



NYCRUISE

**2010
Economic Impact Study**



Survey Overview

- **Survey Period: September and October, 2010**
- **Number of Surveys Returned**
 - Passengers: 1,276
 - Crew: 817
- **Cruise ships surveyed:**
 - Caribbean Princess
 - Carnival Glory
 - Carnival Miracle
 - Crystal Symphony
 - Norwegian Dawn
 - Norwegian Jewel
 - Queen Mary 2
 - AidaLuna
 - Arcadia
- **Business Research & Economic Advisors (BREA) conducted the study**

Highlights



- 1. Passengers and crew are spending more money while in NYC**
- 2. Number of ships and passengers using the NYC cruise terminals continue to increase**
- 3. Majority of NYC cruise passengers come from outside the city**
- 4. Cruise passengers are overwhelmingly satisfied with their visit to NYC**

Economic Impact

Key Results

- **Passengers and crew spent an estimated \$144.6 million while ashore in 2010, far exceeding the \$93.8 million spent in 2009**
 - Embarking Passengers: \$117.9 million
 - Transit Passengers: \$5.2 million
 - Crew: \$21.5 million
- **Overall, average spending per passenger was \$247.14**
 - Highest among all continental US ports (2nd only to Hawaii)
- **Passengers with an overnight stay spent an average of \$437 during their two-night stay:**
 - \$274 for lodging
 - \$65 for food & beverage

Estimated Passenger Spending

Spending by embarking passengers was dominated by those with pre- and post-cruise overnight stays.

- Pre- and Post cruise stays: \$110.7 million
- No overnight stay: \$7.2 million

	Day of Cruise	Pre/Post	Total
F&B at Restaurants & Bar	\$924,765	\$16,330,467	\$17,255,232
Taxis/Ground Transport	\$929,022	\$5,761,730	\$6,690,752
Watches & Jewelry	\$1,017,283	\$706,105	\$1,723,388
Clothing	\$2,241,393	\$5,461,352	\$7,702,745
Entertainment/Night Clubs/Casinos	\$189,975	\$5,542,504	\$5,732,479
Parking	\$499,449	\$534,708	\$1,034,157
Other Purchases	\$463,293	\$3,087,260	\$3,550,553
Accommodations	-	\$69,310,021	\$69,310,021
Tours	\$893,512	\$4,008,117	\$4,901,629
TOTALS	\$7,158,692	\$110,742,264	\$117,900,956

Estimated Passenger Spending

Transit passengers were estimated to have spent an average of \$165 per passenger and a total of \$5.2 million

- 98% of transit passengers were estimated to have disembarked and visited NYC

	Transit
F&B at Restaurants & Bar	\$672,165
Taxis/Ground Transport	\$302,823
Watches & Jewelry	\$606,279
Clothing	\$682,618
Entertainment/Night Clubs/Casinos	\$65,253
Parking	\$78,556
Other Purchases	\$751,988
Tours	\$2,069,393
TOTALS	\$5,229,074

Crew Onshore Expenditures

Crew were estimated to spend an average of \$195 per crew member and a total of \$21.5 million

- An estimated 109,700 crew visited NYC throughout 2010
- Crew spending is nearly triple the national average and is the highest among US ports

	Crew
F&B at Restaurants & Bar	\$3,347,046
Taxis/Ground Transport	\$1,191,377
Watches & Jewelry	\$1,459,053
Clothing	\$5,191,158
Entertainment/Night Clubs/Casinos	\$485,985
Parking	\$234,765
Other Purchases	\$9,268,828
Tours	\$310,460
TOTALS	\$21,488,673

Cruise Passengers and Ship Calls

- **Total passenger arrivals increased by 30% from 2009-2010, and are projected to increase even further in 2011**

Year	Brooklyn Cruise Terminal (Embarks)	Brooklyn Cruise Terminal (Transit)	Manhattan Cruise Terminal (Embarks)	Manhattan Cruise Terminal (Transit)	Total
2009	112,365	10,080	304,945	18,328	445,718
2010	113,260	7,339	438,107	24,273	582,979
2011 (Projected)	104,350	10,200	530,662	39,094	684,306

- **Total ship calls increased by 33% from 2009-2010, and will continue to rise in 2011**

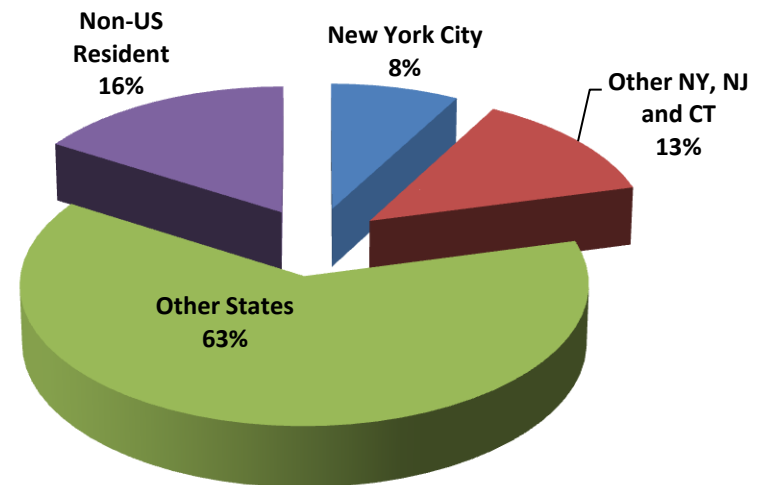
Year	Brooklyn Cruise Terminal	Manhattan Cruise Terminal	Total
2009	44	137	181
2010	42	199	241
2011 (Projected)	39	253	292

Embarking Passenger Demographics



- **More passengers are traveling to NYC to cruise**
- **Only 21% of NYC embarking cruise passengers reside in Tri-State Area**
 - Was 35% in 2009
- **63% of NYCruise passengers reside outside the Tri-State area**
 - Was 48% in 2009
- **\$91,000 is the average HHI of an embarking NYC cruise passenger**

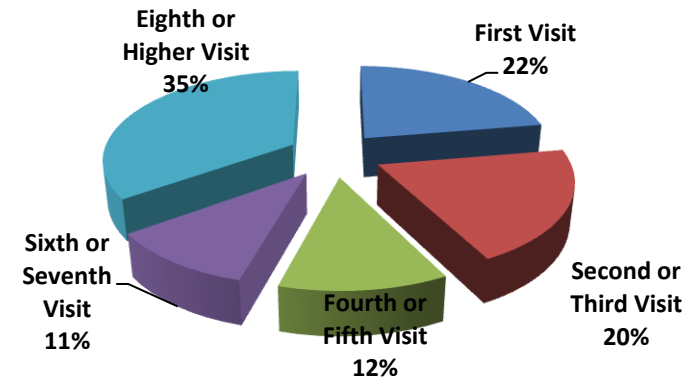
Residence of NYC Cruise Passengers



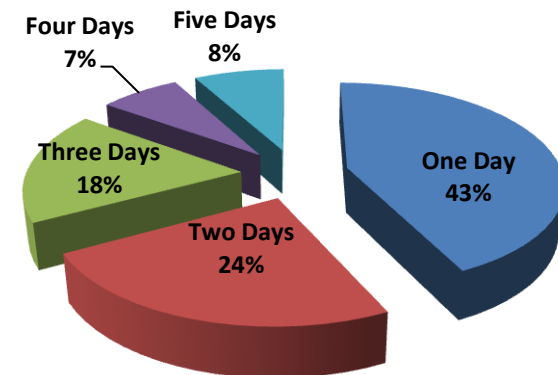
Length & Frequency of Passenger Visits

- **22% reported this was their first visit to NYC**
- **35% reported this was their eighth or more visit**
- **46% of cruise parties did pre- and/or post- stays in NYC**
 - 80% spent an average of two nights in NYC prior to their cruise
 - Average spending by passengers with overnight stays is 80% above the national average and is second to Honolulu
 - 15% of passengers planned both pre- and post-cruise stays

Number of Previous Visits to NYC



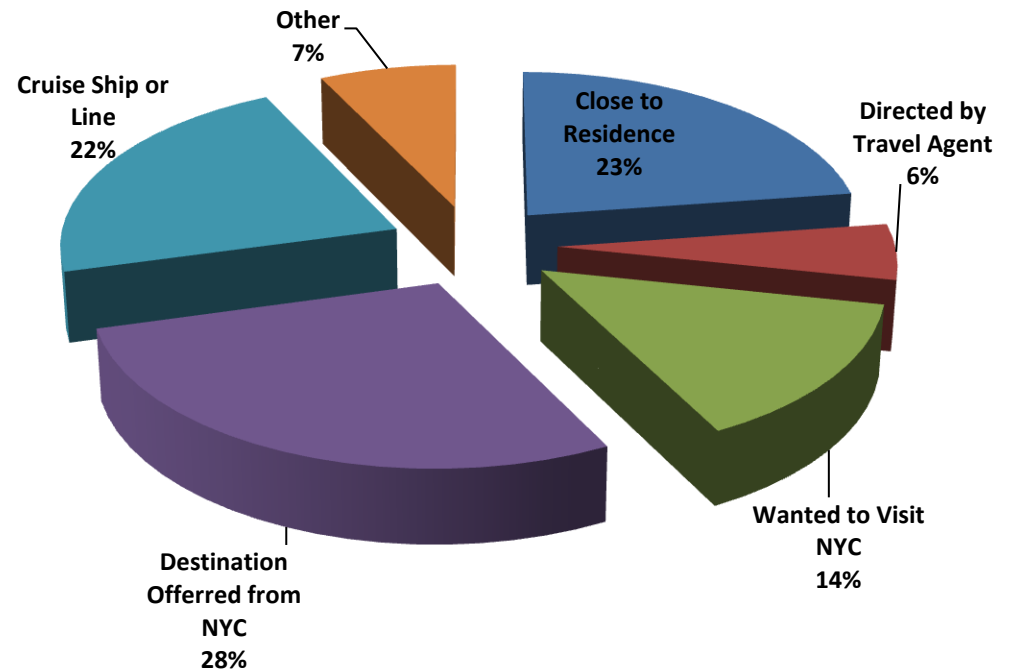
Length of Overnight Stay Prior to or After Cruise



Reasons for Cruising from NYC

Most Popular Reasons:

1. Close to Home
2. Destination Offered
3. Specific Cruise Ships



Passenger Satisfaction

Overall, 95% of Cruise passengers were satisfied with their overall visit to New York City

Attribute	Satisfied
Overall Visit	95%
Variety of Things to See and Do	95%
Overall Shopping Experience	90%
Guided Tour	90%
Terminal Facilities	85%

Contact Information

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