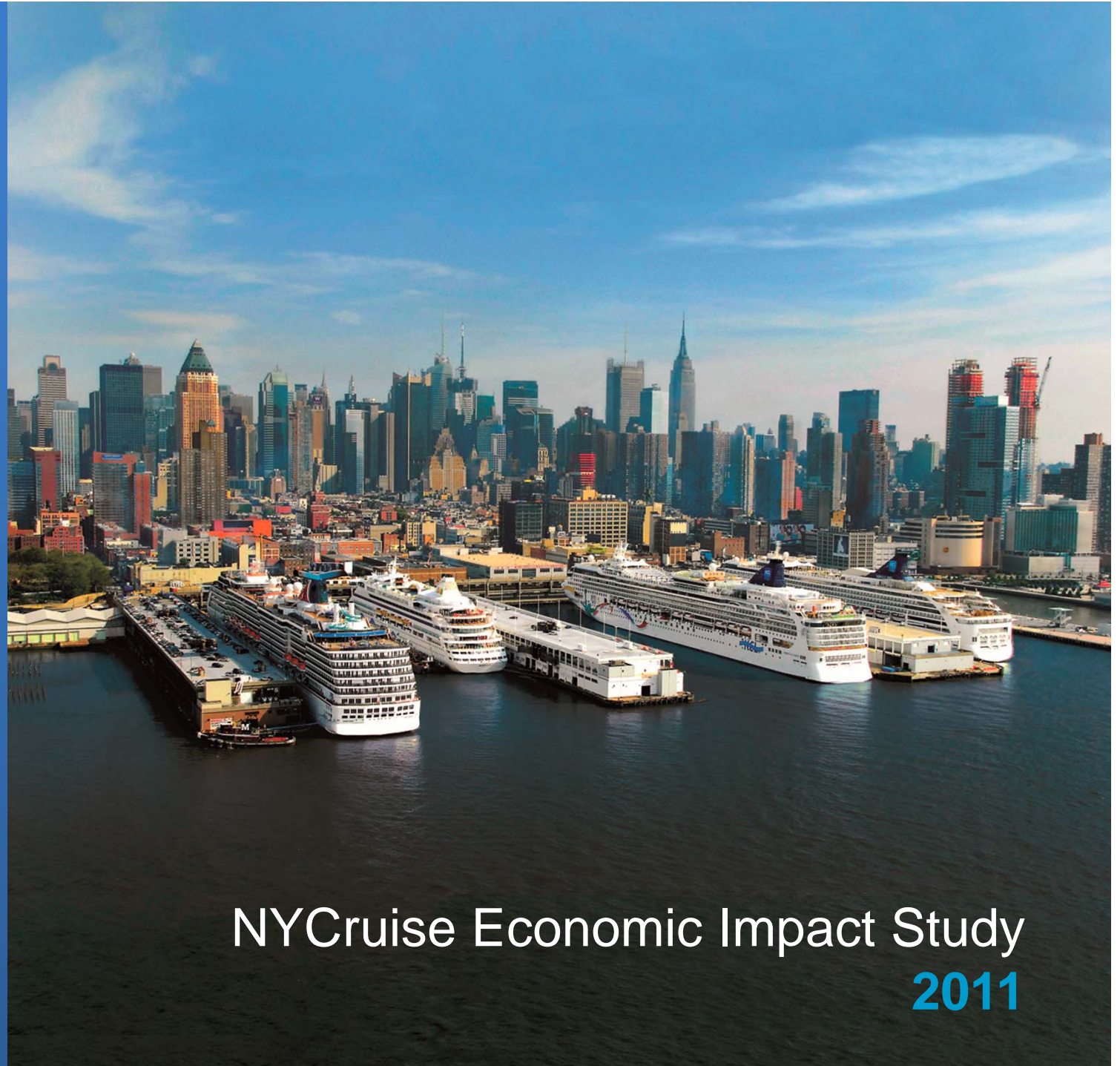




NYCRUISE



NYCruise Economic Impact Study
2011

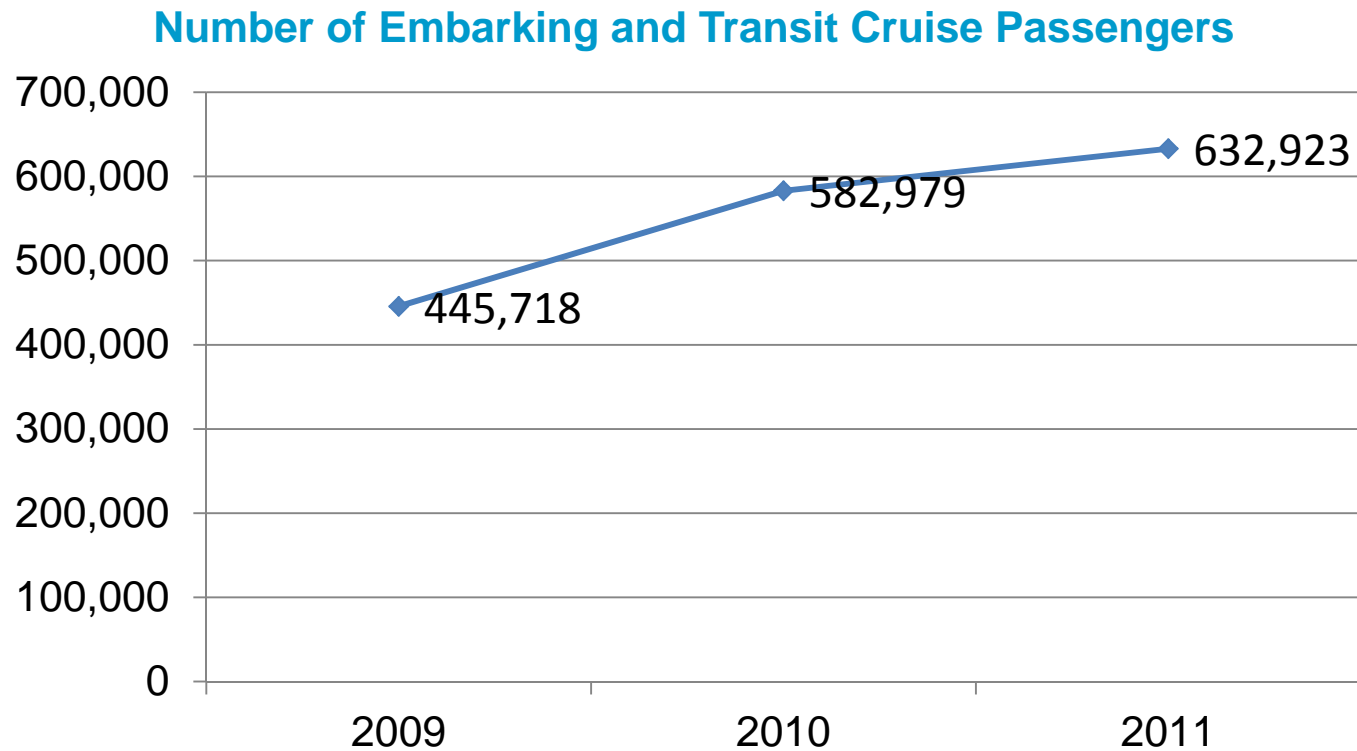
Economic Impact

Key Results

- **Total economic impact of New York City's cruise industry in 2011 was \$239 million**
- **Passengers and crew spent an estimated \$149.8 million while ashore in 2010, far exceeding the \$144.6 million spent in 2010**
 - Embarking Passengers: \$121.9 million
 - Transit Passengers: \$4 million
 - Crew: \$23.9 million
- **Overall, average spending per passenger was \$234.12**
 - Highest among all continental US ports (2nd only to Honolulu)
- **Passengers with an overnight stay spent an average of \$442 during their two-night stay:**
 - \$242 for lodging
 - \$68 for food & beverage

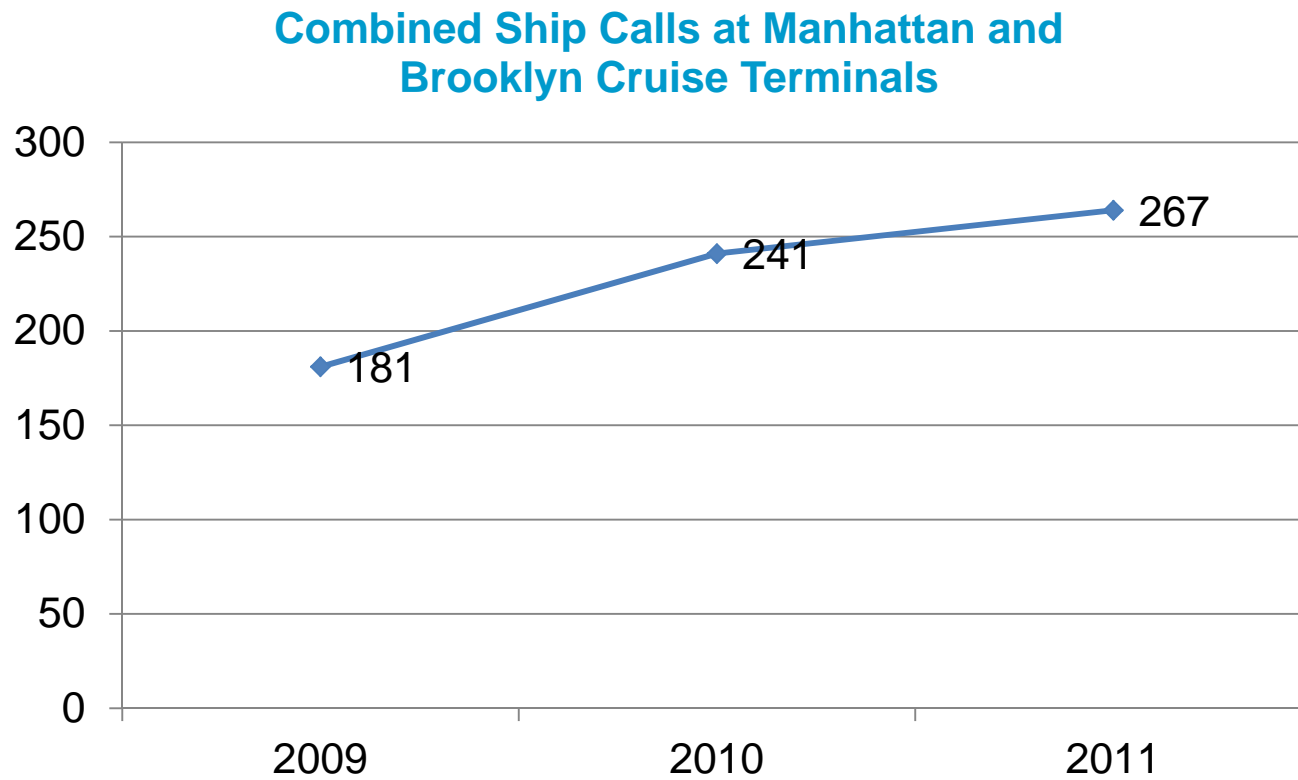
Cruise Passengers

- Total passenger arrivals increased by 9% from 2010-2011



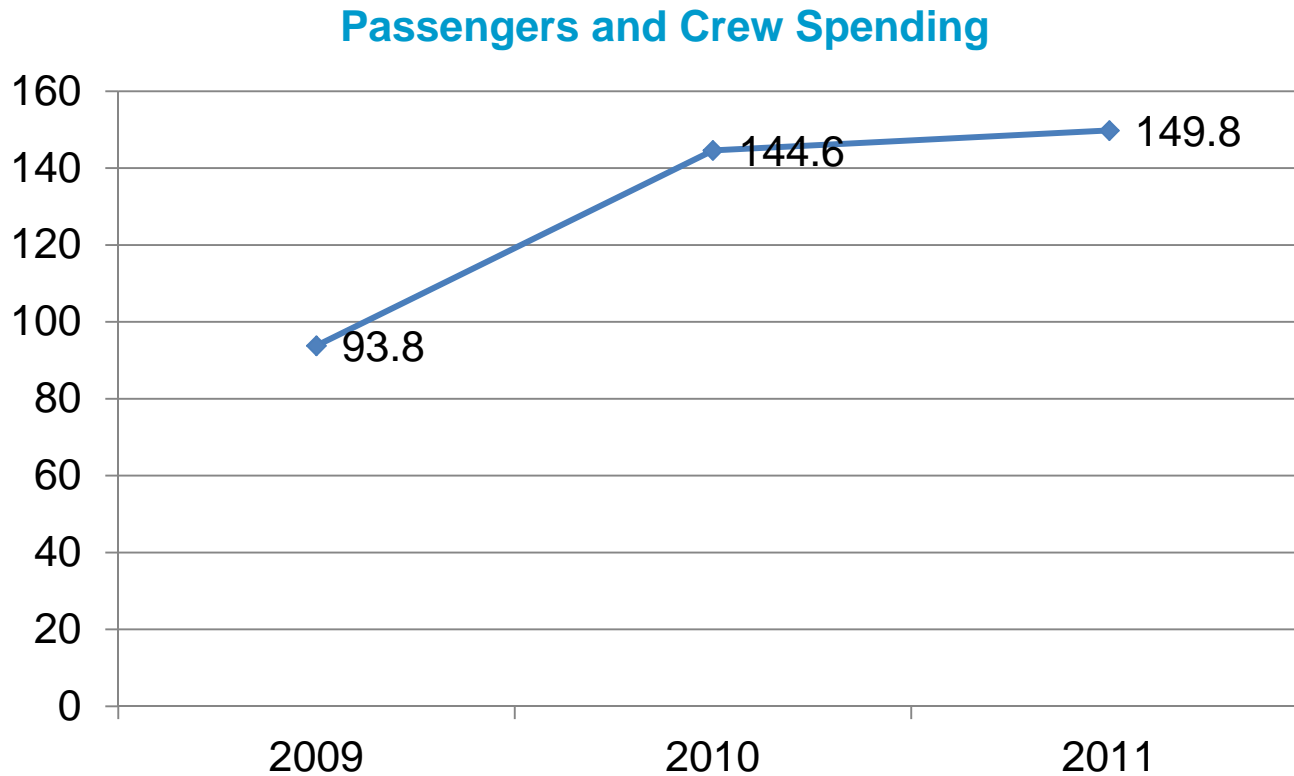
Ship Calls

- Total ship calls increased by 11% from 2010-2011



Passenger Spending

- Total spending by passengers and crew increased by 3.5% from 2010-2011



Estimated Passenger Spending

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

- Pre- and Post- cruise stays: \$113 million
- No overnight stay: \$9 million

Category	Overnight stay	No overnight stay	Total
F&B at Restaurants & Bar	\$17,297,917	\$639,703	\$17,937,620
Taxis/Ground Transport	\$6,324,072	\$1,370,996	\$7,695,068
Watches & Jewelry	\$1,360,924	\$973,972	\$2,334,896
Clothing	\$4,657,893	\$835,588	\$5,493,481
Entertainment/Night Clubs/Casinos	\$7,090,646	\$838,660	\$7,929,306
Parking	\$1,303,110	\$1,474,784	\$2,777,894
Other Purchases	\$4,117,311	\$1,132,634	\$5,249,945
Accommodations	\$61,870,085	-	\$61,870,085
Tours	\$8,920,453	\$1,713,514	\$10,633,967
TOTALS	\$112,942,411	\$8,979,851	\$121,922,262

Estimated Passenger Spending

Transit passengers were estimated to have spent an average of \$175 per passenger and a total of \$4 million

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

Category	Transit
F&B at Restaurants & Bar	\$234,094
Taxis/Ground Transport	\$221,921
Watches & Jewelry	\$509,046
Clothing	\$611,471
Entertainment/Night Clubs/Casinos	\$52,752
Museums	\$80,177
Other Purchases	\$606,434
Tours	\$1,721,074
TOTALS	\$4,036,969

Crew Onshore Expenditures

Crew were estimated to spend an average of \$203 per crew member and a total of \$23.9 million

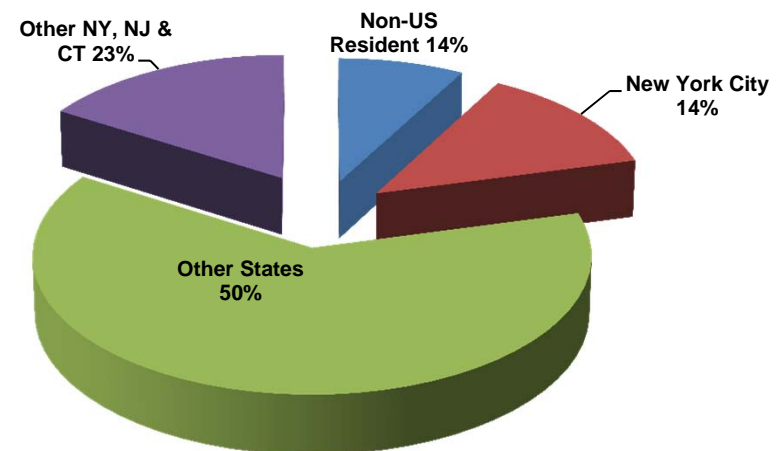
- An estimated 118,000 crew visited NYC throughout 2011

Category	Crew
F&B at Restaurants & Bar	\$3,365,865
Taxis/Ground Transport	\$1,156,242
Watches & Jewelry	\$754,717
Clothing	\$5,601,514
Entertainment/Night Clubs/Casinos	\$510,580
Other Purchases	\$11,258,795
Tours	\$1,253,436
TOTALS	\$23,901,150

Embarking Passenger Demographics

- Passengers from outside NYC and the tri-state area continue to represent the majority of passengers
- 37% of NYC embarking cruise passengers reside in Tri-State Area

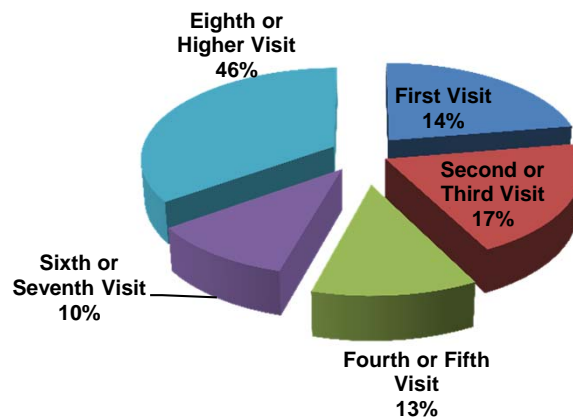
Residence of NYC Cruise Passengers



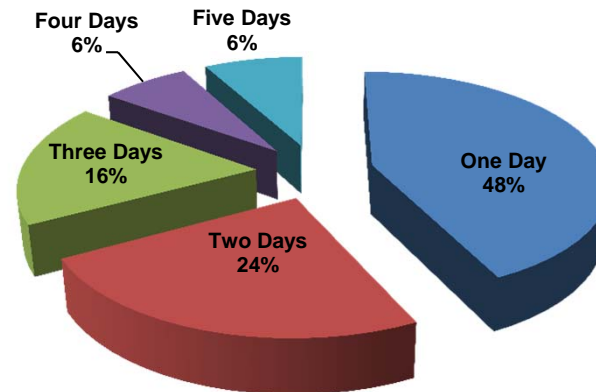
Length & Frequency of Passenger Visits

- Only 14% reported this was their first visit to NYC
- 46% reported this was their eighth or more visit
- 42% of cruise parties did pre- and/or post- stays in NYC

Number of Previous Visits to NYC



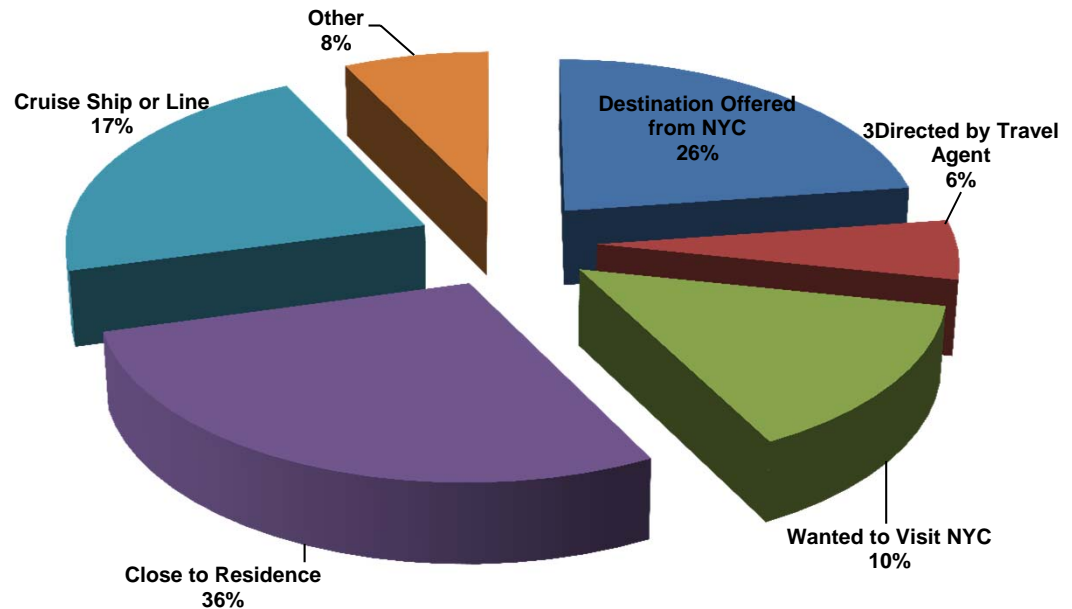
Length of Overnight Stay Prior to or After Cruise



Reasons for Cruising from NYC

Most Popular Reasons:

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



Passenger Satisfaction

Overall, 93% of embarking passengers were satisfied with their overall visit to New York City

Attribute	Satisfied
Overall Visit	93%
Variety of Things to See and Do	96%
Overall Shopping Experience	90%
Guided Tour	86%
Terminal Facilities	95%

Survey Overview

- **Survey period: August through October, 2011**
- **Number of surveys returned**
 - Passengers: 2,441
 - Crew: 554
- **Cruise ships surveyed:**
 - Caribbean Princess
 - Carnival Glory
 - Carnival Miracle
 - Veendam
 - Norwegian Gem
 - Norwegian Jewel
 - Crystal Symphony
 - Queen Mary 2
 - AidaLuna
 - Arcadia
- **Business Research & Economic Advisors (BREA) conducted the study**

Contact Information

Visit: www.nycruise.com

Email or Call: Kyle Sklerov at ksklerov@nycedc.com, 212.312.3523