



Regional Cruising and Tourism

Trends and Challenges in Cruising Markets in
the Caribbean

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The Caribbean



The Caribbean

- According to the Florida Caribbean Cruise Association (FCCA) 2012 Cruise Analysis, the Caribbean is the most popular cruise destination in the world.

The Caribbean

- According to capacity data published by Cruise Lines International Association (CLIA), the cruise industry has approximately 40 percent of its global bed day capacity deployed in the Caribbean.

The Caribbean

- An FCCA survey of cruise passengers indicated that 75 percent of the surveyed passengers were residents of the United States, 12 percent were from Canada and 10 percent were citizens of the United Kingdom. The remaining 3 percent of passengers arrived from a broad range of countries, including Germany, Australia, Mexico, the Philippines and South Africa to name a few.

Caribbean Statistics 2010 and 2011

Table 4: Cruise Passenger Arrivals - 2011 & 2010				
Destination	Period	2011	2010	% ch.
Antigua & Barbuda	Jan-Dec	606,485	557,635	8.8
Aruba	Jan-Dec	599,893	569,424	5.4
Bahamas	Jan-Dec	4,161,269	3,809,807	9.2
Barbados	Jan-Dec	619,054	664,747	-6.9
Belize	Jan-Dec	724,544	764,628	-5.2
Bermuda	Jan-Dec	415,958	347,931	19.6
British Virgin Islands	Jan-Dec	484,715	501,451	-3.3
Cayman Islands	Jan-Dec	1,401,495	1,597,838	-12.3
Cozumel (Mexico)	Jan-Dec	2,871,097	2,911,146	-1.4
Curacao	Jan-Dec	400,918	383,036	4.7
Dominica	Jan-Dec	341,503	517,979	-34.1
Dominican Republic	Jan-Dec	347,914	352,539	-1.3
Grenada	Jan-Dec	309,574	333,291	-7.1
Haiti	Jan-Aug	411,687	330,639	24.5
Jamaica	Jan-Dec	1,125,481	909,619	23.7
Martinique	Jan-Dec	41,142	74,634	-44.9
Puerto Rico	Jan-Dec	1,124,441	1,191,055	-5.6
Saint Lucia	Jan-Dec	630,304	670,043	-5.9
St. Maarten	Jan-Dec	1,656,159	1,512,618	9.5
St. Vincent & the Grenadines	Jan-Dec	88,925	110,955	-19.9
Trinidad & Tobago	Jan-Dec	60,277	101,797	-40.8
U S Virgin Islands	Jan-Dec	2,008,991	1,858,946	8.1
<i>N.B: Figures are subject to revision by reporting countries</i> ^P Preliminary figures SOURCE - Data supplied by member countries and available as at July 2, 2012				

Source:
OneCaribbean.
org

Caribbean Stats 2011 and 2012

Table 4: Cruise Passenger Arrivals - 2012 & 2011				
Destination	Period	2012	2011	% ch.
Antigua & Barbuda	Jan-Dec	551,161	606,485	-9.1
Aruba	Jan-Nov	485,799	496,625	-2.2
Bahamas	Jan-Dec	4,434,161	4,161,269	6.6
Barbados	Jan-Dec	517,436	619,054	-16.4
Belize	Jan-Dec	640,734	724,544	-11.6
Bermuda	Jan-Nov	377,636	412,298	-8.4
British Virgin Islands	Jan-Dec	390,579	484,715	-19.4
Cayman Islands	Jan-Dec	1,507,370	1,401,495	7.6
Cozumel (Mexico)	Jan-Dec	2,739,709	2,871,097	-4.6
Curacao	Jan-Dec	431,555	400,918	7.6
Dominica	Jan-Dec	266,169	341,503	-22.1
Dominican Republic	Jan-Dec	338,170	347,914	-2.8
Grenada	Jan-Dec	242,454	309,574	-21.7
Jamaica	Jan-Dec	1,320,083	1,125,481	17.3
Martinique	Jan-Dec	93,515	41,142	127.3
Puerto Rico	Jan-Oct	803,125	868,379	-7.5
Saint Lucia	Jan-Dec	571,894	630,304	-9.3
St. Maarten	Jan-Dec	1,753,215	1,656,159	5.9
St. Vincent & the Grenadines	Jan-Dec	76,996	88,925	-13.4
U S Virgin Islands	Jan-Dec	1,904,468	2,008,991	-5.2

Source:
OneCaribbean.
org

What Does This Show?

- Of the 6 big players in the Caribbean, 4 of them are located in the Western Caribbean and the other 2 are located in the Eastern Caribbean
- All are within close proximity of the Eastern Seaboard of the USA

The Caribbean

- CLIA also reported that the average cruise length was 7.1 days.
- The Caribbean as a destination is easily accessible within that time-frame all year round.
- CLIA defines the cruiser target market as adults 25 years or older, with household earnings of \$40,000+. This segment represents 43% of the total US population.

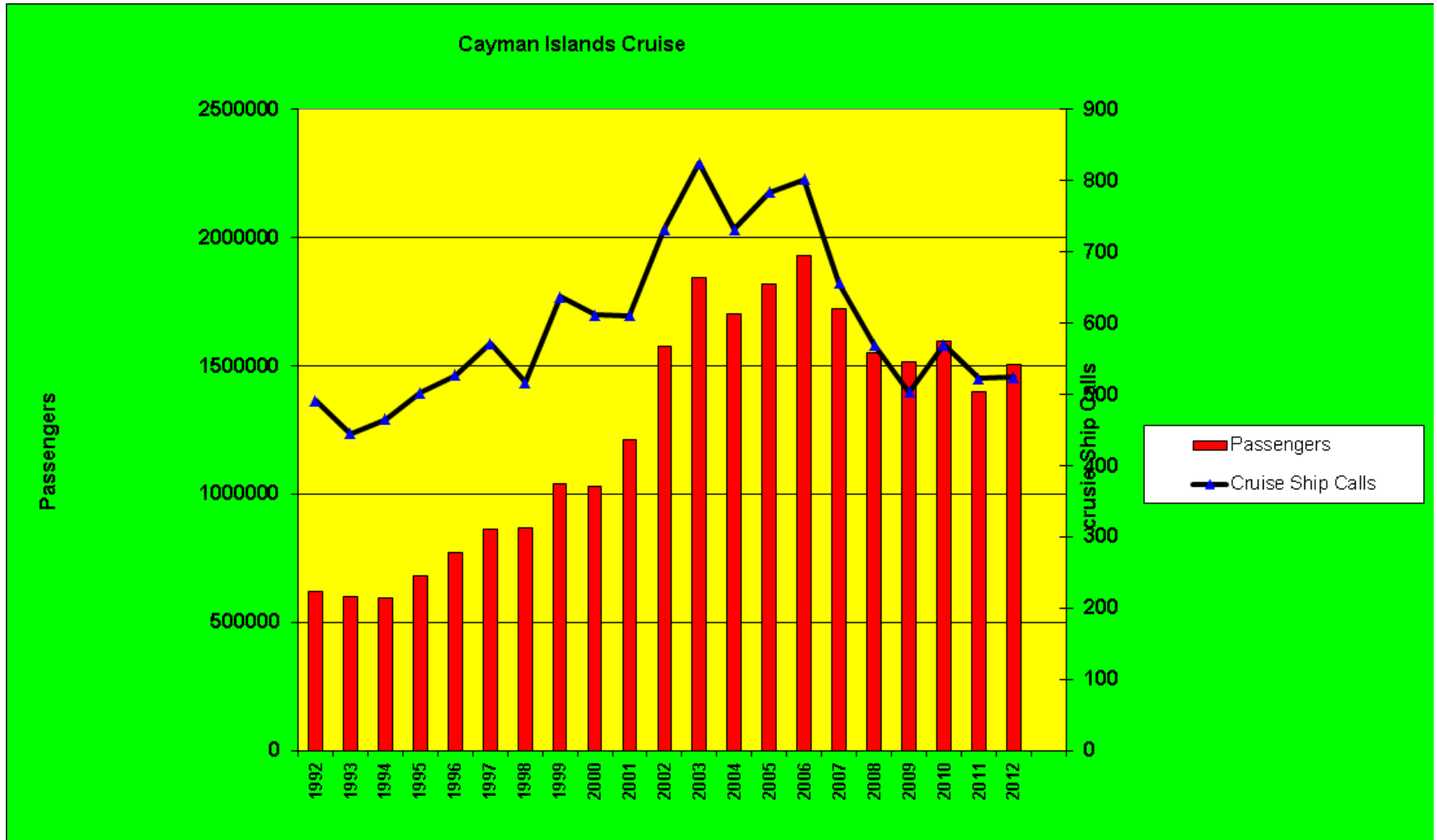
The Cayman Islands -Where Did We Start?

- 1972 One ship a week
- Today – 6 to 8 ships a day





Cayman Cruise Stats 1992 to 2012



Where Did We Start?

- From one tender pier to three tender piers
- From a few tour and taxi operators to over 150 tour and taxi operators



Powdery, White Seven Mile Beach



Stingray City



What Makes the Caribbean So Popular?

- Availability for year-round cruising
- Warm, appealing tropical climate year-round
- Lots of natural and unique attractions
- Affordable and relatively safe, allowing for a relaxed and enjoyable vacation
- Easy access for the largest source market – the USA
- Fits into the 7 day cruise profile

What Makes the Caribbean So Popular?

- The islands have a good working relationship with cruise lines.
- Close partnership with the industry as it has evolved over the years
- Good Infrastructure
- Good transportation system

What Is The Future?

- The rising cost of fuel coupled with regulations for cleaner burning fuels to be used will have an impact on the cruise industry and probably the length of calls and destinations they select.
- The global recession, especially Europe's and Asia's struggles will likely be a plus for the Caribbean in the short term.

What is the future

- These factors indicate that the Caribbean will remain the number one cruise destination for some time to come.
- So to maintain its attractiveness, it is important for the Caribbean to refresh and enhance its unique appeal and attractions that have made and continues to make it, the most popular cruise destination in the world.

The End

