

Research Paper:

Cruise Tourism in Greater Caribbean

Region



ACS Directorate of Sustainable Tourism

JULY-2016

INTRODUCTION

Taking into account the privileged natural and cultural heritage that constitutes its main attraction and reason for investment, cruise tourism represents one of the tourism market segments that have experienced the highest growth in recent years, especially in the Greater Caribbean Region. Cruise Tourism has been capitalised by international tourism companies, including cruise lines and without a shadow of a doubt, this form of tourism has become a global phenomenon.

The Cruise Tourism segment has moved from being a small part of the oceanic passenger industry to a complete and complex business that has benefitted countries' economies, especially those in the Greater Caribbean Region. Cruise Tourism was initially a means of travel targeting a segment with high purchasing power and later became a product available to a market that includes different socioeconomic profiles.

Considering that the Caribbean has the highest rates of tourist arrivals in the world, cruise ships have a powerful impact on the countries where they operate since they require good port infrastructure, business and services and generates a significant amount of economic revenue and employment for the Region. According to *Caribbean News Digital* magazine, the Caribbean Region receives on an annual basis, an average of 50 thousand vessels of all types which signifies that approximately 60% of cruise ship passengers visit the Caribbean.

It is absolutely necessary to recognise that without improving these services and without functional support, achieving tourism progress in the Caribbean would prove difficult, since it must be tackled as an issue of vital importance wherein those involved seek concrete advancements that would contribute to the sustainable development of the Greater Caribbean Region.

Bearing in mind that Cruise Tourism has become one of the major attractions and driving forces behind the economy in the area of tourism, today, new and effective mechanisms must be adopted to facilitate economic and cultural exchange among the countries of the Region. The foregoing presents new challenges that push the Region to achieve new standards of competitiveness by generating foreign exchange, whether as a product of the average expenditure of visitors, the payment of port duties or trust funds created for this segment by each destination. Another challenge is effective and attainable connectivity among the countries of the Region which would facilitate the development of trade ties with other countries in the world.

Cruise Tourism in the Greater Caribbean Region

Cruise tourism began in 1960, which coincided with the decline of the transoceanic ship industry and the introduction of the first non-stop flights between the United States and Europe.

The period between 1970 and 1990 was defined as the period of growth of the industry, moving from half a million passengers in 1970 to 1.4 million in 1980, reaching 3.8 million in 1990.¹ From that point onward, this type of tourism reached Europe, Asia and Oceania, launching a period of tremendous growth. Nowadays, North American countries have the most cruise ship clients and represent more than 80% of the entire global market, followed by European and Asian countries, while the Caribbean is the fastest growing destination.

In this regard, over the course of time, the countries belonging to the Greater Caribbean Region have sought to implement collective measures that would promote cruise tourism together with sustainable economic development, thereby experiencing high growth that has identified it as a strategic and vital market for the Region's economy thanks to its tourist destinations that are considered to be one of the most attractive in the world.

FIGURE 1- THE REGION OF THE GREATER CARIBBEAN



¹ Professor at the University of Quintana Roo Mexico, *Alejandro Palafox Muñoz*, *Ibero-American Tourism Magazine* "Cruise Tourism in the Caribbean Region".

Cruise Tourism in the Greater Caribbean Region

Today, companies dedicated to this segment work constantly to provide better, cutting edge services, for the purpose of attracting clients who are interested in visiting the Caribbean Region.

The following are some of the reasons why the Caribbean is considered one of the most important destinations for the cruise industry:

- **Geography:** the Region is made up mostly of a chain of islands involving very short distances among the ports where cruise ships stopover. In addition, the Region boasts a variety of landscapes, tropical rainforests and the presence of coral reefs.
- **History and Culture:** the Region has a long history associated with European colonialism and is home to the oldest settlements in the Americas of African, Spanish, English, French and Dutch origin, making the Caribbean islands a highly diverse Region. Thus, the cruise industry has the ability to offer its clients a variety of cultural experiences.
- **Commercial:** since it is a Region that lies adjacent to the countries of North America, the Caribbean provides a market for potential tourists who have the purchasing power to pay for cruises without having to travel far from their home towns to embark on a trip.

In light of this scenario, it has been demonstrated that with time the Caribbean is one of the most popular cruise destinations in the world. This is based on a report published by the *Caribbean Tourism Organisation* (CTO) which states that approximately 25 million cruise ship passengers visited 24 Caribbean destinations in 2014, a figure that has increased by 11% in 2015.²

Since cruise ships have stopovers in multiple destinations on a single trip, passenger arrivals increased significantly in 2014 and 2015. In addition, the proximity between the Greater Caribbean and the United States (especially during the winter), has been one of the crucial factors in the growth of the cruise industry in the Region.

² "Caribbean News Digital" Magazine/Cruise News

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Moreover, the Greater Caribbean is a strong attraction for cruise ships from around the world, since data obtained from cruise ship passengers' surveys reveal that 71% are from the United States, 12% from Canada, 6% from the United Kingdom and 5% between Germany and other countries. The remaining passengers are from a wide range of countries, including Australia, Mexico, Philippines and South Africa, to name a few.³

Some cruise lines and their most prominent routes operating at Greater Caribbean ports include⁴:

➤ Holland América de Carnival Cruise

Itinerary



➤ Royal Caribbean

Itinerary



³ Florida Caribbean Cruise Association, "Economic Contribution of Cruise Tourism to the Destination Economies", 2015 report.

⁴ The Diagrams of cruise navigation routes are presented based on information published by each company on their official websites.

Cruise Tourism in the Greater Caribbean Region



➤ Pullmantur Cruises

Itinerary



Cruise Tourism in the Greater Caribbean Region

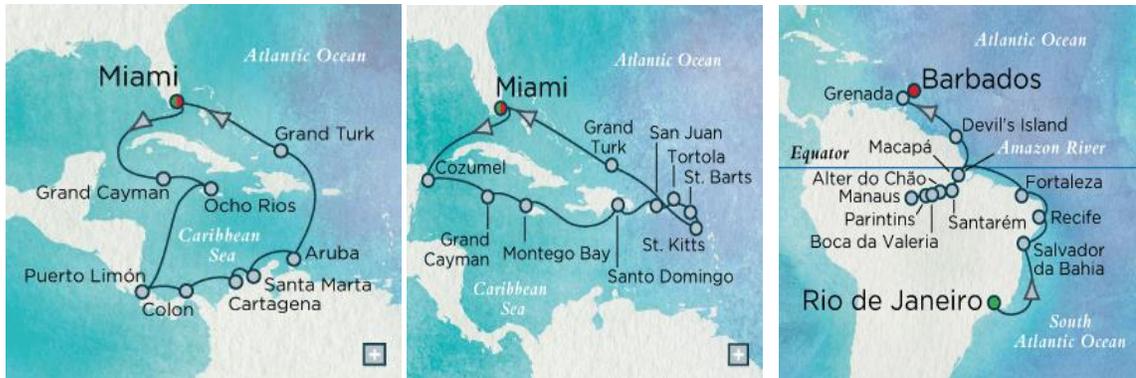
➤ MSC Cruceros

Itinerary



➤ Crystal Cruise

Itinerary

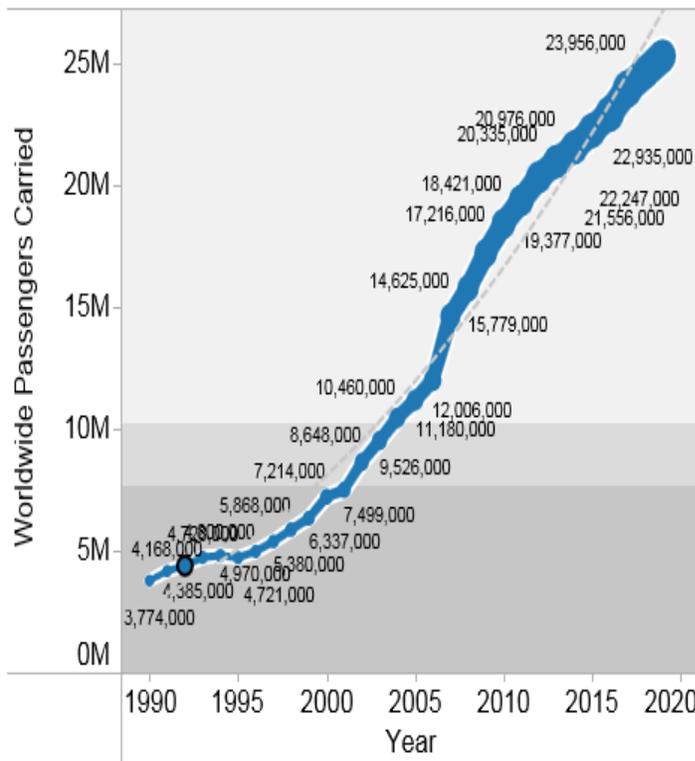


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However, according to *Florida Caribbean Cruise Association (FCCA)*, in 2015, new cruise lines were introduced as well as a total of 7 new vessels, in addition to which, total passenger capacity increased to 18.813 million.⁵ This is indicative of an increase in cruise ship operations in the Greater Caribbean Region.

It is estimated that in 2016 and 2017, the growth of this segment of the travel industry would continue and by extension, passenger capacity, since this industry will implement itineraries that will travel around the world, with the Greater Caribbean Region being included among its routes. The following chart shows the international growth of cruise visits in the Caribbean Region from 1990 to 2015, and what the forecasts indicate for 2020.

FIGURE – 2
-Worldwide Passengers Carried

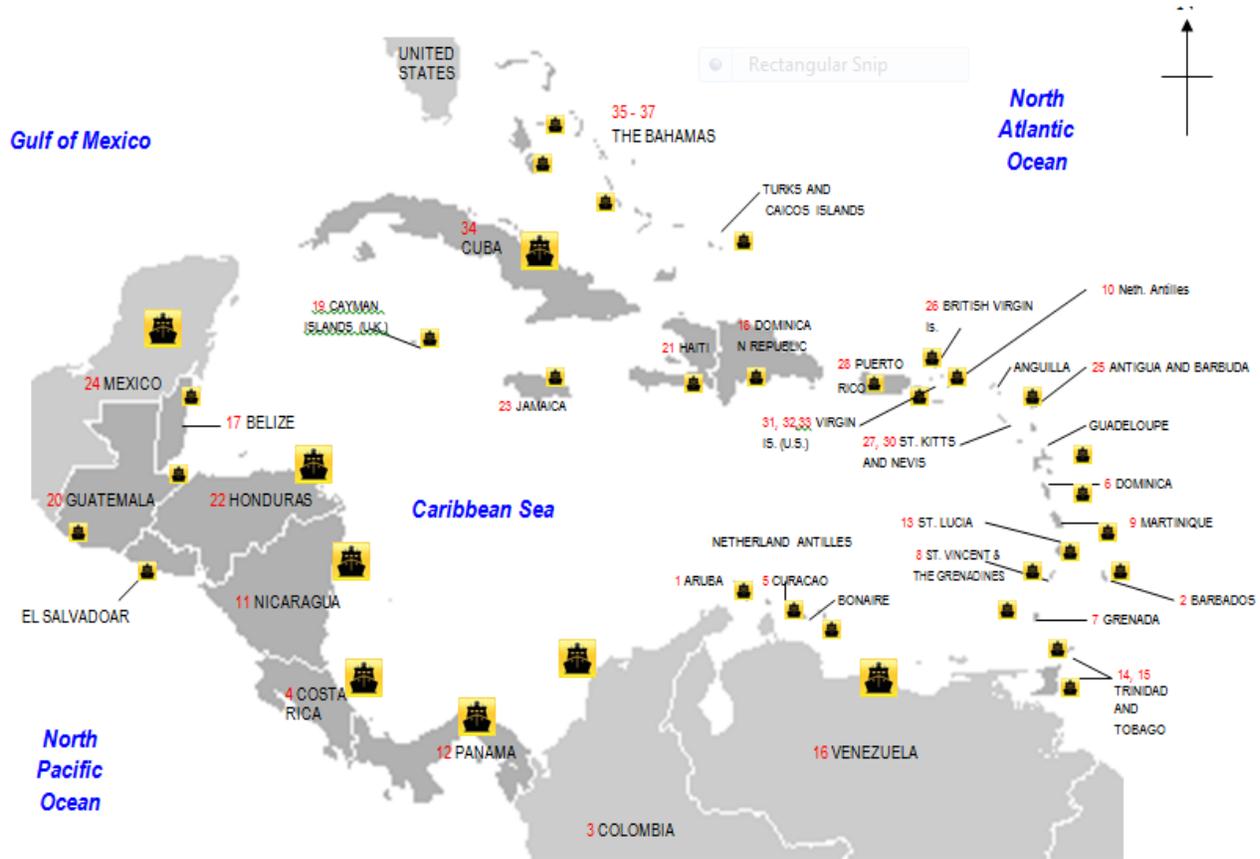


Source: Cruise Market Watch
(2015)

⁵ *Growth of the Cruise Line Industry*, Cruise Market Watch
<http://www.cruisemarketwatch.com/growth/>

Cruise Tourism in the Greater Caribbean Region

FIGURE – 3
Map of the Greater Caribbean and its Main Ports



PRINCIPALES PUERTOS DEL GRAN CARIBE			
<ul style="list-style-type: none"> 1. Oranjestad, Aruba 2. Bridgetown, Barbados 3. Cartengena, Providence, San Andres, Colombia 4. Puerto Moin; Puerto Limon, Costa Rica 5. Willemsted, Curacao 6. Cabrits; Portsmouth; Roseau, Dominica 7. St. George's, Grenada 8. Bequia; Mayreau; Tobago Cays, Grenadines 9. Fort de France, Martinique 10. Saba, Netherland Antilles 11. San Juan del Sur, Nicaragua 12. Cristóbal; Colon; San Blas Isl., Panama 13. Castries, St. Lucia 14. Scarborough, Tobago 15. Port of Spain, Trinidad 16. Los Roques; Tortuga; Margarita, Venezuela 	<ul style="list-style-type: none"> 17. Belize City; Hunting Caye, Belize 18. Catalina Island; Cay Levantado; La Romana; Samana, Dominican Republic 19. George Town, Grand Cayman 20. Izabal, Istapa, Guatemala 21. Labadee, Haiti 22. Roatán; Puerto Cortes, Trujillo, Honduras 23. Ocho Rios; Montego Bay; Port Antonio, Jamaica 24. Cancún; Costa Maya; Cozumel; Majahual; Mérida; Veracruz, México 25. Sonsonate, El Salvador 	<ul style="list-style-type: none"> 26. St. John's, Antigua 27. Jost Van Dyke; Virgen Gorda, British Virgin Islands 28. Charlestown, Nevis 29. Culebra; Ponce; San Juan, Puerto Rico 30. Gustavia, St. Barts 31. Basseterre, St. Kitt's 32. Christiansted; Frederiksted, St. Croix, US Virgin Islands 33. Cruz Bay, St. John, US Virgin Islands 34. Charlotte Amalie, St. Thomas, US Virgin Islands 	<ul style="list-style-type: none"> 35. Santiago; Havana, Cuba 36. Freeport, Grand Bahama, Bahamas 37. Nassau, New Providence Island, Bahamas 38. Paradise Island, Bahamas 39. City of Hamilton; King's Wharf; St. George Town, Bermuda

Source: Caribbean Cruise Ports

FIGURE – 4

The Following Graphic shows the areas with the Heaviest Cruise Traffic in the Greater Caribbean Zone.

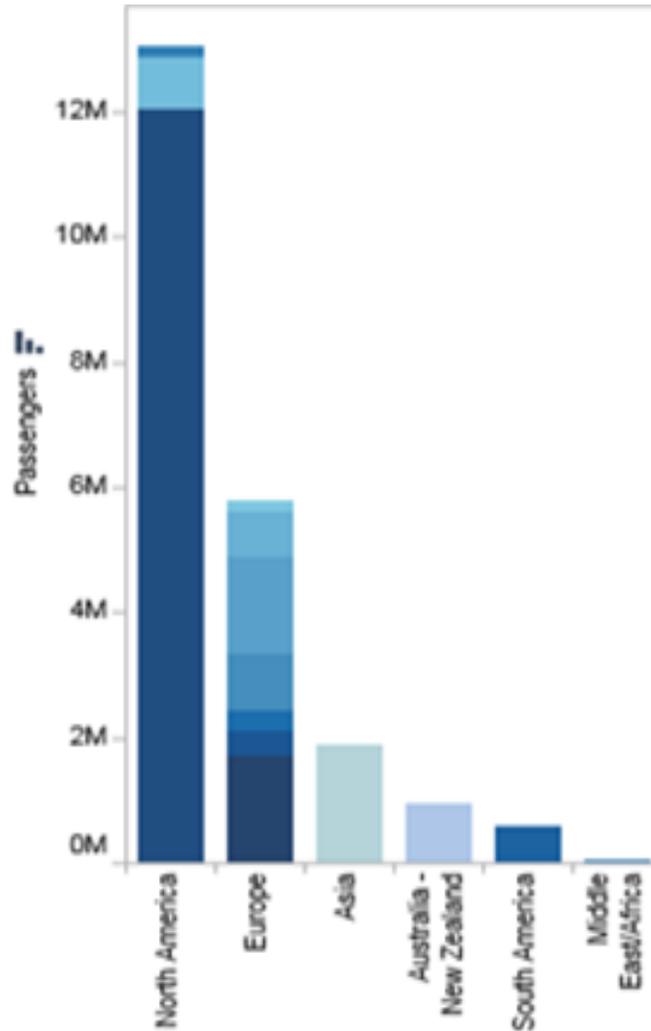


Source: Cruise Market Watch
(2015)

Additionally, *Cruise Lines International Association (CLIA)* statistics indicate that the average expenditure of each passenger visiting the Greater Caribbean ranges between \$222.00 and \$300 dollars, in each destination, during a 7-8 day trip, which reflects the importance of the economic revenue generated for the Region as a major tourist destination. The following chart shows the countries of origin of most cruise ship visits.⁶

⁶ Geography, *Cruise Market Watch*

FIGURE- 5



Source: Cruise Market Watch (2015)

In this way, Cruise Tourism faces its own set of challenges in the Greater Caribbean Region due primarily to the increasing statistics that show that the Region is the most popular destination in the industry. It has therefore become a crucial activity for commerce and the development of regional ports, taking into account the need to facilitate the mobilisation of cruise ships loaded with thousands of tourists that benefit the economies of all the countries of the Region.

The foregoing demonstrates the globalisation process of the international market in this sector, which increasingly receives higher rates of passengers and which at the same time, offers new options for vessels that will soon allow navigation through innovative port infrastructure, attracting even larger cruise ships.

In this respect, a clear example of this growth is the introduction of various cruise lines that will navigate the Caribbean Sea: *Holland American Line*, which is a cruise line that will offer trips with a duration of 7 -21 nights, with itineraries covering routes in the east, west and south of the Caribbean. In addition, the *Nieuw Amsterdam* cruise line which will begin its trips in 2016 and which, for the very first time, will dock at the *Amber Cove* port located in the Dominican Republic, offering a welcome centre, an artisan market, traditional cuisine and a transport centre to access tours to different tourist attractions. Other examples of cruise ships include *Znith*, coming from France and operated by the Pullmantur cruise line, *Norwegian*, originating from Miami, Florida, *Aida Mar* from Germany and *Monarch*, which belongs to the Royal Caribbean line, from which an average of 45,000 passengers will be disembarking around the Greater Caribbean Region on a monthly basis, generating an attractive supply of cruise ships for potential tourists, as well as new itineraries thereby establishing more ports and destinations connecting Europe, Asia and South America. However, the Greater Caribbean will continue to be the main destination, servicing 37.3% of the itineraries travelled globally, when compared with the following: Mediterranean with 18.9% Northern Europe with 11.1%, Australia and New Zealand with 5.9%, Alaska with 4.5% and South America with 3.3%.⁷

In terms of connectivity, according to what has been published by *Caribbean News Digital*, there is high expectation regarding the signing of contracts between the United States *Carnival* cruise line and Cuban companies, to commence operations between the US and Cuba from May 2016. This would promote not only cruise operations between both countries, but also mutually benefit bilateral cooperation, taking into account compliance with the respective laws governing maritime navigation safety, among other issues related to the national security of Cuba and the United States. This is an initiative that will undoubtedly have a positive impact on the growth of cruise tourism in the Caribbean.

⁷ TTC, Travel Trade Caribbean, Magazine "Tourist Industry".

Also under this topic of connectivity, it is important to mention that Ferries are another type of vessel operating in almost all of the islands belonging to the Greater Caribbean and which have allowed more immediate access to travel to countries that are in close geographic proximity. In light of the growing tourism in the Caribbean Region, ferries have been incorporated into the new trends that include modernisation., For example: *Caribbean Fantasy*, which travels from the Dominican Republic to Puerto Rico, as well as *L'Express des Iles*, which connects the island of Guadeloupe, Dominica, Saint Lucia and Martinique, to name a few, provide a transport capacity of up to 1,100 passengers/tourists, thereby becoming a different option for facilitating connectivity in support of tourism in the Region.⁸

⁸ Maru Relloso, Magazine on the Caribbean, "How to travel among the Caribbean islands"

Cruise Tourism in the Greater Caribbean Region

The following chart shows Cruise passenger arrivals to the different countries of the Greater Caribbean Region. (Data presented in Thousands)

Destinations	Passenger Onshore Visits (Thousands)	Average Expenditure per Passenger	Total Passenger Expenditures (\$US Millions)
Antigua & Barbuda	527.6	\$ 64.88	\$ 34.2
Aruba	546.6	\$ 112.10	\$ 61.3
Bahamas ^①	2,940.0	\$ 82.83	\$ 243.5
Barbados ^②	554.4	\$ 78.03	\$ 43.3
Belize	867.6	\$ 77.87	\$ 67.6
Bonaire	146.7	\$ 54.22	\$ 8.0
British Virgin Islands	307.8	\$ 69.43	\$ 21.4
Cabo San Lucas	211.4	\$ 85.98	\$ 18.2
Cayman Islands	1,446.3	\$ 115.60	\$ 167.2
Colombia ^②	306.6	\$ 120.70	\$ 37.0
Costa Maya	361.7	\$ 61.47	\$ 22.2
Costa Rica	187.7	\$ 82.84	\$ 15.6
Cozumel	2,538.1	\$ 119.89	\$ 304.3
Curacao	476.7	\$ 77.55	\$ 37.0
Dominica	226.0	\$ 50.81	\$ 11.5
Dominican Republic ^②	480.6	\$ 66.41	\$ 31.9
Ensenada	610.7	\$ 65.10	\$ 39.8
Grenada	201.5	\$ 46.55	\$ 9.4
Guadeloupe ^②	308.2	\$ 90.06	\$ 27.8
Guatemala	73.4	\$ 63.62	\$ 4.7
Honduras	738.1	\$ 86.51	\$ 63.8
Jamaica	1,349.1	\$ 119.29	\$ 160.9
Martinique ^②	263.7	\$ 68.99	\$ 18.2
Mazatlan	109.4	\$ 64.85	\$ 7.1
Nicaragua	43.0	\$ 54.94	\$ 2.4
Progreso	289.4	\$ 57.88	\$ 16.8
Puerto Rico (San Juan) ^②	1,393.9	\$ 88.95	\$ 124.0
Puerto Vallarta	223.8	\$ 95.43	\$ 21.4
St. Kitts & Nevis	676.5	\$ 111.30	\$ 75.3
St. Lucia	603.2	\$ 78.44	\$ 47.3
St. Maarten	1,854.4	\$ 191.26	\$ 354.7
Tobago	30.9	\$ 74.18	\$ 2.3
Trinidad	10.8	\$ 42.58	\$ 0.5
Turks and Caicos	879.0	\$ 88.75	\$ 78.0
U. S. Virgin Islands	1,839.7	\$ 150.21	\$ 276.3
All Destinations	23,624.5	\$103.83	\$2,452.8

Source : Florida Caribbean Cruise Association FCCA
(2015)

Cruise Tourism in the Greater Caribbean Region

Total Financial Contribution of Cruise Tourism by Destinations (2014-2015)

Destinations	Total Cruise Tourism Expenditures (\$US Millions)	Total Employment	Total Employee Wage Income (\$US Millions)
Antigua & Barbuda	\$ 43.9	1,170	\$ 11.10
Aruba	\$ 71.9	1,716	\$ 29.20
Bahamas	\$ 373.1	7,954	\$ 138.50
Barbados	\$ 57.3	1,845	\$ 19.50
Belize	\$ 86.3	2,492	\$ 26.50
Bonaire	\$ 9.4	191	\$ 3.20
British Virgin Islands	\$ 26.2	465	\$ 8.70
Cabo San Lucas	\$ 22.4	587	\$ 3.90
Cayman Islands	\$ 207.6	4,454	\$ 87.00
Colombia	\$ 48.4	1,089	\$ 6.90
Costa Maya	\$ 27.6	726	\$ 4.50
Costa Rica	\$ 20.0	557	\$ 3.20
Cozumel	\$ 365.5	9,727	\$ 61.00
Curacao	\$ 51.0	903	\$ 16.70
Dominica	\$ 14.2	373	\$ 2.90
Dominican Republic	\$ 61.0	1,914	\$ 8.00
Ensenada	\$ 52.7	1,370	\$ 9.50
Grenada	\$ 12.2	342	\$ 2.30
Guadeloupe	\$ 38.2	724	\$ 6.10
Guatemala	\$ 5.6	183	\$ 0.80
Honduras	\$ 73.0	1,585	\$ 7.80
Jamaica	\$ 198.6	7,067	\$ 46.10
Martinique	\$ 22.7	453	\$ 3.70
Mazatlan	\$ 9.4	268	\$ 1.50
Nicaragua	\$ 2.9	141	\$ 0.40
Progreso	\$ 23.9	609	\$ 3.60
Puerto Rico (San Juan)	\$ 198.2	5,209	\$ 75.00
Puerto Vallarta	\$ 27.1	757	\$ 4.90
St. Kitts & Nevis	\$ 84.3	1,293	\$ 11.20
St. Lucia	\$ 57.2	1,422	\$ 11.70
St. Maarten	\$ 422.9	9,259	\$ 189.10
Tobago	\$ 2.7	124	\$ 1.50
Trinidad	\$ 0.6	30	\$ 0.40
Turks and Caicos	\$ 95.0	1,654	\$ 29.10
U. S. Virgin Islands	\$ 344.3	6,397	\$ 141.00
All Destinations	\$3,157.5	75,050	\$ 976.5

Source: Florida Caribbean Cruise Association FCCA
(2015)

Conclusion

In closing, it is necessary to emphasise that the Greater Caribbean Region has a high geostrategic value given that since the arrival of European sailors, it was being transformed into one of the zones that service some of the most important trade routes in the world due to a wide range of characteristics that identify the Region and which simultaneously contributed economically to the colonising countries.

The development of the Greater Caribbean Region has been diverse throughout its history; from the tourism industry that began in the mid-20th century when economic models were substituting primary imports and promoting industrialisation. Thus, the tourism industry easily adjusted in order to have the proper conditions for its development. According to statistics that reveal a boom in tourism in this Region, especially in the Cruise segment, the high value of the natural and cultural resources that characterise the zone, coupled with the access infrastructure created during the Second World War made the activity progress with the passage of time to the present.

In this regard, Cruise Tourism in the Greater Caribbean has been set apart primarily due to its tremendous economic impact, as well as the high number of passengers or potential tourists who are motivated to visit the Region. It is therefore important for the countries belonging to the Greater Caribbean to implement production strategies in order to be able to promote the construction of port infrastructure capable of receiving a higher number of tourists and visitors. This infrastructure should be equipped with the conditions necessary to accommodate larger Cruise Ships.

Additionally, countries should implement tourism security protocols, thereby joining the new order of modernisation in the industry with practices that would foster the sustainability of the destinations. This can be done through the implementation of tourism sustainability indicators and other initiatives promoted by the Sustainable Tourism Zone of the Greater Caribbean (STZC) of the Association of Caribbean States and other initiatives existing in the Region. Furthermore, the countries of the Greater Caribbean Region should enforce public policies geared toward supporting and strengthening the cruise segment since it presents the highest growth at the global level and requires the implementation of improved investment strategies linked to more effective connectivity between the various maritime routes and port terminals.

Finally, thanks to its incomparable tourist destinations and other resources of prime importance mentioned earlier, there is no doubt that Cruise Tourism is a type of

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modern tourism and an instrument that functions as a production method by having a major economic impact on each of the countries of the Greater Caribbean Region.

The incorporation of new itineraries by cruise lines reinforces what was previously mentioned regarding the expectation of further Cruise Tourism growth for the Greater Caribbean Region, which in turn must produce a commitment from Governments for destinations to strengthen their best practices with the aim of achieving tourism sustainability.

ANNEXES

Impact of Cruise Tourism on the Greater Caribbean Region

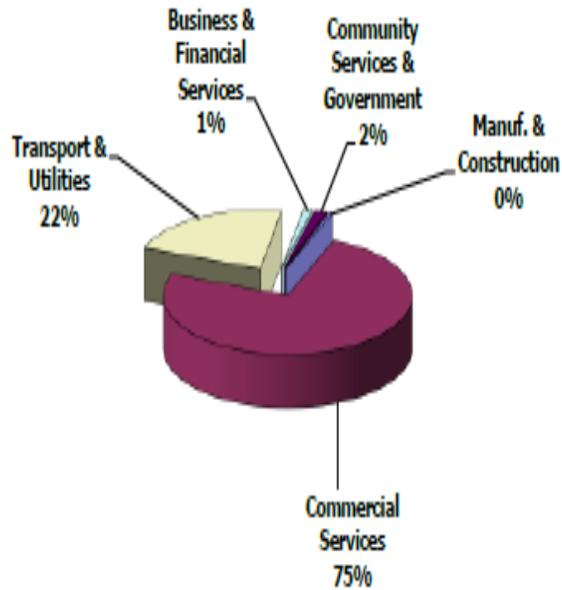
Cruise Tourism in the Greater Caribbean Region

➤ Antigua and Barbuda

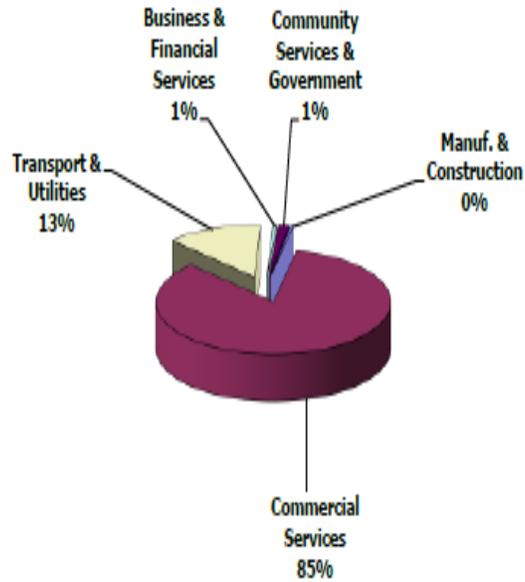
Financial Contribution of Cruise Tourism 2014-2015

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	740	\$ 6.90
Total Economic Contribution	1,170	\$11.10

Total Impact of Employment by Sector



Total Impact of Salaries by Sector



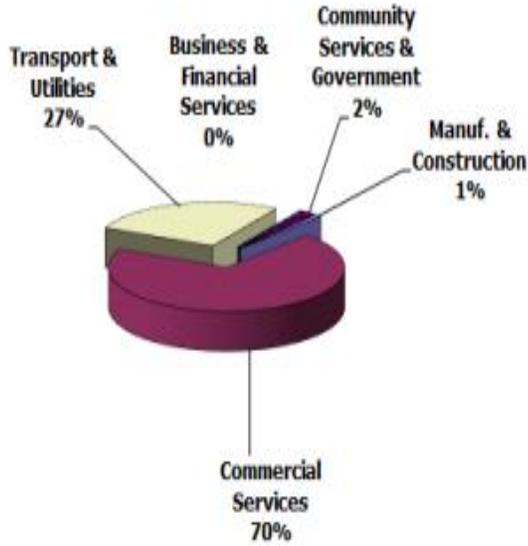
Source: Florida Caribbean Cruise Association
(2015)

➤ **Bahamas**

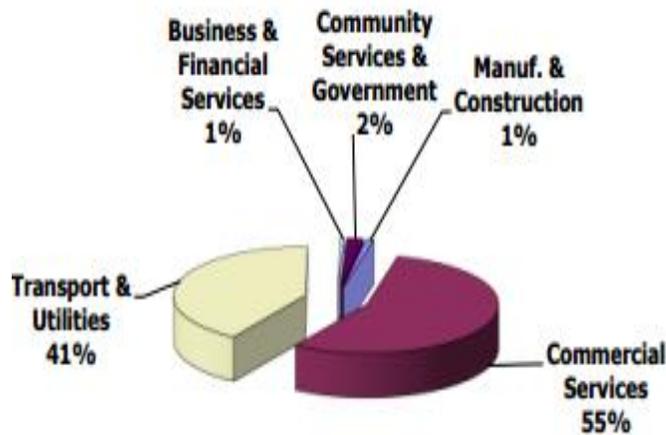
Financial Contribution of Cruise Tourism 2014-2015

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	4,568	\$ 81.00
Total Economic Contribution	7,954	\$138.50

Total Impact of Employment by Sector



Total Impact of Salaries by Sector



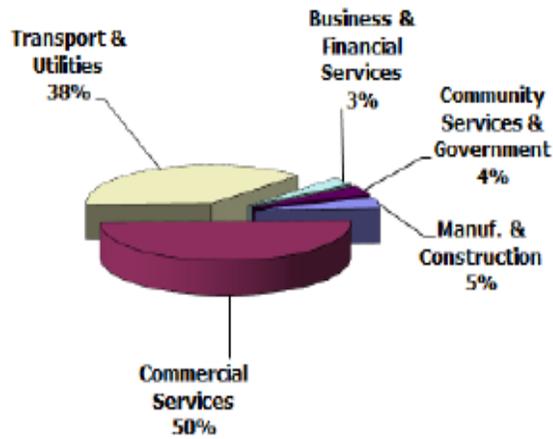
Source: Florida Caribbean Cruise Association (2015)

➤ **Dominican Republic**

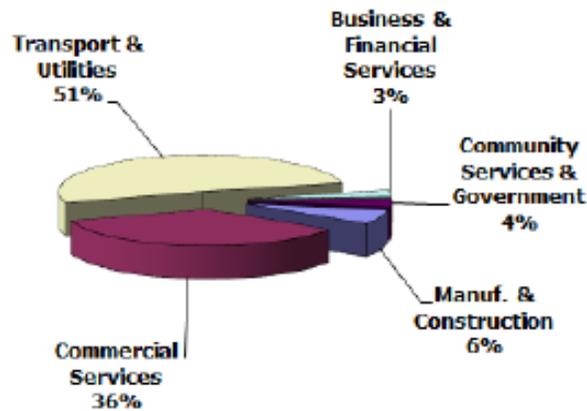
Financial Contribution of Cruise Tourism 2014-2015

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	1,211	\$5.4
Total Economic Contribution	1,914	\$8.0

Total Impact of Employment by Sector



Total Impact of Salaries by Sector



Source: Florida Caribbean Cruise Association
(2015)

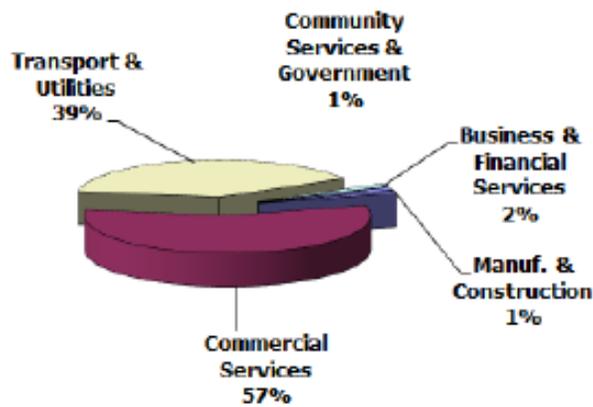
Cruise Tourism in the Greater Caribbean Region

➤ Guadeloupe

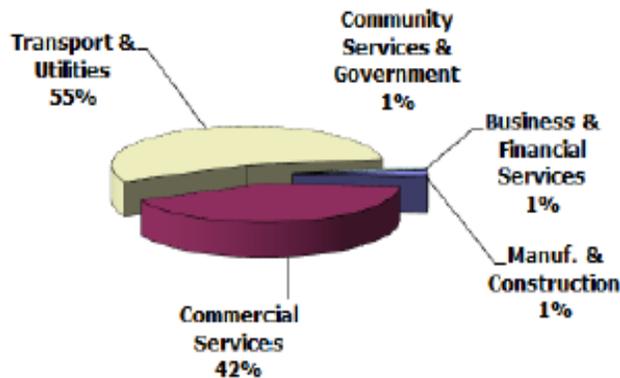
Financial Contribution of Cruise Tourism 2014-2015

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	465	\$4.0
Total Economic Contribution	724	\$6.1

Total Impact of Employment by Sector



Total Impact of Salaries by Sector



Source: Florida Caribbean Cruise Association
(2015)

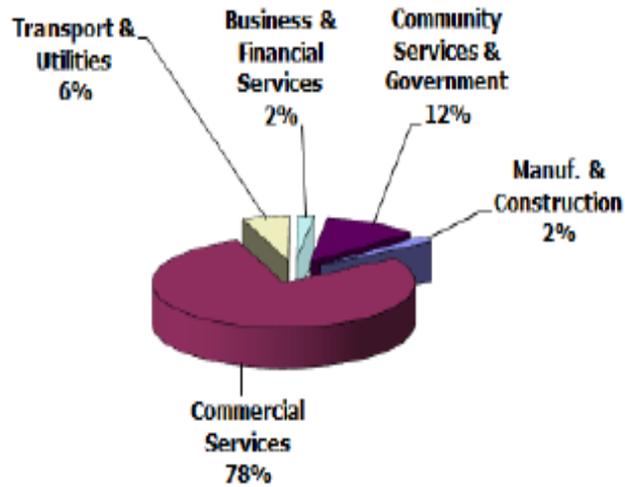
Cruise Tourism in the Greater Caribbean Region

➤ Puerto Rico

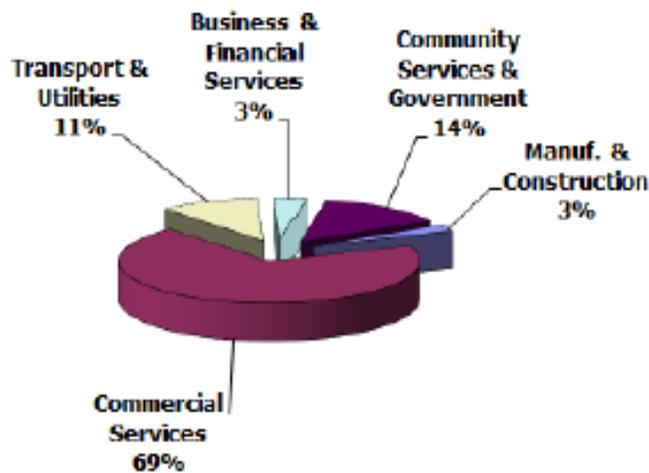
Financial Contribution of Cruise Tourism 2014-2015

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	2,814	\$38.7
Total Economic Contribution	5,209	\$75.0

Total Impact of Employment by Sector



Total Impact of Salaries by Sector



Source: Florida Caribbean Cruise Association
(2015)

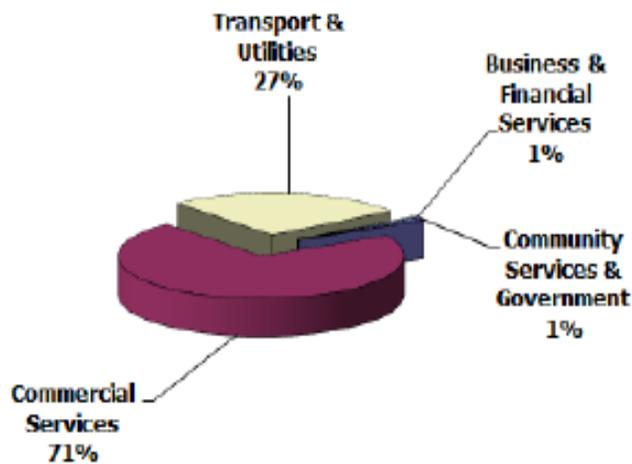
Cruise Tourism in the Greater Caribbean Region

➤ **St. Kitts and Nevis**

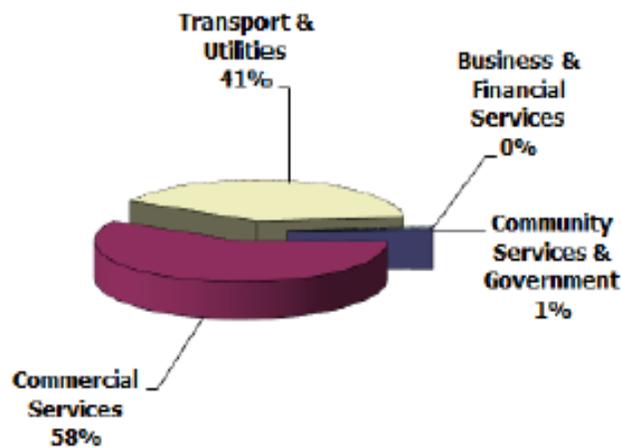
Financial Contribution of Cruise Tourism 2014-2015

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	838	\$ 7.3
Total Economic Contribution	1,293	\$11.2

Total Impact of Employment by Sector



Total Impact of Salaries by Sector



Source: Florida Caribbean Cruise Association
(2015)

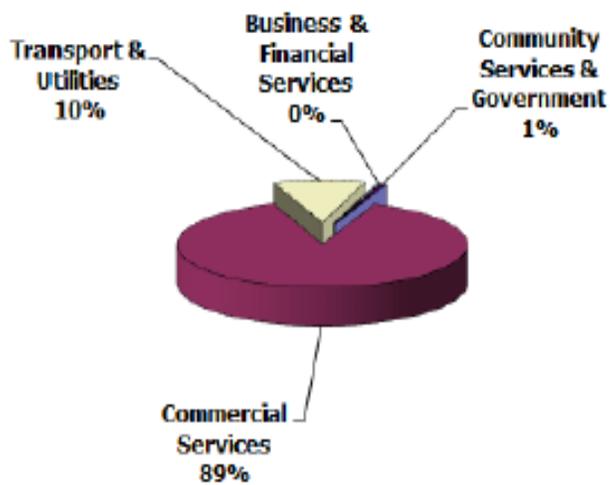
Cruise Tourism in the Greater Caribbean Region

➤ San Martin

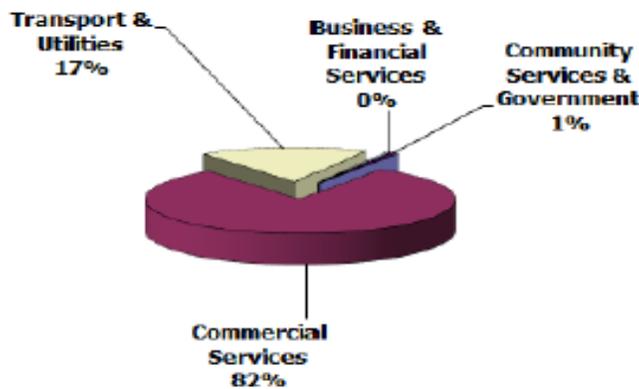
Financial Contribution of Cruise Tourism 2014-2015

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	4,897	\$101.6
Total Economic Contribution	9,259	\$189.1

Total Impact of Employment by Sector



Total Impact of Salaries by Sector



Source: Florida Caribbean Cruise Association
(2015)

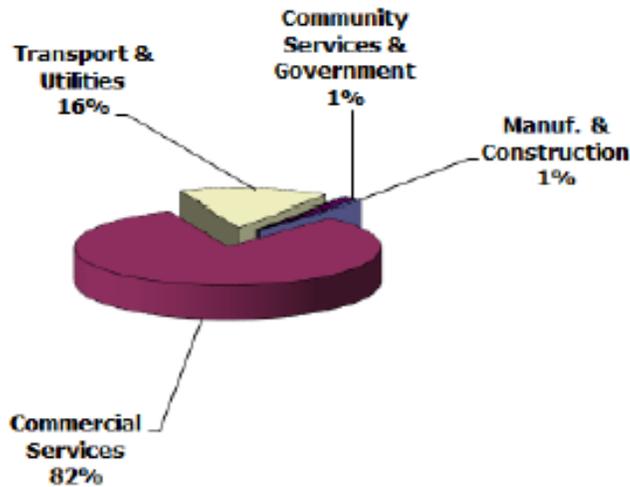
Cruise Tourism in the Greater Caribbean Region

➤ Turks and Caicos

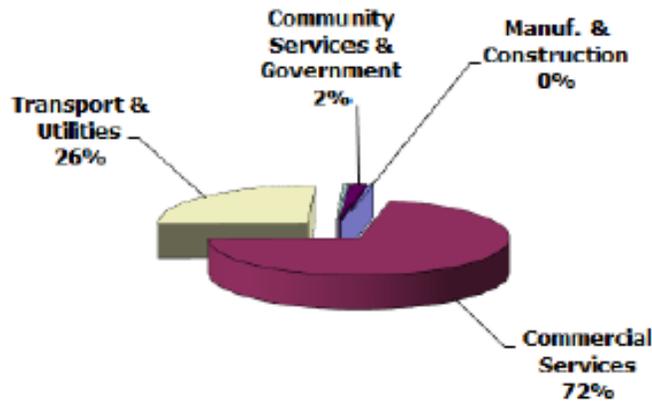
Financial Contribution of Cruise Tourism 2014-2015

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	1,064	\$18.6
Total Economic Contribution	1,654	\$29.1

Total Impact of Employment by Sector



Total Impact of Salaries by Sector



Source: Florida Caribbean Cruise Association
(2015)

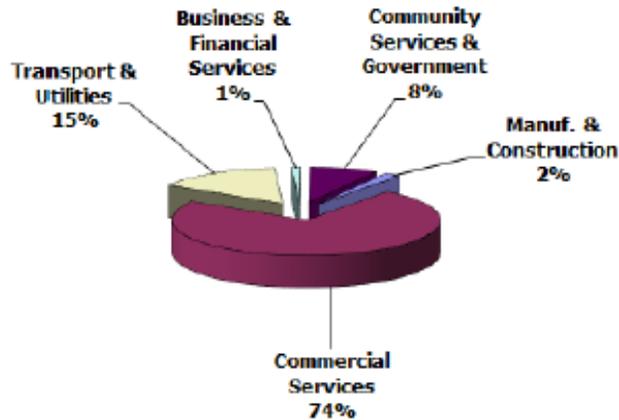
Cruise Tourism in the Greater Caribbean Region

➤ Virgin Islands

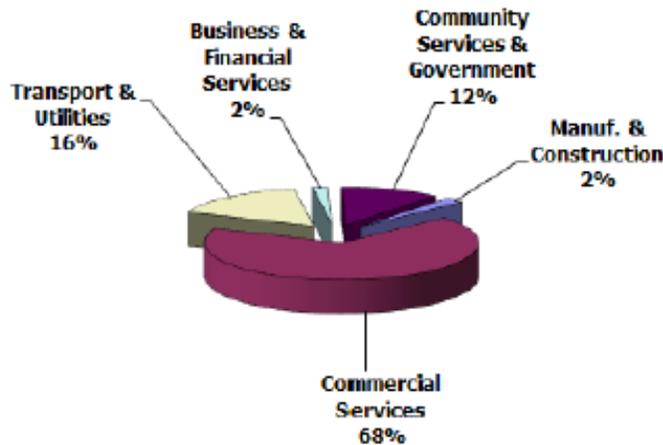
Financial Contribution of Cruise Tourism 2014-2015

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	3,396	\$ 75.0
Total Economic Contribution	6,397	\$141.0

Total Impact of Employment by Sector



Total Impact of Salaries by Sector



Source: Florida Caribbean Cruise Association
(2015)

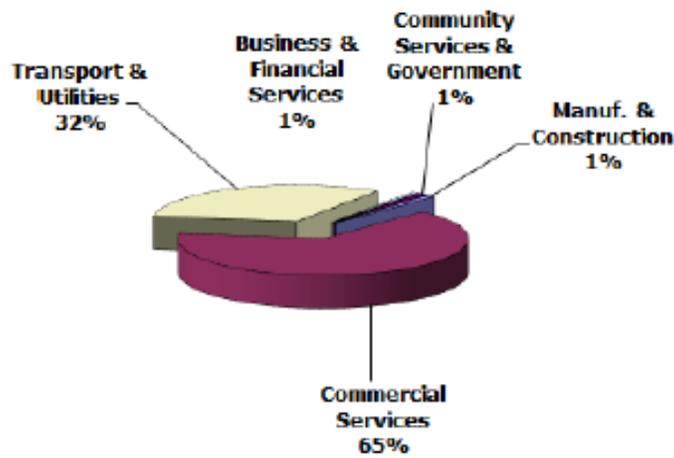
Cruise Tourism in the Greater Caribbean Region

➤ **Belize**

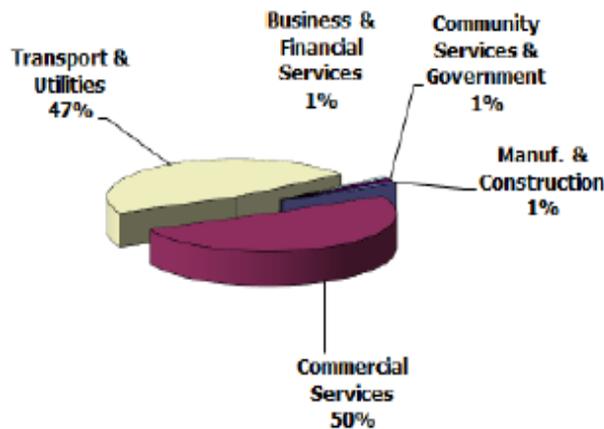
Financial Contribution of Cruise Tourism 2014-2015

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	1,666	\$17.7
Total Economic Contribution	2,492	\$26.5

Total Impact of Employment by Sector



Total Impact of Salaries by Sector



Source: Florida Caribbean Cruise Association
(2015)

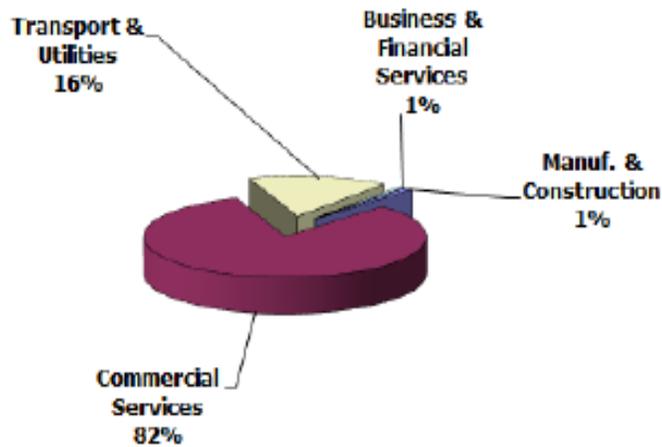
Cruise Tourism in the Greater Caribbean Region

➤ **Cayman island**

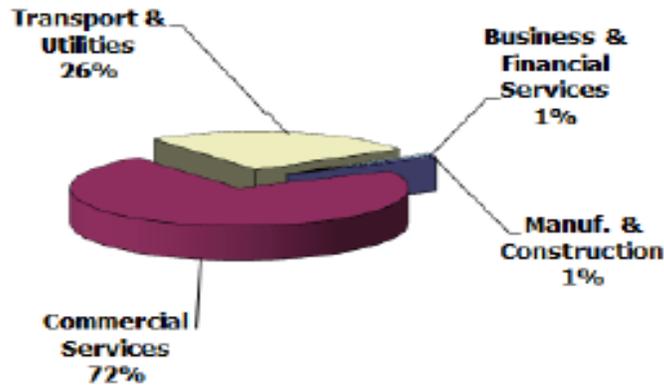
Financial Contribution of Cruise Tourism 2014-2015

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	2,453	\$47.4
Total Economic Contribution	4,454	\$87.0

Total Impact of Employment by Sector



Total Impact of Salaries by Sector



Source: Florida Caribbean Cruise Association
(2015)

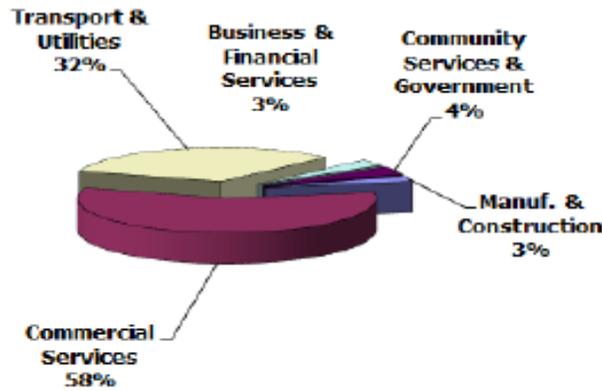
Cruise Tourism in the Greater Caribbean Region

➤ Colombia

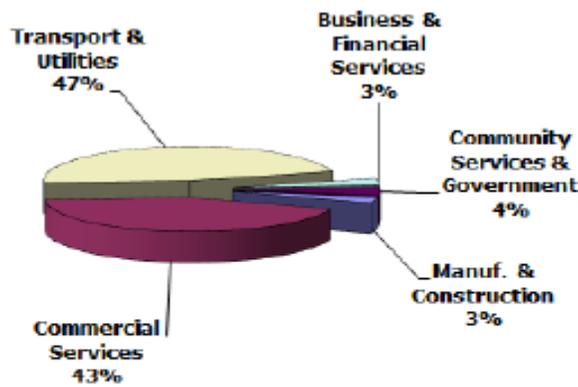
Financial Contribution of Cruise Tourism 2014-2015

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	686	\$4.5
Total Economic Contribution	1,089	\$6.9

Total Impact of Employment by Sector



Total Impact of Salaries by Sector



Source: Florida Caribbean Cruise Association
(2015)

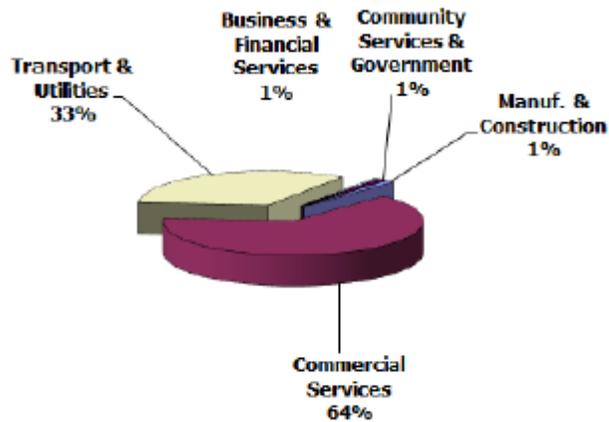
Cruise Tourism in the Greater Caribbean Region

➤ Costa Rica

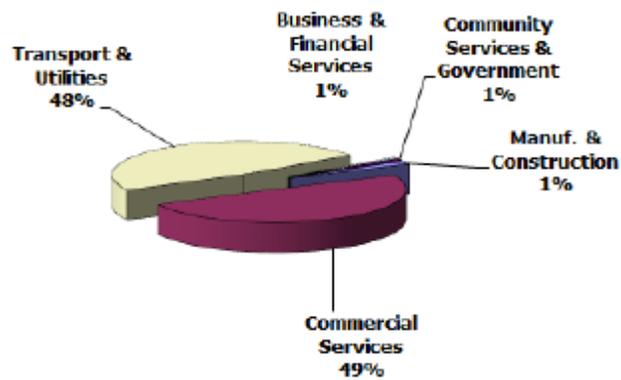
Financial Contribution of Cruise Tourism 2014-2015

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	397	\$ 2.30
Total Economic Contribution	557	\$ 3.20

Total Impact of Employment by Sector



Total Impact of Salaries by Sector



Source: Florida Caribbean Cruise Association
(2015)

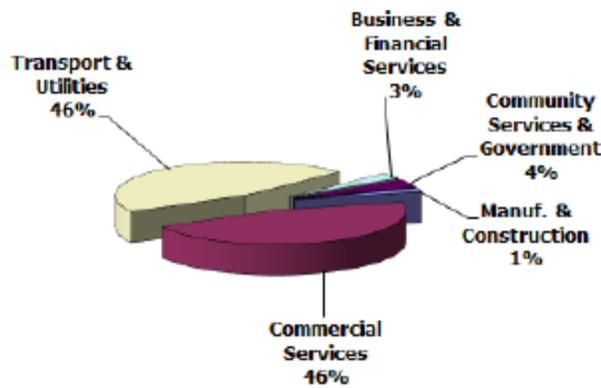
Cruise Tourism in the Greater Caribbean Region

➤ Guatemala

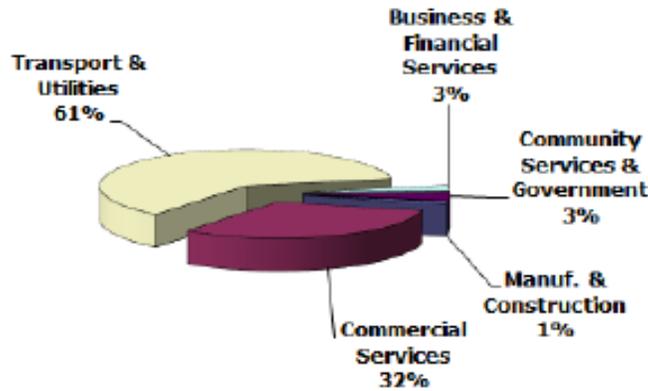
Financial Contribution of Cruise Tourism 2014-2015

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	124	\$ 0.60
Total Economic Contribution	183	\$ 0.80

Total Impact of Employment by Sector



Total Impact of Salaries by Sector



Source: Florida Caribbean Cruise Association
(2015)

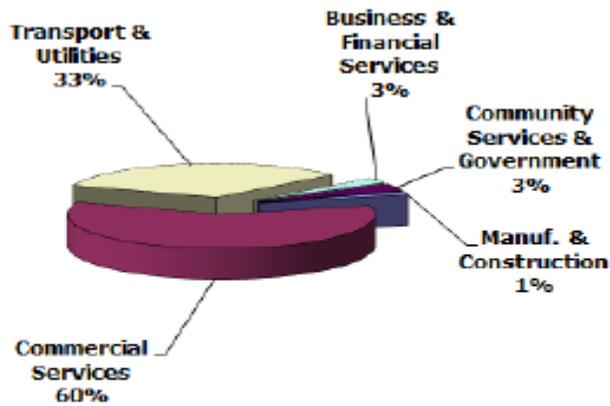
Cruise Tourism in the Greater Caribbean Region

➤ Honduras

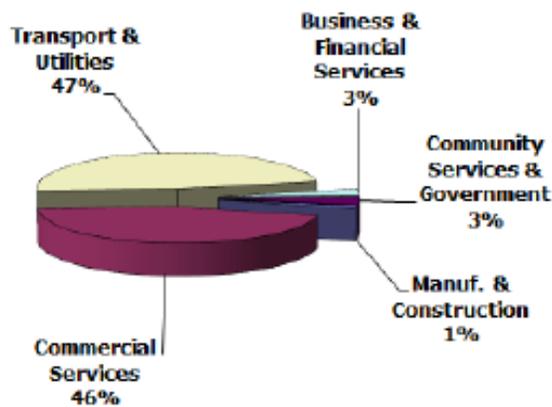
Financial Contribution of Cruise Tourism 2014-2015

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	1,101	\$ 5.40
Total Economic Contribution	1,585	\$ 7.80

Total Impact of Employment by Sector



Total Impact of Salaries by Sector



Source: Florida Caribbean Cruise Association

(2015)

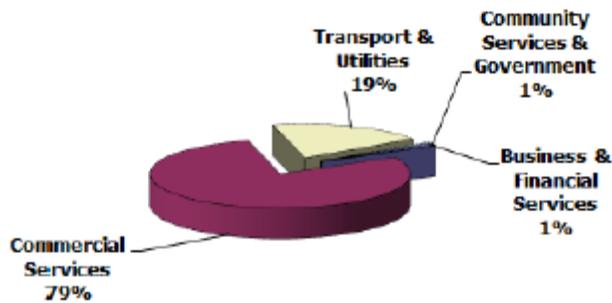
Cruise Tourism in the Greater Caribbean Region

➤ Jamaica

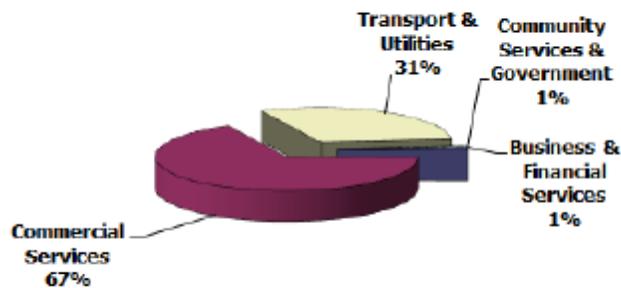
Financial Contribution of Cruise Tourism 2014-2015

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	4,494	\$29.3
Total Economic Contribution	7,067	\$46.1

Total Impact of Employment by Sector



Total Impact of Salaries by Sector



Source: Florida Caribbean Cruise Association
(2015)

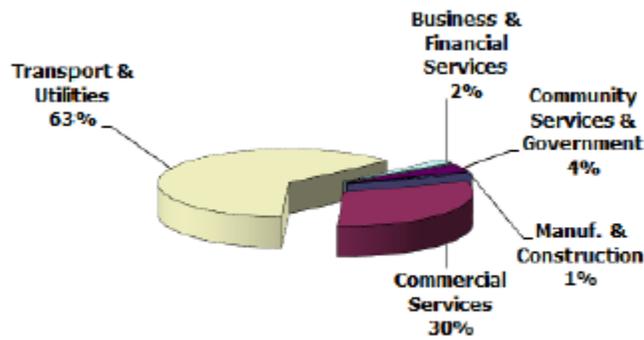
Cruise Tourism in the Greater Caribbean Region

➤ Nicaragua

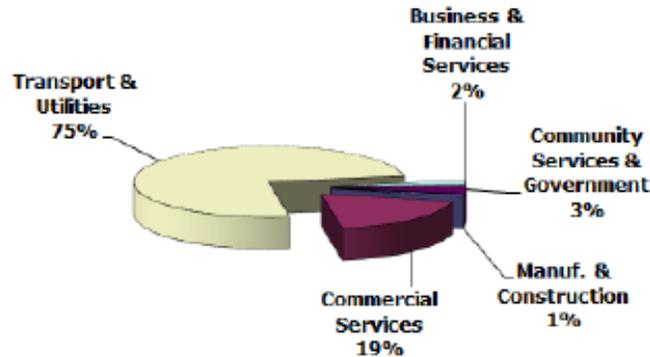
Financial Contribution of Cruise Tourism 2014-2015

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	109	\$0.30
Total Economic Contribution	141	\$0.40

Total Impact of Employment by Sector



Total Impact of Salaries by Sector



Source: Florida Caribbean Cruise Association
(2015)

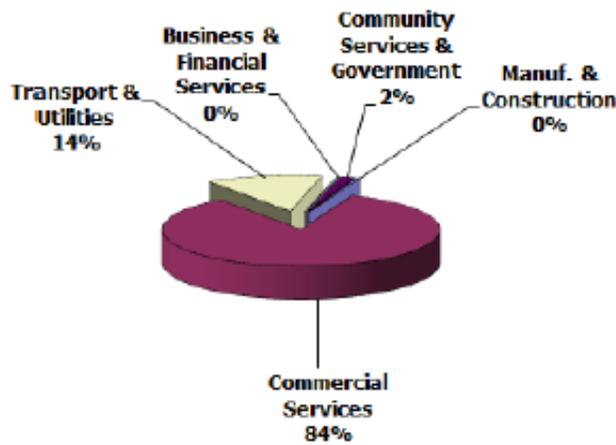
Cruise Tourism in the Greater Caribbean Region

➤ **Aruba**

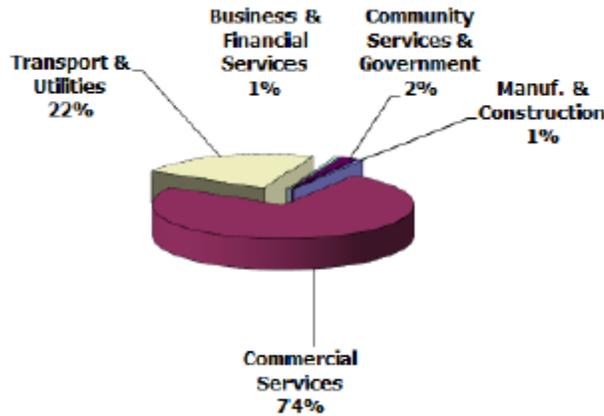
Financial Contribution of Cruise Tourism 2014-2015

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	917	\$16.0
Total Economic Contribution	1,716	\$29.2

Total Impact of Employment by Sector



Total Impact of Salaries by Sector



Source: Florida Caribbean Cruise Association
(2015)

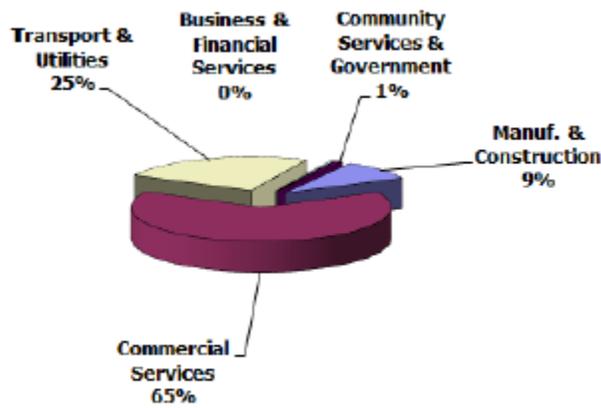
Cruise Tourism in the Greater Caribbean Region

➤ Barbados

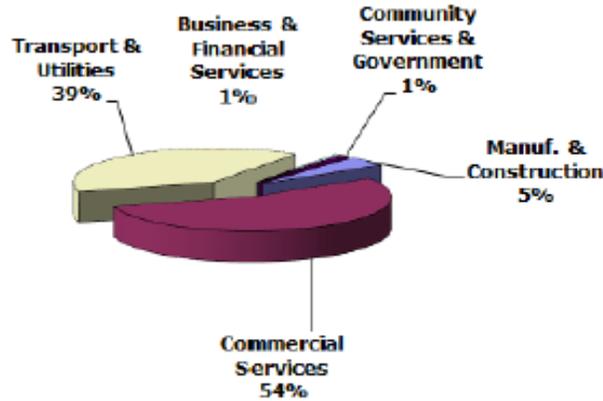
Financial Contribution of Cruise Tourism 2014-2015

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	985	\$10.9
Total Economic Contribution	1,845	\$19.5

Total Impact of Employment by Sector



Total Impact of Salaries by Sector



Source: Florida Caribbean Cruise Association
(2015)

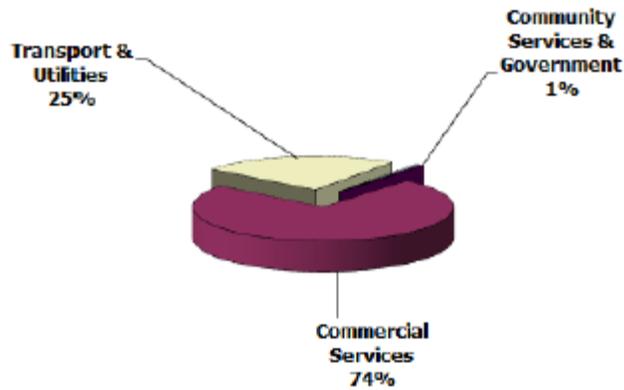
Cruise Tourism in the Greater Caribbean Region

➤ **Bonaire**

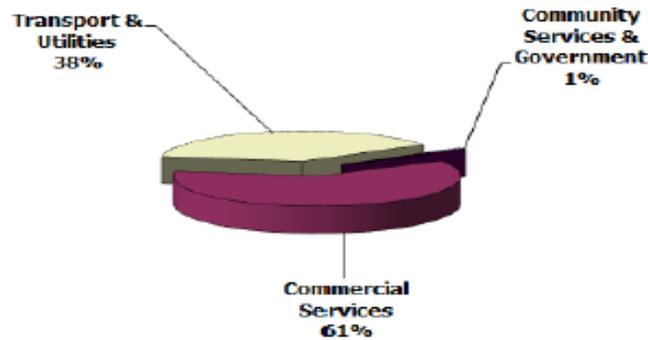
Financial Contribution of Cruise Tourism 2014-2015

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	116	\$1.90
Total Economic Contribution	191	\$3.20

Total Impact of Employment by Sector



Total Impact of Salaries by Sector



Source: Florida Caribbean Cruise Association
(2015)

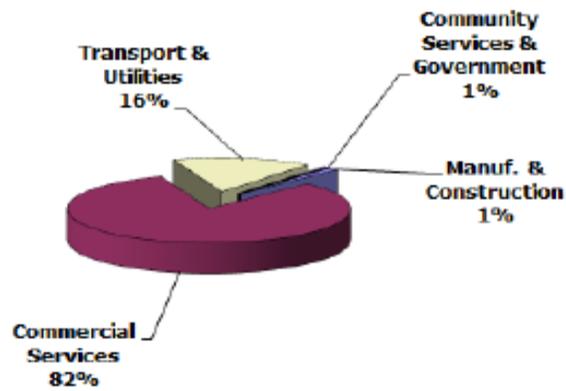
Cruise Tourism in the Greater Caribbean Region

➤ Curacao

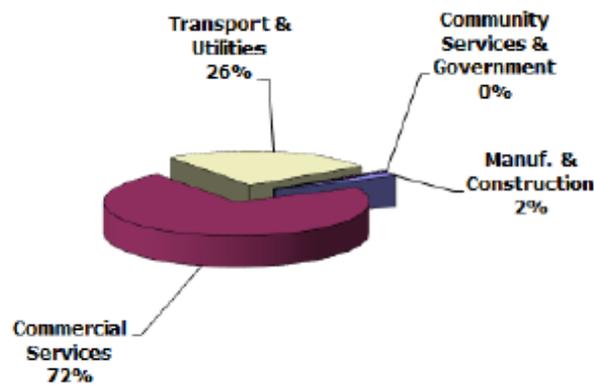
Financial Contribution of Cruise Tourism 2014-2015

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	520	\$ 9.6
Total Economic Contribution	903	\$16.7

Total Impact of Employment by Sector



Total Impact of Salaries by Sector



Source: Florida Caribbean Cruise Association
(2015)

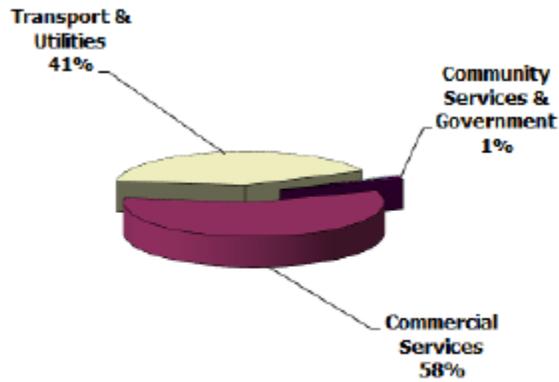
Cruise Tourism in the Greater Caribbean Region

➤ **Dominica**

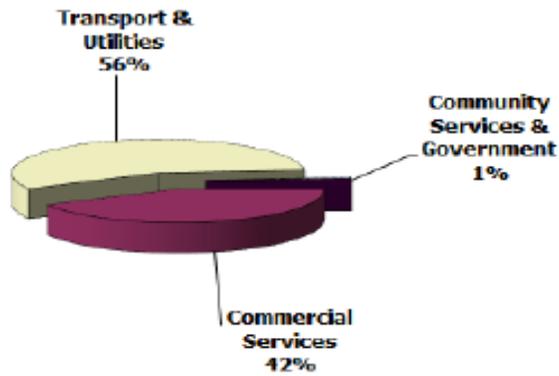
Financial Contribution of Cruise Tourism 2014-2015

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	236	\$1.90
Total Economic Contribution	373	\$2.90

Total Impact of Employment by Sector



Total Impact of Salaries by Sector



Source: Florida Caribbean Cruise Association
(2015)

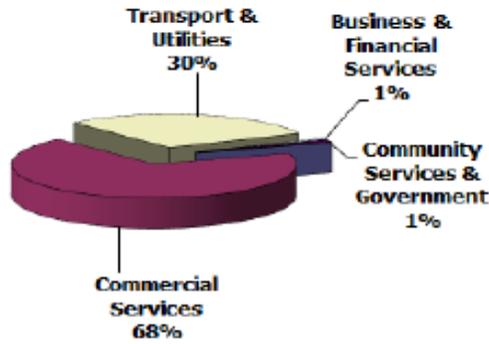
Cruise Tourism in the Greater Caribbean Region

➤ **Grenada**

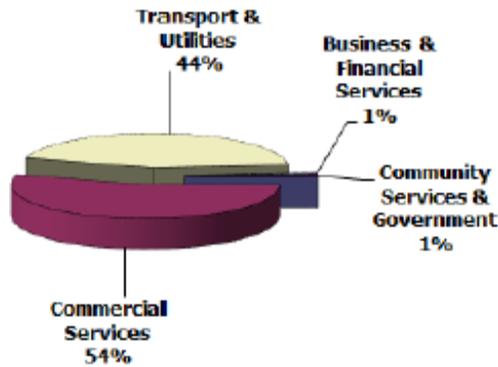
Financial Contribution of Cruise Tourism 2014-2015

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	213	\$1.50
Total Economic Contribution	342	\$2.30

Total Impact of Employment by Sector



Total Impact of Salaries by Sector



Source: Florida Caribbean Cruise Association
(2015)

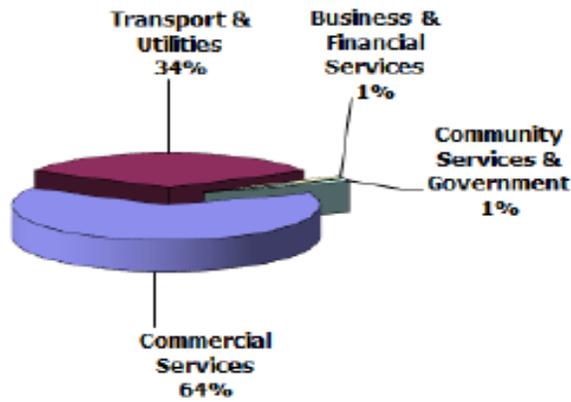
Cruise Tourism in the Greater Caribbean Region

➤ Martinique

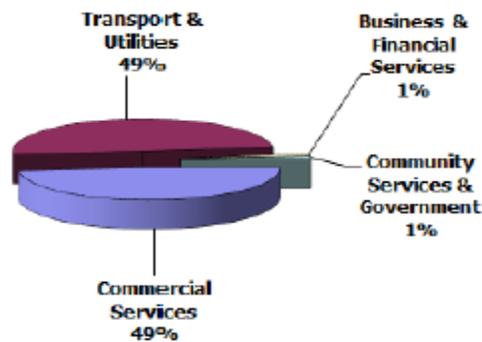
Financial Contribution of Cruise Tourism 2014-2015

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	292	\$2.40
Total Economic Contribution	453	\$3.70

Total Impact of Employment by Sector



Total Impact of Salaries by Sector



Source: Florida Caribbean Cruise Association
(2015)

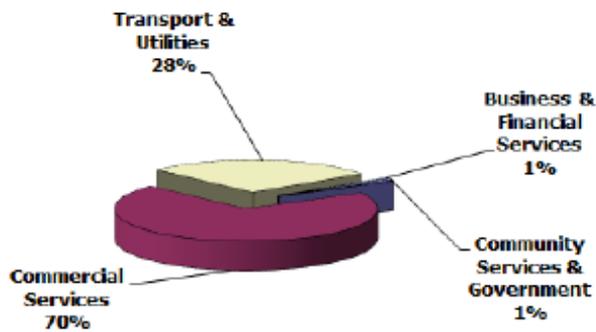
Cruise Tourism in the Greater Caribbean Region

➤ Saint Lucia

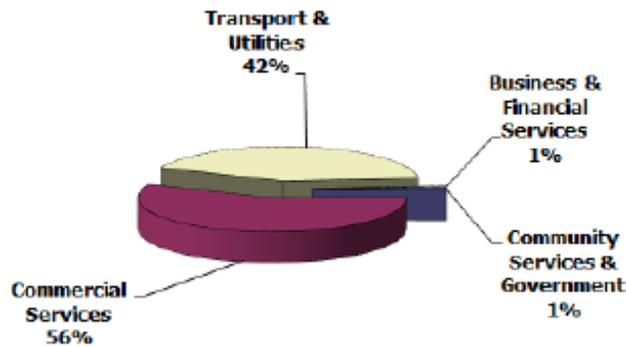
Financial Contribution of Cruise Tourism 2014-2015

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	942	\$ 7.7
Total Economic Contribution	1,422	\$11.7

Total Impact of Employment by Sector



Total Impact of Salaries by Sector



Source: Florida Caribbean Cruise Association
(2015)

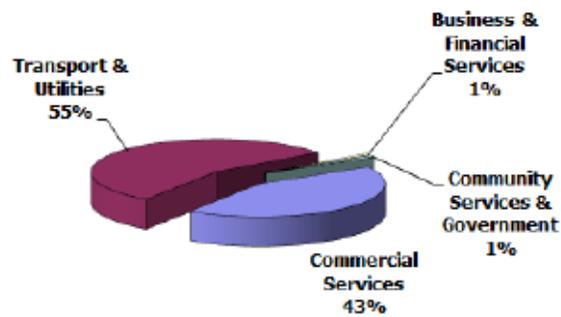
Cruise Tourism in the Greater Caribbean Region

➤ Tobago

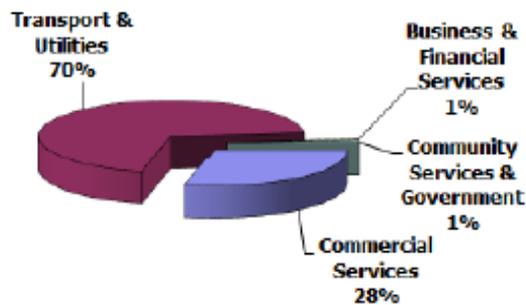
Financial Contribution of Cruise Tourism 2014-2015

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	80	\$1.00
Total Economic Contribution	124	\$1.50

Total Impact of Employment by Sector



Total Impact of Salaries by Sector



Source: Florida Caribbean Cruise Association
(2015)

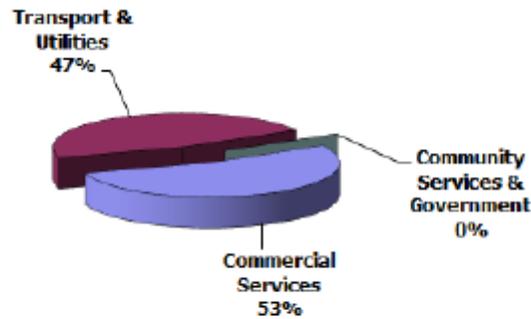
Cruise Tourism in the Greater Caribbean Region

➤ Trinidad

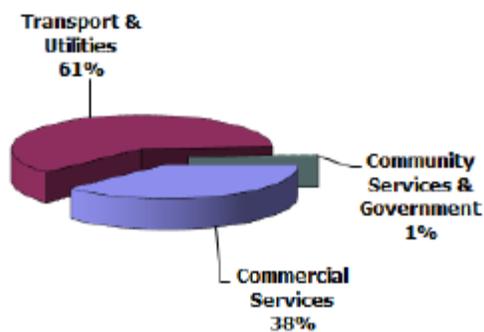
Financial Contribution of Cruise Tourism 2014-2015

	Employment	Wage Income (\$US Millions)
Direct Economic Contribution	740	\$ 6.90
Total Economic Contribution	1,171	\$11.10

Total Impact of Employment by Sector



Total Impact of Salaries by Sector



Source: Florida Caribbean Cruise Association
(2015)