



CRUISE PASSENGER EXPENDITURE 2008 INTRODUCTION

- In keeping with its commitment to provide meaningful and reliable information on visitor expenditure, the Jamaica Tourist Board (Research & Market Intelligence Unit) continues to conduct annual Visitor Expenditure Surveys.
- The Cruise Passenger survey was conducted during the Winter and Summer periods of 2008. The data on expenditure were analyzed by the total number of passengers covered in the sample while those not relating to expenditure were analyzed by the “Heads” completing the questionnaires.
- The main categories of expenditure were as follows:
 1. Food and Beverage off ship
 2. Visitor Attractions
 3. Transportation
 4. Shopping
 5. Tips
 6. Miscellaneous Expenditure

CRUISE PASSENGER EXPENDITURE 2008 HIGHLIGHTS OF FINDINGS

- During Winter, 2,435 questionnaires were completed representing 7,063 visitors or **1.3%** of total cruise passenger arrivals.
- In the Summer, 4,244 questionnaires were completed representing 13,334 visitors or **2.4%** of the arrivals.
- The total number of persons represented was 20,397 or **1.9%** of the cruise passenger arrivals.
- The overall average expenditure per cruise passenger was **US\$94.19**
- Average expenditure per person was **US\$100.00** in Winter and **US\$91.28** in Summer.
- Average expenditure per person by port was:
 - Montego Bay **US\$110.13**
 - Ocho Rios **US\$92.00**

CRUISE PASSENGER EXPENDITURE 2008 HIGHLIGHTS OF FINDINGS Cont'd

- **In-bond shopping** was **37.1%** of total expenditure and **22.6%** was at the **Attractions**.
- **67.2%** of the cruise passengers were visiting Jamaica for the **first time**.
- **74.8%** of the cruise passengers were on their **first cruise visit** to Jamaica.
- The majority of cruise passengers indicated it is “**extremely likely**” to “**very likely**” to return to Jamaica, be it a cruise trip (**91.9%**) or a land-based vacation (**64.0%**).
- The majority of cruise passengers (**97.7%**) indicated that their experience in Jamaica was “**Most Enjoyable**” to “**Enjoyable**”
 - **99.8%** of the Ocho Rios cruise passengers stated this.
 - **89.9%** of the Montego Bay cruise passengers stated this.

CRUISE PASSENGER EXPENDITURE 2008 HIGHLIGHTS OF FINDINGS Cont'd

- **5.7%** of the cruise passenger said they were harassed while in port.
 - The major areas where this harassment took place were in the shopping areas and on the streets.
- **92.6%** of the cruise passengers came from the U.S.A.
 - Most of the cruise passenger from the U.S.A. came from the State of Texas (13.3%).

DISTRIBUTION OF EXPENDITURE FOR CRUISE PASSENGERS 2008

	WINTER	SUMMER	YEAR
	%	%	%
Food & Beverage (Off Ship)	3.4	4.2	3.9
Attractions	21.2	23.5	22.6
TRANSPORTATION			
Taxis	1.8	1.8	1.8
Other Transportation	0.3	0.3	0.3
Shopping			
In-Bond	39.7	35.6	37.1
Clothing	5.6	6.7	6.3
Straw Products	3.9	3.6	3.7
Wooden Articles	5.2	4.5	4.7
Other Shopping	6.2	6.6	6.5
Tips	0.8	0.8	0.8
Miscellaneous (Including Tax)	12.0	12.4	12.2
TOTAL	100.0	100.0	100.0
 Average Expenditure per Person	 US\$100.00	 US\$91.48	 US\$94.19

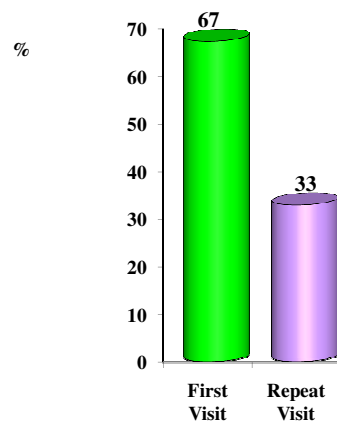
DISTRIBUTION OF EXPENDITURE FOR CRUISE PASSENGERS

BY PORT 2008

	MONTEGO BAY	OCHO RIOS	TOTAL
	%	%	%
Food & Beverage (Off Ship)	8.2	2.6	3.9
Attractions	20.9	23.2	22.7
TRANSPORTATION			
Taxis	2.9	1.4	1.8
Car Rental	0.0	0.0	0.0
Other Transportation	1.3	0.0	0.3
Shopping			
In-Bond	18.4	43.0	37.1
Clothing	14.6	3.8	6.3
Straw Products	2.7	4.0	3.7
Wooden Articles	2.6	5.4	4.7
Other Shopping	12.6	4.6	6.5
Tips	2.7	0.3	0.8
Miscellaneous (Including Tax)	13.1	11.8	12.2
TOTAL	100.0	100.0	100.0
 Average Expenditure per Person	 US\$110.13	 US\$92.00	 US\$94.17

Q1: Is this your first trip to Jamaica?

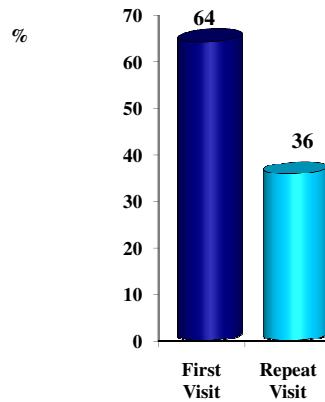
67% of the cruise passengers were visiting Jamaica for the first time.



Q1: Is this your first trip to Jamaica by port?

OCHO RIOS

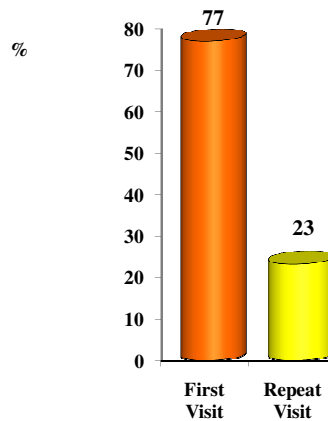
- 64% of the cruise passengers visiting the port of Ocho Rios were visiting Jamaica for the first time.



Q1: Is this your first trip to Jamaica by port?

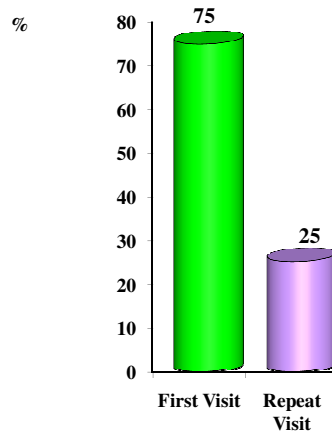
MONTEGO BAY

- 77% of the cruise passengers visiting the port of Montego Bay were visiting Jamaica for the first time.



Q1: Is this your first *Cruise* trip to Jamaica?

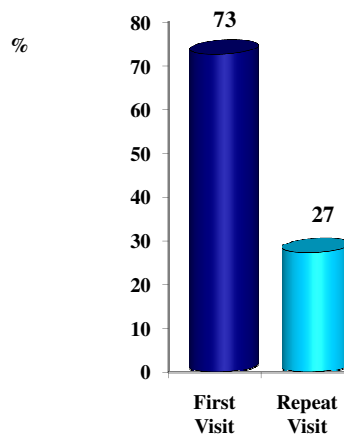
75% of the cruise passengers were on their *first cruise* visit to Jamaica.



Q1: Is this your first *Cruise* trip to Jamaica by port?

OCHO RIOS

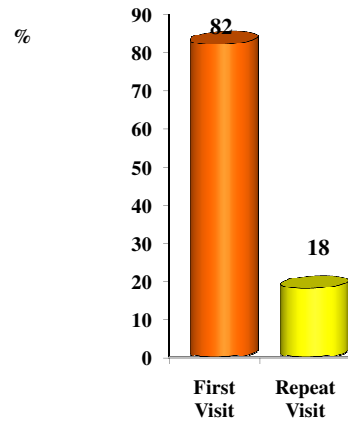
73% of the cruise passengers visiting Ocho Rios were on their *first cruise* trip to Jamaica.



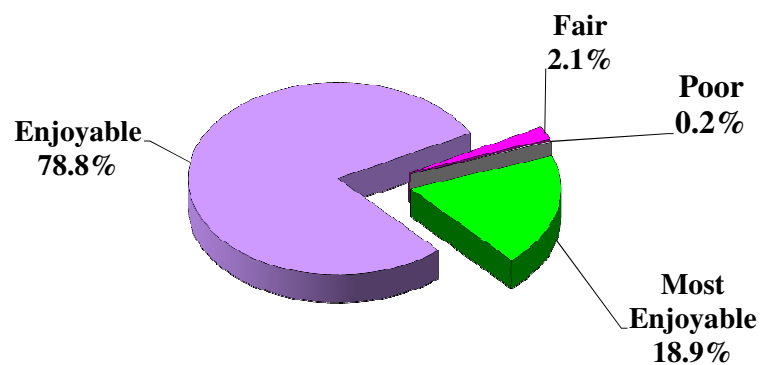
Q1: Is this your first *Cruise* trip to Jamaica by port?

MONTEGO BAY

82% of the cruise passengers visiting Montego Bay were on their first cruise trip to Jamaica.



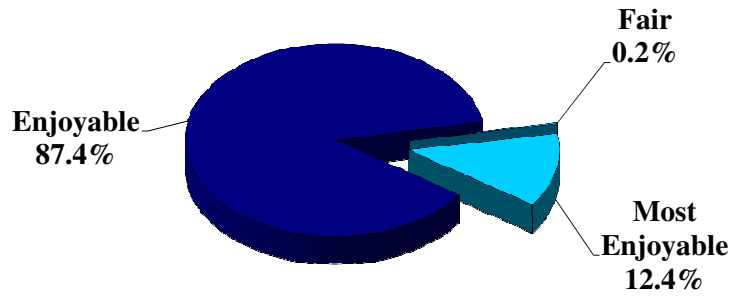
Q2: How would you rate your experience in Jamaica on this trip?



Q2: How would you rate your experience in Jamaica on this trip?

By Port

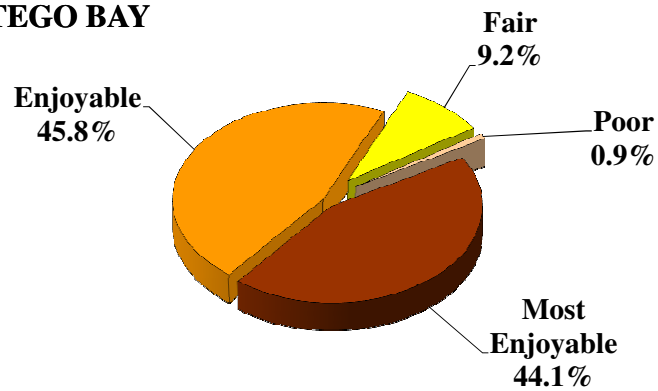
OCHO RIOS



Q2: How would you rate your experience in Jamaica on this trip?

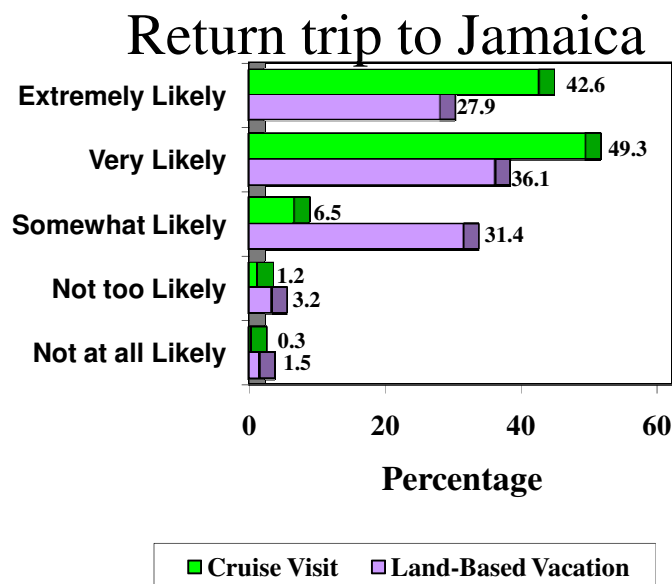
By Port

MONTEGO BAY



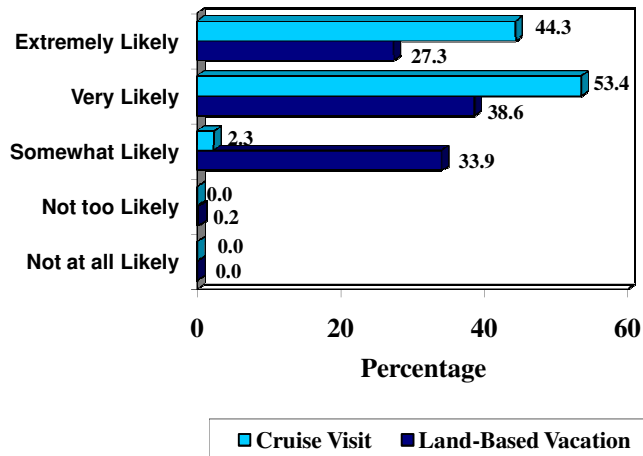
Q2: How likely would you be to return to Jamaica on a cruise visit?

📍 The majority of cruise passengers interviewed indicated it is “very likely” to “extremely likely” they would return to Jamaica, be it a cruise trip(92%) or a land-based vacation (64%).



Return trip to Jamaica by Port

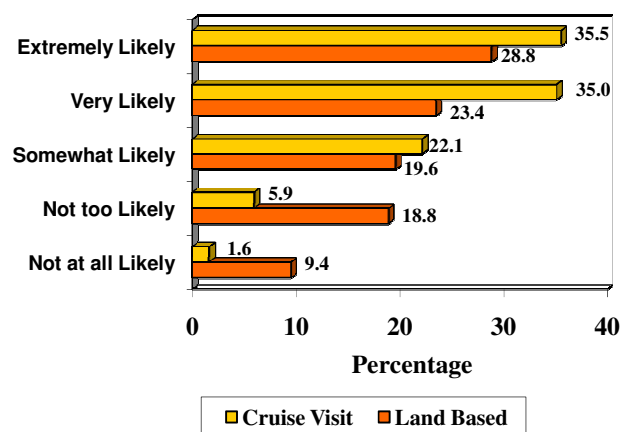
OCHO RIOS



A vast majority of cruise passengers visiting Ocho Rios indicated it is “very likely” to “extremely likely” they would return to Jamaica, be it a cruise trip (97.6%) or a land-based vacation (65.9%).

Return trip to Jamaica by Port

MONTEGO BAY



70.5% of cruise passengers visiting Montego Bay indicated it is “very likely” to “extremely likely” they would return to Jamaica. 52.2% stated that they would return for a land-based vacation

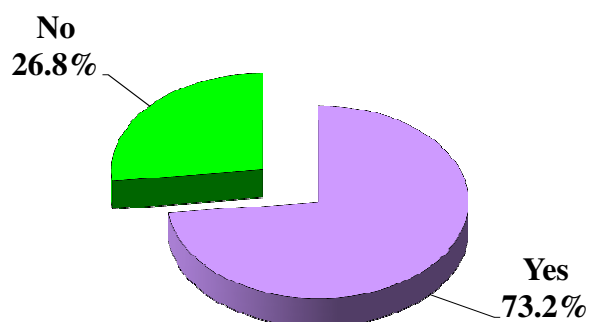
Q6: How would you rate the facilities and services at this port of call in Jamaica?

- **52%** of the visitors visiting the port of *Montego Bay* and who went on *Guided Tours* considered the service as “*excellent*”, compared to **51%** for the port of *Ocho Rios*.
- **70%** of the *Ocho Rios* cruise passengers who went *shopping* indicated the facilities as being “*excellent*”, compared to **33%** of the *Montego Bay* passengers.
- The *Transportation services* provided by each port was rated “*excellent*” as follows:
 - **Ocho Rios (34%)**
 - **Montego Bay (44%)**

Q6: How would you rate the facilities and services at this port of call in Jamaica?

	OCHO RIOS			MONTEGO BAY		
	SHOPPING FACILITIES	GUIDED TOURS	TRANSPORTATION SERVICES	SHOPPING FACILITIES	GUIDED TOURS	TRANSPORTATION SERVICES
Base	5,058	942	3,681	1,342	1,024	1,157
	%	%	%	%	%	%
Excellent	69.7	50.8	33.7	32.8	52.1	43.5
Good	30.0	46.9	60.1	45.1	36.1	42.3
Fair	0.3	2.1	6.2	18.9	10.7	11.4
Poor	0.0	0.1	0.0	1.8	0.6	1.6
Needs Improvement	0.0	0.1	0.0	1.4	0.5	1.3
	100.0	100.0	100.0	100.0	100.0	100.0

Q7: During your stay in port did you visit any of our Attractions?

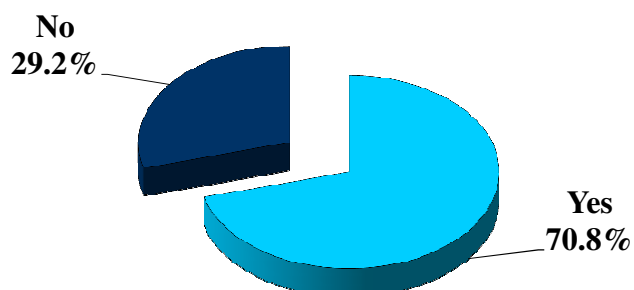


73.2% of the cruise passengers indicated that they visited attractions during their stay in port, this is approximately 2.3 percentage points less than the 75.5 % who said they visited attractions in the survey for the year 2007.

Q7: During your stay in port did you visit any of our Attractions?

By Port

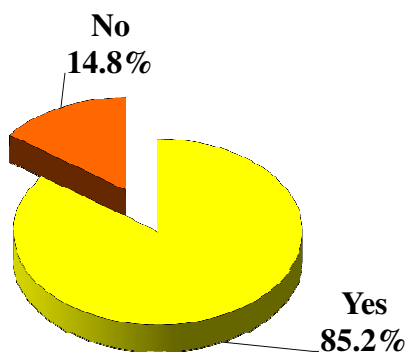
OCHO RIOS



70.8 of the cruise passengers surveyed at the Ocho Rios port indicated that they visited attractions during their stay in port, this is 1.3 percentage points less than the 72.1% who said they visited attractions in the survey for the year 2007.

Q7: During your stay in port did you visit any of our Attractions?
By Port

MONTEGO BAY



85.2% of the cruise passengers at the Montego Bay port indicated that they visited attractions during their stay in port, this is approximately 4.4 percentage points less than the 89.6% who said they visited attractions in the survey for the year 2007.

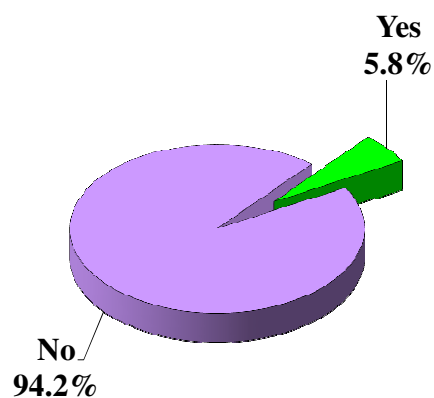
Q7a: If you visited any of the following Attractions, how would you rate their facilities and services?

	ATTRACTION							
	Dunn's River Falls	Dolphin Cove	Margarita ville	Plantation /Farm Tours	City Tours	Horseback Riding	Adventure Tours	Boat Rides
Base	1,074	456	478	368	418	362	580	365
	%	%	%	%	%	%	%	%
Excellent	72.7	85.3	64.0	63.0	73.0	90.0	76.6	82.3
Good	26.7	14.5	27.6	35.6	24.6	9.7	22.4	16.6
Fair	0.6	0.2	7.3	1.1	1.7	0.3	0.8	1.1
Poor/Needs Improvement	0.0	0.0	1.1	0.3	0.7	0.0	0.2	0.0
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Other Attractions Visited

BEACHES
BOB'S BIRTHPLACE
RAIN FOREST
MAHOE FALLS
MYSTIC MOUNTAIN
RESORT VISIT
SNORKELLING
WET & WILD
SHOPPING TOURS
ROSE HALL TOUR
GREEN GROTTTO CA
CRAFT MARKET
MOUNTAIN TO SEA
BIRD SANCTUARY
SPICE MOUNTAIN
BLUE LAGOON
COUNTRY DRIVE
BLACK RIVER SAFARI

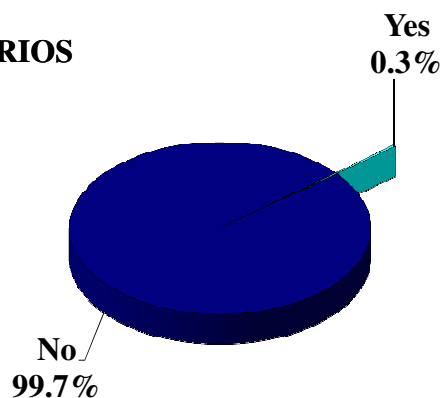
Q8: Would you say that you were harassed in any way during your visit here?



5.8% of the cruise passengers indicated that they were harassed during their stay in port, this is a slight decrease from the 6.1% who said they were harassed in the survey for the year 2007.

Q8: Would you say that you were harassed in any way during your visit here?
By Port

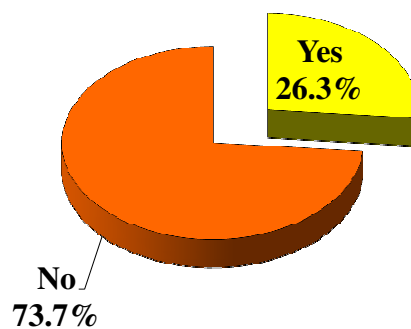
OCHO RIOS



0.3% of the cruise passengers at the Ocho Rios port indicated that they harassed during their stay, compared to the 0.9% who said they were harassed in the survey for the year 2007.

Q8: Would you say that you were harassed in any way during your visit here?
By Port

MONTEGO BAY



26.3% of the cruise passengers at the Montego Bay port indicated that they were harassed while in port. This is a decrease of 2.1 percentage points when compared to the level of 28.4% in 2007.

Q8a: Where were you Harassed?

	OCHO RIOS	MONTEGO BAY	TOTAL
Base	67 %	480 %	556 %
In the Shopping Areas	38.5	61.2	60.4
On the Streets	38.5	55.7	55.1
At the Attractions	53.8	9.3	10.8
On the Beach	0.0	12.0	11.6
At the Pier	0.0	9.0	8.7

* Percentage will not add to 100 because of multiple responses

🗣️ **Of the cruise passengers who said they were harassed, the main areas in which this harassment took place were in *the shopping areas* and on *the streets***

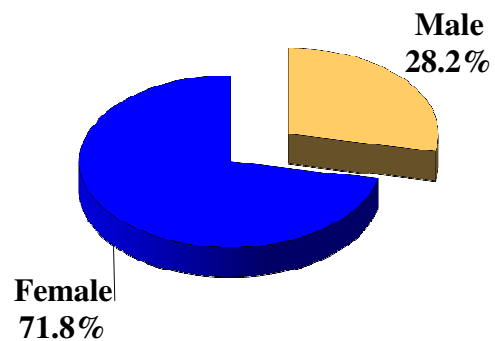
Q9: Which other ports have you visited on this trip?

Base	9,144 %
Labadee, Haiti	25.9
Cozumel, Mexico	25.5
Grand Cayman	19.6
Princess Cay, Bahamas	2.1
Other Ports	7.9
	100.0

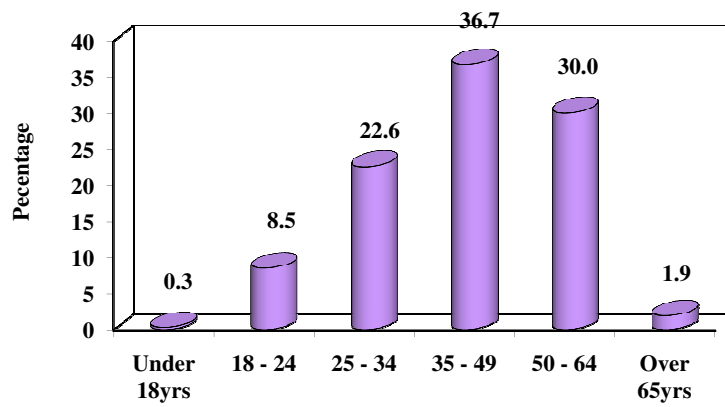
**Q9a:How do you rate this port of call to the other ports
you visited on this trip?**

	OCHO RIOS	MONTEGO BAY
BASE	5,123 %	1,435 %
Much Better	39.6	22.9
Better	55.8	33.8
About the same	4.6	37.2
Worse	0.0	6.1
	100.0	100.0

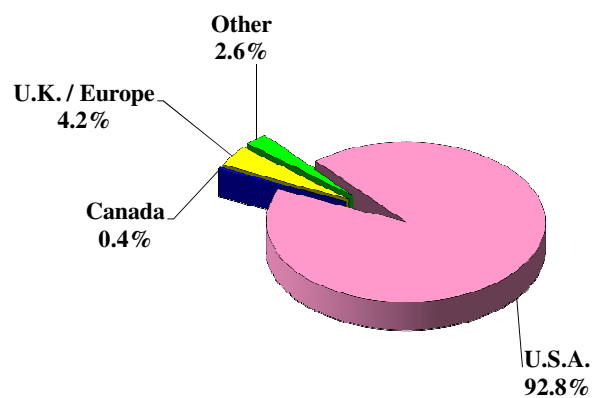
Gender Distribution of Cruise Passengers



Age Distribution of Cruise Passengers



Country of Residence of Cruise Passengers



STATE	#	%SHARE
Texas	824	13.3
Florida	357	5.8
Ohio	262	4.2
Louisiana	258	4.2
South Carolina	184	3.0
Oklahoma	182	2.9
Alabama	149	2.4
New York	147	2.4
Tennessee	146	2.4
California	140	2.3
Georgia	132	2.1
Iowa	131	2.1
Kansas	130	2.1
Utah	129	2.1
Wisconsin	129	2.1
Virginia	127	2.1
Kentucky	123	2.0
Arizona	116	1.9
Idaho	115	1.9
North Carolina	115	1.9
Other States	2,196	35.5
Not stated	93	1.5
U.S.A.	6,185	100.0

COMMENTS

519 passengers were interviewed at the Montego Bay and Ocho Rios Piers.

- 470 were positive comments
- 35 Negatives
- 2 Requests
- 6 Mixed Reactions
- 6 Recommendations

Positives

- 5th time to Jamaica – had fun
- Beautiful country, people are nice and friendly
- Enjoyed the tour will tell all my friends
- Food was excellent
- Great experience. I love Jamaica
- I had a great time. My kids really enjoyed the tour. Will definitely encourage my friends to take the kids and visit

Positives Cont'd

- We had so much fun today. I will encourage all my friends to visit because they fear visiting because of the crime
- We had such a great time. The host taught us a lot of Jamaican culture and dance.
- We will most definitely visit again. We got married here. It was amazing, the island is beautiful. A friend recommended here

Negatives

- Did not get around properly, shuttle was not good
- Not many wheelchair accessible areas/taxis
- Port reception and departure – worst in the world
- Pressured at Fort Market. Had to leave. Felt more and most comfortable at the beach
- The garbage needs to be picked up to make the country appear nicer and cleaner
- The people in the shops are too pushy and aggressive. Let people shop without harassing them

Negatives Cont'd

- The taxi transportation fees are too high and they do not explain fees at start of trip
- The driver was late picking us up at the Falls. They should have a policy for being late or give us back a percentage
- The vendors at the Falls were too pushy and they also tried to sell us drugs

Requests

- Do not contact
- Please email promotions

Mixed Reactions

- Nice trips, except JTB drivers makes you or better say, force you to tip them
- The country seems to have taken a lot of battering from the hurricane lately. Some people are very friendly
- We enjoyed the Falls very much, but the vendors were very aggressive and they sort of scared me a bit
- We will definitely visit next year. Our only concern are the vendors at the Falls. They are very pushy

Recommendations

- Repair the roads, schools. Its great to see emphasis placed on education
- There should be stores at the port and other duty free shops
- Tourists need to be taken to the craft market to buy from the locals and not from rich Indians whose merchandise is over priced to pay shuttle driver to take tourists to them