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Executive Summary

The current decline in cruise arrivals to the Caribbean, especially during the summer months and the persistent volatile nature of cruise activity in the market, with no clear pattern of growth, is a source of great concern for tourism officials in the region. Reversing the current precipitous decline, specifically during the summer period, has therefore become an area of urgent priority for the region.

In their discussions with the Caribbean Tourism Organization (CTO) on the issue, the Florida Caribbean Cruise Association (FCCA) has posited the view that if the Caribbean can assist in stimulating demand for the region in a way that would make it viable for the cruise lines to operate, they would rethink their position and consider increasing activity in the Caribbean waters during the summer period.

Therefore, the CTO took the initiative to conduct an in-depth study in the form of a cruise survey to gather the empirical evidence required to identify the key challenges facing the Caribbean cruise industry; to ascertain the thinking of cruise visitors to the Caribbean regarding various aspects of summer cruise activity and to devise tangible and attainable solutions that would augment demand for Caribbean cruises during the summer. The on-line sample survey was administered through Survey Monkey, an online survey tool and completed in September 2013. Using this method, a wide range of demographics, behaviors, perceptions and future plans of the repeat and potential summer cruise passengers were ascertained and analyzed. The survey captured the feedback of 1,044 individuals responding from across the USA (41.6%), the United Kingdom (26.1%), the Caribbean (22.7%), Other Countries (4.4%), Other Europe (3.4%) and Canada (1.8%).

One of the main objectives of the survey was to target, not only repeat cruisers, but particularly the huge global untapped market of those individuals who had never cruised before, or those who may have cruised, but never to the Caribbean. To a large extent, this goal was achieved, as the survey revealed that of the target population 52.1% have cruised before and 47.9% have never cruised. Of those respondents who have cruised before, 60% have been on a Caribbean cruise. This means that that almost seventy percent of the respondents (68.7%) have never been on a Caribbean cruise and that includes both categories of individuals have cruised and never cruised before.

Profile of Respondents

Of the sample, the overwhelming majority was female (63%) and 37% were male. Demographic statistics gathered revealed that most of the respondents came from the USA, followed by the UK and the Caribbean. Amongst cruisers, the largest group by a wide margin, was from the USA, followed by the UK and the Caribbean. Interestingly, in the group of non-cruisers, the majority was from the Caribbean, closely followed by the UK and the USA.

Respondents were evenly spread across the ages of 30-60+ (84.4%), members of the retirement and working age population. Overall, the majority of the respondents (44.6%) were
predominantly from the more mature over-fifty Baby and Late Boomer age groups, made up primarily of respondents from the USA, and the UK, while the smallest cadre of respondents was from 29 and under age groups (15.6%). which was mostly made up of individuals from the Caribbean.

Almost sixty percent of total respondents (59.6%) were from the lower to middle-class social bracket, collectively earning US$59,999 or less, with the largest group earning US$20,000-$39,999. Almost twenty percent (19.5%) of total respondents were from the upper income brackets of US$100,000 – 180,000+. The respondents from the USA were the wealthiest and the highest earners of all the nationalities, in direct contrast to the UK, the Caribbean and Other Europe, where the majority of respondents earned from the much lower US$20,000 - $39,999 and under US$20,000 income brackets.

Overall, the majority of total respondents (28.8%) were prepared to pay in the medium range of US$600 - $799 to go on a cruise¹. Collectively, almost seventy percent (68.7%) are willing to pay $600 or more for a cruise. Although amongst the lowest earners, the majority of UK respondents are willing to pay the most for a cruise ($1,000+), while respondents from the Caribbean are prepared to expend the least amount of money.

**Key Findings**

**Deterrents to taking a Caribbean cruise**

The main purpose of the survey was to identify the major deterrents or motivators to taking a Caribbean cruise during the summer months. The research identified several factors that act as disincentives to visitors. Both cruisers and non-cruisers expressed similar concerns that would discourage them from taking a cruise during that period. While there were several diverse reasons expressed, the top seven (7) ranked in order of importance were: (1) Adverse weather conditions (Hurricanes, extreme heat etc.), (2) High costs associated with cruising (3) Unavailability of vacation leave, (4) Problems with summer crowding, (5) Limited cruise options in the summer, (6) “Been there, done that” syndrome, and (7) More attractive summer vacation alternatives than the Caribbean.

The fear of hurricanes/other forms of bad weather and high temperatures, combined to be the number one deterrent expressed by almost fifty percent (44.5%) of all the respondents across every nationality, except the “Other countries” category. In fact, apprehension about adverse weather conditions, especially hurricanes, was the primary concern expressed by the USA respondents, the largest cruising segment to the region, by an overwhelming 64.3%. Therefore this environmental issue is by far the biggest problem impacting summer cruising in the Caribbean.
Despite these deterrents however, on a positive note, almost twenty percent of total respondents (18.6%), expressed the view that cruising the Caribbean is considered to be an “aspirational” dream vacation. This type of holiday was also referred to as “a dream come true” and a “once in a lifetime experience” to share with family, spouses, or friends. Several respondents also stressed the point that nothing would discourage them from taking a cruise in the region at any time of the year.

**Motivators to taking a Caribbean summer cruise**

Despite these deterrents, there were several factors identified in the survey that would motivate respondents to consider taking a Caribbean summer cruise. Based on survey responses, the main motivating factors, ranked in order of importance are: (1) Attractive ship destinations (1) Cost of the cruise (3) Onshore Activities (4) Onboard Activities (5) Availability of Vacation from Work and (6) Experiential/Learning activities. Overall, both the availability of attractive destinations and the cost of a cruise tied for first place, as the most influential reasons that would motivate the respondents to take a Caribbean cruise during the summer. Onshore activities were also deemed to be a more important motivator to go on a cruise than Onboard activities, by both genders of respondents and across all nationalities and age groups, except the Caribbean and Canada and the 20-29 age group.

**Motivating Factors – Onboard Activities**

Overall, the onboard activities were ranked in order of importance by total respondents as follows: (1) Restaurants (culinary experiences), (2) Entertainment, (3) Exercise/Spa, (4) Shopping, (5) Sports, (6) Children’s facilities and (7) Gambling. The three top categories were ranked the same across all nationalities and age groups. Surprisingly, the presence of gambling and children’s facilities were deemed to be the least important motivators by the majority of respondents.

**Motivating Factors – Onshore Activities**

According to the majority of respondents, onshore activities were deemed to be more important than onboard activities in influencing their decision to book a summer cruise. This means that the quality and variety of onshore activities play a very critical role in motivating respondents to take a Caribbean cruise. Overall, the activities were ranked by respondents in order of importance as follows; (1) Cultural Heritage (2) Restaurant (culinary experiences), (3) Beach/Watersports, (4) Adventure/Sports, (5) Exercise/Spa, (6) Voluntourism and (7) Gambling.

One of the most interesting revelations of the survey was the fact that cultural heritage and culinary activities ranked much higher in importance than the traditional beach and watersports activities typically associated with the Caribbean region, by: both segments of cruisers and non-cruisers; both males and females, and across all nationalities and age groups (except under 20 who ranked them 2nd). However, beach/watersports activities were an important motivator for USA respondents and amongst respondents in the 40-49 age group, who ranked them second in importance.

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1 Excludes cost of air transport.
A relatively high proportion of respondents demonstrated an elevated level of interest in the availability of shopping opportunities onshore, especially amongst the females, respondents from the UK, Canada and the Caribbean and the over-fifty segments. There was even less interest in gambling activities onshore than there was for gambling onboard ship.

**The Way Forward – Recommendations**

It is anticipated that the information gleaned from the Survey, from all segments of respondents, will be used to develop the relevant strategic actions, policies, infrastructure and products and services necessary to directly target the root causes that negatively affect demand for cruising to the Caribbean. The main priority now must be to devise effective strategies designed to stimulate consumer demand for the region in a way that would make it feasible for the cruise lines to operate and increase activity in the Caribbean during the summer months.

Addressing critical exogenous factors, such as the weather, the perceived high costs associated with cruising, summer crowds or the development of new itineraries may be for the most part, beyond the control of regional tourism authorities. Therefore, the primary focus must be on those endogenous factors over which the CTO and Caribbean tourism officials can exercise direct control, such as devising the appropriate messaging to allay fears about the hurricane season, more aggressive, creative and targeted marketing of the Caribbean Cruise Brand, diversifying source markets to increase global market share, diversifying the tourism product beyond sand, sea and sun, conducting ongoing research and development and developing memorable, unique onshore experiences of the highest international standards. Priority must also now be placed on the creation of the types of tourism products and services and marketing strategies that would attract the kind of demand that transcends seasonality and can stimulate increased cruise arrivals to the region on a **year-round basis**.

The global cruise industry is expected to continue to experience phenomenal growth in the future. In light of these developments, a major priority of the Caribbean must be to devise strategies and initiatives to capitalize on this growth pattern by redoubling its efforts to remain competitive and looking outside the traditional areas to experience growth. This will entail developing a bold, aggressive, strategic and immediate response to this issue, specifically designed to recapture and increase market share to the region. The Caribbean’s ability to stimulate the required demand will be directly dependent upon its capacity to refresh and reinvent its tourism economies by effectively adapting to the ever-changing global environment, pushing the envelope, taking risks and launching innovations, which consistently deliver on changing consumer expectations. Undoubtedly, a revolutionary approach must now be adopted by regional tourism stakeholders. Therefore, responding to the needs, expectations and concerns expressed in Caribbean Tourism Organization Future Caribbean Cruise Travel Survey this survey in a timely manner and close collaboration between regional tourism officials and industry partners to implement workable solutions, will go a long way towards achieving these goals.
1.0 Overview of Caribbean Cruise Tourism

The Caribbean has experienced steady growth in cruise passenger arrivals over the last thirty two (32) years, increasing from 3.8 million passengers in 1980, to a record 21.8 million arrivals in 2013. Over the last ten years (2003-2013), there has been a 21.6% growth in cruise passenger arrivals to the region, with an annual average growth rate of 2.0%.

A closer analysis of this overall growth, however, reveals some distinct anomalies. Data indicates that the region experienced a definitive upward trajectory of growth from 2001 to 2004, which culminated with a peak in arrivals of 19.8 million. However, this spike in numbers was followed by a decline of 5.4% in 2005. The region struggled to recover from this decline for five (5) years and was unable to fully recuperate from this fall-off until 2010, when, after a period of inconsistent growth, the industry registered a record 21.2 million arrivals, after an 8.6% spike in arrivals. The impressive increase in 2010 was however followed by a marginal growth rate of 2.0% in 2011 and a 1.0% decline in 2012 (see Table 1). The region however returned to a path of growth in 2013, with a moderate increase in cruise arrivals of 2.7%.

| Table 1: Cruise Passenger Arrivals 2008 – 2013 (% Change) |
|-----------------|---|---|---|---|---|---|
| Year            | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
| Annual          | -1.6 | 0.5  | 8.6  | 2.0  | -1.0 | 2.7  |
| Note:           | Imputed from data on Cruise Passenger travel to member Countries |
| Source:         | CTO and CTO Member Countries |

This growth was attributed to strong increases experienced during the summer months of July-October, which counterbalanced declines in the winter months of February to April. A review of the monthly cruise arrivals performance revealed that the summer months of 2013 were the best since 2010 for cruise in the Caribbean. However, it is left to be seen if this is the commencement of a consistent upward trajectory trend for the region, or just another phase in the extreme volatility being experienced over the last five (5) years.
### Table 2: Monthly Cruise Passenger Arrivals ('000) 2007-2013

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<th>2011</th>
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**Note:** Inputed from data on Cruise Passenger travel to member countries

**Source:** CTO and CTO Member Countries

### 1.0 Declining Caribbean Cruise Passenger Arrivals

Although there is considerable variability in annual growth rates for cruise passenger arrivals in the Caribbean over the last five (5) years (2008-2013), overall the level of cruise activity remains high with annual total arrivals having exceeded 21.0 million for the past three (3) consecutive years (see Table 2).

However, the data provided by twenty-five Caribbean Countries (see Table 3), clearly outlines the marginal declines in cruise passenger arrivals to the Caribbean in recent times. Additionally, the average annual growth rate for the Caribbean is a meagre 2.5% over the last five years, when compared to the global cruise industry’s average annual passenger growth rate of approximately 7.4% per annum\(^2\).

There was however a marked improvement in 2013, where twice as many destinations (12), of the 23 destinations upon which the estimates were based, recorded increased cruise activity over 2012, while 11 registered declines, down from fifteen in 2012.

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\(^2\) FCCA Cruise Industry Overview - 2013, pg. 6.
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<td>-5.2</td>
<td>4.9</td>
</tr>
</tbody>
</table>

Key: ¹ At first port of entry only    ² All sea arrivals; estimate    ³ Port of Guadeloupe only (excludes arrivals at St. Barthelemy)

**Notes:** Figures are subject to revision by reporting countries. Preliminary figures. Total cruise passenger arrivals as given above represent the sum of arrivals at individual destinations. However, because most cruise ships stop at more than one destination, this figure is considerably larger than the number of cruise passengers visiting the region.

**Source:** CTO Member Countries and CTO estimates.
1.2 Erratic growth across sub-regions

Overall, growth rates in individual ports have been erratic, with some countries experiencing improved business, while others are progressively declining (see Table 3). The sub-region of the Northern Caribbean continues to experience positive, albeit sharply declining growth rates (see Table 4). On the contrary, the Southern Caribbean continues to be the most vulnerable region, experiencing consistently declining arrivals for the past three (3) years. These sharp declines are mainly attributed to the fact that some islands receive no cruise ships during the summer, while others receive a minimal amount.

However, the southern sub-region bounced back in 2013 to achieve growth of 14.4%, which can mostly be attributed to very strong performances by Aruba (25.4%) and Curacao (41.4%) and to a lesser extent Martinique (11%) and Barbados (10.2%).

<table>
<thead>
<tr>
<th>Sub-Region</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Northern Caribbean</td>
<td>13.6</td>
<td>16.3</td>
<td>10.0</td>
<td>5.1</td>
<td>2.7</td>
<td>3.9</td>
</tr>
<tr>
<td>Eastern Caribbean</td>
<td>-0.6</td>
<td>-3.9</td>
<td>3.3</td>
<td>3.0</td>
<td>-4.8</td>
<td>2.4</td>
</tr>
<tr>
<td>Southern Caribbean</td>
<td>4.0</td>
<td>14.4</td>
<td>-3.9</td>
<td>-5.6</td>
<td>-5.6</td>
<td>14.4</td>
</tr>
<tr>
<td>Western Caribbean</td>
<td>-3.3</td>
<td>-7.6</td>
<td>15.2</td>
<td>-0.9</td>
<td>1.4</td>
<td>-3.1</td>
</tr>
<tr>
<td>TOTAL</td>
<td>-1.6</td>
<td>0.5</td>
<td>8.6</td>
<td>2.0</td>
<td>-1.0</td>
<td>2.7</td>
</tr>
</tbody>
</table>

Over the last five (5) years the top five worst performing destinations have been primarily from the eastern and southern sub-regions, while top five (5) performers have been mixed, i.e. from all regions with no clear pattern. The “wild fluctuations” in cruise passenger arrivals continued in 2013, as cruise arrivals in individual destinations ranged from declines of 21.8% in Grenada to increases of 45.1% in Curacao. The mixed performance experienced across the Caribbean has resulted in no significant incremental growth in the trade for the region as a whole.

1.3 Patterns of declines across low and high seasons

A worrisome trend is developing where declines are not only being experienced during the low season (May to October), but also during the traditionally buoyant high season (November to April) (see Table 5). This was witnessed in 2013, where there was a decline of 4.1% during the traditional high season. However, this regression was off-set by an impressive recovery of a 7.5% growth during the summer months, after steady declines in the previous two years. A look at the arrival numbers for both periods for the last five (5) years reveals that overall there was no clear pattern of growth.
Table 5: Cruise Passenger Arrivals by Season 2007-2013 (% Change)

<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>High Season (Nov-Apr)</td>
<td>3.5</td>
<td>-2.2</td>
<td>2.4</td>
<td>8.2</td>
<td>3.7</td>
<td>-4.1</td>
</tr>
<tr>
<td>Low Season (May-Oct)</td>
<td>-9.0</td>
<td>4.0</td>
<td>15.8</td>
<td>-6.4</td>
<td>-1.7</td>
<td>7.5</td>
</tr>
<tr>
<td>TOTAL</td>
<td>-0.7</td>
<td>-0.3</td>
<td>6.7</td>
<td>3.1</td>
<td>2.0</td>
<td>-0.6</td>
</tr>
</tbody>
</table>

Key: \* – Revised, \* – CTO estimate
Note: Imputed from data on Cruise Passenger travel to member countries
Source: CTO and CTO Member Countries

1.4 Conclusion

Despite the positive summer cruise arrivals for 2013, the overall continual decline in market share to the Caribbean and the persistent volatile nature of cruise activity in the market, with no clear pattern of growth, is a source of great concern for tourism officials in the region. This is due to the fact that the cruise tourism segment plays a vital role in contributing to the overall economic well-being of the region. The present state of affairs therefore has several negative implications for the Caribbean, including consequential contractions in cruise tourism revenue and tourism-related employment.

Ensuring the sustained growth in cruise tourism arrivals across all sub-regions is an objective of paramount significance for Caribbean governments. Therefore, it is of critical importance that immediate measures be put in place to stem the declining share of passenger arrivals, stabilize the current volatility in the market and return the Caribbean cruise industry to a consistent upward growth trajectory.


2.0 Future Caribbean Cruise Travel Survey

Defying crippling world economic conditions, a challenging financial climate, rising oil prices and other external shocks, the cruise industry continues to grow at a rapid pace, from 7.2 million passengers in 2000 to 21.3 million in 2013, with yearly occupancies above 100%. The majority of this growth has taken place over the last decade, where over 70% of the total passengers have been generated and nearly 40% of this number in the past five (5) years5.

To accommodate this rapid growth, on average, about eight (8) “ocean-going vessels”, with more room capacity, are expected to be introduced to the market, each year, over the next two (2) years6. It is estimated that many of those ships would be travelling to destinations other than the Caribbean region. This development has already commenced, as a reduction in cruise lines plying the Caribbean waters is currently being experienced by the majority of regional destinations, particularly during the summer months.

The significant reduction in cruise capacity is mostly attributed to the redeployment of ships from the Caribbean to the more profitable and increasingly popular European market and other regions around the world. This shifting of capacity to European waters has been described by leading travel expert, Arthur Frommer as being, “the biggest development in cruising”, and he further predicted that fewer berths will be deployed to the region in the future7. The major reasons for this development are two-fold. Simply put, strong consumer demand makes it more financially feasible for cruise lines to operate in Europe during the summer months. Additionally, the North American dominance of the global cruise industry continues to gradually erode, as other global cruise regions experience growth8.

As a result, cruise lines are beginning to rely more on Asian and European passengers for their ships (and on a declining percentage of Americans) and due to its location, the Caribbean is less of a natural destination for these emerging new nationalities. Consequently, besides Europe and Asia, strong growth will also be experienced in the Australia, New Zealand, South American and Singapore cruise industries. Therefore, while the Caribbean (including the Bahamas and Bermuda) continues to command the leading share of deployment capacity globally, due to these declines, the amount has decreased by 3.1% over the last seven years, falling from 48.4% in 2006 to 45.3% 20139. Interestingly, when the Bahamas and Bermuda are excluded, deployment decreased by almost 10% over the same period for the Caribbean, from a high of 46.7% in 2006 to 37.3% in 201310. CLIA’S five-year deployment trends reveals the source of this decline, with the 2013 capacity to the Caribbean being up by 33%, vs. the Mediterranean (+ 49%), Europe (no Med), (+ 57%) and South America (+ 57%). Asia and Australasia are also up by a phenomenal 302% and 155% respectively11.

Furthermore, a disturbing trend has also developed where, besides summer, decreases are also being experienced during the traditional high winter season by several destinations. Reversing the current decline, specifically during the summer period, has therefore become an area of
urgent priority for the region. A reduction in seasonality and persistent annual growth of cruise arrivals will lead to stronger and more predictable earnings from the Cruise industry, greater local employment and higher economic growth in the region.

In their discussions with the Caribbean Tourism Organization (CTO) on the issue, the Florida Caribbean Cruise Association (FCCA) posited the view that if the Caribbean can assist in stimulating demand in a way that would make it viable for the cruise lines to operate, they would rethink their position and consider increasing activity in the Caribbean waters during the summer period.

As a consequence, the CTO has sought to conduct the research necessary to determine the root causes directly impacting cruise demand for the Caribbean. Towards this end, the Organization took the initiative to conduct an in-depth study in the form of a cruise survey to (1) gather the empirical evidence required to identify the key challenges facing the Caribbean cruise industry, (2) to ascertain the thinking of cruise visitors to the Caribbean regarding various aspects of summer cruise activity and (3) to devise tangible and attainable solutions that would augment demand for Caribbean cruises during the summer.

2.1 Survey Purpose
The purpose of conducting the survey was to achieve the following:

• to understand the circumstances surrounding low demand for Caribbean cruises especially during the summer months, and;

• to inform planning and creation of an environment that would make it viable for cruise lines to expand business especially during the summer months.

2.2 Survey Outputs
The three (3) main outputs to be delivered by the study were as follows:

1. To determine what is necessary to stimulate demand for cruises to the Caribbean during the summer months;
2. To determine what are the major deterrents and motivators for customers taking a cruise during the summer months;
3. To utilise the research data to develop key strategies and recommend measures needed to better plan, develop and boost the regional cruise tourism industry.

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5 CLIA Cruise Industry Update 2013, pg.5.
6 FCCA Cruise Industry Overview 2013, pg.1.
8 Between 1980 and 2012, the CLIA North America fleet will have carried an estimated 225 million guests: 188 million passengers sourced from North America and 37 million passengers from other parts of the world. However, the rate of growth of the North American market has slowed since 2005, dropping from a high of 91% of total cruise passengers in 2000 to 68% in 2012 and is growing at a modest rate, albeit on a very large base.
9 Source: CTO. CLIA’s data was adjusted to include cruise arrivals numbers from the Bahamas and Bermuda.
10 FCCA Cruise Industry Overview – 2012, pg. 1; FCCA Cruise Industry Overview – 2013, pg. 2.
11 CLIA Cruise Industry Update 2013, pg. 8.
3.0 Survey Methodology

The data collection process was conducted online and administered through Survey Monkey, an online survey tool that enables users to create professional web-browser based surveys.

Using this method, a wide range of demographics, behaviours, perceptions and future plans of 1,044 repeat and potential summer cruise passengers were ascertained and analyzed (see APPENDIX I). The survey captured feedback from a cross-section of individuals from the USA, Canada, the United Kingdom, Other Europe, the Caribbean and Other countries\(^\text{12}\).

Diverse incentives in the form of a Caribbean summer cruise and a tablet computer were offered to generate as high a response rate as possible. However, despite the fact that incentives were offered, the survey commenced in summer 2012 and was completed in September 2013, after much delay due to nonresponse challenges.

3.1 Survey Instrument

The survey was structured with twelve (12) open and closed-ended questions (see APPENDIX II). Data was gathered on demographics such as country of residence; gender; age; occupation and income group. The core questions addressed the major factors that would either deter or motivate respondents to consider taking a Caribbean cruise during the summer period.

3.2 Data Sources

Several different data sources were utilized:

- Virtual Tourist (a global online travel community with 65,000 members);
- Facebook; and
- The CTO United Kingdom’s office database of individuals who agreed to participate in the survey.

3.3 Target Respondents

Views were obtained from three distinct groups:- (1) persons who have cruised before; (2) persons who have never cruised and (3) persons who have cruised before, but never to the Caribbean.

3.4 Targeting the “non-cruise” segment

One of the main objectives of the survey, therefore, was to target, not only repeat cruisers, but particularly the huge global untapped market of those individuals who had never cruised before, or those who may have cruised, but never to the Caribbean.

Repeat visitation to the Caribbean is very high. This is mainly attributed to the region’s close proximity to the Continental USA, the world’s most mature and prolific cruising market, which has easy and convenient access to over thirty (30) North American embarkation ports. The

\(^{12}\) The “Other countries” category included respondents from countries as far afield as China, India, Australia, Nigeria, Malaysia, Indonesia, Brazil, Mexico, the Philippines, Myanmar and Mauritius.
main intention of targeting the individuals that have never cruised to the Caribbean, therefore, is to increase the current market share to the region, by attracting a new segment of traveler. The main goal of this strategy is to counterbalance the loss of consumers who may have repeatedly travelled to the Caribbean islands and are now seeking to experience new and diverse global destinations that are becoming increasingly available in line with the cruise industry’s globalization policy.

To a large extent, this goal was achieved, as the survey revealed that of total respondents:
• 52.1% have cruised before; and
• 47.9% have never cruised
(See Figure 2).

Overall, of those respondents who have cruised before, over half (60%) have been on a Caribbean cruise (see Figure 3).

Therefore, this means that in total, almost seventy percent (68.7%) of total respondents, both cruisers and non-cruisers combined, have never been on a Caribbean cruise. The survey therefore has succeeded in its objective of engaging a core audience of regular cruisers, as well as tapping into the minds and perspectives of a brand new segment of prospective consumers of a future Caribbean cruise.
4.0 Key Survey Findings

The survey data was successful in achieving one of its main objectives of revealing the main criteria that would either discourage or entice respondents to take a cruise. The key findings in these areas are as follows:

4.1 Deterrents to taking a Caribbean cruise

The research identified several factors that act as deterrents to visitors taking a cruise in the Caribbean during the summer months of May to September. Both cruisers and non-cruisers, across all age groups and nationalities expressed similar concerns that would discourage them from taking a cruise during that period. While there were several diverse reasons expressed, the top seven (7) are ranked in order of importance:

1. Hurricanes and adverse weather/temperature conditions;
2. High costs associated with cruising;
3. Lack of availability of vacation time from work;
4. Problems with summer crowds;
5. Limited number of cruise ships in the summer;
6. “Been there, done that” syndrome; and
7. More attractive summer vacation alternatives than the Caribbean.

Figure 4: Most Important Deterrents to taking a Caribbean Cruise by Total Respondents
4.1.1 Hurricanes and adverse weather/temperature conditions

The fear of hurricanes/other forms of bad weather and high temperatures, combined to be the biggest deterrent expressed by almost fifty percent (44.5%) of all the respondents across every nationality, except the ‘Other Countries’ category. In fact, this combination of bad weather and humidity was the number one concern of the USA respondents, the largest cruising segment to the region, by an overwhelming 73.5%.

However, by far the single biggest source of concern and the primary disincentive to taking a Caribbean cruise during the summer months expressed by almost forty percent (38.0%) of all respondents was the possibility of encountering a hurricane or other forms of stormy, rainy or unpredictable weather while on the high seas. Interestingly, even the majority of respondents from the Caribbean (41.3%), cite fear of hurricanes and other bad weather as their primary deterrent to taking a Caribbean cruise during the summer, as well as over one third (36.3%) of the UK respondents. Amongst both categories of cruisers and non-cruisers, this was also largely the number one deterrent. However, it was a greater concern amongst the segment of cruisers (42.8%) vs. non-cruisers (32.8%)

This high level of concern stems from the fact that most of the respondents seem to be aware that the Caribbean is located within the hurricane belt and that the summer cruise period falls within the hurricane season. Several travel agents who participated in the survey also expressed the view that the prospects of the hurricane season are “fear-provoking”. This is primarily due to the fact that in recent years, it has received a lot of negative attention of the devastation caused in the media and this is a major concern for many of their clients. One agent actually stated that her clients are “terrified” of going to the Caribbean during the summer months.

There are also major safety concerns about being caught in stormy weather with choppy seas that would create unsafe sailing conditions. Some respondents expressed fears of the possibility of the ship sinking, not altering course to avoid a hurricane, or not being adequately equipped to withstand adverse weather conditions. There were also concerns about the cruise being cancelled, or of challenges getting to the port of embarkation if the ship is diverted from its scheduled itinerary, thus spoiling holiday plans. To avoid these possibilities, several respondents stated that they prefer to just avoid the hurricane season altogether and book their cruise during the winter months.
4.1.1.1 Hot and humid temperature

Another major deterrent to summer cruising revealed by 6.5% of the respondents, was the excessive heat and humidity in the Caribbean region during that period. Obviously based on first-hand experience, of those persons who have cruised, 10.3% considered the hot temperature to be a major deterrent, as opposed to just 2.4% of those who have never cruised to the Caribbean. This distaste for the hot climate was mostly expressed by respondents from the USA and the UK who have personally experienced the conditions and less so from the respondents from the Caribbean who may naturally have a higher affinity to the regional tropical conditions.

Due to the hot temperature conditions, several respondents expressed the view that they preferred to travel to Caribbean in the spring, fall or winter when it is cooler and stay at home in the summer. Some travel agents particularly stressed the point that summer is traditionally not the favourite time of year for Caribbean cruises, rather, winter is. Some respondents also posited the view that they were trying to “escape the heat at home” and hence preferred to take an Alaskan or European cruise, or travel to an alternate destination during this period.

4.1.2 High costs associated with cruising

The cost associated with cruising was the second highest deterrent identified by 26.1% of all respondents. Cost ranked second as a deterrent behind the weather for respondents from the USA, the UK, the Caribbean and Canada and third for Other Europe. The one exception was the ‘Other Countries’ category, where it ranked first as the primary deterrent. Across age groups, cost was ranked as the primary prohibiting factor for the younger Gen Y segment (under 39), mostly from the Caribbean market. The ensuing global financial crisis may be a primary factor affecting consumer spending power.

Almost thirty percent (28%) of non-cruisers considered the expense associated with cruising to be a major deterrent, compared to 24.4% of regular cruisers. Although many respondents expressed a desire to actually go on a cruise, the perceived high costs, combined in some instances with their personal financial constraints, were deemed to be the main reasons that prevented them from doing so. It was the general perception held by several of the respondents that cruising (inclusive of cost of cruise + airfare) during the peak summer season is a very expensive endeavour and as a consequence, it is a widely desired, yet not highly considered travel option.

Several respondents posited the view that even if Caribbean cruises are reasonably priced, the lack of affordable airfare, especially for trans-Atlantic flights, was considered to be a major deterrent. Airfare to reach embarkation ports in the USA or the Caribbean, especially from the UK and Europe, was considered by many to be more costly during the peak summer period and was deemed to be especially prohibitive, particularly for families. The issue of costly airfare for transatlantic flights was a major deterrent cited by many UK and European respondents. The higher airfare out of the UK can be partially attributed to the Air Passenger Duty tax, which makes it more expensive for passengers to travel to join ships in the region.
The issue of prohibitive airfares also extends to the Caribbean region, which makes up the largest segment of non-cruisers. Costly intra and extra regional air travel to embarkation ports in Florida, Puerto Rico and Barbados, was one of the major deterrents identified that prohibits increased patronage of the cruise lines by Caribbean nationals.

This means that, generally speaking, taking a Caribbean cruise is a very price-sensitive exercise, where the capacity for taking this type of vacation decreases when costly air travel is required for embarkation.

There is also a perception that cruises are heavily booked during the peak summer period and sell at premium prices. The extra costs associated with taking a cruise for alcohol, tips and other gratuities, surcharges for specialty dining and onshore excursions, were also considered to be very expensive and in some instances, over-priced. Some respondents stated that even if they acquired a reasonably priced cruise, these extra costs inflate the price of the vacation dramatically out of their reach. With all the additional expenses and perceived “hidden costs”, a number of frustrated respondents from the USA complained about feeling “nickel and dimed” for everything by the cruise lines. Several single travelers also expressed concerns that cruising is an expensive option for them as they are required to pay double occupancy fares. For several Caribbean respondents, extremely high exchange rates for certain regional currencies against the US dollar, was cited as a prohibiting factor that limits their capacity to purchase a cruise. Consequentially, for several of the respondents, a Caribbean cruise was therefore viewed as a “dream vacation” that they simply cannot afford.

With the costs associated with cruising being such a factor, this may be an indicator that those who actually do take a cruise may possess limited disposable income to spend in addition to these expenses (e.g. on onshore activities, etc.). In fact, this is already occurring as available CTO data indicates a falling trend in total visitor spend in a number of Caribbean countries. While this is consistent with decreasing passenger numbers in most cases, there are also hints of falling average spend per visitor on shore in recent years.

4.1.3 Lack of availability of vacation time from work

The inability to get vacation time during the summer due to work obligations or conflicting schedules is a major factor that would prevent 7.4% of the respondents from taking a summer Caribbean cruise. This is an issue amongst almost ten percent (8.8%) of the non-cruising segment, versus 6.3% of those who have cruised. This can be attributed to the fact that a sizeable proportion of cruisers are from the over-fifty Boomer segment, several of whom are retirees. The inability to get vacation time during the summer months was ranked as the third highest deterrent by respondents across all nationalities after bad weather and high costs, except for the Other Europe and UK respondents, where it ranked second and fourth respectively. The inability to get time off as a potential deterrent to cruising was particularly evident amongst the younger Gen Y and Gen X working population, who also ranked it third behind weather and high costs.
Major inhibitors identified by these respondents were scheduling conflicts; an excessive workload; competing vacation plans with spouse or family members; or the fact that fixed annual vacation times do not correspond with the summer period and hence this makes it impossible to take a cruise during that period.

4.1.4. Problems with summer crowds

The issue of massive crowds of families and children that inundate the ship, or descend upon the various ports of call during the summer season, was another major concern expressed by 5.4% of total respondents. Based on first-hand experience once again, this issue was a bigger deterrent to cruisers (9%), primarily respondents from the USA and the UK, than it was for non-cruisers at 1.2%. The issue of summer crowds was a deterrent across all age groups, with one respondent in the 20-29 age group expressing the view that they want “a vacation not an expensive floating headache”. A prevalent concern expressed, especially by the more mature over-fifty segment, was the impression that ships become overrun with too many families travelling with rowdy children and teens, resulting in the cruise becoming too noisy, chaotic and stressful. However, overall, the issue of crowds was less a problem with the younger Gen Y age group, than for the more mature Boomer segments.

Members of the travel trade also stated that many of their clients choose to avoid the annual family outings at spring break, summer holidays, fall break, Thanksgiving and Christmas, when ships are at their highest capacity. The large number of children on board is a major disincentive especially for childless adults and mature travellers who are looking for a more relaxed environment. The more mature respondents expressed a distinct preference for “adult-only” cruises during the summer, or to travel during the “off-season” when there were less children and crowds on board.

Some travel agents especially were of the view that if “adults-only” cruises were offered to interesting ports of call in the Caribbean during the summer, there would be interest from that section of the population who want to avoid incidents of unsupervised children onboard ship. To avoid the crowds and larger “mass-market” ships, several respondents expressed a preference for smaller, more intimate ships that visit more unusual, authentic, ‘off-the-beaten-path’ port destinations, where the true feel of the Caribbean is available.

In addition to crowds on the ships, there is also an aversion expressed to over-crowding at the more popular and heavily traversed Caribbean ports and destinations around the region, during what it perceived to be a busy peak period.

4.1.5. Limited number of cruise ships in the summer

Another disincentive to summer cruising expressed exclusively by the respondents from the USA who have cruised to the region before, was the fact that there are a limited amount of ships, cruise lines and itineraries available to choose from during that period. It was felt that those that are available cater primarily to the mass family market.
This dearth of ships in the region has occurred as a result of major cruise lines shifting their itineraries and repositioning their boats from the Caribbean Sea, particularly to that of European and Alaskan waters during their coinciding peak summer months, in response to the growing global demand for cruising.

Respondents, including members of the travel trade, stated that due to these limited cruise opportunities during the summer, they experience difficulty in finding an itinerary, cruise line or price that suits their preference, specific taste or budget, (or that of their clients’). One agent, who exclusively serves the lucrative luxury market, claimed that there are no luxury ships plying the Caribbean waters during the summer months to accommodate her upscale clientele. These limitations can result in regular and potential cruisers forgoing a Caribbean cruise as a preferred travel option.

4.1.6. “Been there, done that” syndrome

Another major deterrent identified, primarily amongst high-repeat USA cruisers to the region, was the perception that cruising the Caribbean islands has become a “boring exercise”. The prevailing belief is that there is currently a proliferation of cruises to the Northern and Western Caribbean, with a repetition of the same “old” itineraries, offering a limited number of interesting and authentic destinations, with “nothing new to discover”. Some were of the view that there is little to distinguish one island from the other and therefore, once “you’ve seen one Caribbean island, you’ve seen them all”.

The availability of interesting itineraries to attractive destinations is a primary motivator for cruising. Therefore, many respondents, especially the travel trade, are of the view that Caribbean ports have become saturated and cruisers are tired of revisiting the same islands on such a frequent basis. This state of affairs has resulted in a waning of interest in the Caribbean as a cruise destination, especially by repeat cruisers, particularly during the summer, who are in turn seeking new and emerging alternative destinations, such as Europe and Asia.

4.1.7. More Attractive Summer Vacation Alternatives to the Caribbean

Two percent (2%) of all respondents were of the view that there are more attractive vacation opportunities available during the summer than taking a Caribbean cruise. This was the view expressed across all nationalities, with higher percentage of non-cruisers (2.8%) feeling this way compared to 1.5% of their cruising counterparts.

Based on the responses, there seems to be a preference to take full advantage of summer “at home” (Europe, US, etc.) when the weather is pleasant and there are fun activities (beach, etc.) available that may be more affordable and plentiful (especially for children). A definite preference was instead expressed for spending time in, or “escaping to the Caribbean” during the cold winter months. Many were of the view that there are several new cruise options with more interesting itineraries, or a plethora of appealing destinations to experience with similar favourable weather conditions as the Caribbean during that period.
It appears therefore, that in addition to the issue of hurricanes, heat and humidity, the availability of preferred summer vacation alternatives, increases the perception that cruising in the Caribbean is primarily a winter time endeavour, as opposed to a venture that could be experienced on a year-round basis.

4.1.8. Other Deterrents to Taking a Caribbean Cruise

In addition to these main disincentives to taking a summer cruise to the region, other concerns were expressed that should be duly noted, as follows:

- too many sailing days, the limitation of or poor quality of onshore time while at the destination and lack of onshore activities;
- poor attitudes and a lower level of service offered onshore during the low season (i.e. the summer months);
- harassment by vendors and taxi-men in the various ports;
- high crime rate and safety and security concerns both onboard and onshore (especially amongst single and more mature travellers);
- destinations appear to be more dirty/unkempt during the low season;
- the Caribbean is closed for visitors during the low season or there will be less tourism-related things to do during that period;
- ships that are too large and impersonal – smaller more intimate ships are preferred;
- poor accessibility for the disabled;
- no special activities offered for the disabled;
- single travellers expressed concerns of feeling of isolated if not part of a group or couple;
- lack of ports or itineraries that depart from New York or New Jersey, (especially to the Southern Caribbean);
- overly “touristy” destinations;
- cruise ships that are too formal or have too many restrictions i.e. rigid dress codes, dining hours, or passengers being “forced” to participate in entertainment or social activities etc.; and
- bad publicity from the recent cruise ship incidents (ship sinking, mechanical failures, passengers falling overboard, food-borne illness outbreaks, ship encounters with stormy weather etc.).

While there are many points of similarity between cruisers and non-cruisers with respect to the deterents identified, there are also several points of departure between these two groups. Issues with heat and humidity, massive crowds/too many children, high repetition of same itineraries and the limited amount of ships and cruise lines available in the summer, were primarily concerns of those respondents who have experienced a Caribbean cruise first-hand.

Amongst non-cruisers, a small cadre of individuals expressed concern that cruises cater primarily to “old people” and that there is not much to do on board. Concerns were also raised by a few respondents about:

- political unrest or upheaval; high crime rates; possible terrorism; homophobic destinations; active volcanoes; tornado season; insects & mosquitoes and bad reviews in the press.
While the majority of the concerns expressed by all parties were justified and must be addressed as a matter of urgent priority, it is obvious that with respect to some others, there seems to be several misperceptions in the public arena, especially amongst the ‘never-cruised’ segment that need to be clarified through education, information and effective marketing and promotion. Once this is achieved, the possibility of actually taking a cruise for a whole new segment of individuals who may never have considered it, or thought it possible before, becomes a highly plausible venture.

4.2 Caribbean considered “dream” vacation

Despite these deterrents however, on a positive note, almost twenty percent (18.6%) of total respondents, stated that nothing would discourage them from taking a cruise in the region at any time of the year. Many expressed the view that cruising the Caribbean is an “aspirational dream vacation”. This high demand and interest in a Caribbean cruise, is in line with the fact that the region is the most sought after cruise destination in the world, with nearly all traveler segments naming the Caribbean (45% overall) as the most appealing destination to visit on a cruise.¹³

In general, past cruisers tend to have a very big interest in a future sailing, due to the fact that once travelers are convinced to cruise, many become “hooked” or “addicted” to the experience. Several of the survey respondents have taken multiple cruises and find the experience to be a fun and relaxing way to get away from it all and escape the stress of everyday life. In their opinion, cruising also provides opportunities for fine dining, to be pampered, to visit multiple destinations on one holiday, to meet new people and experience Caribbean hospitality, to learn about other cultures, and create new and memorable experiences.
Multiple respondents who have never cruised, repeatedly referred to the possibility of a Caribbean cruise as being “a dream come true” and a “once in a lifetime experience” to share with family, spouses, or friends. Some of these individuals stated that they are planning to take a cruise in the near future, while others lamented the fact that it is beyond their financial means to do so.

Potential cruisers, (non-cruisers who expressed an interest in a future cruise), stated that they aspire to travel to the Caribbean because they perceive it to be a beautiful and amazing place for single, couples, or families to take the ultimate vacation. Many have been influenced by positive testimonies and glowing referrals from friends or family who have gone on a Caribbean cruise and had a wonderful time. They want to go to the Caribbean to have fun and relax, to experience the heritage, culture, food, and music of multiple islands, to see the natural beauty and wildlife and experience the warm hospitality of the Caribbean people. The high level of interest shown in the Caribbean indicates that the industry still continues to attract new (first time) passengers, which holds great potential for the future growth of the cruise industry in the region.

Many of the respondents who have cruised, or plan to cruise view the occasion as a special trip, requiring some level of planning. Many of the cruisers have already been on, or will be taking a ‘Celebration Vacation’ with their spouse, family or friends to commemorate a milestone event such as a birthday, anniversary, honeymoon, etc.

4.3 Motivating factors to taking a Caribbean Cruise

Despite the deterrents to taking a Caribbean cruise, there were several factors identified in the survey that would motivate respondents to consider taking a Caribbean summer cruise as follows:

4.3.1 Incentives to taking a Caribbean cruise

Based on total survey responses, the main motivating factors are ranked below in order of importance:

The CLIA 2011 Market Profile Study revealed that ‘cost of the cruise’ leads as the most influential reason that travelers choose a vacation or cruise, followed by ‘attractive ship destinations’. The results of this survey correspond with the CLIA data, as according to the majority of respondents, the “availability of attractive destinations” plays a very critical role in influencing the actual selection of a cruise.

13 FCCA 2013 Cruise Industry Overview, pgs.6, 12; CLIA Cruise Industry Update 2013, pg. 15.
vacation. Correspondingly, the "cost of the cruise" also plays an equally important role in motivating respondents to actually consider taking a cruise in the summer, particularly for the recessionary-weary, price-sensitive consumer. Despite the fact that more respondents rated the "cost of the cruise" slightly higher in the very important category compared to "attractive ship destinations", overall, both these categories tied for first place as being the greatest motivators for respondents to take a Caribbean cruise during the summer.

**Table 6: Incentives to taking a Caribbean Cruise**

<table>
<thead>
<tr>
<th>Ranking</th>
<th>Incentives to taking a Caribbean Cruise</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Attractive ship destinations</td>
</tr>
<tr>
<td>1</td>
<td>Cost of the cruise</td>
</tr>
<tr>
<td>3</td>
<td>On shore activities</td>
</tr>
<tr>
<td>4</td>
<td>On board activities</td>
</tr>
<tr>
<td>5</td>
<td>Availability of vacation from work</td>
</tr>
<tr>
<td>6</td>
<td>Experiential/Learning activities</td>
</tr>
</tbody>
</table>

Cost of the cruise was deemed to be the most important motivator by the majority of respondents from Canada (71.3%) and the Caribbean (78.8%). For the younger Gen Y (30 and under) generation who earn the least amongst all the age groups, the affordability of a cruise played a critical role in their final determination to take a cruise vacation.

Attractive Destinations were deemed to be the biggest motivator for respondents from the USA, the UK, Other Europe and Other countries. For the more financially-sound respondents from the mature Gen X and Boomer (40 and over) age groups, an interesting itinerary took precedence over cost by a slim margin when contemplating a Caribbean cruise.

Both onboard and onshore activities played a significant and equal role in influencing respondents to cruise, with more respondents, considering onshore activities to be a more important motivator than onshore activities. This was so for both genders of respondents and across all nationalities and age groups, except the Caribbean and Canada and the Gen Y, 20-29 age group, who deemed onboard activities to be a more important incentive to cruise than onshore activities.

For non-cruisers in the survey, cost of the cruise was by far the most important motivator to entice them to take a cruise. A much higher percentage of them considered cost to be extremely influential in their decision-making than cruisers.
On the other hand, while the availability of attractive destinations was the greatest motivator for cruisers, basically an equal percentage of non-cruisers deemed this category to be just as important. Onshore and Onboard activities were both important motivators for both cruisers and non-cruisers, however, non-cruisers ranked onshore activities higher in importance than cruisers.

When making the decision to take a cruise, the availability of vacation time from work was a more important motivator for non-cruisers vs. cruisers. Non-cruisers also exhibited a greater interest in experiential activities than cruisers.

Interestingly, for total respondents, the “availability of vacation from work” was one of the biggest motivators for them to take a cruise. In fact, this category overall outranked both onshore activities and onboard activities in the very important category for both cruisers and non-cruisers. However, it tended to rank higher in importance amongst the younger Gen X and Gen Y working population and the countries with the highest proportion of respondents from these groups:

- All working population age groups: 50-50 (39.5%), 40-49 (41.1%), 30-39 (46.3%), 20-29 (51.9%)14; and
- Across all nationalities: Other countries (47.8%), Other Europe (45.7%), the Caribbean (45.1%), Canada (42.1%), the USA (39.4%) and the UK (34.1%).

However, while “Availability of vacation from work” ranked higher in the very important category across the board, it ranked much lower in the important category than onshore and onboard activities.

The desire for or popularity of experiential/learning activities and learning vacations is a growing trend in the global tourism market. Although the category ranked 6th on the list of motivators, in reality, almost forty percent (38.4%) of all respondents considered the existence of experiential/learning activities to be a very important/important incentive to take a cruise.

Almost forty percent of the respondents from the USA (37.4% or 161 respondents) and Canada (36.9%) considered these types of activities to be a very important/important motivator. Almost fifty percent of the respondents from ‘Other Europe’ (48.6% or 17 respondents) and the Caribbean (46% or 109 respondents) and 60% (or 26 respondents) from the ‘Other countries’ group, also expressed a desire for such activities. These types of experiential activities were ranked the lowest in importance out of all the nationalities, by respondents from the UK, where
just under thirty percent (28.5% or 79 respondents), considered them to be very important/important motivators and (43.9% or 120 respondents) deemed them to be not so important/not important.

The desire for these types of activities also ranked slightly higher amongst the Gen Y (39 and under) age group, in the very important/important category, than the Gen X and Boomer (40 and over) age groups. However, despite this, it was mainly the USA respondents from the Boomer segments that clearly demonstrated a more overt interest in the availability for these types of activities, both onboard and onshore. This expressed desire for culture–based experiential/learning activities was supported throughout the survey by respondents requesting opportunities for activities such as rum tasting, sampling/preparing local food and beverages, opportunities for interacting with locals, lectures/talks by locals on Caribbean culture and history, etc.

4.3.2 Motivating Factors – Onboard Activities

Overall, the onboard activities that would motivate total respondents to take a cruise were ranked in order of importance as follows:

<table>
<thead>
<tr>
<th>Ranking</th>
<th>Motivating Factors for Onboard Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Restaurants (culinary experiences)</td>
</tr>
<tr>
<td>2.</td>
<td>Entertainment</td>
</tr>
<tr>
<td>3.</td>
<td>Exercise/Spa</td>
</tr>
<tr>
<td>4.</td>
<td>Shopping</td>
</tr>
<tr>
<td>5.</td>
<td>Sports</td>
</tr>
<tr>
<td>6.</td>
<td>Children’s facilities</td>
</tr>
<tr>
<td>7.</td>
<td>Gambling</td>
</tr>
</tbody>
</table>

Respondents from the UK, Canada, and the Caribbean, also ranked their preferred onboard activities in this same order. So too did the respondents from the USA and ‘Other Europe’ markets, however, USA respondents ranked gambling higher than children’s facilities and those from ‘Other Europe’ and ‘Other countries’ considered sports to be a more important motivator than shopping.

The availability of culinary experiences was by far the greatest onboard enticement to take a Caribbean cruise, with almost sixty percent of both the male (58.4%) and female (59.8%) respondents, across every nationality – Canada (78.9%), the Caribbean (70.3%), the UK (57.9%), Other countries (57.8%), USA (54.7%), and Other Europe (42.9%) - citing it as being a very important motivator. Entertainment also ranked very highly across all segments. The availability of restaurants/ diverse culinary experiences was the greatest motivator amongst cruisers, followed by entertainment, with a larger percentage of cruisers deeming them to be more important than their non-cruising counterparts.

\(^4\) Of all the age groups, this category was rated comparatively low and ranked least in importance by the 60+ segment, due to the fact that over a third of these respondents (35.5% or 72 out of 203) were retirees.
Opportunities for exercising or being pampered came a distant third, but was cited as being very important/important for a higher percentage of females than males and for respondents across all nationalities. However, the presence of exercise/spa activities was more important to non-cruisers than cruisers. Shopping activities were also rated higher amongst cruisers than sports activities.

Surprisingly, the presence of gambling and children’s facilities were deemed to be the least important motivators by the majority of respondents, including both cruisers and non-cruisers. Interestingly, gambling was actually identified as the least favoured activity and not important as a motivator by:

- both males (51.9%) and females (44.9%);
- across all nationalities – Other Europe (65.7%), the UK (62.1%), the Caribbean (50.9%), Other countries (44.4%), USA (41.1%) and Canada (21.1%); and
- across all age groups: under 20 (87.5%), 20-29 (43%), 30-39 (51%), 40-49 (53.7), 50-59 (50.2%) and 60+ (45.5%).

The small group of Canadian respondents was the most partial to gambling activities with 21.1% deeming them to be a very important motivator versus 2.3% of respondents from the UK, and 7.9% of respondents from the USA. Not surprisingly, respondents from the over-fifty demographic ranked gambling higher than children’s facilities. Of all the age groups the 40-49 was the most partial to gambling activities.

The availability of children’s facilities was also generally ranked very low as a motivator:

- across every nationality, especially from the USA and UK markets, where 69.5% and 54.6% respectively considered these activities to be not important;
- by over half of male (56%) and female (52.5%) respondents;
- by the majority of the 50-59 (65.5%) and the 60+ (63.1%) Boomer age groups who rated these activities as not important.

The existence of these facilities was naturally deemed to be very important by the younger 30-39 (22%) and 20-29 (14.3%) age groups. These numbers can be attributed to that fact that almost half (48.3%) of the respondents from the Caribbean, who made up 61% of the 20-39 age demographic, considered the existence of children’s facilities to be a very important/important motivator for them to take a cruise (vs. respondents from the UK (10.6%) and the USA (22.8%). However, the higher the age demographic, the less important children’s facilities were ranked. In direct contrast to the younger generations, only 5% of the 50-59 and 6.5% of the 60+ age groups deemed children’s facilities to be very important. These individuals tended to be very open about their preference for adult-only or child-free cruises. Members of this older demographic, who did exhibit a preference for these types of facilities, were those who usually took multigenerational vacations with their grandchildren.
4.3.3 Motivating Factors – Onshore Activities

Based on data gleaned from this survey, onshore activities ranked higher than onboard activities as a motivator to book a summer cruise to the Caribbean. This means that the quality and variety of onshore activities play a very important role in motivating respondents to take a Caribbean cruise.

Overall, the onshore activities that would motivate respondents to take a Caribbean cruise were ranked in order of importance as follows:

Table 8: Top Ranked Motivating Factors for Onshore Activities

<table>
<thead>
<tr>
<th>Ranking</th>
<th>Motivating Factors for Onshore Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Cultural Heritage</td>
</tr>
<tr>
<td>2.</td>
<td>Restaurant (culinary experiences)</td>
</tr>
<tr>
<td>3.</td>
<td>Beach/Watersports</td>
</tr>
<tr>
<td>4.</td>
<td>Shopping</td>
</tr>
<tr>
<td>5.</td>
<td>Adventure/Sports</td>
</tr>
<tr>
<td>6.</td>
<td>Exercise/Spa</td>
</tr>
<tr>
<td>7.</td>
<td>Voluntourism</td>
</tr>
<tr>
<td>8.</td>
<td>Gambling</td>
</tr>
</tbody>
</table>

These preferred onshore activities were ranked in the same order for both categories of cruisers and noncruisers.
Total respondents, across all nationalities, considered the following top three activities to be very important/important to their decision-making with respect to Caribbean cruising:

### Table 9: Top Three Motivating Onshore Activities

<table>
<thead>
<tr>
<th>Ranking</th>
<th>Motivating Onshore Activities</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Cultural Heritage Activities</td>
<td>81.9%</td>
</tr>
<tr>
<td>2.</td>
<td>Restaurant/Culinary Activities</td>
<td>62.5%</td>
</tr>
<tr>
<td>3.</td>
<td>Beach/Water sports Activities</td>
<td>54.2%</td>
</tr>
</tbody>
</table>

Indeed, one of the most interesting revelations of the survey was the fact that cultural heritage and culinary activities ranked much higher in importance than the traditional beach and watersports activities typically associated with the Caribbean region. In fact, the desire for cultural heritage activities outranked all other activities by a relatively high margin, with the highest percentage of respondents in each category deeming it to be a very important motivator for them to take a summer cruise, including:

- both segments of cruisers (44.1%) and non-cruisers (50.6%);
- both males (43.3%) and females (49.5%);
- across all age groups – 60+ (42%), 50-59 (45%), 40-49 (44.3), 30-39 (51.7%), 20-29 (55.6%) - (except the under 20 age group who ranked this activity second to Adventure activities); and
- across all nationalities - USA (42.6%), Canada (57.9%), the UK (46.8%), the Caribbean (51.5%), Other Europe (60%) and Other countries (56.5%).

The enormous popularity and desire for excellent culinary experiences extends from onboard to onshore, with several respondents expressing an interest in sampling and preparing indigenous food and beverage. As a consequence, the restaurant category ranked second in importance.
for cruisers and non-cruisers, across all age groups (except the under 20), and respondents across all nationalities, (except the USA, where it ranked third).

Interestingly, beach/watersports activities, the traditional primary draw to the region was ranked:

- **3rd** in importance by both categories of cruisers and non-cruisers;
- **4th** in importance by respondents from Canada, the UK, and Other Europe and fifth by respondents from the Caribbean; and
- **4th** in importance by the under 20, 20-29, 30-39, 50-59 and 60+ age groups.

To the contrary, beach/watersports activities are an important motivator for respondents from the USA and amongst respondents in the Gen X, 40-49 age group, who ranked them 2nd in importance.

A relatively high proportion of respondents demonstrated an elevated level of interest in the availability of shopping opportunities onshore. This activity ranked third in importance for females, as well as respondents from Canada, the UK and the Caribbean. However, respondents from the USA and Other Europe demonstrated less interest in this activity, where it ranked fifth and sixth respectively. Shopping was more important to the over-fifty Boomer segments, which ranked it third in importance, than it was to the younger Gen Y and Gen X segment that ranked Beach and Adventure/Sports activities higher in importance.

Voluntourism continues to be growing trend in the global tourism industry amongst an emergent cadre of socially conscious travelers. Total respondents were almost evenly split on the importance of this activity as a motivator. Just over half of (52.7%) considered these types of activities to be somewhat important to very important, while almost fifty percent (47.2%) considered them to be not so important to not important.

Interest in these activities was highest amongst respondents from Other countries (39.1%), the Caribbean (35%) and Canada (31.6%) who considered them to be very important/important motivators. Similar to experiential/learning activities, interest was least amongst the UK market, where only 18.2% deemed them to be very important/important and 53.9% deeming them to be not so important/not important. These types of activities held the highest appeal for the Generation Y, 20-29 age group, followed by the 30-39 age group.

Similar to gambling onboard ship, the availability of gambling activities onshore was the least motivating factor amongst all respondents, and was deemed to be not important by:

- both cruisers (47%) and non-cruisers (61.2%);
- both males (50.9%) and females (55.5%);
- every age group – under 20 (87.5%), 20-29 (48.7%), 30-39 (54.8%), 40-49 (58.3%), 50-59 (55.4%) and 60+ (48.5%)\(^{15}\); and
- over half of the respondents from Other Europe (71.4%), the UK (69.8%) and the Caribbean (51.8%) and 44.7% and 38.8% from the USA and the Canada respectively.

\(^{15}\) Onshore gambling was rated as being even less important than onboard gambling as an incentive to cruise by every age group.
Exercise/Spa, Voluntourism and Gambling activities ranked as the bottom three onshore activities in popularity for cruisers and non-cruisers, both genders, across all nationalities except Other Europe and across every age group except for those in the under 20 age group.

4.3.4 Other Motivating Factors – Onboard and Onshore Activities

In addition to responding to the actual survey questions on the motivating factors, respondents were also invited to make any additional comments to further ventilate their perspectives on the topic, as follows:

Both cruisers and non-cruisers, across all nationalities, stated that the following onboard and onshore factors would motivate them to take a cruise to the Caribbean:

- age of ship (newer versus older model);
- size of ship (smaller ships preferred);
- quality and variety of food/diverse onboard dining experiences;
- comfort, size and quality accommodation/good amenities in rooms;
- quality of onboard entertainment/ Dinner shows/Night time activities;
- kid’s club/ child care;
- activities for teenagers and groups;
- adult-only areas;
- adult-only cruise;
- alcoholic beverage packages;
- an affordable spa;
- trendy bars/lounges;
- internet access/ free Wi-Fi;
- singles club/provisions for single travellers;
- location of port of embarkation/cost of flights;
- provisions made for vegetarians/vegans;
- interesting itineraries/fewer days at sea/length of cruise;
- a safe and healthy environment; and
- friendly service on board the ship and on shore from locals.

While factors such as great food, entertainment and quality accommodation, free WiFi and a safe and secure onboard environment were important across all age groups, pursuits such as Kid’s activities, trendy bars, nighttime activities, dancing and other forms of fun entertainment are most important to the younger Gen Y and Gen X age groups. Kids-free areas, adults-only cruises, smaller ships, new itineraries and surprisingly, singles clubs and provisions for single travelers, are more important to the older Boomer markets.

A common theme expressed was a demand for experiential, educational and cultural activities for both onboard and onshore activities, by both cruisers and non-cruisers, such as:

- cooking classes/wine tasting;
- rum/local food sampling and local arts and crafts displays on board;
- talks/education about the ports to be visited highlighting the culture and history of the area;
• interesting lectures/lessons/classes/seminars on board;
• history lessons or cultural talks on the destinations, not just shopping information on each port;
• lectures by locals on the destinations;
• a guide to explain Caribbean culture and history;
• more people-to-people opportunities at each destination, to socialise and interact with indigenous communities and learn about their traditions and way of life;
• opportunities to experience/prepare local foods & beverages, genuine crafts, as well as activities indigenous to the islands;
• more organised excursions to heritage and cultural sites;
• unusual tourist attractions;
• sightseeing around the island, exploring the country and places of interest;

The greatest interest in these types of activities came overwhelmingly from respondents from the USA, especially those from the over-fifty age group who clearly outlined these as the types of activities that would motivate them to take a cruise. A smaller number of respondents from both the UK and Caribbean markets also exhibited a preference for these types of activities to enhance their onshore experience. Respondents across every age group expressed an interest in partaking in some form of cultural or experiential activity while on board ship, or on shore, primarily in the areas of experiencing local cuisine through sampling or preparation, learning more about the history and culture of the islands and community immersion with the locals.

There were also several requests by both cruisers and non cruisers, across all nationalities for the following onshore activities:

• sightseeing and island tours;
• golf/scuba diving/whale watching/dolphin experiences/hiking/archaeology;
• accessible facilities;
• lots of unstructured onshore time;
• safety advice on how to conduct oneself while onshore;
• a peaceful, relaxing and friendly environment; and
• kids/group activities.

Other than experiential activities, scuba diving was the most frequently mentioned water-based activity by respondents from the USA, the UK, the Caribbean and Other Europe. The importance of safety on board and onshore, especially for single females, was also highlighted by respondents from the USA, the UK, the Caribbean, Other Europe and Other countries.
5.0 The Way Forward – Recommendations

The CTO has taken the initiative to conduct this Cruise Tourism Survey as a proactive measure to stem the decline in cruise arrivals to the region, as well as to increase demand for the Caribbean cruise brand, particularly during the summer season. It is anticipated that the information gleaned from the survey, will be used as a basis to develop the relevant strategic actions, policies and infrastructural and product enhancements necessary to directly target the root causes that negatively affect demand, as well as to stimulate a revival in cruise arrivals to the region.

In order to compete or even survive in the New World Order of 21st century tourism, the Caribbean must reconfigure its current tourism business model to develop an industry that is innovative, relevant, unique, highly competitive and consistently offers value for money. The industry must also be flexible enough to adapt quickly to rapidly changing conditions and demonstrate a high level of creativity through the ongoing development of new and exciting products and services and unique, specialized experiences that are specifically aligned with the needs, tastes and expectations of the contemporary traveller.

Therefore, the main priority now must be to devise strategies designed to stimulate consumer demand for the region in a way that would make it feasible for the cruise lines to operate and increase activity in the Caribbean during the summer months. An effective “pull strategy” must therefore be developed that ensures that the marketing of the Caribbean cruise brand and the onshore tourism experiences offered are capable of attracting the quantum and mix of visitors needed to meet cruise line expectations of yield and profitability and the region’s expectations of tourism revenue generation. Once a high level of demand for the Caribbean tourism product is stimulated on the ground, it is more likely that the cruise ships will respond by increasing deployment to the region.

Addressing critical exogenous factors, such as the weather, the perceived high costs associated with cruising, summer crowds or the development of new itineraries, are for the most part, beyond the control of regional tourism authorities. Therefore, the primary focus must be on those endogenous factors over which the CTO and Caribbean tourism officials can exercise direct control, such as devising the appropriate messaging to allay fears about the hurricane season, diversifying source markets to increase market share, diversifying the tourism product beyond sand, sea and sun, developing memorable, unique onshore experiences of the highest international standards, conducting ongoing research and development and more aggressive, creative and targeted marketing of the Caribbean Cruise Brand.

To achieve this critical goal, one of the major areas of focus for the region must be on the collective strengthening of the Caribbean Brand to ensure that the regional tourism product remains relevant, globally competitive and of a high quality. Priority must also now be placed on the development and marketing of the types of tourism products and services that would attract
the kind of demand that transcends seasonality and stimulates increased cruise arrivals to the region on a year-round basis.

The following recommendations are specifically formulated to ensure that these important objectives are achieved:

5.1.1 Effective messaging to allay fears about the Caribbean hurricane season

According to the survey data, by far, the greatest deterrent to Caribbean summer cruising from a consumer perspective is an engrained fear or concern about hurricanes and other forms of bad weather associated with the hurricane season. While thousands of cruisers are undeterred by this issue and continue to cruise during the summer, especially those with children on school holiday, based on the survey responses, there is a real possibility that large numbers of consumers may be avoiding the Caribbean during this period. As a consequence, in the short term, finding a tangible solution to this challenge must be a priority area for regional tourism officials.

It is a fact that the CTO, Caribbean governments or tourism officials have no control over ‘Mother Nature’, therefore, this dramatically increases the challenge of finding a workable solution to this problem. While the issue cannot be fully resolved, it can however, be managed, due to the fact that tourism authorities do have control over the type of information and messaging that is circulated in the marketplace dealing specifically with this pertinent issue. Now that the seriousness of the situation has been brought to light in the cruise survey data, the CTO and other regional tourism officials can now take direct ownership over allaying the fears of concerned repeat and prospective cruisers by:

- understanding the facts pertaining to current and future hurricane activity in the Caribbean basin;
- clearing up any misperceptions about summer cruising;
- promoting information and putting measures in place that specifically address the major areas of concern in a way that would increase individuals’ comfort levels to travel to the Caribbean during this time; and
- providing advice and tips on how to have a safe, hassle-free and enjoyable cruise in the Caribbean during the summer;

In order to achieve this, a comprehensive picture of the Caribbean hurricane season must be established, including a profile and trends of past activity; the sources that stimulate fear of travel to the region; and developing a clear understanding about what is going to happen in the future with respect to hurricane activity in the region, especially with the increasing incidences of extreme weather being witnessed due to climate change and global warming. All of this data must then be taken into consideration in order to build a counter-argument in support of travel to the region during the summer cruise season from May to November. One of the first and most important areas to be addressed is determining whether the fear of hurricanes and travelling to the Caribbean during the summer months is justified and whether there should be concern about future hurricane activity in the region.
5.1.2. Profile of Caribbean Hurricane Season

The Caribbean tourism season runs from 1st June to 30th November, and based on past trends, approximately 70% of hurricanes and tropical storms occur between August and October with storm activity peaking in early to mid-September. Therefore it is estimated that visitors who travel to the region in June, July and November have a lower chance of encountering a tropical disturbance.

5.1.3. Sources of fear for hurricanes

The source of the fear of hurricanes is usually nurtured and stimulated by the heavy focus that is placed on the season during the summer months. Every year, several meteorological agencies release their preseason forecasts for the upcoming Caribbean hurricane season, oftentimes predicting an “extremely active” or “above normal” cycle. In addition to these forecasts, hurricanes in the Caribbean are a big part of the weather news every summer and fall. In recent times ‘superstorms’ like Katrina and Sandy focused the attention of every American and the world on the devastation that hurricanes can cause. All these negative images of the extreme damage caused by these tempests in the media play a critical role in influencing repeat and prospective cruisers’ decision to avoid the Caribbean during this period.

5.1.4. Will hurricane activity and temperature increase in the future?

There are two conflicting schools of thought regarding future hurricane activity in the region. The prevailing theory is that global warming will cause more frequent, powerful and destructive hurricanes that will last longer and make landfall more often than in times past. However, other scientific evidence casts doubt over this theory, because even as warmer oceans provide jet fuel for hurricanes, changes in atmospheric conditions, also caused by global warming, (i.e. the chaotic interaction between the difference in sea and air temperatures, humidity, dust and wind) can still prevent storms from forming or, literally, tear them apart. This means that these changes in atmospheric conditions can impact the severity of hurricanes and increase the probability that the number of tropical storms and cyclones may decrease in the future. This theory was proven during the 2013 Atlantic Hurricane season, where despite dire preseason predictions of an “extremely active” or “above normal” season, activity remained far below predictions with 2 hurricanes (the lowest seasonal total since 1983), and 0 major hurricanes, ranking it as one of the least intense and historically quiet ever.

16 However, most of these long-range hurricane forecasts that are released every year by the meteorological agencies, such as the National Hurricane Centre (NHC) and the National Oceanic and Atmospheric Administration (NOAA) are based on probability, which means that a hurricane may actually not materialize. Experts readily admit that there is no reliable way to accurately predict hurricane formation beyond five (5) to seven (7) days, or when and where it will strike. Therefore, as a consequence, it has been suggested that travellers as a rule should not be too negatively influenced by long range hurricane predictions. Rather they should pay close attention to the system once a storm actually does develop. However, whether a hurricane does end up striking the region or not, the dire preseason forecasts in many cases can still heavily influence both regular and prospective visitors’ decision not to travel to the Caribbean at that time.
This is an indication of not only the challenges being posed by climate change, but also the high degree of uncertainty that exists within the scientific fraternity with respect to projecting storm activity decades into the future. This means that future hurricane activity in the Caribbean cannot be predicted with a high level of certainty at this time and research is constantly ongoing to identify the answers.

With respect to extreme heat and rising temperatures in the Caribbean in the future, it is estimated that for most places (including the Caribbean), global warming will result in more frequent hot days and fewer cool days, with an increased risk of more intense, more frequent and longer-lasting heat waves.

5.1.5. Allaying fears about cruising the Caribbean during the hurricane season

The aforementioned information proves that the fear or apprehension about taking a cruise to the region during the Caribbean hurricane season does have some basis. However, while there is a probability that hurricane activity in the region will intensify in the coming years due to global warming, this expectation of increased activity cannot be predicted with a high degree of accuracy.

Despite the uncertainty about the actual level of future activity, the concerns expressed in the survey makes it essential that the Caribbean plays a greater role in directly addressing this pertinent issue. The priority areas would be to dispel any misperceptions expressed by respondents in the survey, and provide them with the relevant information required to alleviate their apprehension about taking a cruise during the summer. As a consequence, it is necessary for the region to be promoted in a way that convinces or reassures both cruisers and potential cruisers that the Caribbean is a safe, enjoyable destination, even during the hurricane season. To achieve this goal, the following facts must be prominently highlighted:

• while there are risks involved in taking a Caribbean cruise during the summer, the region is safe for cruising – even during hurricane season;
• thousands of satisfied travellers sail the Caribbean waters during the hurricane season every year without experiencing any problems;
• even at the height of hurricane season, the odds strongly favour a Caribbean cruise vacation that is unaffected by any adverse weather conditions. Statistically speaking, the chances of any voyage being disrupted or cancelled by a hurricane in the region are very slim;
• modern day vessels are very safe and are built to withstand the harshest environments; they are equipped with solid engineering, aircraft reconnaissance and satellite technology with sophisticated weather tracking systems that help to predict weather patterns;
• the probability of being caught in a storm or hurricane are extremely low; when faced with severe tropical storms or hurricanes in its path, a cruise ship simply alters its course or adjusts its itinerary to sail around the bad weather. The worst case scenario is that some rough seas may be encountered;
• research can be conducted by cruisers on travel websites, such as about.com and cruisecritic.com, that provide useful information and “survival tips” to travellers (who often have a myriad of questions about the risks of cruising during hurricane season), including special advice on how best to avoid a hurricane when planning a cruise, where and when it is safe to travel, how to get the best weather on a Caribbean trip etc.; and
• the key to enjoying a Caribbean cruise during the hurricane season is having a positive attitude and being flexible. This flexibility means being able to endure any unexpected changes to the cruise plans that may occur at that time of the year. Purchasing travel insurance with weather protection is also highly advisable.

While this serious environmental issue is outside of the jurisdiction of the regional authorities to resolve, it can however be managed by also executing the following:

• Forging strategic partnerships with industry partners to promote the Caribbean as a safe cruise destination during the summer; and
• Assessing the region’s vulnerabilities to exogenous forces and devising the appropriate crisis-contingency responses.

5.2 Diversify and Differentiate the Caribbean Brand beyond sand, sea and sun

One of the key and most surprising revelations of the survey is the fact that cultural heritage and culinary activities were rated as being the most important onshore motivator by 47% of the respondents. This development is in line with current consumer trends dominating the global tourism arena of a “new tourist driving a new tourism”, who is increasingly looking for an experience beyond the beach. This contemporary traveller is seeking “more things to do” while on vacation in the form of “off-the-beatenpath” experiences that are exciting, unique, rewarding and memorable, with a strong emphasis on cultural, experiential and educational activities. They have become increasingly interested in immersing themselves in the culture and communities of the destination, interacting with locals, savouring indigenous cuisine and “giving back”. As a consequence, tourism product offerings must now also be both physically and intellectually stimulating.

Therefore, while sand sea and sun remain an enduringly popular choice, there is an increasing trend of a renewed interest in cultural trips, as Americans in particular, seek to combine precious downtime with enriching experiences\textsuperscript{19}. Based on this data, it is evident that the Caribbean can no longer rely solely on sand, sea and sun to maintain the region’s ranking as an attractive tourist destination. The travel trade, the cruise lines and even visitors, are now calling for more differentiation between the islands and more diversification of the product offering to also showcase cultural heritage and other authentic components of the Caribbean tourism product. Differentiating the Caribbean brand from other destinations will create Caribbean Tourism new opportunities and a competitive advantage for the region, while reducing the over-reliance on just one component of the tourism product.

One of the first steps towards truly differentiating the Caribbean Brand is identifying the Unique Selling Points that are indigenous and specific only to the Caribbean and cannot easily be duplicated by international competitors. Culture is arguably the greatest source of differentiation between the destinations, even within the Caribbean itself. Although the region is oft times erroneously viewed as a homogenous space, the reality is that each island has its own distinct and separate cultural identity which is exhibited in the form of history, national dishes, national dress, dialects, lifestyles, folklore, song, dance, music, etc. The blend of Amerindian, African, British, Spanish, French, Dutch and Indian cultures have especially shaped the Caribbean identity into something that holds great economic value for the region.

Therefore, greater synergies must be created between tourism and culture in a way that ‘tells the story’ of the Caribbean, through the creation of a comprehensive and diverse portfolio of products and services that highlight every aspect of the region’s rich cultural heritage offering. This means that the entire array of unique and authentic culinary, cultural and historical attributes that differentiate the Caribbean Brand and set it apart from its competitors must identified, packaged and showcased to the world. This will include the effective exposure of the region’s UNESCO World Heritage Sites, which also have the potential to stimulate demand and bring a significant level of global prestige, recognition and value to the region\textsuperscript{20}.

The prominent highlighting all the aspects that are unique to the Caribbean, including “little-known cultural and historic gems”, will equip the region with the capacity to reinvent and transform itself into an exciting, “new” destination, especially for high repeat visitors. This will create an innovative dimension to the Caribbean Brand that should stimulate the necessary travel inspiration required to drive business, attract new visitors and entice repeat visitors to want to “re-discover” the islands. A unique opportunity will be provided for the region to broaden its focus and complement the volume of its leisure tourists seeking sand, sea and sun, by pursuing the development of special interest tourism attractions and activities in direct response to current consumer demand. This is increasingly becoming the modus operandi of warm weather destinations around the world, as they seek to diversify their sand, sea and sun designations.

Restaurants and culinary experiences were also identified as a major motivator to visit the Caribbean by survey respondents. This is also in line with current trends of tourists seeking out
local, fresh and high quality cuisine that reflects the authenticity of the destination. The entire gamut of the culinary experience that the islands have to offer, from higher-end haute cuisine to indigenous community “street food” experiences, will provide a priceless opportunity to showcase the Caribbean as a culinary “melting pot” that offers more than just “fun in the sun”.

As the region attaches greater prominence to its rich history and culture, increased opportunities for public/private sector partnerships (PPPs), entrepreneurial ventures and employment will be created, which will redound to the overall benefit of regional economies.

5.3 Create a memorable and high quality onshore experience

The global trend of a new tourism, being driven by the new tourist - who is more knowledgeable; demanding; and technologically-savvy than in times past - places considerable demands on the evolution of the tourism product. In this survey, onshore activities were ranked higher in importance than onboard activities by the majority of respondents as a motivator to take a summer Caribbean cruise. Therefore, one of the main priorities and objectives of every regional cruise destination must be to deliver the type of quality on-shore experiences that would increase global demand for the Caribbean cruise tourism product; increase the disembarkation ratio and customer satisfaction index; and increase cruise passenger spend and repeat visitation levels21. This is especially important as the region seeks to increase market share as well as cater to its high-repeat North American cruise passenger clientele that is looking for unique and exciting experiences.

Due to this high repeat visitation, continuous improvement and innovation, through the creation of new and rewarding on-shore experiences, must become a regional imperative. This means that the focus must be on getting the product right. It is only thereafter that the Caribbean Brand can be to successfully showcased to the world. For this to be achieved, the experiences delivered must be of a consistently high standard, to ensure that the region develops a reputation for excellence and is able to market and promote itself on the merits of the quality of its products and services. This means that a systematic and sustained investment will be essential over the coming years to improve the overall tourism product in an increasingly competitive environment. Once achieved, this will stimulate a demand for the Caribbean Brand that can be leveraged to ensure benefits to the entire region.

To achieve this important goal, the following measures should be implemented:

- **Invest in Brand to improve the quality and standards of onshore products and services**

  In describing their onshore experience, some of the survey respondents described the more heavily traversed ports-of-call as being “dirty”, “decaying”, “shabby” and “poorly maintained” and stated that the first impression of some of the destinations left a lot to be desired. This is an indication that the requisite investment must be made in the continual upgrade of the region’s critical tourism infrastructure, such as ports of entry, ground transportation, telecommunications, road networks, signage, attractions, information
centres, amenities and facilities, to ensure they are well-maintained and of the highest standard. Priority must also be placed on developing the types of new events, attractions, activities, facilities, products and services that deliver the type of unique, memorable, quality experiences that attract or cater to the needs of the fastest growing cruise consumer segments (Multigenerational families, Seniors, Singles, “Foodies” etc). While traditional attractions are vital, their importance declines unless they are sustained by investment. Mature and “tired” attractions especially need to be consistently maintained, upgraded and refreshed by incorporating innovative developments and cutting-edge technology to enhance the visitor experience. Attractions, events and activities that offer exciting experiences, which are specifically designed for the cruise passenger and tailor-made for the length of time cruise ships spend at a destination (an average of 6-8 hours), must also be developed.

Several international destinations have dramatic investment plans to transform their tourism economies. The Caribbean’s competitiveness depends upon a similar commitment to investment. It is therefore essential for the region to organise its public and private sectors to focus investment efforts in an integrated way to improve its tourism product offering. Therefore, clear investment promotion strategies and plans for tourism sector development must be created that involve the creation of a more enabling environment to facilitate and stimulate favourable investment conditions that are capable of attracting both domestic and foreign investors.

• **Develop a “Welcoming Society” delivering world class experiences**

The survival of the Caribbean tourism industry in this extremely competitive and turbulent environment, fundamentally hinges on a friendly, welcoming environment and consistent world class service, to ensure that visitors are receiving memorable experiences and exceptional value for money. This means that particular attention has to be paid to improving the welcome and onshore service experiences across the region at every level. The first impression at the ports of entry must be extraordinary, with respect to the aesthetics, as well as the welcome that is received. Not only do first impressions count, but they also tend to set the mood for the rest of the visitor’s stay at the destination.

In addition to incidences of harassment, some survey respondents complained about poor service levels onshore, compared to the level of service received onboard ship. Measures must therefore be put in place to ensure that the renowned, warm and friendly

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20 There are 17 UNESCO sites in the Caribbean. Eight are in Cuba and the others are in the Dominican Republic, Haiti, Puerto Rico, St. Kitts, Dominica, St. Lucia, Barbados, Curacao and Bermuda. There are also sites in other Central American destinations that make up Caribbean itineraries such as Mexico (the most in the Americas at 32), Belize, Guatemala, Costa Rica, Honduras and Panama.
Caribbean hospitality is delivered on a consistent basis at every visitor interaction and that all incidences of shoddy service and harassment are eliminated completely from the Caribbean experience. Particular attention must therefore be paid to the creation of a value-driven premium product and the consistent delivery of quality, based on the highest standards of skills and service. Additionally, visitors must be continually provided with unique, “Wow” experiences in their interactions with the Caribbean populace, in order to retain, if not increase market share to the islands.

The expressed desire by a number of the survey respondents was for more interaction with locals through community and cultural immersion. This means that a Welcoming Society must be created across the board at a regional level, where the average Caribbean national is fully educated about the importance of the tourism industry and not only understands the critical role they play in the success of the sector, but also feels involved in the process. All this is essential to ensuring that visitors’ expectations are exceeded in such a way, that they will bring additional business to the Caribbean through repeat visitation and recommendations made to their friends, relatives and peers.

The Caribbean’s “Human Factor” is perhaps the most critical element that will determine the future sustainability and competitiveness of the region’s tourism sector; therefore, it must be valued, nurtured, developed and empowered. There must be a renewed region-wide commitment to investing in this precious asset, by ensuring that it is equipped with the tools, knowledge and skills required to take the tourism industry to the next level. This will be a prerequisite for the tourism industry to grow and be successful. Regional authorities must therefore continue to provide the necessary leadership through the construction of a strong foundation of human resources development, sensitization, education and involvement that ensures the region achieves a competitive advantage through its people.

- Ensure a safe and secure onshore environment

The value of safety and security is extremely important component of the overall Caribbean tourism experience. This core element should not be underestimated or lost, as a safe and secure environment has traditionally been one of the region’s more significant areas of competitive advantage. Crime has arguably become one of the most critical social issues across the Caribbean and, although it may take place in one island, it has a debilitating impact on the entire Brand. Incidences of crime and harassment or any act which tourists perceive to be hostile or dangerous can literally “kill the goose that lays the golden egg”. Therefore, a critical part of developing a successful regional tourism industry and delivering a memorable onshore experience to cruise visitors is ensuring that they feel safe during their time spent at each destination.

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21 According to the 2011 CLIA Market Profile study, 80% of cruisers typically agree that cruise vacations are a good way to sample destinations that they may wish to visit again. The study also stated that 49% of cruisers most often return for land-based vacations to the Caribbean.
The safety issue was a concern expressed by several survey respondents, especially single travellers. Complaints about harassment from vendors and taxi-men were also highlighted as a problem by some individuals. These concerns are worrisome for Caribbean tourism officials, due to the fact that a visitor’s perception of safety at any destination highly affects their level of comfort, relaxation and satisfaction, or even their decision to disembark from the ship.

The issue of rising crime is a Caribbean problem that will require an immediate regional response from the relevant officials and authorities, in the short term, so as to ensure that this blot on the Caribbean landscape is curtailed or eliminated altogether. As a consequence, one of the main areas of urgent priority will involve a zero-tolerance approach and a number of critical actions being taken to control and reduce the rates of crime and all forms of deviant behaviour across the region, to ensure that a safe and secure Caribbean is maintained for locals and visitors alike. This is of particular importance, especially if the region endeavours to actively promote greater levels of host-visitor interactions and facilitate more people-to-people programmes and activities in the communities to meet consumer demand.

- **Prioritize the sustainable preservation of natural, cultural and built assets**

A critical component to an excellent onshore experience is the presence of a clean, healthy and pristine environment. Apart from being inherently good for tourism, it is also key to the region’s competitiveness. Therefore, the importance of well-preserved surroundings, including the absence of litter and debris on the beaches, reefs and roadways and the proper disposal of solid waste is a regional imperative.

Despite the fact that beach activities ranked third behind cultural heritage and culinary activities in the survey, the popularity of beach vacations to the Caribbean cannot be discounted. The Caribbean is the world’s foremost warm weather destination and sand, sea and sun activities are the primary reason why millions of visitors flock to the region, to relax, rejuvenate and enjoy these natural resources. These natural assets are therefore of inestimable value.

Besides sand, sea and sun, visitors also enjoy the exquisite natural beauty of the region, in the form of beautiful landscapes, mountains, rivers, underground caves, gullies and wetlands. The environment, particularly the marine and coastal assets of each island are therefore extremely critical assets of the Caribbean economies and an indispensable resource base for the tourism industry. Besides its natural assets, the rise in popularity and interest in culture and history also means that the preservation of the region’s traditions, lifestyles and built heritage is extremely vital to meeting the demands of the “new tourist” and therefore must also be an area of priority. These natural and built assets are extremely valuable components of the overall onshore experience and therefore must be preserved and protected to ensure the sustainability of the Caribbean tourism product.
Tourism is widely considered to be the “goose that lays the golden egg”, however, it also has the capacity to “foul its own nest” if not strategically planned, developed, controlled and managed within the confines of current economic, social and environmental parameters. This is why a delicate balance must be achieved to develop an industry where the benefits outweigh the costs and the industry gives back more than it takes. Therefore, to protect these precious natural, cultural and heritage assets, regional governments must rigidly enforce environmental legislation to ensure that the principles of sustainable development inform all areas of tourism planning and management, with respect to adherence to physical environmental policies for the conservation of natural resources and the preservation of antiquities and cultural heritage patrimony. This includes the preservation of local culture to insulate the same from overcommercialization and exploitation; the preservation and management of the natural and built environment from the damage caused by unsustainable practices, natural or manmade disasters and risks associated with climate change; and the enforcement of national beautification and anti-litter programmes.

The region’s rich heritage architecture, especially, provides the Caribbean with unique and differentiating attributes. Therefore, regional authorities must put measures in place to arrest the demolition of and other infringements to listed buildings or those of architectural and historic significance; prioritize the preservation of historic buildings and other artifacts of significant importance to the region; and encourage adaptive reuse of historic buildings and sites particularly in the areas of tourism product development.

- **Conduct ongoing Research & Development to stimulate global demand**

In order to ensure that the Caribbean’s onshore experience remains relevant and globally competitive, conducting ongoing and extensive market and consumer research must also become a regional priority. This is the most effective way to ensure that the Caribbean is responding to the changing preferences, tastes, expectations and vacation patterns of the contemporary cruise passenger, in a way that would stimulate demand for the Caribbean cruise brand.

Ongoing research will equip regional tourism officials with the capacity to better identify and respond to consumer trends and the most feasible emerging cruise markets to target, as the Caribbean seeks to increase market share to the region. It will also improve the authorities’ capacity to predict what potential and repeat cruisers will want and inform them of the types of onshore products and services that will have to be developed to continually meet their needs and expectations. This will increase the region’s ability to respond faster to changing market dynamics and enable it to become more proactive, strategic and creative in its marketing and product development efforts.
The Caribbean must now be challenged to formulate strategies grounded in meaningful data to drive innovation and develop a more crisis-resilient, strategically-focused and competitive cruise tourism industry.

5.4 Diversify source markets to increase market share

Due to its strategic location and close proximity to the USA mainland, the Caribbean has traditionally been heavily reliant on the North American market as its main source of cruise passenger arrivals to the region. However, the gradual erosion of the dominance of the North American market and the corresponding growth in global cruise passengers may require that the relevant modifications be made to this strategy. This must become an imperative as the realignment of assets among cruise lines means that there may continue to be less capacity sailing out of North America to the Caribbean, particularly during the summer months.

As the Caribbean seeks to continue to strengthen its North American base, it must also now diversify its source markets by targeting the largely up-tapped markets from the fastest growing global cruise regions, such as the UK, Other Europe and South America. These markets are the perfect fit for the Caribbean, due to the availability of air access and the close proximity especially to the South American continent. For example, some islands such as Curacao, Aruba, Martinique and Barbados\(^{22}\) have already benefited from the diversification of their cruise markets with Dutch, South American, French, British and Other European visitors and they, by extension, have experienced some growth in cruise passenger arrivals (see Table 3).

High-net worth clientele from these markets who can afford the costs associated with cruising should be specifically targeted through effective marketing and promotional efforts. A low percentage of the respondents in the survey from the UK and Other Europe have actually taken a cruise to the Caribbean. However, interestingly, the majority were willing to expend the highest amount on this type of vacation. This is a positive sign, as there was a distinct interest expressed in Caribbean cruising by respondents from these markets, therefore, the opportunities that exist must now be effectively capitalised upon by the regional tourism authorities. Besides these “medium-haul” markets, opportunities for attracting passengers from “long-haul” destinations, where cruising is experiencing increasing popularity, such as Asia and Australasia, must also be explored. To these faraway markets, the Caribbean region will be considered to be an “exotic, off-the-beaten-path” destination that the contemporary traveler is seeking.

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\(^{22}\) Increases in cruise arrivals in Barbados are largely attributed to the rise in home porting of vessels out of Europe.
5.5 Develop targeted marketing strategies to promote the Caribbean Cruise Brand

The cruise ship industry aggressively markets its onboard experiences in vibrant, exciting on and offline advertisements and promotions, which stimulates brand awareness and the desire amongst consumers to take a cruise vacation. As a consequence, for many travellers, the cruise ship is the destination. However, data gleaned from this survey has indicated that onshore activities and the availability of interesting itineraries play a major role in motivating individuals to book a cruise to the Caribbean. This information strengthens the argument that the region needs to play a more proactive and collective role in positioning itself more prominently within the global marketplace, by directly marketing and promoting its onshore experiences to repeat and potential cruisers, rather than passively providing a “destination for the cruise ships”. Such an action could potentially increase brand awareness and stimulate greater demand for the Caribbean Cruise product.

To achieve this goal, the Baltic region in Northern Europe can be used as a useful case study for the Caribbean as a model to be benchmarked and emulated. The countries of the Baltic Sea region have joined forces in order to offer a variety of destinations, sights and adventures and successfully market its brand, Cruise Baltic, as “10 countries on a string – One Sea - Oceans of Adventure”.

Similar to Cruise Baltic, it may be more beneficial for the Caribbean to also market a fully integrated cruise experience, by developing a series of themes that link the many attractions and activities of the region together across destinations, such as:

- Watersports, Sailing, Swimming & Diving;
- UNESCO World Heritage sites\textsuperscript{23};
- Historic Great Houses, Forts, Churches and other forms of magnificent architecture;
- Rum and Gastronomy;
- Local Festivals, Carnivals, Museums and Cultural Events;
- Pristine Beaches, Reefs, Botanical Gardens, Volcanoes, and Nature Parks and Sanctuaries;
- Hiking, Biking, Horse-back riding, Ziplining etc.;
- People-to-People Activities and Community Events;
- Spas, Mineral Baths & other Holistic activities;
- Shopping and indigenous Arts & Crafts.

These themes and products are common across all Caribbean cruise destinations, and as such, any strategic on or offline marketing and promotional efforts, should prominently showcase the colour, vibrancy and splendor of the region through its spectacular natural landscapes, beautiful sceneries, exotic flora and fauna, unique history and culture, rich traditions, indigenous world-class cuisine, outdoor activities, friendly locals and the plethora of exciting, unique experiences. Cruise-specific marketing strategies can be devised, including a stand-alone website that is

\textsuperscript{23} UNESCO sites collectively represent a spectrum of Caribbean attractions across several islands, and can be clustered and packaged as a major theme and key onshore attraction for cruise passengers on a year-round basis.
separate and distinct from any other platform which targets the mainstream leisure traveler, in order to set up a structure that is geared towards those consumers who are specifically seeking a cruise vacation. Such a platform will also provide the region with the opportunity to explicitly highlight new and exciting summer activities, attractions and events, on an ongoing basis, that will greatly assist in transforming the Caribbean into a year-round cruise destination.

This new strategic approach will demonstrate that the Caribbean is taking collectively ownership of this issue by re-positioning the Caribbean Cruise Brand in the market and utilizing every avenue to create top-of-mind awareness amongst consumers, as the region seeks to increase market share, especially amongst un-tapped markets. One of the most cost effective, creative and influential methods will also be the effective utilization of diverse social media platforms to provide a forum for loyal repeat Caribbean cruisers to act in the capacity of passionate brand advocates, where they encourage family, friends and peers to take a Caribbean cruise. The appointment of a cruise professional to directly oversee and facilitate the process of strengthening and marketing the regional Cruise Brand is also an imperative at this time.
6.0 Conclusion

Though currently experiencing challenges, the Caribbean is still a force to be reckoned with within the global cruise industry. Despite the persistent volatility in cruise visitor arrivals, the positive news is that although there has been growth in all global cruise regions, the Caribbean still ranks as the dominant cruise destination, with the highest number of berths deployed globally (37.3% in 2013). Additionally, nearly all traveler segments rank the Caribbean (45% overall) vs. Alaska (24%), the Mediterranean/Greek islands/Turkey (14%) and Europe (13%), as the most sought after cruise destination in the world.24 Furthermore, survey results confirm that the Caribbean is still a much desired, exotic, aspirational destination, which is renowned for its natural beauty, rich cultural heritage, history and genuinely friendly people. This means that demand for the region is still very high, and as a consequence, much potential exists to reverse the declining market share.

Based on the results of the survey, it is apparent that there must be some enticement or incentive to motivate visitors to come to the Caribbean, particularly during the spring and summer seasons. This can be achieved through initiatives such as the development of new itineraries and innovative onshore attractions and experiences, pricing advantages; infrastructural enhancements, safe and welcoming environments and allaying concerns about the hurricane season’s impact on cruise safety. This is an imperative if the region is determined to counteract the current trend of ships being redeployed to Europe and increasingly to other parts of the globe.

The global cruise industry is expected to continue to experience phenomenal growth in the future. In light of these developments, a major priority of the Caribbean must be to devise strategies and initiatives to capitalize on this growth pattern by to redoubling its efforts to remain competitive and looking outside the traditional areas to experience growth. All this will entail developing a bold, aggressive, strategic and immediate response specifically designed to recapture and increase market share to the region. The Caribbean’s ability to stimulate the required demand will be directly dependent upon its capacity to refresh and reinvent its tourism industries by effectively adapting to its ever-changing environment, pushing the envelope, taking risks and launching innovations, which consistently deliver on changing consumer expectations.

Undoubtedly, a revolutionary approach must now be adopted by regional tourism stakeholders. Therefore, responding to the needs, expectations and concerns expressed in this survey in a timely manner and close collaboration between regional tourism officials and industry partners to implement workable solutions will go a long way towards achieving these goals.

24 FCCA Cruise Industry Overview 2013, pgs. 1 & 12; CLIA Cruise Industry Update 2013, pg. 15.
Appendix I

Profile of Respondents

Gender

In total, a sample of 1,044 individuals participated in the survey. Of the total respondents, an overwhelming majority of 63.1% (or 659 respondents) was female and 36.9% (or 385 respondents) were male (See Appendix 1).

Female respondents dominated every aspect of the survey. This is primarily due to the fact that there were 274 more female than male respondents. Therefore, they made up the largest group across all nationalities, and every generational segment.

A higher percentage of the male respondents (53.5%) have cruised, vs. 51.3% of the total cohort of female respondents. However, of those who have cruised before, a higher percentage of respondents in the female grouping (61.4% or 338) have experienced a Caribbean cruise than their male counterparts (57.6% or 144)

Country of Origin

Demographic statistics gathered revealed that the overwhelming majority of total respondents were from the North American market (including Canada), followed by the United Kingdom and the Caribbean. By far, the smallest groups of respondents were from the Other Europe and Other countries categories (See Appendix 3&4).

The numerical breakdown of total respondents is as follows:

There is a wide disparity between the number of respondents from the US and those from the UK and the Caribbean, and an even wider gap between these three nationalities and those from Other Countries, Other Europe and Canada25.
Between the two genders, the majority of males were from the USA, followed by the UK and the Caribbean. The majority of female respondents were also from the USA, however, the second largest group came from the Caribbean and the third largest from the UK.

Not surprisingly, of all the respondents that have been on a cruise, the largest group by a wide margin, came from the USA, followed by the UK and the Caribbean. The smallest group of cruisers came from Other Europe and Other countries (See Appendix 6).

It is interesting to note that in the group of non-cruisers, the majority was from the Caribbean, closely followed by the UK and the USA. There were also a higher number of non-cruisers than cruisers from Other Europe and Other countries (See Appendix 7).

The USA and Canada were the only two markets where cruisers outnumbered non-cruisers. Of the total USA respondents, almost 60 percent (56.6%) have cruised, compared to 25.2% of those who have never cruised (see Figures 9 & 10). Although representing a very small cohort of only 19 persons, the Canadian respondents who have cruised are exactly double in number (2.4%) to those who have not (1.2%).

Across the other nationalities, non-cruisers outnumbered cruisers amongst total respondents, with the largest gap being amongst the Caribbean grouping (33% vs. 14%). Although the UK,
Other countries and Other Europe are amongst the fastest growing cruise passenger markets globally, a low percentage of respondents in this survey from these countries have actually taken a cruise before (See Appendix 8).

Amongst cruisers, who made up just over half of all respondents, 60% are not strangers to the Caribbean, having taken such a cruise before. Not surprisingly, of this number, an overwhelming 71% of USA and 60.4% of the Canadian respondents have been on a cruise and of this number, 76.8% and 68.8% have been on a Caribbean cruise respectively.

Conversely, a much smaller proportion of respondents surveyed from the other nationalities have actually taken a cruise in general, or cruised specifically to the region. Less than half (44.3%) of the respondents from the UK have cruised and of this number, only 35.3% have visited the Caribbean.

Amongst the forty-six (46) respondents from the Other Countries category, 37% have cruised before, with only 29.2% of these have being on a Caribbean cruise. For the thirty five (35) respondents from the Other European countries, the numbers are even lower, with less than a third having taken a cruise (31.4%) and only 5.6% (or only one respondent) of this number cruising the Caribbean.

Interestingly, although only 31.2% of the Caribbean respondents have cruised before, of this relatively low number, almost sixty percent (57.5%) have been on a Caribbean cruise. Though a small sample size, this may be an indication that when Caribbean nationals do take a cruise vacation, they are more likely to take one within the region.
Age

The majority of respondents (84.4%) were basically evenly spread across the 30-60+ age groups (Gen Y, Gen X and Baby and Late Boomer)\textsuperscript{26}, representing members of the retirement and working age population. The largest age group (25.2%) was in the mature Baby Boomer 50-59 grouping for both males and females (See Appendix 9).

Overall, the majority of the respondents (44.6%) were predominantly from the more mature over fifty Baby and Late Boomer age groups, followed by the Gen X, 30-49 age groups (39.8%). The smallest cadre of respondents was from the Gen Y, 29 and under age groups (15.6%).

In general, a higher percentage of the male respondents were more mature in age than their female counterparts, with over fifty percent (53.6%) of this group being over 50 years, versus 39.4% of females. An approximate equal percentage of males (19.5%) and females (20.6%) made up the Gen X 40-49 age group (See Appendix 10).

\textsuperscript{26} Generational segments: Late Boomer: >69, Baby Boomer: 50-69, Gen X: 35-49, Gen Y: <35. Source: Deloitte Research, 2009. Although the survey respondents were segmented across six distinct age groups, the four generational segments (Late Boomer, Baby Boomer etc.) were still generally applied to categorize these groupings.
In terms of sheer numbers, the Baby and Late Boomer generations collectively were the predominant age groups for respondents from the USA (56%), and the UK (55.6%), the two countries with the greatest number of respondents. Over seventy percent (73.7%) of the nineteen (19) respondents from Canada were also from this over fifty segment, with almost half (47.4%) being represented in the 50-59 age group. Conversely, the Caribbean market comprised a much younger age group, with 61% of the respondents from that region being between the ages of 20-39 (See Appendix 11).

The majority of the respondents from both Other Europe (60%), and Other countries (65.3%) were between the ages of 30-49.

Of those respondents who have cruised before, they tend to be more mature than their non-cruising counterparts. Almost sixty percent of cruisers (57.8%) were from the older Boomer segments, while over two-thirds (68.0%) of the non-cruisers were in the younger 20-49 age group. The reason for this outcome is because the majority of cruisers are from the USA market, which is dominated by the more mature overfifty age group, whereas the noncruising segment is dominated by Caribbean nationals who are primarily from the younger Gen Y 20-39 age group (See Appendix 12).
Not surprisingly, the most frequent cruisers to the Caribbean are also from the over fifty Boomer market. The largest age group of cruisers is from the over sixty cohort, where 77.3% have cruised before and of this number, an extremely high proportion (75.7%), have cruised to the Caribbean. Comparatively fewer respondents from the younger Gen Y (29 and under) age group have ever been on a cruise. Just over half (51.7%) of the Gen X generation have cruised and of these almost sixty percent (56.6%) have cruised to the Caribbean.

**Annual Income before Taxes**

Almost sixty percent of total respondents (59.6%) are from the lower to middle class social bracket, collectively earning US$59,999 or less, with the largest group earning US$20,000-$39,999. On the upper end of the income scale, almost twenty percent (19.5%) of total respondents collectively earn US$100,000 – 180,000+. (See Appendix 14).

The respondents from the USA were the wealthiest and highest earners of all the nationalities, with the majority from this market being spread across the higher income brackets of US$40,000-$59,999 (21.7%), US$60,000-$79,999 (17.1%), US$80,000- $99,999 (11.8%) and US$100,000-$119,999 (11.3%). This is in direct contrast to the UK, the Caribbean and Other Europe, where the majority of respondents (66.3%, 49.4% & 54.3% respectively) earn under US$40,000 vs. 16.9% of Americans (See Appendix 15).

The wealth gap between the USA respondents and those from other nationalities, is demonstrated by the fact that almost one third (32.7%) of Americans earn over US$100,000, versus for example, only 3% of the respondents from the UK. Of this, almost ten percent (9.9%) of respondents from the USA earn over US$180,000 compared to 1.5% from the UK.

Through a small cohort, the respondents from Canada and Other Countries were also high income earners. Although Canada only had nineteen (19) respondents, the majority of them (31.6%) earned US$60,000-$79,000 and 21% earned over US$100,000 (with 10.5% earning over US$180,000). Of the forty six (46) respondents from Other Countries category, 23.9% earn
The research data also indicates that cruisers generally earn more than noncruisers. A higher percentage of noncruisers earn from the lower income brackets, while cruisers predominate in the higher income brackets. This can be attributed to the fact that cruisers are primarily wealthier, male North American (including Canada) respondents from the over fifty Boomer segment, while the majority of noncruisers are predominantly younger females from the Caribbean and UK, who have a lower income level than their Boomer counterparts (See Appendices 16 & 17).

Prepared to pay for a Cruise

Overall, the majority of total respondents are prepared to pay in the median-range of US$600 - $799 to go on a cruise, followed by those who are prepared to pay in the higher price bracket of US$1000.

Based on the overall results, almost seventy percent (68.7%) of the total respondents are willing to pay US$600 or more to go on a Caribbean cruise.
Similar to total respondents, the majority of both the male and female groups will also pay an average US$600-$799 to go on a cruise, with a slightly higher percentage of males (31.2% vs. 27.5%) willing to do so. In line with the fact that males have a higher earning capacity than their female counterparts, females tend to be more frugal when investing in a cruise, with a higher percentage of this group choosing to pay less than US$600 (34.6% vs. 25.7% for males) for the experience. Conversely, a greater percentage of males than females are prepared to pay over US$1000 for a cruise (24.7% vs. 19.1%). However, the same percentage of both genders would pay US$800-$999 for a cruise (See Appendix 19).

The majority of the respondents from the USA and Other Europe would pay US$600-$799 for a cruise, while the majority of those from Canada and Caribbean are prepared to pay in the lower price range of US$400-$599 (See Appendix 20).

Interestingly, although the respondents from the UK earn a lower level of income than most of their counterparts, of all the nationalities, they are willing to expend the highest amount on a cruise. The majority of UK respondents (31.9%) are willing to pay over US $1000 for a cruise, vs. 22.4% of Americans. In fact, 57.9% of UK respondents would pay over US$800 for a cruise vs. 42% from the USA. Conversely, a greater percentage of respondents from the USA (27.8%) would pay less than US$600 for a cruise vs. 15.9% from the UK.

Besides the UK, respondents from the Other Europe category were willing to pay the highest amount for a cruise followed by the USA.

Of all nationalities, the respondents from the Caribbean are prepared to spend the least amount of money on a cruise. In effect, a higher percentage of respondents from the Caribbean (57.5%) are willing to invest in a cheaper cruise (less than US$600) and a much lower percentage (16.1%) for a more expensive cruise (US$800 and over). Indeed, only 6.8% of the Caribbean respondents would pay over US$1000 for a cruise, vs. the UK (31.9%) and the USA (22.4%).
This may be as a result of the lower income levels of the majority of the Caribbean respondents (49.4% earn less than $40,000 per annum), compared to the other nationalities, or the challenge of the weakness of some Caribbean currencies against the US dollar.

There appears to be a direct correlation between the respondents who have cruised before, their income levels and the amount that they are willing to invest in a cruise. The majority of cruisers and non-cruisers are both willing to pay in the range of US$600-$799 for a cruise. However, overall, cruisers are more willing to pay more for a cruise vacation than their noncruising counterparts, no doubt in large part to their superior income levels (See Appendix 21).

Besides higher income levels, the willingness for cruisers to pay more for a cruise may also be attributed to the fact that they may possess a better understanding of the value associated with paying more to patronize a higher quality ship or to acquire a higher category of onboard accommodation, as opposed to those who have never cruised at all. Evidence of this is demonstrated by the UK respondents who, despite lower income levels, are prepared to pay a higher price for a cruise vacation. This means that opportunities exist for non-cruisers to be educated about the options available to them with respect to the diverse amenities and facilities that cruise ships have to offer.

Several respondents also stated that what they would be prepared to pay for a cruise also depended upon factors such as, length of cruise, category of cabin, type of itinerary, quality of amenities, facilities and services and brand of cruise line.

There is also a direct correlation between the age of the respondent and their willingness or capacity to pay more or less for a cruise.

Survey data suggests that naturally, the more mature and wealthier Boomer market are prepared to invest more heavily in a cruise than their younger Gen X and Gen Y counterparts (See Appendix 22).
**Occupation**

A similar diverse cross-section of occupations was represented from both the private and public sectors across all nationalities. They ranged across the entire gamut, from top corporate executives, medical and legal practitioners, bankers, managers, information technology specialists, civil servants, consultants, educators, engineers, business owners/managers, tourism officials, hoteliers, human resource professionals, financial analysts and entrepreneurs, to teachers, homemakers, retired persons, students, clerks, hospitality workers, postmen, policemen, cashiers, hairstylists, fashion designers, the unemployed etc. The respondents also included a large number of travel agents and tour operators.

It should be noted that a sizable proportion of the respondents from North America (USA & Canada) are employed in the travel trade. One quarter (25.3% or 110) of the respondents from the USA and one third (33.3% or 5) from Canada are travel agents/advisors/consultants/owners, the majority of who exhibited first-hand knowledge of the cruise industry and the demands and expectations of its clientele. Conversely, less than four percent (3.7% or 10) of UK respondents were travel agents, there was one tour operator amongst the Caribbean respondents and none from Other Europe or Other countries.
Appendix II

SURVEY OF FUTURE CARIBBEAN CRUISE TRAVEL

Dear ........

The Caribbean Tourism Organization is conducting a survey to gather information in the hope of finding possible ways and means of stimulating demand for Caribbean cruises between the summer months of May and September.

We are kindly requesting your assistance in completing this questionnaire as accurately as you can and submitting it to us. We deeply appreciate your assistance in this effort as we seek to better plan and develop our region’s tourism industry.

This Survey is being carried out by:-

CARIBBEAN TOURISM ORGANIZATION - WE DO NOT REQUIRE YOUR NAME -

1. Where Do You Live?
   United States □ State _________________________
   Canada □ Province _________________________
   United Kingdom □
   Other Europe □
   Caribbean □
   Other Caribbean □

2. What Is Your Gender?
   Male □    Female □

3. In Which Age Group Are You?
   Under 20 Years □    20-29 Years □    30-39 Years □    40-49 Years □
   50-59 Years □    60+ □

4. What is your occupation? ______________________________________________________

5 (a). Have You Ever Taken A Cruise Before?
   Yes □    No □

(b). If yes, have you ever taken a Caribbean cruise?
   Yes □    No □
6. How important are the following in encouraging you to take a cruise to the Caribbean between the months of May and September in any year?

<table>
<thead>
<tr>
<th>Availability</th>
<th>Very Important</th>
<th>Somewhat Important</th>
<th>Not So Important</th>
<th>Not Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Availability of Vacation from work</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Experiential/Learning Activities (e.g. Caribbean Cooking, Craftwork, Rum Making etc.)</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Attractive Ship Destinations</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Onshore Activities</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Cost of the Cruise</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>On Board Activities</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Please Specify:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

7. How important are the following on shore activities to you?

<table>
<thead>
<tr>
<th>Activity</th>
<th>Very Important</th>
<th>Somewhat Important</th>
<th>Not So Important</th>
<th>Not Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beach/water sport activities</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Adventure/sports</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Restaurant</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Shopping</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Cultural/heritage</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Gambling</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Exercise/spa Voluntarism</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>(community projects, etc):</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
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<tr>
<td>Please Specify:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

8. What would discourage you from taking a Caribbean cruise between May and September?

____________________________________________________________________________________

9. How important are the following on-board activities to you?

<table>
<thead>
<tr>
<th>Activity</th>
<th>Very Important</th>
<th>Somewhat Important</th>
<th>Not So Important</th>
<th>Not Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sports</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Entertainment</td>
<td>☐</td>
<td>☐</td>
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</tr>
<tr>
<td>Restaurant</td>
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<tr>
<td>Shopping</td>
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<td>☐</td>
</tr>
<tr>
<td>Exercise/Spa</td>
<td>☐</td>
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</tr>
<tr>
<td>Gambling</td>
<td>☐</td>
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<td>☐</td>
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<tr>
<td>Other</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Please Specify:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
10. How much would you be prepared to pay for a Caribbean cruise?

US$800 – US$999 □  US$1,000 or more □

11. What is your approximate annual average income before taxes?
Please state amount and currency.

Under 20,000 □  20,000 - 39,999 □  40,000 - 59,999 □
60,000 - 79,999 □  80,000 - 99,999 □  100,000 - 119,999 □
120,000 - 139,999 □  140,000 - 159,999 □  160,000 - 179,999 □
180,000+ □  CURRENCY ________________
FUTURE CARIBBEAN CRUISE TRAVEL SURVEY