

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



**RESEARCH AND STATISTICS DEPARTMENT
MINISTRY OF TOURISM
2019**

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1. Cruise Ships in the Cruise Expenditure Survey 2019

NAMES OF SHIPS IN SURVEY 2019

			Nassau
Ship Name	Mariner of the Seas	Count	97
		Col %	9.3%
	Anthem of the Seas	Count	82
		Col %	7.8%
	Carnival Liberty	Count	78
		Col %	7.5%
	Enchantment of the Seas	Count	61
		Col %	5.8%
	Norwegian Sky	Count	58
		Col %	5.6%
	Carnival Freedom	Count	52
		Col %	5.0%
	Majesty of the Seas	Count	52
		Col %	5.0%
	Carnival Victory	Count	49
		Col %	4.7%
	Elation	Count	48
		Col %	4.6%
	Carnival Sunshine	Count	48
		Col %	4.6%
	MSC Seaside	Count	35
		Col %	3.3%
	Disney Dream	Count	34
		Col %	3.3%
	Navigator of the Seas	Count	29
		Col %	2.8%
	Sensation	Count	26
		Col %	2.5%
	Adventure of the Seas	Count	25
		Col %	2.4%
	Ecstasy	Count	23
		Col %	2.2%
	Carnival Sunrise	Count	20
		Col %	1.9%
	Norwegian Breakaway	Count	19
		Col %	1.8%
	Infinity	Count	18
		Col %	1.7%
	Carnival Glory	Count	17
		Col %	1.6%

Source: Cruise Expenditure Survey 2019, Research and Statistics Dept., Ministry of Tourism

NAMES OF SHIPS IN SURVEY 2019

		Nassau
Celebrity Equinox	Count	14
	Col %	1.3%
Norwegian Sun	Count	13
	Col %	1.2%
Norwegian Bliss	Count	13
	Col %	1.2%
Norwegian Getaway	Count	12
	Col %	1.1%
Symphony of the Seas	Count	12
	Col %	1.1%
Grandeur of the Seas	Count	11
	Col %	1.1%
Norwegian Pearl	Count	11
	Col %	1.1%
Explorer of the Seas	Count	8
	Col %	0.8%
Norwegian Dawn	Count	8
	Col %	0.8%
Norwegian Escape	Count	8
	Col %	0.8%
Disney Magic	Count	7
	Col %	0.7%
Norwegian Epic	Count	7
	Col %	0.7%
Disney Wonder	Count	6
	Col %	0.6%
Voyager of the Seas	Count	6
	Col %	0.6%
Columbus	Count	4
	Col %	0.4%
Empress of the Seas	Count	4
	Col %	0.4%
Freedom of the Seas	Count	4
	Col %	0.4%
Jewel of the Seas	Count	4
	Col %	0.4%
Allure of the Seas	Count	4
	Col %	0.4%
Independence of the Seas	Count	4
	Col %	0.4%
Sirena	Count	3
	Col %	0.3%
Carnival Dream	Count	2
	Col %	0.2%
Carnival Pride	Count	2
	Col %	0.2%
Costa Deliziosa	Count	2
	Col %	0.2%
Carnival Conquest	Count	1
	Col %	0.1%
Norwegian Gem	Count	1
	Col %	0.1%
Silver Whisper	Count	1
	Col %	0.1%
MSC Divina	Count	1
	Col %	0.1%
Nieuw Amsterdam	Count	1
	Col %	0.1%
Total	Count	1045
	Col %	100.0%

Source: Cruise Expenditure Survey 2019, Research and Statistics Dept., Ministry of Tourism

2. How Much Money Did Cruise Visitors Spend in Nassau/Paradise Island In 2019?

In 2019, cruise visitors to Nassau/Paradise Island spent \$325.78 million compared to \$295.33 million in 2018, an increase of 10.3%. The significant increase in cruise visitor expenditure to Nassau/Paradise Island in 2019 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.

In 2019, cruise visitors increased their expenditure on: activities/tours/excursions, and meals and drinks off the ship. However, they spent less of their money on shopping, transportation and playing in the casino. Virtually all the cruise ships coming into Nassau/Paradise Island have casinos on board their ships. The increase in expenditure to the island of New Providence in 2019, did help to propel overall cruise visitor expenditure to the Bahamas up by 10.9%.

3. What Was the Average Expenditure Per Cruise Visitor in Nassau/Paradise Island in 2019?

The average expenditure of a cruise visitor to Nassau/Paradise Island trended downward between the years of 2013 to 2016 before it began to climb back up again in 2017. This upward trend in average cruise expenditure continued into 2019.

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, \$73.08 in 2016, \$78.53 in 2017, and \$89.21 in 2018. In 2019, however, the average expenditure for a cruise visitor to Nassau/P.I. climbed to \$92.48.

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 and continued this upward trend into 2018 and 2019 for Disney, Norwegian, and Royal Caribbean. Average expenditure went up for Carnival in 2018 but not in 2019.
- In 2019, three in every ten (29%) 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 (34%) of those that got off the Royal Caribbean Fleet of ships boasted this level of income per household.
- In 2019, the average expenditure of a cruise visitor to Nassau/Paradise Island on the Carnival fleet of ships was \$93.44 compared to \$97.63 in 2018, \$76.60 in 2017, \$74.40 in 2016, \$81.71 in 2015, \$76.04 in 2014, and \$90.65 in 2013.
- In 2019, the average expenditure of a cruise visitor on the Royal Caribbean ships was \$99.25 in 2019 compared to \$94.55 in 2018, \$92.73 in 2017, \$79.48 in 2016, \$82.38 in 2015, \$92.83 in 2014, and \$102.84 in 2013.
- In 2019, the average expenditure for a cruise visitor who came to the island on the Norwegian Cruises' fleet of ships was \$88.87 compared to \$73.18 in 2018, \$68.80 in 2017, \$73.79 in 2016, \$78.75 in 2015, \$87.22 in 2014, and \$111.14 in 2013.
- In 2019, the average expenditure for a cruise visitor who came on the Disney Cruise Line ships was \$121.30 compared to \$81.40 in 2018, \$63.69 in 2017, \$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 (18%) 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?

Approximately four in ten (43%) 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 2019, roughly six in ten (57%) cruise visitors on average spent \$50.00 or more during their visit to Nassau/Paradise Island with 12% spending over \$200.00.

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 (12%) cruise visitors spent on average \$200.00 or more when they got off the ship. In 2019, approximately one in every ten (12%) cruise visitors to Nassau/Paradise Island spent over \$200 while onshore compared to 7% in 2018, 6% in 2017, 7% in 2016, 9% in 2015, and 10% in 2014.

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

**CRUISE VISITORS
EXPENDITURE BY MAJOR CATEGORY 2019 & 2018**

Expenditure by Category	2019		2018		19/18
	Expenditure (mln)	% SHR	Expenditure (mln)	% SHR	% CHG
Shopping	\$104.17	32.0%	\$139.32	47.2%	-25.2%
Activities/Tours/Excursions	\$172.65	53.0%	\$95.94	32.5%	80.0%
Meals and Drinks off Ship	\$32.92	10.1%	\$30.25	10.2%	8.9%
Transportation	\$12.53	3.8%	\$15.60	5.3%	-19.7%
Casino	\$3.50	1.1%	\$14.16	4.8%	-75.3%
Nightlife	\$0.00	0.0%	\$0.07	0.02%	0.0%
Total New Providence	\$325.78	100.0%	\$295.33	100.0%	10.3%

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

Cruise visitors spent most of their money on activities/tours/excursions, shopping, and meals and drinks. In 2019, cruise visitors to Nassau/Paradise Island spent significantly more of their money doing activities/tours/excursions in the destination than they had in 2018.

In 2019, thirty-two percent (32%) of the money spent by cruise visitors in Nassau/Paradise Island was spent on shopping while more than half of the money (53%) was spent on activities/tours/excursions. A higher percentage of cruise visitors spent their money on activities/tours/excursions in 2019 than in 2018.

Cruise visitors to Nassau/Paradise Island spent the rest of their money on meals and drinks that they bought off the ship (10% on this), transportation (4% on this), and playing in the on-island casino (1% of expenditure was spent on this).

10. Did Cruise Expenditure grow in 2019 in Nassau/Paradise Island?

Cruise Expenditure in 2019 grew by 10.3% in Nassau/Paradise Island.

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

In 2019, seven in ten (70%) cruise visitors who got off the ship did some form of shopping while they were in Nassau/Paradise Island compared to eight in ten (80%) 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 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, 66% in 2017, 64% in 2018 and 70% in 2019.

12. How Much Did Cruise Visitors Spend on Shopping in Nassau/Paradise Isl.?

In 2019, cruise visitors spent \$104.17 million on shopping in New Providence and Paradise Island compared to \$139.32 million in 2018 and \$115.21 million in 2017.

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								
	2019	2018	2017	2016	2015	2014	2013	2012	2011	2019	2018	2017	2016	2015	2014	2013	2012	2011	
Did Shopping?	70.2%	64.3%	65.8%	46.6%	53.5%	53.6%	55.7%	60.6%	53.0%	80.3%	85.1%	87.2%	85.8%	88.9%	87.8%	87.2%	80.5%	73.6%	
Bought T-shirts	64.0%	56.8%	59.4%	82.3%	76.4%	67.8%	75.4%	69.1%	79.4%	59.3%	58.3%	59.6%	56.0%	64.2%	67.4%	62.6%	50.3%	48.6%	
Bought Other Clothing	16.5%	13.8%	16.1%	8.6%	9.2%	12.5%	10.2%	12.2%	13.6%	30.3%	28.3%	23.4%	22.3%	21.0%	23.0%	23.0%	24.9%	21.5%	
Bought Other Souvenirs	40.2%	39.9%	38.2%	37.4%	36.7%	44.7%	45.8%	46.1%	47.0%	54.0%	43.5%	41.3%	42.7%	40.4%	39.4%	37.7%	35.5%	37.6%	
Bought Other Items	20.3%	26.7%	25.6%	38.6%	38.6%	28.7%	20.1%	34.7%	42.9%	13.9%	26.2%	24.7%	27.2%	31.5%	38.2%	28.7%	35.1%	27.2%	
Bought Jewelry	19.5%	19.7%	18.3%	32.9%	34.3%	31.8%	31.2%	33.2%	40.4%	19.0%	20.0%	23.4%	24.2%	30.6%	37.0%	38.8%	40.8%	38.7%	
Bought Straw Work	12.5%	12.5%	18.6%	40.3%	29.5%	22.2%	29.0%	26.8%	39.4%	17.6%	18.1%	17.7%	17.6%	18.5%	20.7%	16.7%	13.7%	16.5%	
Bought Perfumes or Cosmetics	6.4%	5.5%	5.6%	24.6%	24.2%	19.5%	25.0%	21.4%	32.2%	4.7%	4.3%	2.9%	2.1%	2.7%	4.6%	5.2%	2.0%	4.5%	
Bought Liquor	9.0%	12.0%	11.2%	30.3%	26.9%	22.4%	26.5%	25.3%	31.0%	8.8%	8.3%	5.2%	4.0%	5.5%	8.7%	8.0%	4.3%	2.0%	
Did Hair Braiding	1.6%	2.9%	4.7%	22.0%	20.3%	11.4%	12.7%	9.9%	21.1%	3.5%	5.5%	2.1%	3.2%	2.0%	2.7%	3.6%	2.7%	2.7%	
Bought Linen	1.1%	1.0%	1.1%	0.6%	0.2%	1.0%	0.2%	2.7%	6.8%	0.6%	0.5%	0.8%	0.0%	0.8%	0.9%	1.2%	0.9%	1.1%	
Bought Tobacco	3.0%	2.6%	3.3%	4.3%	4.1%	3.5%	2.1%	3.0%	3.3%	0.6%	0.3%	0.3%	0.6%	0.5%	1.0%	1.2%	1.9%	0.7%	
Bought Leather Goods	1.8%	1.1%	1.4%	6.6%	4.6%	4.0%	2.9%	2.7%	3.1%	0.2%	0.6%	0.2%	0.3%	0.5%	0.4%	0.4%	0.9%	0.7%	
Bought China/Crystal	0.7%	0.9%	0.9%	0.6%	0.0%	0.2%	0.6%	1.6%	1.6%	0.4%	0.4%	0.1%	0.3%	0.5%	0.6%	0.9%	1.8%	1.8%	

Source: Cruise Expenditure Exit Survey 2011 to 2019, Bahamas Ministry of Tourism Research & Statistics Dept.

In August 2019, Hurricane Dorian began its track through the Southern Islands of the Bahamas. It skirted all of the Central and Southern Islands of the Bahamas as it focused in on the Northern Islands of the Bahamas: Abaco and Grand Bahama.

On September 1, 2019, Hurricane Dorian slammed into the Islands of Abaco and GB as a category 5 Hurricane. Intentional Flights to Grand Bahama came in through the airport in West End.

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 2019, seven in ten (70%) cruise visitors who got off the ship in Nassau/Paradise Island went shopping compared 64% in 2018. Cruise visitors to Nassau/Paradise Island bought T-shirts, clothing, jewelry, straw work, perfumes, cosmetics, liquor, tobacco, linen, leather goods, china, crystal, and a host of other goods. The percentage of cruise visitors that went shopping did increase in 2019 compared to 2018, but total expenditure on shopping did not increase as less money was spent on the big-ticket items like jewelry, perfumes/cosmetics, and liquor. In addition, cruise visitors spent a higher percentage of their money on activities/tours/excursions in 2019 than in 2018.

In 2019, cruise visitors to Nassau/Paradise Island that came ashore and went shopping increased their expenditure on T-shirts, clothing, china/crystal, straw work, leather goods, linen, tobacco, and other souvenirs, but they decreased their expenditures on jewelry/watches, perfumes/cosmetics, liquor to take home, 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 increased in 2019 (64%) compared to 2018 (57%). In 2019, the cruise visitors that purchased t-shirts spent more of their money on this item than the cruise visitors that made these purchases in 2018, and for this reason there was an increase in expenditure for this item.

Of the 70% of the cruise visitors who got off the ship and did some form of shopping in Nassau/Paradise Island, approximately six in ten (64%) bought t-shirts while on the island in 2019 compared to approximately 57% in 2018, 59% in 2017, 82% in 2016, 76% in 2015, and 68% in 2014.

15. How Many Cruise Visitors Bought Jewelry While in Nassau/Paradise Island?

The percentage of cruise visitors that purchased jewelry in 2019 and 2018 remained virtually unchanged however, the amount of money spent on this item did decline dramatically.

Approximately two in ten cruise visitors who got off the ship bought jewelry in 2019 (20%), 2018 (20%) and 2017 (18%). Between 2013 to 2016, a higher percentage of cruise visitors purchased this item than in 2017 to 2019. Roughly one third of cruise visitors purchased this item in 2016 (33%), 2015 (34%), 2014 (32%), and 2013 (31%).

16. How Many Cruise Visitors Bought Straw Work While in Nassau/Paradise Island?

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

The percentage of cruise visitors that purchased straw work trended down since 2016. In 2019, roughly one in ten (13%) cruise visitors purchased straw work compared to 13% in 2018, 19% in 2017, and 40% in 2016.

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 and this downward trend continued into 2019. In 2019, approximately one in ten (9%) cruise visitors bought liquor to take home compared to 12% in 2018, 11% in 2017, 30% in 2016, 27% in 2015, 22% in 2014, and 27% in 2013.

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 2019, one in every sixteen (6%) cruise visitors that shopped bought perfumes and cosmetics compared to the same percentage in 2018 (6%) and 2017 (6%). In 2016 and 2015, one in every four (25%) cruise visitors purchased these items, 25% and 24% respectively.

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

In 2019, 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?

Two percent (2%) 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 purchased by two in ten (20%) cruise visitors who had bought other items. Some of the cruise visitors also bought other items like bags/purses/wallets/tote bags (17% of the cruise visitors purchased this item), hats/caps (14%), magnets (7%), wood carvings (6%), seashells/conch shells (5%), shot glasses (4%), and beach towel/towels (3%),

Less popular items purchased by cruise visitors to Nassau/Paradise Island included: beach bags, cane/walking cane, fans (handmade), key chains, masks/wooden masks, hair accessories, mugs/cups, postcards, shoes/slippers, soaps/toiletries, sunglasses, tea/coffee, and toys, etc.

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

In 2019, cruise visitors to Nassau/Paradise Island spent less of their money on hair braiding than they had in 2018. In 2019, cruise visitors to the island spent an estimated \$702.7K on hair braiding compared to \$1.3 million in 2018.

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

The amount of money spent by cruise visitors on Activities/Tours/Excursions increased in 2019. In 2019, cruise visitors spent \$172.65 million on Activities/Tours/Excursions in Nassau/Paradise Island compared to \$95.94 million in 2018, \$80.07 in 2017, \$51.95 million in 2016, \$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 2019

How Activity/Tour Booked	Nassau/P.I.									Grand Bahama								
	2019	2018	2017	2016	2015	2014	2013	2012	2011	2019	2018	2017	2016	2015	2014	2013	2012	2011
Booked on Board Ship	27%	27%	29%	18%	29%	37%	35%	44%	47%	72%	68%	66%	61%	59%	62%	70%	61%	73%
Booked Independently	65%	65%	49%	52%	39%	28%	34%	33%	37%	20%	28%	27%	28%	29%	28%	22%	31%	21%
Booked On shore	11%	10%	22%	31%	33%	36%	31%	22%	16%	8%	5%	7%	11%	13%	11%	9%	7%	6%
Non-Response	0%	0%	3%	0%	0%	0%	0%	3%	2%	1%	0%	0%	0%	0%	0%	0%	2%	1%

Source: Cruise Expenditure Surveys 2019, 2018, 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 2013. 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, 29% in 2017, 27% in 2018 and 27% in 2019.

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 steadily increased between 2014 to 2017 before they began to fall in 2018. In 2019, cruise visitors spent \$12.5 million on transportation compared to \$15.60 in 2018, \$22.90 in 2017, \$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 and continued to decline. In 2019, cruise visitors spent \$3.50 million playing in the on-island casino in Nassau/Paradise Island compared to \$14.16 million in 2018, \$13.11 million in 2017, \$28.25 million in 2016, \$12.30 in 2015, \$14.68 million in 2014 and \$15.26 in 2013.

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, and \$25.64 million in 2016. \$26.75 million in 2017, \$30.25 in 2018 and \$32.93 in 2019.

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 2018. 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, 56% in 2017, 46% in 2018 and 50% in 2019.

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

Between 2014 and 2019, Señor Frogs was the most popular restaurant where cruise visitors dined while they were in Nassau/Paradise Island. In 2019, the next most popular restaurants were Fat Tuesday, Sharkeez Bar and Grill, Hard Rock Café, and Starbucks.

The other popular restaurants where cruise visitors ate or drank while they were in Nassau/Paradise Island were: Athena's Café, Atlantis, 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.), Imperial Café, John Watlings Distillery, Linda's Place, Lukka Kairi, Margaritaville, McDonald's, Olives Mediterranean Café & Bar, Pirate Republic Brewing Company, Poop Deck, Shark Bites, Subway, Tiki Bikini Hut, Via Caffè, 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 2019, approximately three in ten (31%) cruise visitors who got off the ship on Nassau/Paradise Island and bought food or drinks, bought water during their time ashore on the island compared to 13% in 2018. The percentage of cruise visitors purchasing water declined between 2015 to 2018 before increasing once again in 2019. In 2015, approximately four in ten (38%) cruise visitors purchased water compared to 31% in 2016, 25% in 2017, 13% in 2018 and 31% in 2019.

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 briefly in 2017. In 2018, this percentage fell again, but in 2019 it climbed back up to higher than 2013 levels.

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, 11% in 2017, 7% in 2018 and 19% in 2019.

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

In 2019, one in every twenty (5%) cruise visitors who got off the ship bought ice cream while ashore on Nassau/Paradise Island compared to 1% in 2018. The percentage of cruise visitors purchasing ice cream in Nassau/Paradise island trended downwards between 2014 to 2018. In 2014, approximately one in ten (8%) cruise visitors purchased ice cream while on shore compared to 6% in 2015, 6% in 2016, 3% in 2017 and 1% in 2018.

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

In 2019, approximately six in ten (58%) cruise visitors who came to Nassau/Paradise Island had visited The Bahamas before compared to 63% in 2018, 54% in 2017, 49% in 2016, 53% in 2015, 45% in 2014.

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

In 2019, of the cruise visitors that had visited The Bahamas before, two in ten (20%) had visited one time before. Approximately one in four (26%) cruise visitors had visited The Bahamas two times before, and more than half (53%) 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 On-shore	Cruise	Count	472
		Col %	78.4%
	Stayed on shore	Count	54
		Col %	9.0%
	Both	Count	74
		Col %	12.3%
Non-Response	Count	2	
	Col %	0.3%	
Total	Count		602
	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 until 2019: 2012 (66%), 2013 (59%), 2014 (43%), 2015 (43%) but in 2016 (45%), 2017 (70%), 2018 (73%) and 2019 (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, 11% in 2017, 10% in 2018 and 9% in 2019.

- 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 2014. 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, 18% in 2017, 17% in 2018 and 12% in 2019.

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 (95.2% i.e., 74.8% definitely would & 20.4% 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	302
		Col %	30.4%
	Would come by cruise ship	Count	487
		Col %	48.9%
	Both	Count	144
		Col %	14.5%
	Don't Know	Count	61
		Col %	6.1%
	Non-Response/No Answer	Count	1
		Col %	0.1%
Total	Count	995	
	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 2019. In 2019, of the cruise visitors to Nassau/Paradise Island that came ashore who said that they would or probably would return, three in ten (30%) indicated that they would stay in a hotel when they returned compared to 41% in 2018. In 2016 however, approximately half (51%) of them indicated that they would stay in a hotel.

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 2019 (49%) compared to 2018 (36%). In 2016 however, approximately one in four (24%) of them indicated this.

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 2019, of the cruise visitors to Nassau/Paradise Island who came ashore and said that they would or probably would return, approximately fifteen percent (15%) indicated that they would do both, come back and stay in a hotel and come back on a cruise compared to 17% in 2018, 21% in 2017 and (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 (99% i.e., 85.5% definitely will & 13.2% 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 and 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	188
		Col %	18.0%
	No	Count	822
		Col %	78.7%
	Don't Know	Count	34
		Col %	3.3%
	Non-Response	Count	1
		Col %	0.1%
Total	Count	1045	
	Col %	100.0%	

In 2019, 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 than in the past. As the percentage of repeat cruise visitors to the island continues to remain over 50%, the need

to attend lectures on what to see and do on the island continued to decline in 2019. In 2019, approximately two in ten (18%) 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 approximately three in ten (28%) of them in 2018, 29% in 2017, and 52% in 2016. This decline was in part due to the fact that approximately six in ten (58%) cruise visitors to Nassau/Paradise Island in 2019 were repeat visitors 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	438
		Col %	41.9%
	No	Count	572
		Col %	54.7%
	Don't Know	Count	30
		Col %	2.9%
	Non-Response	Count	5
		Col %	0.5%
Total	Count		1045
	Col %		100.0%

In 2019, four in ten (42%) 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: The Internet, Brochures/pamphlets/flyers, cruise directors, tour directors, maps, television on board the ship. 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	Internet	189	42.7%
	Brochures/Pamphlets/Flyers/Booklets	179	40.4%
	Cruise Director	78	17.6%
	Tour Director	73	16.5%
	Maps	71	16.0%
	Television on board ship	52	11.7%
	Other people/neighbours	12	2.7%
	Non Response	43	9.7%

Roughly four in every ten cruise visitors that got other information on what to see and do while in Nassau/Paradise Island got it off the Internet (43%) or from the brochures/pamphlets/flyers/booklets (40%). Roughly two in ten cruise visitors got their other information from the cruise directors (18%) or the tour directors (17%).

Sixteen percent (16%) of cruise visitors got the other information on what to see and do on island from maps, and roughly one in ten (12%) got it from the television on board the ship.

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

Approximately seven in ten (68%) cruise visitors got off the ship one time and approximately two in ten (23%) got off two times.

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

Length of Stay: Approximately half (47%) the suggestions 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 to see and do more, etc.

In the past the fact that the visitors wanted to stay longer in port was categorized as a negative from their perspective but a positive from the perspective of the destination. However, the decision was made to reclassify this cruise visitor comment of wanting more time in port as a suggestion.

47. Cruise Visitor Demographics:

**DEMOGRAPHICS
NASSAU/PARADISE ISLAND
CRUISE VISITORS
2019**

	2019	2018
CRUISE VISITORS LIKELY TO RETURN	95%	97%
Those Who Would Return and Stay in a Hotel	30%	41%
Those Who Would Return by Cruise ship	49%	36%
Those Who Would Return & Do a Cruise or a Land Stay	15%	17%
CRUISE VISITORS LIKELY TO RECOMMEND	99%	99%
REPEAT VISITORS	58%	63%
AGE		
18-24	3%	3%
25-34	8%	11%
35-44	15%	20%
45-54	27%	28%
55-64	24%	20%
65 yrs. & over	22%	19%
AGE OF CHILD TRAVELLING		
Under 12 months	6%	6%
Age 1 to 5	17%	20%
Age 6 to 11	28%	32%
Age 12 to 17	39%	32%
Over 17 yrs.	10%	10%
TRAVELLING PARTY SIZE		
One	3%	2%
Two	50%	47%
Three	9%	11%
Four or More	37%	40%
AVERAGE TRAVELLING PARTY SIZE	5.0	5.0
HOW VISITORS WERE TRAVELLING (Travel Type)		
Alone	3%	2%
As a couple	42%	39%
As a family	42%	47%
As a group	13%	12%

**DEMOGRAPHICS
NASSAU/PARADISE ISLAND
CRUISE VISITORS
2019**

	2019	2018
HOUSEHOLD INCOME*		
\$25,001-\$50,000	5%	10%
\$50,001-\$75,000	10%	10%
\$75,001 to \$100,000	14%	14%
\$100,001 and over	33%	37%
TOP STATES: WHERE CRUISE VISITORS LIVE		
Florida	24%	21%
New York	8%	9%
Texas	7%	5%
Georgia	6%	8%
North Carolina	6%	6%
New Jersey	5%	4%
South Carolina	4%	4%
Ohio	3%	3%
Pennsylvania	3%	3%
Virginia	3%	3%
Michigan	2%	2%
Maryland	2%	2%
California	2%	3%
Illinois	2%	3%
Massachusetts	2%	1%
Alabama	2%	2%
Mississippi	1%	0.4%
COUNTRY OF RESIDENCE		
USA	97%	94%
Canada	1%	2%
Europe	1%	2%
Other	1%	2%

Source: Cruise Expenditure Survey 2019 and 2018, 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. The average number of persons the expenses relate to usually always less than the travel party size as people tend to travel with friends, etc.

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/Stayovers are travelers that travel outside of their normal environment for any purpose other than to be employed by a resident entity and stay in the destination for 24 hours or more but less than a year. Some examples of stopover visitors include persons that stay in hotels, private boats/yachts, vacation rentals, timeshares, etc. Boaters/yachters hotel visitors 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/Excursionists 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 2019, 2018, 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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