

CRUISE VISITOR EXPENDITURE REPORT



2013

NASSAU/PARADISE ISLAND
THE BAHAMAS MINISTRY OF TOURISM

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EXECUTIVE SUMMARY

Expenditure:

- ✚ In 2013, Cruise Visitors spent an estimated \$324.60 million in Nassau/Paradise Island compared to \$336.68 million in 2012.¹
- ✚ The average expenditure of a cruise visitor to Nassau/Paradise Island was \$98.66 per person in 2013 compared to \$108.08 in 2012, a decline of \$9.42.² This decline in average expenditure in 2013 did cause a decline in overall cruise visitor expenditure despite the significant increase in the amount of cruise visitors that came to the island on cruise lines like Carnival during the year.
- ✚ The average expenditure by cruise visitors in Nassau/Paradise Island differed by cruise line. In 2013, the average expenditure of a cruise visitor to Nassau/Paradise Island on the Carnival fleet of ships was \$90.65 compared to \$106.27 in 2012 (down \$15.62).³ In 2013, the average expenditure of a cruise visitor on Royal Caribbean was \$102.84 compared to \$112.46 in 2012 (down \$9.62).⁴ In 2013, the average expenditure for a cruise visitor who came to the island on the Norwegian Cruises' fleet of ships was \$111.14 compared to \$109.45 in 2012 (up \$1.69) and for a cruise visitor who came on the Disney Cruises ships was \$104.70 compared to \$91.17 in 2012 (up \$13.53).⁵
- ✚ The bulk of expenditure in Nassau/Paradise Island by cruise visitors was on Shopping. Activities/Tours/Excursions were the second biggest expenditure item. In Grand Bahama shopping was the second biggest expenditure item and activities/tours/excursions were the first.
- ✚ Approximately half (48%) of the expenditure by cruise visitors in Nassau/Paradise Island was on shopping and nearly one third (31%) was on Activities, Tours and Excursions.⁶
- ✚ Thirteen percent (13%) of the expenditure made by cruise visitors was on Meals and Drinks purchased off the ship, 5% of the cruise expenditure was spent in the casino on island and 4% was on transportation not included in the Activity/Tour/Excursion.⁷

¹ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

² Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

³ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

⁴ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

⁵ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

⁶ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

⁷ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

- ✚ Approximately half (47%) of the cruise visitors spent under \$50.00 while they were in Nassau/Paradise Island and more than half (53%) spent \$50.00 or more while they were on the island.⁸
- ✚ A higher percentage of cruise visitors in Nassau/Paradise Island spent \$100 or more than cruise visitors to Grand Bahama. Approximately one in three (34%) cruise visitors spent \$100 or more in Nassau/Paradise Island compared to two in ten (21%) for Grand Bahama Island.⁹

Shopping:

- ✚ More than half (56%) 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%) to Grand Bahama.¹⁰ Grand Bahama has some tours/excursions that include shopping as a part of the experience.
- ✚ Of the cruise visitors who had done some shopping in Nassau/Paradise Island, approximately three in four (75%) bought t-shirts, one in ten (10%) bought some other type of clothing and three in ten (31%) bought jewelry.¹¹
- ✚ Approximately three in ten (29%) cruise visitors bought straw work in Nassau/Paradise Island compared to 17% of those to Grand Bahama. Nassau/Paradise Island has the world famous “Straw Market” which attracts cruise visitors and stopover visitors alike.¹² The island of New Providence has more than one straw market but the main one is in downtown Nassau.
- ✚ One in four (25%) cruise visitors bought perfumes or cosmetics while they visited Nassau/Paradise Island compared to 5% of those who visited Grand Bahama Island.¹³
- ✚ Roughly three in ten (27%) cruise visitors to Nassau/P.I. bought liquor compared to approximately one in ten (8%) cruise visitors to Grand Bahama.¹⁴
- ✚ Approximately one in ten (13%) cruise visitors got their hair braided while they were in Nassau/Paradise Island compared to 4% of those who visited Grand Bahama.¹⁵ Nassau/Paradise Island has a hair braiding centre directly in the front of Festival Place.

⁸ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

⁹ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁰ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹¹ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹² Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹³ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁴ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁵ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

- ✚ Some cruise visitors to Nassau/Paradise Island also bought leather goods (3%), tobacco products (2%), china/crystal (0.6%) and linen (0.2%).¹⁶
- ✚ Two in ten (20%) cruise visitors who shopped in Nassau/Paradise Island bought other items than the ones already mentioned.¹⁷
- ✚ Of the cruise visitors who had purchased other goods the most popular items were rum cake/cake purchased by nearly half (45%) of the cruise visitors who had bought other items.¹⁸
- ✚ Other popular items purchased in Nassau/Paradise Island included hand bags/purses/wallet/tote bags, (24% of the cruise visitors purchased this item), hats/caps (10%), sunglasses (6%), mugs/cups (6%), shot glasses (6%), beach towel/towel (5%) and key chains (3%).¹⁹

Activities/Tours/Excursions:

- ✚ One in three (33%) cruise visitors who got off the cruise ship in Nassau/Paradise Island did an activity/tour or excursion compared to roughly half (47%) of those to Grand Bahama.²⁰
- ✚ The most popular activity/tour or excursion was the City Tour/Island tour. Half (50%) of the cruise visitors who got off the ship in Nassau/Paradise Island participated in this activity compared to approximately one in ten (13%) of those to Grand Bahama.²¹
- ✚ Other popular tours included snorkeling, Atlantis/Discover Atlantis/Other Atlantis Tours, Nassau See and Sea Tour, Glass Bottom Boat Tour, etc.²²

How Did Cruise Visitors Book Their Activity/Tour/Excursion?

- ✚ The percentage of cruise visitors to Nassau/Paradise Island booking their activity/tour/excursion on board the cruise ship has been declining since 2011. In 2011, roughly half (47%) of the cruise visitors to Nassau/Paradise Island booked their activity/tour/excursion on board the ship and four in ten (44%) did so in 2012.²³
- ✚ In 2013, approximately one in three (35%) cruise visitors to Nassau/Paradise Island booked their activity/tour/excursion on board the ship compared to seven in ten (70%) cruise visitors to Grand Bahama who did the same.²⁴

¹⁶ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁷ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁸ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁹ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

²⁰ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

²¹ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

²² Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

²³ Source: Cruise Expenditure Exit Survey 2011, 2012 and 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

²⁴ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

- ✚ Approximately one in three (34%) cruise visitors to Nassau/Paradise Island booked their activity/tour/excursion independently of the cruise ship compared to approximately two in ten (22%) cruise visitors to Grand Bahama who did the same.²⁵
- ✚ Three in ten (31%) cruise visitors who did some sort of activity/tour/excursion booked it when they got off the boat on shore in Nassau/Paradise Island compared to 9% of those who went to Grand Bahama.²⁶

Transportation:

- ✚ **Taxi:** One in seven (14%) cruise visitors to Nassau/Paradise Island used a taxi to get around compared to approximately three in ten (28%) cruise visitors to Grand Bahama Island. (Does not include persons who used a taxi as a part of a tour).²⁷
- ✚ **Water Taxi/Ferry:** One in every twenty (5%) cruise visitors to Nassau/Paradise Island used a ferry while on the island.²⁸
- ✚ **Surrey:** Three percent (3%) of cruise visitors who got off the ship in Nassau/Paradise Island used a surrey while on the island.²⁹
- ✚ **Motor Scooter:** One percent (1.0%) of the cruise visitors who got off the ship used a motor scooter as transportation to get around.³⁰
- ✚ **Bus/Jitney:** One percent (1.0%) of the cruise visitors who got off the ship used a bus/jitney as transportation to get around.³¹

Casino:

- ✚ Most of the cruise ships that travel to Nassau/Paradise Island and the other islands of The Bahamas have on-board casinos. Despite this fact, approximately one in twenty (5%) cruise visitors who got off the ships in Nassau/Paradise Island visited a casino there.³²

Food and Drink:

- ✚ Approximately two in three (64%) cruise visitors who got off the ship in Nassau/Paradise Island bought food or drink on the island compared to approximately seven in ten (69%) of the cruise visitors who visited Grand

²⁵ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

²⁶ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

²⁷ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

²⁸ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

²⁹ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

³⁰ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

³¹ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

³² Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

Bahama Island. Some of them bought full meals or snacks while others just bought water, soda/juice/drink, and ice cream.³³

Repeat Visitors:

- ✚ Approximately half (48%) the cruise visitors who visited Nassau/Paradise Island had visited The Bahamas before.³⁴
- ✚ Of the repeat visitors who had come to The Bahamas before, approximately six in ten (59%) had visited before on a cruise ship.³⁵
- ✚ One in six (16%) cruise visitors who had visited before had stayed on shore during their last visit.³⁶
- ✚ One in four (25%) visitors to Nassau/Paradise Island who had visited The Bahamas before had done both, i.e., cruised to The Bahamas or stayed on shore at one time or another.³⁷

Likelihood of Return to The Bahamas and Likelihood of Recommending The Bahamas to Friends/Relatives:

- ✚ Nine in ten (90%) cruise visitors who had gone 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 holiday.³⁸
- ✚ Of the cruise visitors who said that they would definitely or probably return, roughly three in ten (27%) said that they would stay in a hotel when they came back but more than half (55%) said that they would come back on a cruise ship again.³⁹
- ✚ The majority (99%) of cruise visitors who had gone ashore in Nassau/Paradise Island indicated that they would recommend The Bahamas as a place for their friends/relatives to visit.⁴⁰

Did Cruise Visitors Attend Talk/Lecture About Island Before They Got off Ship:

- ✚ More than half (54%) the cruise visitors to Nassau/Paradise Island who had gotten off the ship indicated that they had attended a talk/lecture about what there was to see and do on the island before they got off the ship.⁴¹

³³ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

³⁴ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

³⁵ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

³⁶ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

³⁷ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

³⁸ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

³⁹ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

⁴⁰ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

⁴¹ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

Did Cruise Visitors Receive Other Information About What to Do & See On Island and Where Did They Get That Information:

- ✚ Roughly two in three (63%) cruise visitors to Nassau/Paradise Island indicated that they did get other information beside a talk/lecture about what there was to see and do while they were on the island before they got off the ship.⁴²
- ✚ The most popular means for cruise visitors to find out information on what to see or do while in Nassau/Paradise Island included: Brochures/pamphlets/flyers (68% of them), maps (52%), the Internet (35%), television on board the ship (23%), and cruise directors (5%).⁴³

Cruise Visitor Demographics Nassau/Paradise Island:

- ✚ Cruise Visitors to Nassau/Paradise Island were primarily between the ages of 25 to 64 years of age and female. Two in ten cruise visitors had household incomes of \$25,001 to \$50,000 (22%) or \$50,001 to \$75,000 (21%) and one in ten (10%) cruise visitors had household incomes of \$75,001 to \$100,000.⁴⁴ Some of the cruise visitors traveled with children and the children were primarily between the ages of 6 to 17 years of age. The average travelling party size was three although approximately six in ten (58%) cruise visitors traveled as a party of two persons. Roughly half (48%) the cruise visitors to Nassau/Paradise Island had been to The Bahamas before i.e. were repeat visitors.⁴⁵
- ✚ Cruise visitors were primarily from the United States. Florida was the state that produced the most cruise visitor business for Nassau/Paradise Island followed by Ohio, Georgia, New York, Illinois, Pennsylvania South Carolina, California and New Jersey.⁴⁶

⁴² Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

⁴³ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

⁴⁴ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

⁴⁵ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

⁴⁶ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

INTRODUCTION

Once upon a time many decades ago the Karnak (owned by Mr. Samuel Cunard, founder of the Cunard Cruise Line) a paddle wheel steamer, made its first inaugural trip between New York and Nassau in 1859.⁴⁷ The Cruise Industry did not flourish immediately after this initial cruise to The Bahamas.

In 1971, air arrivals which made up 66.3% of the total arrivals to The Bahamas held the lion's share of the tourism business to the destination while sea arrivals (sea arrivals include cruise arrivals and boaters/yachters) held only 33.7% of the market share.⁴⁸ This would all change as the pages of time were destined to re-write history. By the early 1980's, the cruise industry to The Bahamas began to see significant growth as cruise travel began to explode in The Bahamas and all over the world. In 1986, for the first time in Bahamian history, sea arrivals (1,628,700) surpassed air arrivals (1,378,600) and this trend continued into the present.⁴⁹ Between 1989 and 1999, cruise arrivals to The Bahamas grew by 21% and between 1999 and 2009 they grew by 64%.⁵⁰ By 2013, cruise arrivals to The Bahamas had climbed to an all new high of 4,709,236.⁵¹ The mix of business between air and sea arrivals which had begun to reverse in 1986 continued that trend in 2013. Air arrivals now made up 20.8% of the total arrivals and sea arrivals made up 79.2% of the market share of business to the Bahamas.⁵²

The Cruise Industry with its explosion of growth had become a force to be reckoned with and that trend continues today. In 2013, the cruise market transported an estimated 21.3 million passengers globally and pumped an estimated US\$44 billion into the US economy and an estimated US\$117 billion globally.⁵³ It is estimated that in 2014 the Cruise Industry will transport 21.7 million cruise passengers globally.⁵⁴ The Cruise Industry grew tremendously over the years and the cruise lines built bigger and more lavish ships to accommodate the growth. In order to capitalize on this booming cruise business The Bahamas dredged the harbour in New Providence to accommodate the larger ships. In addition, the plethora of beautiful islands in The Bahamas made the destination ideal for Bahamas only cruises. This meant that cruise ships could stop in

⁴⁷ Source: History of Tourism in The Bahamas by Angela Cleare

⁴⁸ Source: Bahamas Dept. of Immigration, Bahamas Customs Dept. and Bahamas Ministry of Tourism & Statistics Dept.

⁴⁹ Source: Bahamas Dept. of Immigration, Bahamas Customs Dept. and Bahamas Ministry of Tourism & Statistics Dept.

⁵⁰ Source: Bahamas Dept. of Immigration, Bahamas Customs Dept. and Bahamas Ministry of Tourism & Statistics Dept.

⁵¹ Source: Bahamas Dept. of Immigration, Bahamas Customs Dept. and Bahamas Ministry of Tourism & Statistics Dept.

⁵² Source: Bahamas Dept. of Immigration, Bahamas Customs Dept. and Bahamas Ministry of Tourism & Statistics Dept.

⁵³ Source: AAPA (American Association of Port Authorities)

<http://www.aapaports.org/Industry/content.cfm?ItemNumber=1099&navItemNumber=550>

⁵⁴ Source: <http://www.f-cca.com/downloads/2014-Cruise-Industry-Overview-and-Statistics.pdf>

Nassau/Paradise Island, then travel on to Grand Bahama, and then on to another island in The Bahamas without traveling to any other island outside of The Bahamas on the cruise.

As more and more visitors cruised to The Bahamas it became evident that the island nation should encourage cruise visitors to spend more money in the destination, but this would be no easy task. Out of the need to increase the visitor spend in the destination the Cruise Visitor Expenditure Survey was born.

The Research and Statistics Department of the Ministry of Tourism has conducted a survey of cruise visitors to [The Islands of The Bahamas](#) for a number of years. In the past the survey was conducted in conjunction with the Cruise Lines on board their ships. In recent years, the Research and Statistics Department developed two new surveys, the Cruise Satisfaction Survey and the Cruise Expenditure Survey to not only give insight into the tourism product and help The Bahamas to fix any concerns that cruise visitors had about the destination but to gain insight into the spending habits of these visitors to the island. In 2013, [The Prince George Dock in Nassau/Paradise Island](#) received a total of 2,496,497 cruise visitors by first port of entry and 3,602,485 in total (1st 2nd and 3rd ports).⁵⁵

RESEARCH OBJECTIVES

1. To measure the level of expenditure made by cruise ship visitors to Nassau/Paradise Island
2. To discover the amount of spending made by cruise visitors on shopping
3. To discover the amount of spending made by cruise visitors on activities
4. To discover the amount of spending made by cruise visitors on transportation not included in the activity/tour/excursion
5. To discover the amount of spending made by cruise visitors on food and drinks purchased off the ship
6. To examine the repeat visitor pattern of cruise visitors to Nassau/Paradise Island
7. To discover whether the repeat visitors to The Bahamas had stayed on a cruise, on shore or both the last time they visited
8. To discover if cruise visitors had attended a talk or lecture about what there was to see or do in Nassau/Paradise Island

⁵⁵ Source: Bahamas Dept. of Immigration, Bahamas Customs Dept. and Bahamas Ministry of Tourism & Statistics Dept.

9. To discover what other information cruise visitors to Nassau/Paradise Island received about what to do and see there and where did they get the information
10. To discover if cruise visitors to Nassau/Paradise Island thought that they would likely return to The Bahamas
11. To discover if the cruise visitors who were likely to return to The Bahamas thought that they would stay in a hotel or come back on a cruise ship
12. To better understand the cruise passenger demographics

A copy of the cruise questionnaire is provided in the Appendix.

METHODOLOGY

In the past the survey was conducted in conjunction with the Cruise Lines and the methodology used was very different from the one that is used now. In the past the cruise surveys were placed on board the cruise ships in the rooms by the Chief Pursers and the cruise visitors were asked to fill them out. Over the years the sample size began to dwindle and as a result a new survey methodology was started to collect the information given by cruise visitors.

The cruise surveys are now conducted on island by way of interviews. Interviews are conducted on a year round basis on various days of the month. The method used in the selection of the sample for The Cruise Study can be described as a two-staged Systematic Probability Sampling. With this method every kth element (mainly every 5th person) in the sampling frame is selected.

During 2013, 34 ships which called at the Prince George Dock in Nassau/Paradise Island formed a part of the sample. These 34 ships were from nine major cruise lines. A total of 931 face to face interviews were completed during this period from these ships. The interviews were conducted on a monthly basis. Interviews were conducted at various times of the day between 11:30 am and 6:00 pm in accordance with the times that the cruise ships were scheduled to be in port.

As with any survey dependent upon random sampling, the percentages and averages in this report are subject to sampling error. The sample is used to estimate the population and differences exist between the result of the sample and the true underlying population value that is unknown. This difference is called sampling error and it is measurable. Sampling tolerances (error) for the percentages in this report are shown below.

SAMPLING TOLERANCES FOR PERCENTAGES AT OR NEAR THESE LEVELS* 2013

Place of Survey	Base	5% or 95%	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
Nassau/Paradise Isl.	931	± 1.4%	± 1.9%	± 2.6%	± 2.9%	± 3.1%	± 3.2%

* 95% Confidence level

For example, if 50% of the stopover visitors to Nassau/Paradise Island gave a particular response, 95 times out of 100 times, the answer would be no higher than 53.2% and no lower than 46.8% (a margin of plus or minus 3.2%).

CRUISELINES IN SURVEY 2013

			Nassau
Cruiseline Name	Carnival Cruise Lines	Count	426
		Col %	45.8%
	Norwegian Cruises	Count	243
		Col %	26.1%
	Royal Caribbean International	Count	174
		Col %	18.7%
	Disney Cruises	Count	69
		Col %	7.4%
	Celebrity Cruises	Count	6
		Col %	.6%
	Holland American Cruises	Count	6
		Col %	.6%
	MSC Cruises	Count	4
		Col %	.4%
	Aida Cruises	Count	2
		Col %	.2%
	Costa Cruises	Count	1
		Col %	.1%
Total		Count	931
		Col %	100.0%

- ✚ Carnival Cruise lines is one of the biggest suppliers of cruise passengers to Nassau/Paradise Island and made up 46% of the sample.⁵⁶
- ✚ Norwegian Cruises another large supplier of cruise visitors to Nassau/Paradise Island made up 26% of the sample.⁵⁷
- ✚ Royal Caribbean International is another big supplier of cruise passengers to Nassau/Paradise Island and made up 19% of the sample.⁵⁸

⁵⁶ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

⁵⁷ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

⁵⁸ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

2013

NAMES OF SHIP IN SURVEY			Nassau
Ship Name	Norwegian Sky	Count	135
		Col %	14.5%
	Carnival Ecstasy	Count	89
		Col %	9.6%
	Carnival Sensation	Count	83
		Col %	8.9%
	Carnival Fantasy	Count	71
		Col %	7.6%
	Norwegian Gem	Count	70
		Col %	7.5%
	Disney Dream	Count	69
		Col %	7.4%
	Monarch of the Seas	Count	59
		Col %	6.3%
	Enchantment of the Seas	Count	53
		Col %	5.7%
	Carnival Fascination	Count	47
		Col %	5.0%
	Norwegian Epic	Count	34
		Col %	3.7%
	Majesty of the Seas	Count	29
		Col %	3.1%
	Carnival Pride	Count	28
		Col %	3.0%
	Carnival Breeze	Count	28
		Col %	3.0%
	Carnival Victory	Count	26
		Col %	2.8%
	Carnival Dream	Count	16
		Col %	1.7%
	Oasis of the Seas	Count	13
		Col %	1.4%
	Carnival Miracle	Count	10
		Col %	1.1%
	Mariner of the Seas	Count	9
		Col %	1.0%
	Allure of the Seas	Count	8
		Col %	0.9%
	Carnival Splendor	Count	7
		Col %	0.8%

NAMES OF SHIP IN SURVEY		Nassau
Carnival Conquest	Count	6
	Col %	0.6%
Eurodam	Count	6
	Col %	0.6%
Carnival Imagination	Count	6
	Col %	0.6%
Eclipse	Count	5
	Col %	0.5%
Carnival Dream	Count	4
	Col %	0.4%
MSC Poesia	Count	4
	Col %	0.4%
Norwegian Jewel	Count	4
	Col %	0.4%
Explorer of the Seas	Count	3
	Col %	0.3%
Aidaaura	Count	2
	Col %	0.2%
Carnival Glory	Count	2
	Col %	0.2%
Carnival Valor	Count	2
	Col %	0.2%
Carnival Liberty	Count	1
	Col %	0.1%
Constellation	Count	1
	Col %	0.1%
Costa Mediterranea	Count	1
	Col %	0.1%
Total	Count	931
	Col %	100.0%

- ✚ Fifteen percent (15%) of the cruise visitors interviewed came to Nassau/Paradise Island on Norwegian Sky.⁵⁹
- ✚ Ten percent (10%) of the cruise visitors interviewed came to Nassau/Paradise Island on the Carnival Ecstasy and 9% came on Carnival Sensation.⁶⁰
- ✚ Eight percent of the cruise visitors interviewed came to Nassau/Paradise Island on the Carnival Fantasy (8%) or the Norwegian Gem (8%).⁶¹

⁵⁹ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

⁶⁰ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

⁶¹ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

MAIN FINDINGS
CRUISE VISITOR EXPENDITURE
AVERAGE EXPENDITURE

- ✚ In 2013, the average expenditure of a cruise visitor to Nassau/Paradise Island was \$98.66 per person compared to \$108.08 in 2012 (down \$9.42).⁶² Thirteen years ago (13) in 1998, cruise visitors to Nassau/Paradise Island spent an average of \$74.3 per person during their visit.⁶³
- ✚ In 2013, Carnival Cruise lines (*not including their subsidiaries*) which had 47% of the market share of cruise visitor business into Nassau/Paradise Island brought in 10.2% more cruise visitors into the island (by 1st, 2nd and 3rd port of call) but the amount of money spent by each of the visitors on island declined.⁶⁴
- ✚ The average expenditure by cruise visitors in Nassau/Paradise Island differed by cruise line. In 2013, the average expenditure of a cruise visitor to Nassau/P.I. on the Carnival fleet of ships was \$90.65 compared to \$106.27 in 2012 (down \$15.62).⁶⁵ In 2013, the average expenditure of a cruise visitor on Royal Caribbean was \$102.84 compared to \$112.46 in 2012 (down \$9.62).⁶⁶ In 2013, the average expenditure for a cruise visitor who came to the island on the Norwegian Cruises ships was \$111.14 compared to \$109.45 in 2012 (up \$1.69) and for a cruise visitor who came on the Disney Cruises ships was \$104.70 compared to \$91.17 in 2012 (up \$13.53).⁶⁷

⁶² Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

⁶³ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

⁶⁴ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

⁶⁵ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

⁶⁶ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

⁶⁷ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

AVERAGE AMOUNT SPENT BY VISITORS NASSAU

			Nassau
Average Amount Spent by Visitors	Under \$20.00	Count	216
		Col %	23.2%
	\$20.00 to \$49.99	Count	219
		Col %	23.5%
	\$50.00 to \$69.99	Count	91
		Col %	9.8%
	\$70.00 to \$99.99	Count	90
		Col %	9.7%
	\$100.00 to \$199.99	Count	160
		Col %	17.2%
	\$200.00 and over	Count	155
		Col %	16.6%
Total	Count	931	
	Col %	100.0%	

- ✚ Roughly one in four (23%) cruise visitors spent under \$20.00 while they were in Nassau/Paradise Island.⁶⁸
- ✚ Roughly one in four (24%) spent \$20.00 to \$49.99 on the island.⁶⁹
- ✚ Roughly half (53%) of cruise visitors to Nassau/Paradise Island spent \$50.00 or more while they were on the island.⁷⁰

⁶⁸ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

⁶⁹ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

⁷⁰ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

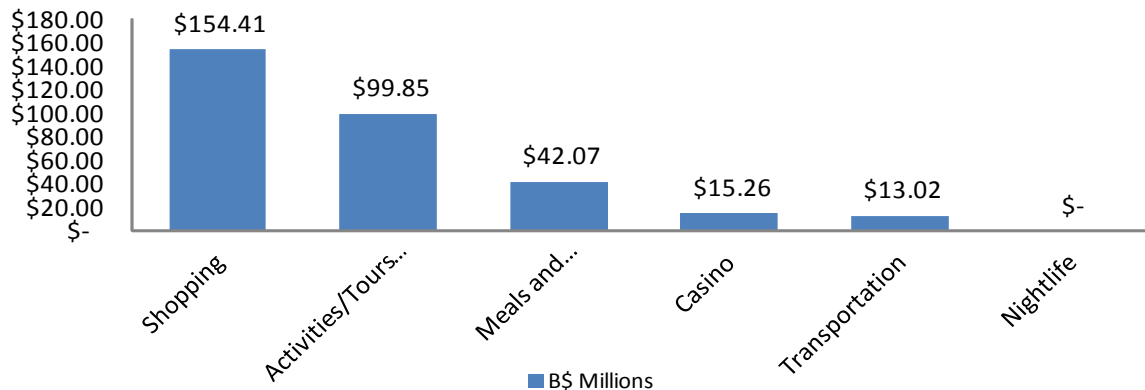
**WHAT DID CRUISE VISITORS SPEND THEIR MONEY ON:
EXPENDITURE DISTRIBUTION**

**DISTRIBUTION OF EXPENDITURE BY DOLLARS
CRUISE VISITORS
NASSAU PARADISE ISLAND
2013**

	2013		2012	
	B\$ Millions	% Share	B\$ Millions	% Share
Shopping	\$ 154.41	47.6%	\$ 148.54	44.1%
Activities/Tours/Excursions	\$ 99.85	30.8%	\$ 108.44	32.2%
Meals and Drinks off Ship	\$ 42.07	13.0%	\$ 33.94	10.1%
Casino	\$ 15.26	4.7%	\$ 32.09	9.5%
Transportation	\$ 13.02	4.0%	\$ 13.67	4.1%
Nightlife	\$ -	0.0%	\$ -	0.0%
Total	\$ 324.60	100.0%	\$ 336.68	100.0%

Some rounding may have occurred. Source: Cruise Expenditure Survey 2013 and 2012

**DISTRIBUTION OF EXPENDITURE BY DOLLARS
NASSAU/PARADISE ISLAND**



- ✚ Fifteen years ago in 1998 cruise visitors pumped an estimated \$81.8 million dollars into the Nassau/Paradise Island economy.⁷¹ The tremendous increase in dollars pumped into the economy over the last few years came as a result of an increase in cruise visitor spend and a huge surge in the number of cruise arrivals to the destination.
- ✚ Total Cruise Visitor spend did not trend upwards in 2013. Cruise Visitors spent an estimated \$324.60 million in Nassau/Paradise Island in 2013

⁷¹ Source: Cruise Expenditure Exit Survey 1998, Bahamas Ministry of Tourism Research & Statistics Dept.

compared to \$336.68 in 2012, a decline of 3.6%.⁷² Although Nassau/Paradise Island received more cruise visitors in 2013 than in 2012 average spend per cruise visitor declined from \$108.10 in 2012 to \$98.7 in 2013.⁷³

- ✚ The amount of cruise expenditure in Nassau/Paradise Island declined because of a number of factors: Carnival Cruise lines brought in 10% more cruise passengers to Nassau/Paradise in 2013 than in 2012 but the cruise visitors who got off the ship spent on average \$15.62 less in 2013 than the cruise visitors did in the previous year.⁷⁴
- ✚ The bulk of expenditure in Nassau/Paradise Island by cruise visitors was on Shopping. Activities/Tours/Excursions were the 2nd biggest expenditure item. In Grand Bahama the bulk of expenditure was spent on activities/tours/excursions and shopping was the 2nd biggest item.
- ✚ Approximately half (48%) the expenditure by cruise visitors to Nassau/Paradise Island was on shopping and 31% was spent on Activities, Tours and Excursions.⁷⁵
- ✚ Thirteen percent (13%) of the cruise expenditure was on Meals and Drinks purchased off the ship and 5% was spent in the casino on island.⁷⁶
- ✚ Four percent (4%) of the cruise expenditure was on Transportation not included in the Activity/Tour/Excursion.⁷⁷

⁷² Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

⁷³ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

⁷⁴ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

⁷⁵ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

⁷⁶ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

⁷⁷ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

SHOPPING

DID YOU DO ANY SHOPPING?

			Nassau
Did you do any shopping today?	Yes	Count	519
		Col %	55.7%
	No	Count	411
		Col %	44.1%
	Non Response	Count	1
		Col %	.1%
Total	Count		931
	Col %		100.0%

- ✚ In 2013, roughly six in ten (56%) 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.⁷⁸ The percentage of cruise visitors in 2013 who did some form of shopping declined for Nassau/Paradise Island (down 4.9 percentage pts. from 60.6%) and increased for Grand Bahama (up 6.7 percentage points from 80.5%) when compared to 2012.⁷⁹ In 2013, the amount spent on shopping in Nassau/Paradise Island increased despite the fact that a smaller percentage of cruise visitors were shopping because those who did go shopping spent a higher percentage of their money doing so than in 2012.

⁷⁸ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

⁷⁹ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

**CRUISE VISITORS
THE BAHAMAS
SHOPPING SUMMARY**

	% of Cruise Visitors Who Said Yes					
	Nassau/Paradise Isl.			Grand Bahama		
	2013	2012	2011	2013	2012	2011
Did Shopping?	55.7%	60.6%	53.0%	87.2%	80.5%	73.6%
Bought T-shirts	75.4%	69.1%	79.4%	62.6%	50.3%	48.6%
Bought Other Clothing	10.2%	12.2%	13.6%	23.0%	24.9%	21.5%
Bought Other Souvenirs	45.8%	46.1%	47.0%	37.7%	35.5%	37.6%
Bought Other Items	20.1%	34.7%	42.9%	28.7%	35.1%	27.2%
Bought Jewelry	31.2%	33.2%	40.4%	38.8%	40.8%	38.7%
Bought Straw Work	29.0%	26.8%	39.4%	16.7%	13.7%	16.5%
Bought Perfumes or Cosmetics	25.0%	21.4%	32.2%	5.2%	2.0%	4.5%
Bought Liquor	26.5%	25.3%	31.0%	8.0%	4.3%	2.0%
Did Hair Braiding	12.7%	9.9%	21.1%	3.6%	2.7%	2.7%
Bought Linen	0.2%	2.7%	6.8%	1.2%	0.9%	1.1%
Bought Tobacco	2.1%	3.0%	3.3%	1.2%	1.9%	0.7%
Bought Leather Goods	2.9%	2.7%	3.1%	0.4%	0.9%	0.7%
Bought China/Crystal	0.6%	1.6%	1.6%	0.9%	1.8%	1.8%

Source: Cruise Expenditure Survey 2013, 2012 and 2011

- ✚ Of the cruise visitors who had done some shopping in Nassau/Paradise Island, three in every four (75%) cruise visitors bought t-shirts.⁸⁰
- ✚ One in ten (10%) cruise visitors who had done some shopping in Nassau/Paradise Island bought some other type of clothing.⁸¹
- ✚ Three in ten (31%) cruise visitors who had done some shopping in the destination bought jewelry.⁸²
- ✚ Approximately three in ten (29%) cruise visitors to Nassau/Paradise Island bought straw work, compared to roughly two in ten (17%) to Grand Bahama who spent on this item.⁸³ Nassau/Paradise Island is known for its Straw Market.
- ✚ One in four (25%) cruise visitors bought perfumes or cosmetics during their visit to Nassau/Paradise Island compared to only 5% of cruise visitors to

⁸⁰ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

⁸¹ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

⁸² Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

⁸³ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

Grand Bahama who spent on these items.⁸⁴ There are many perfume and cosmetic stores in downtown Nassau which makes shopping for these items very easy, while in Grand Bahama these stores are not as plentiful.

- ✚ Approximately three in ten (27%) cruise visitors to Nassau/Paradise Island bought liquor compared to approximately one in ten (8%) cruise visitors in Grand Bahama.⁸⁵ In Nassau/Paradise Island, there are multiple liquor stores in the downtown area near the cruise ship terminal at the Prince George Wharf/Dock.
- ✚ Approximately one in ten (13%) cruise visitors got their hair braided in Nassau/Paradise Island compared to one in every twenty-five (4%) cruise visitors to Grand Bahama.⁸⁶ There is a hair braiding centre right in front of the Cruise Docking area at Festival Place, this is not the case in Grand Bahama.
- ✚ Three percent (3%) of them bought leather goods in Nassau/Paradise Island.⁸⁷ The purchase of items such as handbags/purses/wallets and totes is categorized separately.
- ✚ Two percent (2%) of them bought tobacco products.⁸⁸
- ✚ One percent (1%) of them bought china/crystal.⁸⁹
- ✚ A small percentage (0.2%) of them bought linen.
- ✚ Two in ten (20%) cruise visitors who shopped in Nassau/Paradise Island bought other items than the ones already mentioned.⁹⁰
- ✚ Of the cruise visitors who purchased other goods the most popular items were rum cake/cake purchased by nearly half (45%) of the cruise visitors who had bought other items.⁹¹
- ✚ Other popular items purchased in Nassau/Paradise Island included hand bags/purses/wallet/tote bags, (25% of the cruise visitors purchased this item), hats/caps (10%), sunglasses (6%), mugs/cups (6%), shot glasses (6%), beach towel/towel (5%) and key chains (3%).⁹²
- ✚ Less popular items purchased by cruise visitors to Nassau/Paradise Island included postcards, shoes/slippers/tennis shoes, movies/DVD's/CD, nail polish, sea shells, picture/painting, beach bags, wooden carvings, beach wrap, hot sauce/hot pepper, magnets, toiletries, toy turtle/toys, flutes,

⁸⁴ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

⁸⁵ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

⁸⁶ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

⁸⁷ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

⁸⁸ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

⁸⁹ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

⁹⁰ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

⁹¹ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

⁹² Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

tea/coffee, cooking mitts/pan holder, candy, magazine/book, seasonings/spices, ash tray, newspaper, and medicine, etc.

- ✚ It is also important to note that cruise visitors can only purchase items that are offered for sale in places where they happen to go and in many instances they purchase what they want of what is made available to them.

ACTIVITIES/TOURS/EXCURSIONS

**DID YOU DO ANY ACTIVITIES, TOURS OR EXCURSIONS
ON-SHORE WHILE YOU WERE OFF THE SHIP?**

		Nassau	
		Count	Col %
Did you do any activities, tours or excursions on-shore while you were off the ship?	Yes	311	33.4%
	No	620	66.6%
Total		931	100.0%

- ✚ One in every three (33%) cruise visitors who got off the cruise ship in Nassau/Paradise Island did an activity/tour or excursion compared to approximately half (47%) of the cruise visitors to Grand Bahama that did an activity/tour or excursion.⁹³
- ✚ The most popular activity/tour or excursion was the City Tour/Island tour. Roughly one half (50%) of cruise visitors who got off the ship in Nassau/Paradise Island participated in this activity compared to roughly one in ten (13%) cruise visitors to Grand Bahama.⁹⁴
- ✚ Other popular tours for Nassau/Paradise Island included snorkeling, Atlantis Tour/Discover Atlantis/Atlantis Aquaventure Tours, Nassau See and Sea Tour, Glass Bottom Boat Tour, City Tour and Atlantis, etc.
- ✚ Cruise visitors to Nassau/Paradise Island also enjoyed: museums like Pirates of Nassau, Dolphin Encounters, Segway Native/Bahamas Segway & Beach Experience Tour, Blue Lagoon Island Beach Day, Seahorse Sailing Adventures, Ardastra Gardens, Rainbow Reef, Jet skis, etc.

⁹³ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

⁹⁴ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

How Did Cruise Visitors Book Their Activity/Tour/Excursion?

HOW DID YOU BOOK YOUR ACTIVITY/TOUR/EXCURSION THE BAHAMAS 2013

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

Source: Cruise Visitor Expenditure Survey 2013, 2012 and 2011. In some instances cruise visitors to GBI booked one activity one way and their other activity another way.

- ✚ The percentage of cruise visitors to Nassau/Paradise Island booking their activity/tour/excursion on board the cruise ship has been declining since 2011.
 - One of the reasons for this decline is that approximately half (48%) of the cruise visitors to Nassau/Paradise Island in 2013 had visited the island before either on a cruise or on a land based stay.⁹⁵ This meant that they already knew their way around the island better than first time visitors to the destination.
 - Another reason for this decline in booking on board the cruise ship is that cruise visitors who have been to the island before are more likely to know that they can book their activity/tour/excursion cheaper if they book online, independently or when they get off the cruise ship.
- ✚ In 2013, roughly one in three (35%) cruise visitors to Nassau/Paradise Island booked their activity/tour/excursion on board the ship compared to seven in ten (70%) cruise visitors to Grand Bahama who did the same.⁹⁶ In 2011, approximately half (47%) of the cruise visitors to Nassau/Paradise Island had booked their activity/tour/excursion on board the ship and four in ten (44%) had done so in 2012.⁹⁷
- ✚ Approximately one in three (34%) cruise visitors to Nassau/Paradise Island booked their activity/tour/excursion independently of the cruise ship

⁹⁵ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

⁹⁶ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

⁹⁷ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

compared to approximately two in ten (22%) cruise visitors to Grand Bahama who did the same.⁹⁸

- ✚ Three in ten (31%) cruise visitors who did some sort of activity/tour/excursion booked it when they got off the boat on shore in Nassau/Paradise Isl. compared to 9% of those who went to Grand Bahama.⁹⁹

TRANSPORTATION

- ✚ Cruise Visitors used various methods of transportation to get around the island of Nassau/Paradise Island. Many of them had their transportation included in their activity/tour/excursion while others used a taxi or motor scooter, bus/jitney or water taxi/ferry.
- ✚ **Taxi:** One in every seven (14%) cruise visitors to Nassau/Paradise Island used a taxi to get around compared to approximately three in every ten (28%) cruise visitors to Grand Bahama Island who did so.¹⁰⁰ (Does not include persons who used a taxi as a part of a tour).
- ✚ **Water Taxi/Ferry:** One in every twenty (5%) cruise visitors to Nassau/Paradise Island used a ferry while on the island.¹⁰¹
- ✚ **Surrey:** Three percent (3%) of cruise visitors who got off the ship in Nassau/Paradise Island used a surrey while on the island.¹⁰²
- ✚ **Motor Scooter:** One percent (1.0%) of the cruise visitors who got off the ship used a motor scooter as transportation to get around.¹⁰³
- ✚ **Bus/Jitney:** One percent (1.0%) of the cruise visitors who got off the ship used a bus/jitney as transportation to get around.¹⁰⁴

CASINOS

- ✚ Most of the cruise ships that travel to Nassau/Paradise Island and the other islands of The Bahamas have on-board casinos. Despite this fact, approximately one in twenty (5%) cruise visitors who got off the ships in Nassau/Paradise Island visited a casino there.¹⁰⁵

⁹⁸ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

⁹⁹ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁰⁰ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁰¹ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁰² Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁰³ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁰⁴ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁰⁵ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

FOOD AND DRINKS OFF THE SHIP

DID YOU BUY ANY FOOD OR DRINKS?

			Nassau
Did you buy any food or drinks?	Yes	Count	597
		Col %	64.1%
	No	Count	334
		Col %	35.9%
Total	Count	931	
	Col %	100.0%	

- ✚ The percentage of cruise visitors eating off the ship in Nassau Paradise Island has steadily been increasing over the years.
- ✚ 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.¹⁰⁶ In 2012, six in ten (60%) cruise visitors who got off the ship bought food or drink while in Nassau/Paradise Island and in 2013 approximately two in every three (64%) cruise visitors who got off the ship bought food or drink on the island.¹⁰⁷ In 2013, approximately seven in ten (69%) of the cruise visitors to Grand Bahama bought food or drink on the island.¹⁰⁸
- ✚ Some of them bought full meals or snacks while others just bought water, soda/juice/drink or ice cream.
- ✚ Señor Frogs was the most popular restaurant where cruise visitors dined while they were in Nassau/Paradise Island.¹⁰⁹ The next most popular restaurant was the Hard Rock Café.¹¹⁰
- ✚ The other popular restaurants where cruise visitors ate or drank while they were Nassau/Paradise Island were: Athena's Café, Burger King, Chop Stix, Café Skans, Conch Fritters, Double Dragon, Dunkin Donuts, Fish Fry, Go Green Café, Goombay Mama, Green Parrot Bar Grill, Jimmy's Takeway, Johnny Rockets, Kafe Kalik, McDonalds, Olives Mediterranean Café & Bar, Sbarro, Sea Food Haven, Sharkeez Bar & Grill, Starbucks, Subway, Twin Brothers, and Via Caffe, etc. *(listed in alphabetical order. All restaurants are not listed, just the most popular ones).*¹¹¹

¹⁰⁶ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁰⁷ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁰⁸ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁰⁹ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹¹⁰ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹¹¹ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

BOUGHT WATER

		Nassau
Yes	Count	304
	Col %	32.7%
No	Count	627
	Col %	67.3%
Total	Count	931
	Col %	100.0%

- ✚ One in every three (33%) cruise visitors who got off the ship and bought food or drinks bought water during their time ashore on the island.¹¹²

BOUGHT SODA/JUICE/DRINK

		Nassau
Yes	Count	159
	Col %	17.1%
No	Count	772
	Col %	82.9%
Total	Count	931
	Col %	100.0%

- ✚ Roughly two in every ten (17%) cruise visitors who got off the ship and bought food or drinks in Nassau/Paradise Island bought soda/juice or some kind of drink.¹¹³

BOUGHT ICE CREAM

		Nassau
Yes	Count	67
	Col %	7.2%
No	Count	864
	Col %	92.8%
Total	Count	931
	Col %	100.0%

- ✚ Roughly one in ten (7%) cruise visitors who got off the ship bought ice cream while ashore in Nassau/Paradise Island.¹¹⁴

¹¹² Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹¹³ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹¹⁴ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

REPEAT VISITORS

			Nassau
Have you ever visited the Bahamas before?	Yes	Count	450
		Col %	48.3%
	No	Count	481
		Col %	51.7%
Total		Count	931
		Col %	100.0%

- ✚ Approximately half (48%) the cruise visitors who visited Nassau/Paradise Island had visited The Bahamas before.¹¹⁵

NUMBER OF TIMES YOU VISITED THE BAHAMAS BEFORE?

			Nassau
Number of Times Visited Before	One	Count	184
		Col %	40.9%
	Two	Count	95
		Col %	21.1%
	Three	Count	47
		Col %	10.4%
	Four or more	Count	123
		Col %	27.3%
Total	Non Response	Count	1
		Col %	.2%
		Count	450
		Col %	100.0%

- ✚ Of the cruise visitors who had visited The Bahamas before, approximately four in ten (41%) had come one time before.¹¹⁶
- ✚ Approximately two in ten (21%) cruise visitors had visited The Bahamas two times before.¹¹⁷
- ✚ Approximately four in ten (38%) cruise visitors had visited three or more times before.

¹¹⁵ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹¹⁶ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹¹⁷ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

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

			Nassau
When you came before, was that also on a cruise visit or did you stay on- shore?	Cruise	Count	266
		Col %	59.1%
	Stayed on Shore	Count	70
		Col %	15.6%
	Both	Count	113
		Col %	25.1%
	Non Response	Count	1
		Col %	.2%
Total	Count		450
		Col %	100.0%

- ✚ Of the repeat visitors who came to The Bahamas before, approximately six in ten (59%) had visited before on a cruise ship.¹¹⁸
- ✚ Approximately one in six (16%) cruise visitors who had visited before stayed on shore during their last visit.¹¹⁹
- ✚ One in four (25%) cruise visitors to Nassau/Paradise Island who had visited The Bahamas before had done both, i.e., cruised to The Bahamas or stayed on shore at one time or another.¹²⁰

¹¹⁸ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹¹⁹ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹²⁰ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

DID YOU ATTEND 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 you got off the ship, did you attend a talk or lecture about what there was to see and do while you were here?	Yes	Count	504
		Col %	54.1%
	No	Count	427
		Col %	45.9%
Total		Count	931
		Col %	100.0%

- ✚ More than half (54%) of the cruise visitors to Nassau/Paradise Island who had gotten off the ship indicated that yes they had attended a talk or lecture about what there was to see and do while they were on the island before they got off the ship, compared to nearly one in three (33%) cruise visitors to Grand Bahama who indicated this.¹²¹

**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	583
		Col %	62.6%
	No	Count	348
		Col %	37.4%
Total		Count	931
		Col %	100.0%

- ✚ Roughly six in ten (63%) 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.¹²²

¹²¹ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹²² Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

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

		Nassau	
		Count	Col %
Other Information	Brochures/Pamphlets/Flyers/Booklets	394	68.4%
	Maps	302	52.4%
	Internet/Online	200	34.7%
	Television on board ship	135	23.4%
	Cruise Director	31	5.4%
	Tour Director	28	4.9%
	Other people/neighbors	2	.3%
	Obtained information off the ship	1	.2%
	Other	1	.2%

- ✚ The most popular means for cruise visitors to find out information on what to see or do while in Nassau/Paradise Island included: Brochures/pamphlets/flyers, maps, the Internet, television on board the ship, cruise directors and tour directors.
- ✚ Approximately two in three (68%) cruise visitors obtained information on what to see and do while in Nassau/Paradise Island from the brochures/pamphlets/flyers/booklets.¹²³
- ✚ Approximately half (52%) of cruise visitors obtained information from maps.¹²⁴
- ✚ Approximately one in three (35%) cruise visitors obtained information from the Internet.¹²⁵
- ✚ Approximately two in ten percent (23%) cruise visitors obtained information from the television on board the ship.¹²⁶
- ✚ One in twenty cruise visitors to Nassau/Paradise Island obtained information from the cruise director (5%) or from the tour director (5%) on what to do or see while on the island.¹²⁷

¹²³ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹²⁴ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹²⁵ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹²⁶ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹²⁷ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

**LIKELIHOOD OF RETURN TO THE BAHAMAS AS A VACATION
DESTINATION**

**HOW LIKELY ARE TO CHOOSE TO RETURN TO THE BAHAMAS AS A
VACATION DESTINATION, EITHER AS PART OF A CRUISE OR FOR A
LONGER HOLIDAY?**

			Nassau
How likely are you to return to the Bah. for vacation, either as part of a cruise or for longer?	Definitely would	Count	565
		Col %	60.7%
	Probably would	Count	276
		Col %	29.6%
	Probably wouldn't	Count	7
		Col %	.8%
	Definitely wouldn't	Count	2
		Col %	.2%
	Don't Know	Count	81
		Col %	8.7%
Total	Count	931	
	Col %	100.0%	

- ✚ Roughly nine in ten (90% i.e., 60.7% definitely would & 29.6% 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 holiday.¹²⁸

¹²⁸ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

DO YOU THINK YOU WOULD STAY IN A HOTEL OR COME ON A CRUISE SHIP			Nassau
Do you think that you would stay in a hotel or come here on a cruise ship?	Would stay in a hotel	Count	223
		Col %	26.5%
	Would come by cruise ship	Count	466
		Col %	55.4%
	Both	Count	103
		Col %	12.2%
	Don't Know	Count	49
		Col %	5.8%
Total	Count	841	
	Col %	100.0%	

- ✚ Of the cruise visitors to Nassau/Paradise Island who indicated that they would definitely or probably return, roughly three in ten (27%) indicated that they would stay in a hotel when they returned compared to approximately two in ten (18%) cruise visitors to Grand Bahama who indicated the same thing.¹²⁹
- ✚ More than half (55%) of cruise visitors to Nassau/Paradise Island indicated that they would come back on a cruise ship again compared to roughly six in ten (60%) cruise visitors to Grand Bahama.¹³⁰
- ✚ Approximately one in ten (12%) indicated that they would do both come back and stay in a hotel and come back on a cruise.¹³¹

¹²⁹ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹³⁰ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹³¹ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

LIKELIHOOD OF RECOMMENDING THE BAHAMAS AS A PLACE TO VISIT TO FRIENDS/RELATIVES

HOW DO YOU FEEL ABOUT RECOMMENDING THE BAHAMAS AS A PLACE FOR YOUR FRIENDS/FAMILY TO VISIT?

			Nassau
How likely are you to recommend the Bah. to friends and relatives?	Definitely will recommend it	Count	689
		Col %	74.0%
	Probably will recommend it	Count	235
		Col %	25.2%
	Probably won't recommend it	Count	5
		Col %	.5%
	Definitely won't recommend it	Count	2
		Col %	.2%
Total	Count	931	
	Col %	100.0%	

- ✚ The majority (99% i.e., 74.0% definitely would & 25.2% 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.¹³²

NUMBER OF TIMES CRUISE PASSENGERS GOT OFF SHIP

NUMBER OF TIMES CRUISE PASSENGERS GOT OFF

SHIP

			Nassau
Times Off Ship	One	Count	750
		Col %	80.6%
	Two	Count	165
		Col %	17.7%
	Three	Count	16
		Col %	1.7%
Total	Count	931	
	Col %	100.0%	

- ✚ Eight in ten (81%) cruise passengers who got off the ship did so one time and nearly two in ten (18%) got off two times.¹³³

¹³² Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹³³ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

CRUISE VISITOR DEMOGRAPHICS

- ✚ Cruise ship demographics usually differ somewhat between cruise lines. There are cruise lines that attract the older mature crowd and those that attract the younger group.
- ✚ In 2013, approximately nine in ten (88%) cruise visitors to Nassau/Paradise Island were between the ages of 25 to 64.¹³⁴ Approximately three in four (74%) cruise visitors to the island were under 55 years of age and approximately one in four (26%) were 55 years of age or over.¹³⁵
- ✚ Adults were not the only persons travelling on cruise ships. On cruises to The Bahamas and Nassau/Paradise Island, children often accompanied their parents or grandparents.
- ✚ Approximately three in ten (31%) children who travelled to Nassau/Paradise Island were between the ages of 12 to 17 years of age but approximately six in ten (61%) cruise visitors were under 12.¹³⁶
- ✚ Approximately one in every ten (9%) cruise visitors who were parents travelled with their adult children over 17 years of age.¹³⁷
- ✚ Not many singles cruised to Nassau/Paradise Island. Some singles were travelling in a group of other persons. Only 1% of the cruise visitors to Nassau/Paradise Island indicated that they were travelling alone or as a party of one.¹³⁸
- ✚ Approximately six in ten (58%) cruise visitors were travelling as a party of two persons.¹³⁹ Not all of these persons who were travelling in a party of two identified themselves as a couple as there were many instances of friends or other relatives travelling along with them rather than a significant other. Approximately half (53%) the cruise visitors to Nassau/Paradise Island identified themselves as a couple.¹⁴⁰
- ✚ Two in ten cruise visitors had household incomes of \$25,001 to \$50,000 (22%) or \$50,001 to \$75,000 (21%) and one in ten (10%) cruise visitors had household incomes of \$75,001 to \$100,000.¹⁴¹
- ✚ Cruise visitors to Nassau/Paradise Island came from all over the world but the majority (94%) of them, were from the United States.¹⁴²

¹³⁴ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹³⁵ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹³⁶ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹³⁷ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹³⁸ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹³⁹ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁴⁰ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁴¹ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁴² Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

- ✚ The states that produced the most cruise visitors to Nassau/Paradise Island were Florida, Ohio, Georgia, New York, Illinois, Pennsylvania, South Carolina, California, New Jersey, Massachusetts and North Carolina.¹⁴³
- ✚ Approximately nine in ten (90%) cruise visitors to Nassau/Paradise Island indicated that they were likely to return to The Bahamas.¹⁴⁴
- ✚ Of the cruise visitors who were likely to return to The Bahamas roughly three in ten (27%) indicated that they would stay in a hotel when they returned.¹⁴⁵ More than half (55%) indicated that they would return by cruise ship and approximately one in ten (12%) indicated that they would do both, i.e., stay in a hotel or come back on a cruise.¹⁴⁶

¹⁴³ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁴⁴ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁴⁵ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁴⁶ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

**DEMOGRAPHICS
NASSAU/PARADISE ISLAND
CRUISE VISITORS
2013**

	2013	2012
CRUISE VISITORS LIKELY TO RETURN	90%	88%
Those Who Would Return and Stay in a Hotel	27%	28%
Those Who Would Return by Cruise ship	55%	53%
Those Who Would Return & Do a Cruise or a Land Stay	12%	15%
CRUISE VISITORS LIKELY TO RECOMMEND	99%	99%
REPEAT VISITORS	48%	44%
AGE		
18-24	2%	2%
25-34	12%	13%
35-44	31%	36%
45-54	29%	23%
55-64	17%	17%
65 yrs. & over	10%	7%
AGE OF CHILD TRAVELLING		
Under 12 months	7%	7%
Age 1 to 5	18%	16%
Age 6 to 11	36%	40%
Age 12 to 17	31%	28%
Over 17 yrs.	9%	9%
SEX		
Male	23%	28%
Female	77%	71%
TRAVELLING PARTY SIZE		
One	1%	1%
Two	58%	58%
Three	12%	9%
Four or More	29%	32%
AVERAGE TRAVELLING PARTY SIZE	3.0	4.0

Cruise visitors who said that they were travelling as a couple differed from the travel party size of 2 because there were people who were travelling as a party of 2 who considered themselves a family/group not a couple e.g . 2 friends
Some singles were travelling in a group of other persons. This is why there is a difference between travel party size and travel party type.

**DEMOGRAPHICS
NASSAU/PARADISE ISLAND
CRUISE VISITORS
2013**

	2013	2012
HOW VISITORS WERE TRAVELLING (Travel Type)		
Alone	1%	1%
As a couple	53%	54%
As a family	36%	35%
As a group	10%	10%
HOUSEHOLD INCOME*		
\$25,001-\$50,000	22%	15%
\$50,001-\$75,000	21%	21%
\$75,001-\$100,000	10%	12%
TOP STATES: WHERE YOU LIVE		
Florida	17%	19%
Ohio	9%	6%
Georgia	9%	6%
New York	8%	7%
Illinois	6%	5%
Pennsylvania	5%	5%
South Carolina	5%	8%
California	4%	3%
New Jersey	4%	3%
Massachusetts	4%	3%
North Carolina	3%	6%
Virginia	3%	4%
COUNTRY OF RESIDENCE		
USA	94%	94%
Canada	4%	3%
Europe	2%	1%
Other	0%	1%

*Non Response for household income not included in the above table and all income categories not mentioned.

Non response for the income question was high.

Grand Bahama Island does not receive the quantity of ships that Nassau/Paradise Island does. For this reason there are differences between these islands on some of the key demographics like household income and top states, etc.

Source: Cruise Expenditure Survey 2013 and 2012

**WHERE DO THE CRUISE VISITORS TO NASSAU/PARADISE ISLAND
FROM THE UNITED STATES AND CANADA LIVE?**

STATE/PROVINCE OF RESIDENCE (2013)

STATE/PROVINCE	Nassau	
	Count	Col %
United States		
Florida	156	17.1%
Ohio	84	9.2%
Georgia	78	8.6%
New York	77	8.4%
Illinois	51	5.6%
Pennsylvania	49	5.4%
South Carolina	44	4.8%
California	36	3.9%
New Jersey	34	3.7%
Massachusetts	32	3.5%
North Carolina	28	3.1%
Virginia	26	2.9%
Michigan	24	2.6%
Tennessee	24	2.6%
Texas	24	2.6%
Connecticut	18	2.0%
Missouri	14	1.5%
Kentucky	12	1.3%
Maryland	8	0.9%
Alabama	5	0.5%
Iowa	5	0.5%
Colorado	4	0.4%
Indiana	4	0.4%
Kansas	4	0.4%
Louisiana	4	0.4%
Minnesota	4	0.4%
Washington State	4	0.4%
Delaware	2	0.2%
Maine	2	0.2%
New Hampshire	2	0.2%
Rhode Island	2	0.2%
West Virginia	2	0.2%
Wisconsin	2	0.2%

STATE/PROVINCE	Nassau	
	Count	Col %
Arizona	1	0.1%
District of Columbia	1	0.1%
Idaho	1	0.1%
Mississippi	1	0.1%
Nebraska	1	0.1%
New Mexico	1	0.1%
North Dakota	1	0.1%
Oklahoma	1	0.1%
Vermont	1	0.1%
Wyoming	1	0.1%
U.S. Resident	1	0.1%
CANADA		
Ontario	23	2.5%
Alberta	3	0.3%
Canadian Resident	3	0.3%
Quebec	2	0.2%
Other Canadian Prov.	2	0.2%
New Brunswick	1	0.1%
Newfoundland	1	0.1%
Non Response	1	0.1%
TOTAL	912	100.0%

Source: Cruise Expenditure Survey 2013. Above table does not include countries other than the US and Canada.

WHAT WOULD HAVE MADE TRIP BETTER
WHAT WOULD HAVE MADE YOUR TRIP BETTER?

2013		Nassau	
		Count	% Shr.
1	Length of Stay (neg.)	121	38.9%
2	Weather/Climate (neg.)	68	21.9%
3	Prices (neg)	39	12.5%
4	General Comm. (neg.)	18	5.8%
5	People (neg)	13	4.2%
6	Food (neg.)	5	1.6%
7	Local Transport. (neg)	5	1.6%
8	Tours/Excursions (neg.)	5	1.6%
9	Ship/Cruiseline (neg)	5	1.6%
10	Hotel (neg)	4	1.3%
11	Trails/Waling/Walk & Stroll (neg)	3	1.0%
12	Activities (neg.)	2	0.6%
13	Casinos (neg)	2	0.6%
14	Development (neg)	2	0.6%
15	Litter (neg)	2	0.6%
16	Roads/Traffic (neg.)	2	0.6%
17	Sea/Water (neg.)	2	0.6%
18	Surrey Rides	2	0.6%
19	Entertainment (neg)	2	0.6%
20	Beaches (neg)	1	0.3%
21	Crime (neg)	1	0.3%
22	Drugs (neg)	1	0.3%
23	Hair Braiding (neg.)	1	0.3%
24	Information (neg)	1	0.3%
25	Sidewalks/Pavements (neg)	1	0.3%
26	Shops & Stores (neg.)	1	0.3%
27	Straw Market (neg.)	1	0.3%
28	Taxes (neg.)	1	0.3%
Total Negative		311	100.0%

In the Negative Comments section, cruise visitors expressed their complaints about what would have made their trip more enjoyable.

- ✚ **Length of Stay**: Approximately four in ten (39%) negative comments received from cruise visitors to Nassau/Paradise Island about what would have made their trip more enjoyable were about length of stay. These cruise visitors thought that their length of stay in Nassau/Paradise Island was not

long enough i.e. they needed more time, more time to see the place, more time to shop, more time to fish, more time on the beach and more time to do tour/excursion.

- ✚ **Weather/Climate**: Approximately two in ten (22%) comments received were about the weather i.e. poor weather conditions: too hot, windy, not enough sunshine/sunlight, weather too cool, weather humid or rainy.
- ✚ **High Prices**: Approximately one in ten (13%) comments received from the cruise visitors were about the high prices i.e., prices are very high/expensive, high prices in stores, transportation too expensive.
- ✚ **General Negative**: Six percent (6%) of the comments received were general negative comments like: too crowded, shorter walk to and from ship, more authentic/too touristic.
- ✚ **Poor Attitude of the People**: Four percent (4%) of the comments received from the cruise visitors were about the people like: people not friendly, pushy sales people, annoying sales people, less hassling, tour guide rude.

WHAT WOULD HAVE MADE YOUR TRIP BETTER?

2013		Nassau	
		Count	% Shr.
1	General	265	62.9%
2	People	55	13.1%
3	Weather/Climate	42	10.0%
4	Can't Wait to Come Back	10	2.4%
5	Straw Market	8	1.9%
6	Scenery/Sightseeing	7	1.7%
7	Food	5	1.2%
8	Hotel	5	1.2%
9	Activities	4	1.0%
10	Relaxation	4	1.0%
11	Tour/Excursions	4	1.0%
12	Length of Stay	3	0.7%
13	Sea/Water	3	0.7%
14	Culture	1	0.2%
15	Local Transportation	1	0.2%
16	Prices	1	0.2%
17	Restaurants	1	0.2%
18	Safety	1	0.2%
19	Service	1	0.2%
Total Positive		421	100.0%

- In the Positive Comments section, cruise visitors simply expressed what they did like about Nassau/Paradise Island.

WHAT WOULD HAVE MADE YOUR TRIP BETTER?

2013		Nassau	
		Count	% Shr.
1	Length of Stay (sugg)	12	20.7%
2	Information (sugg)	7	12.1%
3	General (sugg)	6	10.3%
4	Activities (sugg)	5	8.6%
5	Local Transportation (sugg)	3	5.2%
6	Food (sugg)	2	3.4%
7	Litter/Cleanliness (sugg)	2	3.4%
8	People (sugg)	2	3.4%
9	Prices (sugg)	2	3.4%
10	Restaurants (sugg)	2	3.4%
11	Tours/Excursions (sugg)	2	3.4%
12	Signage (sugg)	2	3.4%
13	Shuttle Bus on Cruise Dock (sugg)	2	3.4%
14	Beaches (sugg)	1	1.7%
15	Development (sugg)	1	1.7%
16	Hotel (sugg)	1	1.7%
17	Shops and Stores (sugg)	1	1.7%
18	Strawmarket (sugg)	1	1.7%
19	Weather/Climate (sugg)	1	1.7%
20	Entertainment (sugg)	1	1.7%
21	Trails/Waling/Walk & Stroll (sugg)	1	1.7%
22	Port/Cruise Dock (sugg)	1	1.7%
Total Suggestion		58	100.0%

The actual suggestions made by cruise visitors about Nassau/Paradise Island can be found in the comments section of this report.

Single Thing That Would Make Trip Better

<i>Island</i>	<i>Comment Type</i>	<i>Comment Category</i>	<i>visitenjoy</i>
Nassau & Paradise Island	Negative		
		<i>Activities</i>	
			Nothing much to do.
			Cheaper activities.
		<i>Beaches</i>	
			Need to clean up beaches.
		<i>Casinos</i>	
			If I won at the casino.
			If we won at casino.
		<i>Crime</i>	
			Stop the killing of the visitors.
		<i>Development</i>	
			Better building code.
			Better building at Festival Place.
		<i>Entertainment</i>	
			No Entertainment

<i>Island</i>	<i>Comment Type</i>	<i>Comment Category</i>	<i>visitenjoy</i>
Nassau & Paradise Island	Negative		
		<i>Food</i>	
			Better food.
			Better food.
		<i>General</i>	
			Not as crowded.
			Less crowd.
			Less crowded.
			More authentic; too touristic.
			If less crowded, less hustle.
			Less crowds.
			Less Crowded.
			Quicker access.
			If I wasn't feeling sick.
			Shorter walk to and from the ship.
			Less Crowded.

<i>Island</i>	<i>Comment Type</i>	<i>Comment Category</i>	<i>visitenjoy</i>
Nassau & Paradise Island	Negative		
		<i>Hair Braiding</i>	Not being charge so much for five rows in my daughter hair.
		<i>Hotel</i>	Atlantis not being so expensive. Atlantis is a rip off; too expensive just to walk through. If we do not have to spend money to walk through Atlantis. Atlantis is very expensive.
		<i>Length of Stay</i>	More Time. More time. More time. Longer stay. Longer stay More time. Longer stay.

<i>Island</i>	<i>Comment Type</i>	<i>Comment Category</i>	<i>visitenjoy</i>
Nassau & Paradise Island	Negative	<i>Length of Stay</i>	More time.
			Longer stay.
			More time.
			Longer stay
			More time.
			More time.
			More Time.
			More time.
			Longer Stay
			More time.
			Longer stay
			More time.
			More time.
			More time.

<i>Island</i>	<i>Comment Type</i>	<i>Comment Category</i>	<i>visitenjoy</i>
Nassau & Paradise Island	Negative	<i>Length of Stay</i>	
			More time.
			More time.
			Longer time.
			More time.
			Longer stay.
			More time.
			Longer stay.
			More time.
			More time.
			More time.
			More time.
			More time.
			More time.
			Longer stay.

<i>Island</i>	<i>Comment Type</i>	<i>Comment Category</i>	<i>visitenjoy</i>
Nassau & Paradise Island	Negative	<i>Length of Stay</i>	
			Longer stay.
			More time.
			More time
			More time, money
			More time.
			More time.
			More time on tour.
			Longer stay.
			Longer stay.
			More time.
			Longer stay.
			More time.
			Longer stay.
			Longer stay.

<i>Island</i>	<i>Comment Type</i>	<i>Comment Category</i>	<i>visitenjoy</i>
Nassau & Paradise Island	Negative		
		<i>Length of Stay</i>	
			More time.
			More time.
			More time.
			More time.
			Longer time.
			More time.
			Longer stay.
			More time.
			Overnight.
			More time.
			More time.
			Longer stay.
			Longer stay.
			Longer time.

<i>Island</i>	<i>Comment Type</i>	<i>Comment Category</i>	<i>visitenjoy</i>
Nassau & Paradise Island	Negative	<i>Length of Stay</i>	More time.
			More time.
			More time.
			More time.
			More time.
			More time.
			More time.
			More time.
			More time.
			Longer stay.
			Longer stay.
			More time.
			More time would be good.
			More time to see more, this was my first time here.
			More time.

<i>Island</i>	<i>Comment Type</i>	<i>Comment Category</i>	<i>visitenjoy</i>
Nassau & Paradise Island	Negative	<i>Length of Stay</i>	More time.
			More time.
			Need more time, would liked to have done more.
			More time
			More time.
			More time.
			More time.
			More time.
			More time.
			More time
			More time.
			Longer stay.
			More time.
			More time.

<i>Island</i>	<i>Comment Type</i>	<i>Comment Category</i>	<i>visitenjoy</i>
Nassau & Paradise Island	Negative		
		<i>Length of Stay</i>	More time.
		<i>Local Transportation</i>	More shuttle buses. Easier transportation. Less crowded taxi Transportation around Atlantis for those who can't walk or handicap. Less hassled by taxi driver.
		<i>People</i>	Pushy sales people. Less hassling from vendors. Not having rude drivers saying I'm in an English speaking country so speak English. Less sales agent on the streets. Atlantis Staff not as friendly as before. Pushy people in the Straw Market.

<i>Island</i>	<i>Comment Type</i>	<i>Comment Category</i>	<i>visitenjoy</i>
Nassau & Paradise Island	Negative	<i>Prices</i>	<p>Very expensive.</p> <p>Many items are very expensive.</p> <p>Prices</p> <p>It's very expensive here.</p> <p>Very expensive</p> <p>Very expensive.</p> <p>Expensive.</p> <p>Very expensive.</p> <p>Too expensive to shop here.</p> <p>Very high prices.</p> <p>Very expensive.</p> <p>This place is very expensive.</p> <p>Very expensive.</p> <p>If they did not charge to walk through Atlantis, 45 dollars</p>

<i>Island</i>	<i>Comment Type</i>	<i>Comment Category</i>	<i>visitenjoy</i>
Nassau & Paradise Island	Negative		
		<i>Prices</i>	
			It is just too expensive.
			Very expensive.
			Prices are high.
			It is very expensive here.
			Very expensive.
			Cheaper shopping prices.
			Very expensive.
			Prices are high.
			Nice place but expensive.
			Less expensive here.
			Very expensive.
		<i>Roads/Traffic</i>	
			Less traffic.

<i>Island</i>	<i>Comment Type</i>	<i>Comment Category</i>	<i>visitenjoy</i>
Nassau & Paradise Island	Negative		
		<i>Sea/Water</i>	
			If the sea wasn't so choppy.
			If the sea was warmer.
		<i>Ship/Cruiseline</i>	
			Not on ship
			Food on cruise ship sucks.
			Better room on ship.
			Better food on ship.
		<i>Sidewalks/pavements</i>	
			Fix pavements for handicapped persons.
		<i>Straw Market</i>	
			Too much hagglers in straw market, need more variety.
		<i>Surrey Rides</i>	
			Horses not treated well.
			Horses smell.

<i>Island</i>	<i>Comment Type</i>	<i>Comment Category</i>	<i>visitenjoy</i>
Nassau & Paradise Island	Negative		
		<i>Tours/Excursions</i>	
			More time on tour.
			Longer tour.
		<i>Trails/Walking/Walk &</i>	
			Did too much walking and tired.
			Not leaving to walk as much around Atlantis.
			Less walking.
		<i>Weather/Climate</i>	
			It's raining, I want to see some sun.
			Better weather.
			Nice not much sun out but...
			Some rain.
			A little more sunshine.
			No rain.
			Less wind.

<i>Island</i>	<i>Comment Type</i>	<i>Comment Category</i>	<i>visitenjoy</i>
Nassau & Paradise Island	Negative	<i>Weather/Climate</i>	
			Better weather.
			I don't like the weather.
			Better weather.
			Too cold to do anything.
			Less heat.
			Didn't enjoy too much because of the weather.
			Sunny weather.
			The weather.
			Weather too cold.
			Windy.
			Too hot.
			Less rain, more sunshine.
			Better weather.
			Bad weather, wish it was cooler.

<i>Island</i>	<i>Comment Type</i>	<i>Comment Category</i>	<i>visitenjoy</i>
Nassau & Paradise Island	Negative	<i>Weather/Climate</i>	
			Less Wind.
			Humid.
			Less humidity.
			The weather.
			The weather.
			Better weather.
			Cooler weather.
			Cooler weather.
			If it wasn't so hot.
			Hot.
			Less Heat.
			If the sun was out.
			Less heat.
			The weather.

<i>Island</i>	<i>Comment Type</i>	<i>Comment Category</i>	<i>visitenjoy</i>
Nassau & Paradise Island	Negative	<i>Weather/Climate</i>	
			If it was cooler.
			Downtown is very dead no entertainment
			Better weather.
			Humid
			Nothing, a windy day.
			It is really hot today.
			Bad weather.
			More sunshine.
			Better weather.
			Better weather.
			No rain.
			No rain.
			A little cooler
			I do not like heat.

<i>Island</i>	<i>Comment Type</i>	<i>Comment Category</i>	<i>visitenjoy</i>
Nassau & Paradise Island	Negative	<i>Weather/Climate</i>	
			Calmer weather
			Better weather.
			No rain
			No rain.
			Very hot.
			Weather.
			Humid.
			No rain.
			Weather
			If it was cooler.
			Better weather.
			Too much sun.

<i>Island</i>	<i>Comment Type</i>	<i>Comment Category</i>	<i>visitenjoy</i>
Nassau & Paradise Island	Neutral		
		<i>Casinos</i>	
			Winning at the casino.
			If I went to the casino.
		<i>General</i>	
			More money to spend.
			If we owned a condo.
			More money to spend.
			More money.
			Didn't do much.
			Did too much walking.
			Wish I could move around; bad knee.
			More money.
			More money.
		<i>Hotel</i>	
			If we were able to get the condo at Atlantis.

<i>Island</i>	<i>Comment Type</i>	<i>Comment Category</i>	<i>visitenjoy</i>
Nassau & Paradise Island	Positive	<i>Can't Wait to Come Back</i>	<p>Had a great time will be back.</p> <p>Will come back soon.</p> <p>Will be back soon.</p> <p>Would come back with my kids.</p> <p>Had a great time will return.</p> <p>Would be back to tour, had a wonderful experience.</p> <p>Will be back to tour the island.</p> <p>We will be back.</p> <p>Will be back.</p>
		<i>Food</i>	<p>Food was great at Hard Rock.</p> <p>Nothing, rum is good had a good time.</p>
		<i>General</i>	<p>Nothing.</p>

<i>Island</i>	<i>Comment Type</i>	<i>Comment Category</i>	<i>visitenjoy</i>
Nassau & Paradise Island	Positive	<i>General</i>	Nothing.
			Nothing.
			Love the Bahamas
			Nothing everything still the same.
			Nothing.
			Wonderful, everything was perfect.
			Nothing, had a blast.
			Nothing
			Nothing.
			Nothing.
			Nothing everything was perfect.
			Nothing.
			Love it.
			Nothing everything was good.

<i>Island</i>	<i>Comment Type</i>	<i>Comment Category</i>	<i>visitenjoy</i>
Nassau & Paradise Island	Positive	<i>General</i>	Nothing.
			Nothing, will be back without my son.
			Nothing.
			Nothing, its okay.
			All good.
			Everything was positive.
			Everything was good , city tour was the best.
			If we had stayed on shore.
			Nothing.
			Nothing.
			Nothing.
			Great place.
			Nothing
			Nothing.

<i>Island</i>	<i>Comment Type</i>	<i>Comment Category</i>	<i>visitenjoy</i>
Nassau & Paradise Island	Positive	<i>General</i>	
			Very enjoyable.
			To the see the island
			Nothing.
			Nothing.
			Great day.
			Nothing.
			Great.
			Nothing.
			Nothing everything was wonderful.
			Nice place.
			Nothing.
			Nothing.
			Nothing had a great time.
			Ok

<i>Island</i>	<i>Comment Type</i>	<i>Comment Category</i>	<i>visitenjoy</i>
Nassau & Paradise Island	Positive	<i>General</i>	
			Nothing.
			Nothing very enjoyable.
			Nothing.
			NOTHING.
			Nothing.
			Nothing everything was good.
			Nothing really enjoyed today this is paradise.
			Nothing.
			Nothing.
			Had fun
			Nothing.
			Nothing.
			Had too much fun.
			It was enjoyable.

<i>Island</i>	<i>Comment Type</i>	<i>Comment Category</i>	<i>visitenjoy</i>
Nassau & Paradise Island	Positive	<i>General</i>	
			Nothing.
			Nothing.
			It was very enjoyable.
			Nothing it is nice.
			Nothing
			Very nice place.
			Had a wonderful time.
			Nothing.
			Everything was good.
			Everything was perfect.
			Nothing.
			Nothing.
			Everything ok.
			Nothing, everything was great.

<i>Island</i>	<i>Comment Type</i>	<i>Comment Category</i>	<i>visitenjoy</i>
Nassau & Paradise Island	Positive	<i>General</i>	Nothing.
			Ok.
			Everything ok.
			Everything was good
			Nothing.
			Nothing.
			Ok.
			Nothing.
			Nothing.
			Nothing. Everything was ok.
			Nothing.
			Nothing.
			Nothing.
			Nothing

<i>Island</i>	<i>Comment Type</i>	<i>Comment Category</i>	<i>visitenjoy</i>
Nassau & Paradise Island	Positive	<i>General</i>	
			It was ok.
			Nothing.
			Nothing.
			Nothing, everything still the same.
			Nothing.
			Nothing everything was good.
			Had a wonderful time.
			Nothing, love the Bahamas, that's why I brought my friends.
			Nothing.
			Nothing.
			Nothing.
			Nothing.
			Nothing.
			Nothing.

<i>Island</i>	<i>Comment Type</i>	<i>Comment Category</i>	<i>visitenjoy</i>
Nassau & Paradise Island	Positive	<i>General</i>	Nothing everything was good.
			Nothing.
			Had a great time.
			Nothing.
			Nothing.
			Love it.
			Nothing.
			Nothing.
			Nothing.
			Nothing.
			Had a great time.
			Nothing had a great time.
			Everything ok
			Had a great day.

<i>Island</i>	<i>Comment Type</i>	<i>Comment Category</i>	<i>visitenjoy</i>
Nassau & Paradise Island	Positive		
		<i>General</i>	
			Wonderful.
			Nothing.
			Love it here.
			No complaints.
			Nothing.
			Nothing.
			It was wonderful.
			Everything ok
			Nothing
			Nothing.
			Had a nice time
			Nothing.
			Nothing
			Its was fine.

<i>Island</i>	<i>Comment Type</i>	<i>Comment Category</i>	<i>visitenjoy</i>
Nassau & Paradise Island	Positive	<i>General</i>	
			Nothing
			Nothing.
			Nothing.
			Nothing.
			Had a good time.
			Nothing.
			Enjoyed myself.
			Everything was good
			I really love this island.
			Nothing.
			Nothing.
			Nice island.
			Nothing
			Keep it up Bahamas looks good.

<i>Island</i>	<i>Comment Type</i>	<i>Comment Category</i>	<i>visitenjoy</i>
Nassau & Paradise Island	Positive	<i>General</i>	Nothing, everything was great.
			love it here.
			Nothing.
			Nothing.
			Nothing, we had a blast.
			Nothing
			Nothing, try to come every year.
			Nothing.
			Nothing, always good.
			Had a nice time.
			Nothing.
			Nothing
			It was perfect.
			Enjoyed ourselves.

<i>Island</i>	<i>Comment Type</i>	<i>Comment Category</i>	<i>visitenjoy</i>
Nassau & Paradise Island	Positive	<i>General</i>	Nothing.
			Nothing everything was awesome.
			Nothing.
			Nothing
			It was ok.
			Nothing everything was beautiful.
			Nothing.
			Everything was fine.
			Nothing
			It was good.
			Enjoyable.
			Excellent.
			It was nice.
			Would love to live here.

<i>Island</i>	<i>Comment Type</i>	<i>Comment Category</i>	<i>visitenjoy</i>
Nassau & Paradise Island	Positive		
		<i>Hotel</i>	Beautiful hotel.
		<i>Length of Stay</i>	More time to see your beautiful island.
		<i>People</i>	Nice people.
			Nice friendly people.
			The people are friendly.
			Nice people.
			The people are very nice.
			Very nice people.
			Very nice people.
			The people we meet were very nice.
			Nice people.
			Very nice people.

<i>Island</i>	<i>Comment Type</i>	<i>Comment Category</i>	<i>visitenjoy</i>
Nassau & Paradise Island	Positive	<i>People</i>	<p>Nice place.</p> <p>The people are friendly.</p> <p>People are friendly.</p> <p>Great people.</p> <p>Taxi driver very friendly.</p> <p>The people are very nice.</p> <p>Met a lot of friendly people.</p> <p>Great friendly people.</p> <p>Very nice people.</p> <p>Nothing, people still friendly.</p> <p>Everyone was wonderful and friendly.</p> <p>Nice and friendly people.</p> <p>Friendly people.</p> <p>The people are friendly.</p>

<i>Island</i>	<i>Comment Type</i>	<i>Comment Category</i>	<i>visitenjoy</i>
Nassau & Paradise Island	Positive		
		<i>People</i>	
			Nice friendly people.
			Nice people.
			Nothing the friendliness of people atmosphere of the island.
			Very friendly people.
			Friendly people.
			The most friendly people.
		<i>Relaxation</i>	
			Nothing was relaxing.
			Very relaxing.
		<i>Safety</i>	
			Felt safe and saw a lot of police.
		<i>Scenery/Sightseeing</i>	
			Beautiful place.
		<i>Sea/Water</i>	
			Beautiful sea and reef.

<i>Island</i>	<i>Comment Type</i>	<i>Comment Category</i>	<i>visitenjoy</i>
Nassau & Paradise Island	Positive		
		<i>Sea/Water</i>	Love the ocean.
		<i>Straw Market</i>	The Straw Market building was nice. The Straw Market has come a long way. Straw Market is a nice building but very not. Love the structure of the Straw Market building. The Straw Market building is beautiful. Very nice building Straw Market The Straw Market building is beautiful.
		<i>Tours/Excursions</i>	Tour was great.
		<i>Weather/Climate</i>	The weather is lovely. The weather is good. Nice weather.

<i>Island</i>	<i>Comment Type</i>	<i>Comment Category</i>	<i>visitenjoy</i>
Nassau & Paradise Island	Positive	<i>Weather/Climate</i>	
			Love the weather.
			Love the weather.
			Great weather.
			Great weather.
			Nice and sunny.
			Nice weather.
			Love the weather.
			Still love the weather.
			Weather is nice.
			Love the weather .
			Love the weather.
			Nice and cold.
			Nice weather.
			Lovely weather.

<i>Island</i>	<i>Comment Type</i>	<i>Comment Category</i>	<i>visitenjoy</i>
Nassau & Paradise Island	Positive	<i>Weather/Climate</i>	Great weather.
			Lovely weather.
			Weather was good.
			Nice weather.
			Beautiful weather.
	Suggestion	<i>Activities</i>	More exciting things to do.
			More activities.
			More to do same stuff.
		<i>Beaches</i>	Easier access to beach.
		<i>Entertainment</i>	More entertainment.

<i>Island</i>	<i>Comment Type</i>	<i>Comment Category</i>	<i>visitenjoy</i>
Nassau & Paradise Island	Suggestion		
		<i>Food</i>	More seafood.
		<i>General</i>	Wheel chair assistance If we were 20 years younger and less heat.
		<i>Hotel</i>	If we could have seen more of the Atlantis hotel.
		<i>Information</i>	More information on tours and shuttles to and from ship. More preparation on boat stopped because of storm. Had no info on Bahamas. More info on what to do. More information.
		<i>Litter/Cleanliness</i>	Need to clean up tourist area. Need to clean up downtown and paint all buildings.

<i>Island</i>	<i>Comment Type</i>	<i>Comment Category</i>	<i>visitenjoy</i>
Nassau & Paradise Island	Suggestion	<i>Local Transportation</i>	<p>If I could have got more transportation; bad knees.</p> <p>More shuttles</p> <p>A more formalized place for taxi instead of them constantly ganging you. Uniform for drivers.</p>
		<i>People</i>	<p>Less people selling on the side of the road.</p> <p>Less sales agents.</p>
		<i>Port/Cruise Dock</i>	<p>Shorter pier.</p>
		<i>Prices</i>	<p>Cheaper price for certain things.</p>
		<i>Restaurants</i>	<p>Native restaurants on site or close by.</p> <p>More places to sit and drink non alcoholic drinks after shopping. Alcohol is against my religion.</p>
		<i>Shuttle Bus on Cruise</i>	<p>If I knew about the shuttle to and from the boat.</p>

<i>Island</i>	<i>Comment Type</i>	<i>Comment Category</i>	<i>visitenjoy</i>
Nassau & Paradise Island	Suggestion		
		<i>Shuttle Bus on Cruise</i>	If we knew about the shuttle.
		<i>Signage</i>	Walking tour better signage.
		<i>Tours/Excursions</i>	Longer tour.
		<i>Trails/Walking/Walk &</i>	Less walking.

CONCLUSION

Cruise Tourism is a very lucrative business. In 2013, it is estimated that the Cruise Tourism Industry transported 21.3 million passengers globally and pumped US\$44 billion into the US economy and an estimated US\$117 billion in revenue globally.¹⁴⁷

Over the years The Cruise Tourism Industry has grown tremendously. As a result of this growth, the cruise lines built bigger and more lavish ships to attract even more cruise passengers. In 2009, the Government of the Bahamas dredged the harbour in New Providence to accommodate the larger ships. In addition to the dredging of the harbour, the plethora of beautiful islands in The Bahamas made the destination ideal for Bahamas only cruises. This meant that cruise ships could stop in Nassau/Paradise Island, then travel on to Grand Bahama and then on to another island in The Bahamas.

In 2013, The Bahamas as a whole received 4.7 million (1st port of entry) cruise visitors.¹⁴⁸ Nassau/Paradise Island as an individual island received 3,602,485 cruise visitors (1st, 2nd and 3rd port of call).¹⁴⁹ As more and more cruise visitors cruised to the destination over the years, more and more revenue was generated and pumped into the economy.

Cruise Visitors for years have pumped millions of dollars every year into local tourist destinations through spending. When cruise visitors cruised to Nassau/Paradise Island or any other island in The Bahamas in 2013, they all pumped money directly into the Government Treasury in the form of port head taxes. Cruise visitors to Nassau/Paradise Island also pumped money into the economy when they spent money on: *shopping* (\$154.41 million), *activities/tours/excursions* (\$99.85 million), *meals and drinks bought off the ship* (\$42.07 million), *playing in the on-island casino* (\$15.26 million) and *transportation not included in tours* (\$13.02 million).¹⁵⁰

In 1998, cruise visitors spent an average of \$74.3 per person and pumped \$81.8 million dollars into the economy of Nassau/Paradise Island through cruise visitor spending.¹⁵¹ Over the years visitor spending continued to increase as cruise

¹⁴⁷ Source: Source:AAPA (American Association of Port Authorities)

<http://www.aapaports.org/Industry/content.cfm?ItemNumber=1099&navItemNumber=550>

¹⁴⁸ Source: Dept. of Immigration, Bahamas Customs, Port Authority and cruise ship manifests.

¹⁴⁹ Source: Dept. of Immigration, Bahamas Customs, Port Authority and cruise ship manifests.

¹⁵⁰ Source: Cruise Expenditure Exit Survey 2013 and 2012, Bahamas Ministry of Tourism Research and Statistics Dept.

¹⁵¹ Source: Cruise Exit Survey 1998, Bahamas Ministry of Tourism Research and Statistics Dept.

arrivals grew. However in 2013, the average expenditure of cruise visitors to Nassau/Paradise Island declined by \$9.42 despite the fact that the island received more cruise visitors than in 2012.¹⁵² The decline in average expenditure from \$108.08 in 2012 to \$98.66 in 2013 had an impact on the overall cruise expenditure in Nassau/Paradise Island and caused it to decline by 3.6% from \$336.68 million in 2012 to \$324.60 million in 2013.¹⁵³

The decline in overall cruise expenditure despite a growth in cruise arrivals meant that The Bahamas was now faced with the task of not only increasing cruise arrival growth but also of increasing the average cruise visitor expenditure back to their 2012 levels or higher. Approximately half (47%) of the cruise visitors to the island spent under \$50.00 in the destination and more than half (53%) spent \$50.00 or more while on the island.¹⁵⁴ Cruise ship visitors spent money on a variety of things including shopping, activities, meals & drinks off the ship, transportation not included in tours/excursions, and on-island casinos.

Shopping made up 48% of the expenditure by cruise visitors to Nassau/Paradise Island.¹⁵⁵ More than one half (56%) of cruise visitors who got off the ship in Nassau/Paradise Island spent money on some form of shopping.¹⁵⁶ Three in four (75%) cruise visitors bought t-shirts, one in ten (10%) bought some form of other clothing and three in ten (31%) bought jewelry.¹⁵⁷ Cruise visitors to Nassau/Paradise Island also spent money on straw work (29% of them), perfumes & cosmetics (25%) and liquor (27%).¹⁵⁸ Some of them got their hair braided (13%).¹⁵⁹ Some of them bought leather goods (3%), tobacco products (2%), china/crystal (0.6%) and linen (0.2%).¹⁶⁰ Cruise visitors to the island also bought other goods. Of the cruise visitors who purchased other goods the most popular items were rum cake/cake purchased by nearly half (45%) of the cruise visitors who had bought other items.¹⁶¹ Other popular items purchased in Nassau/Paradise Island included hand bags/purses/wallet/tote bags, (25% of the cruise visitors purchased this item), hats/caps (10%), sunglasses (6%), mugs/cups (6%), shot glasses (6%), beach towel/towel (5%) and key chains (3%).¹⁶²

¹⁵² Source: Cruise Expenditure Exit Survey 2013 and 2012, Bahamas Ministry of Tourism Research and Statistics Dept.

¹⁵³ Source: Cruise Expenditure Exit Survey 2013 and 2012, Bahamas Ministry of Tourism Research and Statistics Dept.

¹⁵⁴ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁵⁵ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁵⁶ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁵⁷ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁵⁸ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁵⁹ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁶⁰ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁶¹ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁶² Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

In addition to shopping to purchase their souvenirs, some cruise visitors spent money on activities/tours/excursions. The activities/tours/excursions made up 31% of the cruise expenditure by cruise visitors to Nassau/Paradise Island.¹⁶³ One in three (33%) cruise visitors who got off the ship in Nassau/Paradise Island did an activity/tour/excursion.¹⁶⁴ The most popular activity/tour/excursion was the City Tour/Island Tour. Roughly one half (50%) of cruise visitors who got off the ship in Nassau/Paradise Island and did a tour participated in this activity/tour.¹⁶⁵ Other popular tours for Nassau/Paradise Island included snorkeling, Atlantis Tour/Discover Atlantis/Atlantis Aquaventure Tours, Nassau See and Sea Tour, Glass Bottom Boat Tour, City Tour and Atlantis, etc. Cruise visitors to Nassau/Paradise Island also enjoyed: museums like Pirates of Nassau, Dolphin Encounters, Segway Native/Bahamas Segway & Beach Experience Tour, Blue Lagoon Island Beach Day, Seahorse Sailing Adventures, Ardastra Gardens, Rainbow Reef, Jet skis, etc.¹⁶⁶

The percentage of cruise visitors to Nassau/Paradise Island booking their activity/tour/excursion on board the cruise ship has been declining since 2011 and the percentage of cruise visitors booking on-shore has increased during the same period. Approximately one in three cruise visitors who did some sort of activity/tour/excursion booked it on board the cruise ship (35%) or booked it independently (34%) of the cruise ship.¹⁶⁷ Three in ten (31%) cruise visitors booked their activity/tour/excursion when they got off the ship in Nassau/Paradise Island.¹⁶⁸

In addition to spending money on shopping and activities/tours/excursions, some cruise visitors spent money on food and drinks off the ship. As new restaurants opened in Nassau/Paradise Island over the last few years the amount of money spent by cruise visitors on island for meals and drinks has steadily gone up over the years. In 2011, food and drinks made up 6% of the expenditure by cruise visitors to Nassau/Paradise Island but by 2013 it made up 13% of the expenditure.¹⁶⁹ In addition, the percentage of cruise visitors who spent money on meals and drinks on island also increased. In 2011, four in ten (40%) cruise visitors to Nassau/Paradise Island who got off the ship in Nassau/Paradise Island bought food or drink on the island but by 2013, approximately two in every three

¹⁶³ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁶⁴ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁶⁵ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁶⁶ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁶⁷ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁶⁸ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁶⁹ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

(64%) cruise visitors purchased food or drinks while they were off the ship.¹⁷⁰ Some of them bought full meals or snacks while others bought water, soda/juice/drink and ice cream. Señor Frogs was the most popular restaurant where cruise visitors dined while they were in Nassau/Paradise Island.¹⁷¹ The next most popular restaurant was the Hard Rock Café.¹⁷² The other popular restaurants (in alphabetical order) where cruise visitors ate or drank while they were in Nassau/Paradise Island were: Athena's Café, Burger King, Chop Stix, Café Skans, Conch Fritters, Double Dragon, Dunkin Donuts, Fish Fry, Go Green Café, Goombay Mama, Green Parrot Bar Grill, Jimmy's Takeway, Johnny Rockets, Kafe Kalik, Mcdonalds, Olives Mediterrean Café & Bar, Sbarros, Sea Food Haven, Sharkeez Bar & Grill, Starbucks, Subway, Twin Brothers, and Via Caffe, etc.¹⁷³

In addition to all of the other items where cruise visitors spent their money some of them spent their dollars playing in the casinos. Playing in the casinos made up 5% of the total expenditure by cruise visitors to Nassau/Paradise Island.¹⁷⁴ One in twenty (5%) cruise visitors went to an on-island casino despite the fact that most of the cruise ships had a casino on board the ship.¹⁷⁵

In addition to spending money on shopping, activities/tours/excursions, food and drinks on island and playing in the casinos some cruise visitors spent their money on transportation costs to get around the island. The transportation costs not included in tours/excursions made up 4.0% of the expenditure by cruise visitors to Nassau/Paradise Island.¹⁷⁶ Approximately one in seven (14%) cruise visitors used a taxi to get around Nassau/Paradise Island and one in twenty (5%) used a water taxi/ferry.¹⁷⁷ Three percent (3%) of the cruise visitors used a surrey and one percent of the cruise visitors used a motor scooter (1%) or a bus/jitney (1%) to get around or see the island.¹⁷⁸

Before visitors got off the ship or left the cruise dock, many of them were already armed with information about what to see and do on the island. More than half (54%) the cruise visitors to Nassau/Paradise Island who got off the ship indicated that they had attended a talk/lecture about what there was to see and do

¹⁷⁰ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁷¹ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁷² Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁷³ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁷⁴ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁷⁵ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁷⁶ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁷⁷ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁷⁸ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

on the island before they got off the ship. Nearly two in three (63%) cruise visitors to Nassau/Paradise Island indicated that they did get other information besides a talk/lecture about what to do and see on the island.¹⁷⁹ The most popular means for cruise visitors to find out information on what to see or do while in Nassau/Paradise Island included: Brochures/pamphlets/flyers, maps, the Internet/Online, television on board the ship, cruise directors and tour directors.

Cruise Visitors to Nassau/Paradise Island were primarily between the ages of 25 to 64 years of age and female. Two in ten cruise visitors had household incomes of \$25,001 to \$50,000 (22%) or \$50,001 to \$75,000 (21%) and one in ten (10%) cruise visitors had household incomes of \$75,001 to \$100,000.¹⁸⁰ Cruise visitors to the island were primarily from the United States namely Florida, Ohio, Georgia, New York, Illinois, Pennsylvania South Carolina, California and New Jersey.¹⁸¹ Some of the cruise visitors traveled with children and the children were primarily between the ages of 6 to 17 years of age. The average travelling party size was three although approximately six in ten (58%) cruise visitors traveled as a party of two persons.¹⁸² Roughly half (48%) the cruise visitors to Nassau/Paradise Island had been to The Bahamas before i.e. were repeat visitors. Of the repeat visitors who had come to The Bahamas before, approximately six in ten (59%) had visited before on a cruise ship, roughly one in six (16%) had stayed on shore and one in every four (25%) had done both.¹⁸³

The majority (90%) of cruise visitors to Nassau/Paradise Island said that they would return to the Bahamas.¹⁸⁴ Roughly three in ten (27%) cruise visitors indicated that they would return and stay in a hotel, more than half (55%) said that they would come back on a cruise ship again and approximately one in ten (12%) indicated that they would do both come back and stay in a hotel and come back on a cruise.¹⁸⁵ The majority (99%) of cruise visitors to Nassau/Paradise Island indicated that they would recommend the Bahamas to friends/relatives.¹⁸⁶

¹⁷⁹ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁸⁰ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁸¹ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁸² Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁸³ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁸⁴ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁸⁵ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁸⁶ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

RECOMMENDATIONS

All recommendations are based on information received directly from the Cruise Visitors.

Length of Stay:

The biggest complaint that cruise visitors had about their trip to Nassau/Paradise Island was the fact that they needed more time in port. Approximately four in ten (39%) complaints received from cruise visitors to the island were about the length of stay not being long enough. Some of the cruise visitors needed more time to see the place and do more. Nine in ten (90%) cruise visitors to Nassau/Paradise Island said that they were likely to return to the Bahamas on another cruise or for a land based stay.¹⁸⁷ Of this 90% of cruise visitors who said that they would return, approximately three in ten (27%) said that they would return and stay in a hotel.¹⁸⁸ The potential for cruise conversion to a land based stay is significant if hotels develop and execute a well thought out plan with precision and skill.

Roughly six in ten (55%) cruise visitors to Nassau/Paradise Island said that they would return to the Bahamas but by a cruise ship;¹⁸⁹ so hoteliers do not need to place their focus and energy on these persons because they are “dedicated cruisers” who are going to return via cruise ship no matter the deal offered to them by hotels.

1. Hotels who want to capitalize on the fact that cruise lines bring in millions of cruise visitors to Nassau/Paradise Island who want to come back and stay in a hotel could craft a marketing strategy that would help to truly bring these persons back. With the permission of the government body responsible for town planning, they could erect billboards in strategic locations on the island offering cruise visitors a deal, for example free breakfast or the like if they book with their hotel within some desired time frame or they could offer special hotel rates for cruise visitors wishing to return. Cruise visitors wishing to capitalize on hotel offers would of course have to provide proof of purchase of a cruise to Nassau/Paradise Island to the hotel upon booking their hotel reservations.

¹⁸⁷ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁸⁸ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁸⁹ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

Activities/Tours/Excursions:

Some cruise visitors complained about the activities/tours/excursions on the island and said that they did not have enough to do. Cruise lines are always looking for exciting activities and tours/excursions to sell to their passengers. In addition, vendors have the opportunity to sell their activities/tours/excursions directly to the cruise visitors. In 2013, three in ten (31%) cruise visitors booked their activities/tours/excursions when they get off the ship in Nassau/Paradise Island and for vendors who are able to sell to these persons there is no cruise line commission to be paid.¹⁹⁰ Cruise visitors who got off the ship wanted:

2. More activities and things to do-New entrepreneurs with good ideas can see this desire of cruise visitors as a wonderful opportunity for new business development;
3. More exciting things to do;
4. Create some cheaper activities for the cruise visitors who cannot afford the more expensive ones so that all of the persons who want to do an activity can do so;
5. Activities too similar more different stuff to do needed-Create unique and exciting activities to attract the attention of cruise visitors;
6. Some of the exciting tours could possibly be made longer as desired by the cruise visitors.

Beaches:

All of the beaches that are available to the public need to be marked with proper signage so that cruise visitors know how to find them.

7. Access to beaches needs to be better;
8. Beaches need to be cleaned up.

Entertainment:

Some cruise visitors did not think that Nassau/Paradise Island had enough entertainment for cruise visitors to enjoy.

9. Island needs more entertainment for cruise visitors

¹⁹⁰ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

Food and Drinks/Restuarants and Bars:

Despite the “off the cuff” idea that cruise visitors do not buy food or drink on island when they get off the ship because their food is included in their ship cost, is not the case. Approximately two in every three (64%) cruise visitors to Nassau/Paradise Island who got off the ship bought food or drink on the island.¹⁹¹ Cruise visitors to the island suggested the following:

10. Restaurants need to have more seafood options on their menus;
11. Need more native restaurants near the Prince George Wharf;
12. Need more places where cruise visitors can sit and drink non-alcoholic beverages.

Information:

More than half (54%) of the cruise visitors to Nassau/Paradise Island who had gotten off the ship indicated that yes they had attended a talk or lecture about what there was to see and do while they were on the island before they got off the ship and some of the cruise visitors who did not attend a talk or lecture got there information from other sources like the Internet, maps/brochures, etc.¹⁹² However there still appears to be a gap between the information needed by the cruise visitors and what they are actually finding readily available. Cruise visitors to the island suggested the following:

13. More information needs to be available on the shuttle bus to and from the ship; a shuttle schedule would be ideal
14. More information on shuttle bus to and from ship needs to be provided to cruise visitors before they get off the ship
15. More information needs to be provided on things to do on the island

Litter/Cleanliness:

Some cruise visitors complained about the litter/cleanliness of the island. All tourist areas need to be immaculately cleaned at all times, the beaches, the city, along sidewalks, alongside the roads that tourists travel. In Disney World, they have persons who pick up trash all day around the park.

¹⁹¹ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

¹⁹² Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

16. Litter in tourist areas needs to be cleaned up. Attractions like forts, Queen's Staircase, Prince George Wharf, Long Wharf Beach/Junkanoo Beach, Prince George Dock, Downtown and other areas all need to be cleaned.
17. The Prince George Dock has a serious rat problem and that needs to be resolved. Rats are visible to cruise visitors who have to walk on the cruise dock.
18. Some dilapidated buildings in tourist areas need to be painted

Local Transportation & Surreys:

The transportation system used by cruise visitors in Nassau/Paradise Island is very important to the overall success of the island as a tourist destination. One in seven (14%) cruise visitors who got off the ship used a taxi (not as a part of tour) for transportation to get around the island and 3% of them used a surrey.¹⁹³ Cruise visitors to the island suggested the following:

19. Taxi drivers need to wear uniforms-Some cruise visitors thought that the taxi drivers should wear uniforms;
20. Less harassment from taxi drivers-Continued Bahamast training is necessary to make this better;
21. Rude taxi drivers-Continued Bahamast training is necessary to make this better;
22. Horses used for Surreys need to be treated better
23. Horses and poop bag of horses for Surreys need to be cleaned more often to get rid of the smell

Shopping and Straw Market:

Some cruise visitors complained about the shopping available on the island. Some felt that the shops and strawmarket were: too expensive, did not have enough variety, had the same things/stuff. Some felt that the salespeople were too pushy. Cruise visitors to the island suggested the following:

24. Need to have less sales vendors/salespersons on the street
25. Less hassling from the vendors
26. Less pushy salespeople in the Straw Market
27. Need less hagglers in the Strawmarket

¹⁹³ Source: Cruise Expenditure Exit Survey 2013, Bahamas Ministry of Tourism Research & Statistics Dept.

28. Need more variety of goods in Straw Market

General:

29. Need better signage

30. Fix sidewalks in Nassau/Paradise Island

APPENDIX

**CRUISE VISITOR ARRIVALS
BY FIRST PORT OF ENTRY
2013**

THE BAHAMAS				NASSAU/ PARADISE ISLAND		
MONTH	2013	2012	% CHG	2013	2012	% CHG
JAN	445,545	431,527	3.2%	231,098	222,739	3.8%
FEB	418,624	409,793	2.2%	223,749	197,833	13.1%
MAR	504,114	461,636	9.2%	276,606	212,421	30.2%
1QTR	1,368,283	1,302,956	5.0%	731,453	632,993	15.6%
APR	424,680	397,801	6.8%	237,036	194,288	22.0%
MAY	316,291	330,640	-4.3%	177,820	174,830	1.7%
JUN	325,494	314,441	3.5%	173,206	137,237	26.2%
2QTR	1,066,465	1,042,882	2.3%	588,062	506,355	16.1%
JUL	344,043	323,069	6.5%	171,702	143,784	19.4%
AUG	346,214	305,150	13.5%	176,363	147,210	19.8%
SEP	289,824	274,637	5.5%	141,921	136,880	3.7%
3QTR	980,081	902,856	8.6%	489,986	427,874	14.5%
OCT	341,960	278,531	22.8%	174,427	165,121	5.6%
NOV	417,913	408,138	2.4%	235,347	234,141	0.5%
DEC	534,534	498,798	7.2%	277,222	257,831	7.5%
4QTR	1,294,407	1,185,467	9.2%	686,996	657,093	4.6%
YTD	4,709,236	4,434,161	6.2%	2,496,497	2,224,315	12.2%

GRAND BAHAMA ISLAND				THE OUT ISLANDS		
	2013	2012	% CHG	2013	2012	% CHG
JAN	55,096	53,797	2.4%	159,351	154,991	2.8%
FEB	47,288	53,594	-11.8%	147,587	158,366	-6.8%
MAR	60,773	63,477	-4.3%	166,735	185,738	-10.2%
1QTR	163,157	170,868	-4.5%	473,673	499,095	-5.1%
APR	62,981	54,206	16.2%	124,663	149,307	-16.5%
MAY	43,169	57,528	-25.0%	95,302	98,282	-3.0%
JUN	52,216	51,016	2.4%	100,072	126,188	-20.7%
2QTR	158,366	162,750	-2.7%	320,037	373,777	-14.4%
JUL	62,614	61,227	2.3%	109,727	118,058	-7.1%
AUG	51,021	52,205	-2.3%	118,830	105,735	12.4%
SEP	47,925	43,816	9.4%	99,978	93,941	6.4%
3QTR	161,560	157,248	2.7%	328,535	317,734	3.4%
OCT	38,501	51,751	-25.6%	129,032	61,659	109.3%
NOV	32,016	53,961	-40.7%	150,550	120,036	25.4%
DEC	45,393	53,256	-14.8%	211,919	187,711	12.9%
4 QTR	115,910	158,968	-27.1%	491,501	369,406	33.1%
YTD	598,993	649,834	-7.8%	1,613,746	1,560,012	3.4%

In October 2012, Hurricane Sandy passed through The Islands of The Bahamas.

Note: These are preliminary figures, and are subject to change.

**CRUISE VISITOR ARRIVALS
BY SECOND PORT OF ENTRY
2013**

THE BAHAMAS				NASSAU/ PARADISE ISLAND		
MONTH	2013	2012	% CHG	2013	2012	% CHG
JAN	184,255	173,427	6.2%	81,496	85,811	-5.0%
FEB	173,705	174,197	-0.3%	66,873	93,384	-28.4%
MAR	215,071	195,608	10.0%	93,795	104,264	-10.0%
1QTR	573,031	543,232	5.5%	242,164	283,459	-14.6%
APR	179,689	198,871	-9.6%	76,841	100,479	-23.5%
MAY	221,661	218,022	1.7%	110,087	104,181	5.7%
JUN	204,259	192,427	6.1%	98,138	112,955	-13.1%
2QTR	605,609	609,320	-0.6%	285,066	317,615	-10.2%
JUL	225,280	196,669	14.5%	121,318	115,768	4.8%
AUG	197,758	198,478	-0.4%	99,925	114,676	-12.9%
SEP	177,700	171,358	3.7%	86,121	91,872	-6.3%
3QTR	600,738	566,505	6.0%	307,364	322,316	-4.6%
OCT	198,308	154,011	28.8%	96,842	74,840	29.4%
NOV	166,857	174,766	-4.5%	65,280	71,366	-8.5%
DEC	220,905	197,532	11.8%	77,516	92,654	-16.3%
4QTR	586,070	526,309	11.4%	239,638	238,860	0.3%
YTD	2,365,448	2,245,366	5.3%	1,074,232	1,162,250	-7.6%

GRAND BAHAMA ISLAND				THE OUT ISLANDS		
MONTH	2013	2012	% CHG	2013	2012	% CHG
JAN	36,425	24,394	49.3%	66,334	63,222	4.9%
FEB	30,870	21,247	45.3%	75,962	59,566	27.5%
MAR	39,469	25,526	54.6%	81,807	65,818	24.3%
1QTR	106,764	71,167	50.0%	224,103	188,606	18.8%
APR	17,696	25,497	-30.6%	85,152	72,895	16.8%
MAY	36,621	28,807	27.1%	74,953	85,034	-11.9%
JUN	25,952	34,013	-23.7%	80,169	45,459	76.4%
2QTR	80,269	88,317	-9.1%	240,274	203,388	18.1%
JUL	26,353	26,386	-0.1%	77,609	54,515	42.4%
AUG	29,139	34,969	-16.7%	68,694	48,833	40.7%
SEP	25,087	25,561	-1.9%	66,492	53,925	23.3%
3QTR	80,579	86,916	-7.3%	212,795	157,273	35.3%
OCT	30,046	28,935	3.8%	71,420	50,236	42.2%
NOV	40,908	30,114	35.8%	60,669	73,286	-17.2%
DEC	46,471	42,893	8.3%	96,918	61,985	56.4%
4 QTR	117,425	101,942	15.2%	229,007	185,507	23.4%
YTD	385,037	348,342	10.5%	906,179	734,774	23.3%

2nd and 3rd ports of entry for cruise arrivals are only to be used if an analysis is being done by individual island and you do not want the count for the Bahamas as a whole. If you want a count for the Bahamas as a whole you must look at 1st port of entry only to avoid double counting.

The figures are preliminary and subject to revision.

**CRUISE VISITOR ARRIVALS
BY THIRD PORT OF ENTRY
2013**

THE BAHAMAS				NASSAU/ PARADISE ISLAND		
MONTH	2013	2012	% CHG	2013	2012	% CHG
JAN	17,816	19,650	-9.3%	2,443	0	100.0%
FEB	13,056	13,553	-3.7%	2,182	2,228	-2.1%
MAR	22,940	31,380	-26.9%	0	0	0.0%
1QTR	53,812	64,583	-16.7%	4,625	2,228	107.6%
APR	24,833	21,805	13.9%	10,741	0	100.0%
MAY	21,705	29,522	-26.5%	0	2,147	-100.0%
JUN	18,394	24,615	-25.3%	5,323	6,617	-19.6%
2QTR	64,932	75,942	-14.5%	16,064	8,764	83.3%
JUL	23,720	34,125	-30.5%	0	9,598	-100.0%
AUG	25,132	39,327	-36.1%	2,552	4,357	-41.4%
SEP	17,371	20,207	-14.0%	4,210	0	100.0%
3QTR	66,223	93,659	-29.3%	6,762	13,955	-51.5%
OCT	24,637	15,410	59.9%	2,130	0	100.0%
NOV	11,896	16,087	-26.1%	0	338	-100.0%
DEC	18,078	16,127	12.1%	2,175	0	100.0%
4QTR	54,611	47,624	14.7%	4,305	338	1173.7%
YTD	239,578	281,808	-15.0%	31,756	25,285	25.6%

GRAND BAHAMA ISLAND				THE OUT ISLANDS		
MONTH	2013	2012	% CHG	2013	2012	% CHG
JAN	0	6,993	-100.0%	15,373	12,657	21.5%
FEB	2,330	2,284	2.0%	8,544	9,041	-5.5%
MAR	10,471	2,365	342.7%	12,469	29,015	-57.0%
1QTR	12,801	11,642	10.0%	36,386	50,713	-28.3%
APR	2,599	5,077	-48.8%	11,493	16,728	-31.3%
MAY	6,776	9,939	-31.8%	14,929	17,436	-14.4%
JUN	0	0	0.0%	13,071	17,998	-27.4%
2QTR	9,375	15,016	-37.6%	39,493	52,162	-24.3%
JUL	0	0	0.0%	23,720	24,527	-3.3%
AUG	2,656	7,930	-66.5%	19,924	27,040	-26.3%
SEP	4,162	7,166	-41.9%	8,999	13,041	-31.0%
3QTR	6,818	15,096	-54.8%	52,643	64,608	-18.5%
OCT	8,544	2,493	242.7%	13,963	12,917	8.1%
NOV	5,955	2,360	152.3%	5,941	13,389	-55.6%
DEC	13,529	4,889	176.7%	2,374	11,238	-78.9%
4 QTR	28,028	9,742	0.0%	22,278	37,544	-40.7%
YTD	57,022	51,496	10.7%	150,800	205,027	-26.4%

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The figures are preliminary and subject to revision.

**CRUISE VISITOR ARRIVALS
BY FIRST & SECOND & THIRD PORT OF ENTRY
2013**

THE BAHAMAS				NASSAU/ PARADISE ISLAND		
MONTH	2013	2012	% CHG	2013	2012	% CHG
JAN	647,616	624,604	3.7%	315,037	308,550	2.1%
FEB	605,385	597,543	1.3%	292,804	293,445	-0.2%
MAR	742,125	688,624	7.8%	370,401	316,685	17.0%
1QTR	1,995,126	1,910,771	4.4%	978,242	918,680	6.5%
APR	629,202	618,477	1.7%	324,618	294,767	10.1%
MAY	559,657	578,184	-3.2%	287,907	281,158	2.4%
JUN	548,147	531,483	3.1%	276,667	256,809	7.7%
2QTR	1,737,006	1,728,144	0.5%	889,192	832,734	6.8%
JUL	593,043	553,863	7.1%	293,020	269,150	8.9%
AUG	569,104	542,955	4.8%	278,840	266,243	4.7%
SEP	484,895	466,202	4.0%	232,252	228,752	1.5%
3QTR	1,647,042	1,563,020	5.4%	804,112	764,145	5.2%
OCT	564,905	447,952	26.1%	273,399	239,961	13.9%
NOV	596,666	598,991	-0.4%	300,627	305,845	-1.7%
DEC	773,517	712,457	8.6%	356,913	350,485	1.8%
4QTR	1,935,088	1,759,400	10.0%	930,939	896,291	3.9%
YTD	7,314,262	6,961,335	5.1%	3,602,485	3,411,850	5.6%

GRAND BAHAMA ISLAND				THE OUT ISLANDS		
MONTH	2013	2012	% CHG	2013	2012	% CHG
JAN	91,521	85,184	7.4%	241,058	230,870	4.4%
FEB	80,488	77,125	4.4%	232,093	226,973	2.3%
MAR	110,713	91,368	21.2%	261,011	280,571	-7.0%
1QTR	282,722	253,677	11.4%	734,162	738,414	-0.6%
APR	83,276	84,780	-1.8%	221,308	238,930	-7.4%
MAY	86,566	96,274	-10.1%	185,184	200,752	-7.8%
JUN	78,168	85,029	-8.1%	193,312	189,645	1.9%
2QTR	248,010	266,083	-6.8%	599,804	629,327	-4.7%
JUL	88,967	87,613	1.5%	211,056	197,100	7.1%
AUG	82,816	95,104	-12.9%	207,448	181,608	14.2%
SEP	77,174	76,543	0.8%	175,469	160,907	9.0%
3QTR	248,957	259,260	-4.0%	593,973	539,615	10.1%
OCT	77,091	83,179	-7.3%	214,415	124,812	71.8%
NOV	78,879	86,435	-8.7%	217,160	206,711	5.1%
DEC	105,393	101,038	4.3%	311,211	260,934	19.3%
4QTR	261,363	270,652	-3.4%	742,786	592,457	25.4%
YTD	1,041,052	1,049,672	-0.8%	2,670,725	2,499,813	6.8%

2nd and 3rd ports of entry for cruise arrivals are only to be used if an analysis is being done by individual island and you do not want the count for the Bahamas as a whole. If you want a count for the Bahamas as a whole you must look at 1st port of entry only to avoid double counting.

The figures are preliminary and subject to revision.

CRUISE EXPENDITURE SURVEY

1. What cruise ship are you on?

Cruiseship _____
 Cruiseline _____

2. Are you a passenger or crew?

1. Passenger
 2. Crew → Close Interview

3. How many times have you gotten off your ship?

4. Do you intend to get off your ship again?

1. Yes → Close Interview
 2. Maybe
 3. No Continue Interview

5. Did you do any shopping today?

1. Yes 2. No → Go to question 7

If Yes At Q5:

6. Did you personally buy any of the following items on shore and how much did you spend?

	Amount Spent	Did you Buy Any of these
1 T Shirts	_____	Yes No
2 Other clothing	_____	Yes No
3 Jewellery / watches	_____	Yes No
4 Straw-work	_____	Yes No
5 Other souvenirs	_____	Yes No
6 Perfumes/cosmetics	_____	Yes No
7 China / crystal	_____	Yes No
8 Liquor to take home	_____	Yes No
9 Leather goods	_____	Yes No
10 Linen	_____	Yes No
11 Tobacco	_____	Yes No
12 Hair braiding	_____	Yes No
13 Other (Write in)	_____	Yes No
_____	_____	Yes No
_____	_____	Yes No
_____	_____	Yes No

7. Did you do any activities, tours or excursions on-shore while you were off the ship?

1. Yes 2. No → Go to question 9

8. IF YES: Which one did you go on?

ACTIVITIES DONE

	Activity Name	No. of People	Total Cost
Activity 1:			
	Did you book that?		
	1 On Board	2 On-Shore	3 Independently
Activity 2:			
	Did you book that?		
	1 On Board	2 On-Shore	3 Independently
Activity 3:			
	Did you book that?		
	1 On Board	2 On-Shore	3 Independently

9. Did you use any of the following transportation? (i.e. transportation not included in tour/excursion)

	No. of Journeys	Total Cost	No. of People
Did you use:			
Taxi	Yes No _____	_____	_____
Water taxi	Yes No _____	_____	_____
Bus/Jitney	Yes No _____	_____	_____
Horse/Carriage	Yes No _____	_____	_____
Walked/Strolled	Yes No _____		
Comments (if any)	_____		

10. Did you rent a motor scooter, car or a bicycle while you were here today? And how much did that cost? And how many people did that cost cover?

Rented a:		Total Cost
a) Scooter	Yes No	_____
b) Car	Yes No	_____
c) Bicycle	Yes No	_____

11. And did you buy any food or drink while you were out today?

1 Yes	2 No	Total Cost

Restaurant Name _____		

Did you purchase any other food/drink like:

	Total Cost	Yes	No
1. Water	_____	Yes	No
2. Soda/Juice/drink	_____	Yes	No
3. Ice Cream	_____	Yes	No
4. Other _____	_____	Yes	No

12. Did you visit a:

	Yes	No	Total Cost	Name
Casino	Yes	No	_____	_____
Nightclub	Yes	No	_____	_____
Oth. Nightlife	Yes	No	_____	_____
Write in _____				

13. How many people including yourself, do the expenses and purchases made during your trip relate to? Don't include persons not on this trip, please.

14. Have you ever visited The Bahamas before?

- 1 Yes → Go to Q15
- 2 No → Go to Q17

15. How many times have you visited The Bahamas before?

16. And when you came before, was that also on a cruise visit, or did you stay on-shore?

- 1 Cruise
- 2 Stayed on shore
- 3 Both

17. Before you got off the ship, did you attend a talk or lecture about what there was to see and do while you were here?

- 1 Yes
- 2 No
- 3 Don't know

a) Did you get any other information about what to see and do here?

- 1 Yes
- 2 No
- 3 Don't know

From where:

Internet/Online	[]	Maps	[]
Brochures/Pamphlets	[]	TV on ship	[]
Tour Director	[]	Cruise Director	[]

Other _____

18. How likely are you to choose to return to The Bahamas as a vacation destination, either as part of a cruise or for a longer holiday?

- 1 Definitely would — Go to Q19
- 2 Probably would — Go to Q19
- 3 Probably wouldn't — Go to Q20
- 4 Definitely wouldn't — Go to Q20
- 5 Don't know — Go to Q20

IF Definitely or probably would, ASK:

19. Do you think you would stay in a hotel or come here on a cruise ship?

- 1 Would stay in a hotel
- 2 Would come by cruise ship
- 3 Both
- 4 Don't know

20. How do you feel about recommending the Bahamas as a place for your friends/family to visit?

- 1 Definitely will recommend it
- 2 Probably will recommend it
- 3 Probably won't recommend it
- 4 Definitely won't recommend it

21. What would have made your visit here more enjoyable?

22. Where do you live?

1. United States: Which State?

WRITE IN _____

2. Canada: Which Province?

WRITE IN _____

3. Other: Which Country?

WRITE IN _____

23. (Don't ask just circle) Is respondent...

- 1. Male
- 2. Female

24. Into which of these age brackets does your age fall? SHOW CARD. CIRCLE ONE ONLY

- 1 A 18-24
- 2 B 25-34
- 3 C 35-44
- 4 D 45-54
- 5 E 55-64
- 6 F 65-74
- 7 G 75+

25. Are you traveling....

- 1 Alone
- 2 As a couple
- 3 As a family
- 4 As a group

26. How many people are there in your personal

travelling party/group including yourself and any children?

27. If you're traveling with children, how old are the children? CIRCLE ALL THAT APPLY
Interviewer: Write in how many of each age

- 1 Under 12 months _____
- 2 Age 1-5 _____
- 3 Age 6-11 _____
- 4 Age 12-17 _____
- 5 Over 17 _____
- 6 No children in party [] Tick box

28. Into which of these brackets does your household income fall? SHOW CARD. CIRCLE ONLY ONE

- 1=Under \$25,000
- 2=\$25,001-\$50,000
- 3=\$50,001-\$75,000
- 4=\$75,001-\$100,000
- 5=\$100,001-\$125,000
- 6=\$125,001-\$150,000
- 7=\$150,001-\$200,000
- 8=\$200,001-\$250,000
- 9=\$250,001-\$325,000
- 10=\$325,001-\$400,000
- 11=\$400,001-\$500,000
- 12=Over \$500,000

END

Thank you very much indeed for your help with our survey.

Have a good return home and we hope to see you again soon in The Islands of The Bahamas

FOR OFFICE USE ONLY:

PLACE OF SURVEY _____
 DATE dd / mm / yy _____
 SURVEY STAFF ID _____
 CODER ID _____
 Coding completed dd / mm / yy _____

ACTION TAKEN

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Information in this brochure is based on the Cruise Expenditure Exit Survey 2013, 2012, and 2011, Dept. of Immigration, Customs Dept. and the Port Authority.



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