VISITORS LIKELY TO RETURN</b>	92%	90%
Those Who Would Return and Stay in a Hotel	34%	51%
Those Who Would Return by Cruise ship	37%	24%
Those Who Would Return & Do a Cruise or a Land Stay	21%	13%
<b>CRUISE VISITORS LIKELY TO RECOMMEND</b>	98%	99%
<b>REPEAT VISITORS</b>	54%	49%
<b>AGE</b>		
18-24	4%	5%
25-34	15%	15%
35-44	20%	25%
45-54	27%	33%
55-64	19%	17%
65 yrs. & over	15%	6%
<b>AGE OF CHILD TRAVELLING</b>		
Under 12 months	4%	6%
Age 1 to 5	17%	11%
Age 6 to 11	32%	37%
Age 12 to 17	36%	41%
Over 17 yrs.	11%	5%
<b>TRAVELLING PARTY SIZE</b>		
One	3%	2%
Two	52%	59%
Three	9%	10%
Four or More	35%	29%
<b>AVERAGE TRAVELLING PARTY SIZE</b>	5.0	3.3
<b>HOW VISITORS WERE TRAVELLING (Travel Type)</b>		
Alone	2%	1%
As a couple	47%	55%
As a family	39%	37%
As a group	12%	7%

In 2017, there was a higher percentage of cruise visitors that indicated that they came as a group and as a family than in 2016.

**DEMOGRAPHICS**  
**NASSAU/PARADISE ISLAND**  
**CRUISE VISITORS**  
**2017**

	<b>2017</b>	<b>2016</b>
<b>HOUSEHOLD INCOME*</b>		
\$25,001-\$50,000	13%	20%
\$50,001-\$75,000	13%	16%
\$75,001 to \$100,000	12%	6%
\$100,001 and over	35%	30%
<b>TOP STATES: WHERE CRUISE VISITORS LIVE</b>		
Florida	18%	19%
New York	9%	7%
Georgia	9%	6%
North Carolina	7%	5%
Texas	6%	6%
South Carolina	4%	3%
Ohio	4%	5%
New Jersey	3%	5%
Pennsylvania	3%	4%
Maryland	3%	2%
Tennessee	3%	4%
California	3%	3%
Michigan	2%	2%
Illinois	2%	6%
Virginia	2%	3%
Kentucky	2%	2%
Massachusetts	2%	3%
<b>COUNTRY OF RESIDENCE</b>		
USA	94%	96%
Canada	2%	1%
Europe	2%	1%
Other	2%	1%

Source: Cruise Expenditure Survey 2017 and 2016, Research and Statistics Dept. Bahamas Ministry of Tourism

In this survey, a distinction is made between the traveling party size and the number of people expenses relate to, because there was a significant percentage of people that traveled as a group or as a family but their expenses did not relate to all of their traveling companions but to a smaller party within the larger group. In 2017, the average number of persons the expenses related to was 2.83.

## 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 2017, 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:



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