

# The Economics of Cruise Tourism in Key West:

## Behind the Cruise Industry's Propaganda Veil

By Martha Honey, Ph.D.

### Executive Summary

The Miami-based, but foreign-incorporated, cruise industry and its business partners in Key West are using exaggerated and misleading economic data in their campaign to defeat three cruise ship-related referendums that are on the November 3rd ballot. The locally-led ballot initiative seeks to limit the number of cruise passengers and size of ships calling at Key West and to give preference to ships with higher health and safety standards. The cruise industry has countered with claims that “cruise visitors contribute significantly to the visitor economy of Key West” and that, if approved, the referendums “would irreparably harm the long-term economic health of the community.”<sup>1</sup> A close look at the economic realities in Key West shows that:

- The Key West government receives less in cruise port fees than the industry claims. In practice, despite a recent increase, the city has been subsidizing cruise port operations at both the government and privately owned piers and is still said to be only breaking even. Key West's port fee rates are also lower than at other ports in the US and the Caribbean.
- The only independent study, published in 2005, found that onshore passenger spending in Key West is far lower – just \$32.10 per passenger (\$43 today, adjusted for inflation) – than the range of spending – \$55 to \$127 per passenger – put forth in four cruise industry studies. Even the industry's own studies show that Key West ranks near the bottom in passenger spending compared with other Caribbean and US ports.
- Select Key West tour operators and retail stores are required to pay a hefty commission to do business with the cruise lines. Through this lucrative but usually concealed ‘pay to play’ commission system, businesses in ports throughout the Caribbean are estimated to lose close to \$275 million a year in sales revenue which goes instead to the cruise lines.
- Stayover tourists in Key West and other ports spend far more per day and per visit than cruise tourists. Cruise tourism accounts for well under 10% of total tourism spending in Key West, while land-based tourism accounts for over 90%. The picture is similar in the Caribbean as whole: in 2015, stayover visitors generated 12.5 times more than cruise passengers (\$27.6 billion compared to \$2.4 billion). To maximize revenue into the local economy, Key West should therefore focus on strengthening higher value stayover tourism rather than low value cruise tourism.
- There is no evidence to support the industry's claim that passengers ‘convert’ into longer term, higher value, overnight visitors in Key West or the Caribbean. Surveys show that cruise passengers are loyal to cruising and their next vacation is most likely to be on another cruise ship.

**The above findings debunk the cruise industry's glowing financial claims and misleading economic data put forth in its campaign to defeat the three referendums. These economic realities, combined with the grave dangers posed by cruise ships as COVID-19 super-spreaders, strengthen the case that Key West would gain more by prioritizing higher value, sustainable, overnight tourism rather than lower value, riskier, large-scale cruise tourism.**

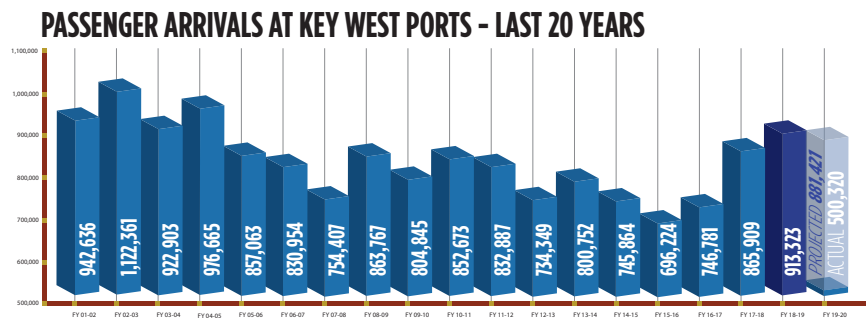
# The Economics of Cruise Tourism in Key West: Behind the Cruise Industry's Propaganda Veil

By Martha Honey, Ph.D.

## Full Report

With a population of almost 25,000 residents, Key West is the tourism centerpiece of the Florida Keys and one of the busiest cruise ports and most popular tourist destinations in the U.S. As the southernmost port of the continental United States, the island is also a gateway destination for eastern and western Caribbean cruise itineraries out of south Florida.

Since 1970, Key West's economic base has shifted toward tourism, with its traditional, laid-back, bohemian tourism sector consisting of lodging, restaurants, bars, retail shops, and entertainment competing with cruise ship tourism, which grew 745% between 1990 and 2005, from 132,840 to 1,122,100<sup>2</sup> (see chart below). The influx of cruise passengers has brought with it a reputation for large crowds, low end retail, and loud partying. Yet Key West has also managed to preserve its vibrant local character and counter-cultural traditions.



By 2019, the city was attracting close to one million cruise passengers and just over 2 million land-based visitors a year which accounted for almost half (48%) of the “direct economic impact” to Monroe County.<sup>3</sup> Predictions were that cruise arrivals would again top one million passenger visits in 2020.

But when the coronavirus exposed cruise ships as dangerous super-spreaders, the cruise industry worldwide was brought to a complete standstill. The US Centers for Disease Control and Prevention issued a No Sail Order for cruise ships which has been a mixed blessing for Key West. It left the city's three cruise piers and surrounding commercial quarters empty, while the environment, including the Florida Keys National Marine Sanctuary, has had time to recover.<sup>4</sup> The pandemic lockdown also gave local residents time to reflect on the future health, economic well-being, and environmental stewardship of Key West.

This led to a grassroots initiative signed by approximately 2,500 petitioners that has successfully put three referendums on the upcoming November 3rd ballot. If passed, the referendums would limit the number of cruise passengers disembarking each day and the size of ships docking in Key West and would give preference to ships with stronger health and safety standards. The vote “yes” campaign is championed by the **Key West Committee for Safer Cleaner Cruise Ships**,<sup>5</sup> and supported by the older tourism businesses catering to overnight guests; the artistic counterculture and retired communities; and environmental and social activists committed to a slower, more authentic, and more sustainable and higher quality of life.

Faced off against this citizens' coalition are the Miami-based, foreign-registered, cruise ship companies and their business partners in Key West. The cruise industry has made dire claims that the three referendums will raise taxes, hurt local businesses, cost jobs, and endanger public safety and security. Their central argument is that “cruise visitors contribute significantly to the visitor economy of Key West” and that “the drastic reduction in cruise visitor spending would irreparably harm the long-term economic health of the community.”<sup>6</sup>



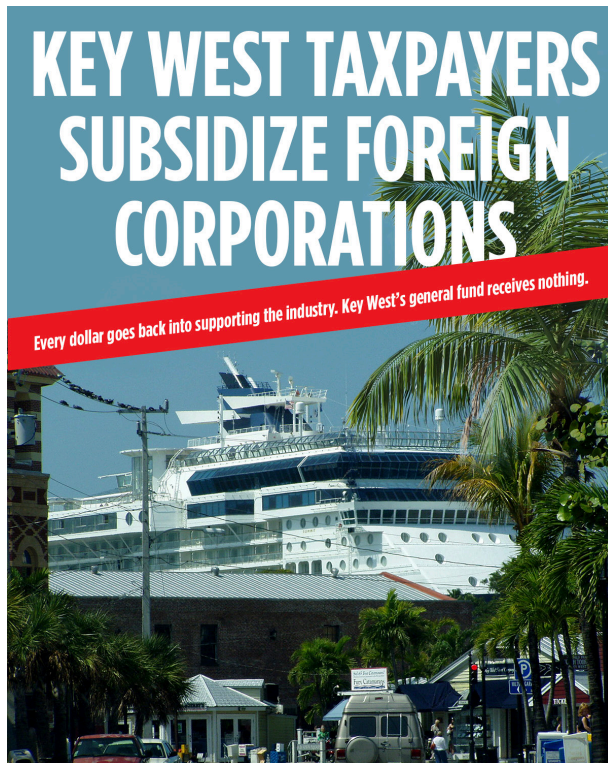
<http://www.cruiseportinsider.com/keywest.html>  
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**The following takes a closer look at the validity of key arguments raised by the cruise industry and others who oppose the ballot referendums.**

# Here is the truth about five cruise industry claims and practices:

## 1. The cruise industry claims that Key West derives significant fiscal revenue from cruise tourism:

An August 2020 study produced for the Cruise Lines International Association (CLIA), the cruise industry trade association, states that cruise lines “spent over \$15 million in dockage fees, disembarkation fees, and other fees and expenses paid in the city”<sup>7</sup> of Key West. In fact, an independent 2018 study commissioned by the city projected that the government would receive only \$4.7 million in fees from cruise ships docking at Key West’s two public and one private cruise piers in FY 2018-2019.<sup>8</sup> That is approximately 33% of what the cruise industry claims. And rather than that revenue going into the city’s budget to be used as the city sees fit, Key West – like other cruise ports – is compelled by law to use these fees to only support cruise port operations and capital expenses.



<https://commons.wikimedia.org/wiki/File:CruiseShipInKeyWest.JPG>  
Attribution: I, Matrek

Key West’s three ports are owned and operated respectively by the city, the US Navy, and a private company which also owns a marina and resort linked to its cruise pier.<sup>9</sup> According to the 2018 report, the combined expenses and revenue from Key West’s three cruise ports cleared just over \$91,000. The study found that the two public ports (Mallory Square and Out Mole) together operated at a loss of just over \$288,000, while the private port (Pier B), which receives over 60% of Key West’s cruise passengers, cleared about \$380,000 in revenue over expenses paid to the city for cruise operations.<sup>10</sup>

Based on these 2018 findings, the city’s Port and Marine Services Director, Doug Bradshaw, concluded in a letter to the City Manager that “the fees were not adequately covering the direct and indirect cost of providing security, safety, and transportation for cruise passengers nor sufficient for maintaining the city of Key West cruise ship facilities and infrastructure.”<sup>11</sup> Another independent study of Key West published in 2005 similarly concluded that the “fiscal balance for cruise ship activity ranges from \$1.4 to \$1.8 million. Still, there are other costs that are not being considered, and cruise ship fees should represent a full cost accounting.”<sup>12</sup>

Key West’s port fees were also found to be “significantly less” than fees charged in other ports in Florida and “well below” fees charge in select Caribbean ports of call including Aruba, Cayman Islands, Trinidad and Tobago, and Cozumel, Mexico, according to the 2018 study.<sup>13</sup>

Despite a modest increase in dockage and disembarkment fees (popularly known as the head tax) in September 2018, Port and Marine Services Director Bradshaw said as of October 2020, “We are at a break-even point.” Key West Mayor Teri Johnston concurs: “Every dollar goes back into supporting the industry. Docks, security, all types of things. Not one dollar goes into the general fund.”<sup>14</sup>

**Rather than gaining \$15 million in cruise line port fees, the truth is that the city of Key West has been partially subsidizing cruise port operations and capital expenses. Only the private pier – whose owners are vigorously opposing the three ballot referendums to control cruise tourism – has come out ahead.**



## 2. The cruise industry dominates the research of economic impacts, publishing large volumes of misleading studies that exaggerate the value of onshore spending:

Onshore spending by cruise passengers and crew is the cruise industry's largest potential economic contribution to any destination, including Key West. It is therefore vital that Key West and other ports understand the real benefits and costs of this spending. Unfortunately, obtaining reliable data can be challenging because nearly all the studies of economic impacts are commissioned by the two major cruise industry associations in the US, CLIA and FCCA (Florida-Caribbean Cruise Association). The great majority of these studies have been produced by the Business Research & Economic Advisors (BREA), an elusive, two-person consulting firm whose headquarters, it turns out, is a post office box in a UPS store in Phillipsburg, New Jersey (pictured below). BREA has repeatedly ignored requests to discuss its methodology or findings.<sup>15</sup>

**BREA's office is a postal address at this UPS store shown here in a strip mall in Phillipsburg, New Jersey.**



These CLIA and FCCA-financed studies generally report higher passenger spending than does research not financed by the cruise industry.<sup>16</sup> For Key West, for instance, four industry-financed studies between 1994 and 2018 reported onshore passenger spending as ranging from \$53 to \$124 per passenger.

Key West's only non-industry study which assessed onshore cruise passenger and crew spending was conducted by Murray & Associates for the Key West Naval Properties Local Redevelopment Authority and published in 2005. Based on its passenger surveys for FY2003-2004, the Murray study calculated average spending for the 906,697 cruise passengers who docked in Key West was just \$32.10 apiece.<sup>17</sup> (Adjusted for inflation it would equal \$43 per passenger today.<sup>18</sup>) At the same time, the 398,316 crew to visit Key West spent on average \$65.80 while on shore. Total spending by passengers, the far larger group, was determined to be over \$28.5 million, while total crew onshore spending was calculated to be just over \$13 million.<sup>19</sup>

**Table 1: Onshore Passenger Spending in Key West, 1994 - 2020<sup>20</sup>**

Year	Spending Per Passenger	Total Passenger Numbers	Total Passenger Spending	Source of Per Passenger Spending
1994	\$53.00 <sup>a</sup>	n/a	n/a	FCCA, 1994
2003-2004	\$32.10 <sup>b</sup>	906,697	\$28.4 million	Murray & Associates (independent study)
2005-2006	\$55.00 <sup>c</sup>	852,630	\$47.1 million	BREA for FCCA, 2006
2011-2012	\$123.58 <sup>d</sup>	857,063	n/a	BREA study for CLIA, 2012
2017-2018	\$72 <sup>e</sup>	865,909	\$73 million	Oxford Economic for CLIA, 2020
2020	\$43			Murray statistics, adjusted for inflation

Murray suggests several reasons for this low passenger spending: average time on shore in Key West is just 3.1 hours, the stop is near the beginning of a cruise itinerary, and there is no significant duty-free shopping.<sup>21</sup> Murray concluded that “cruise ship passengers seem to be tight with their money in Key West...”<sup>22</sup>

In fact, onshore spending in Key West ranks very low among both Caribbean and US ports, even according to the cruise industry’s own studies. For instance, a 2006 report commissioned by FCCA of 19 Caribbean cruise ports states that passenger spending averaged \$98.01 in the Caribbean. The FCCA study calculated Key West passenger spending to be only \$55 – putting it near the bottom of the list, above only Martinique, Curacao, Grenada, and Dominica.<sup>23</sup>

**Onshore passenger spending in Key West appears to be very low compared with other Caribbean and US ports. If Key West continues to operate as a port of call within the Caribbean’s large-scale cruise ship circuits, it will likely continue to gain relatively little from onshore passenger spending.**

- a The 1994 FCCA study cited in Burc Kayahan, Brian VanBlarcon, and Ross Klein. (2018). “Overstating Cruise Passenger Spending Sources of Error in Cruise Industry Studies of Economic Impact.” *Tourism in Marine Environment*. Vo. 13, No. 4. Pp. 193-203.
- b Murray. (April 8, 2005). p. 1.
- c BREA. (October 2006). *Economic Impact of Cruise Tourism on the Caribbean Economy*. Prepared for FCCA. pp. 5-12, 126-132.
- d BREA study for CLIA cited in Florida Department of Transportation. (December 11, 2013). *Florida’s Cruise Line Industry: A Statewide Perspective*. pp. 16-17.
- e Oxford Economics. (August 2020). “Comparative Visitor Economic Impacts for Key West, FL.” Produced for the Cruise Line International Association.

### 3. The cruise industry maintains a little known but lucrative “pay to play” system of onshore commissions:

In all ports, including Key West, cruise lines negotiate “pay to play” agreements that compel onshore tour operators and retail businesses to pay in order to do business with the cruise lines. This lucrative practice is part of the cruise line’s business model, but it is also not clearly described or tallied in any of the cruise industry commissioned studies of the economic impacts of cruise tourism.<sup>24</sup>

The amount of what the cruise industry describes as its “management fee or sales commission”<sup>25</sup> is a closely guarded secret, but independent research reveals that cruise lines charge up to a 100% markup or more on any tours sold or shops advertised on board ships as “preferred” businesses in the port. Field studies in Costa Rica, Honduras, and Belize, for instance, found that cruise lines earned commissions of about 100% on excursions sold onboard the ship.<sup>26</sup>

A Key West tour operator whose company works with the cruise lines estimates that “more than 80% of passengers” purchase their tours onboard the ship and the price of the tour includes “a 100% commission” to the cruise line.<sup>27</sup> This means if a passenger purchases a tour for \$80 while on board the ship, \$40 goes to the local tour operator and \$40 goes back to the cruise line or its agent. For a variety of reasons, few passengers wait to buy tours until they get off the ship, even though the price is considerably lower.

It is estimated that in 2015, cruise lines collected a total of \$273 million in commissions in 35 destinations in the Caribbean. According to these calculations, the cruise lines earned on average a commission of \$22.71 for each onshore tour a passenger bought while onboard the ship.<sup>28</sup> Through this commission system, tour operators and destinations in the Caribbean cruise circuit are losing up to half of what cruise passengers pay for onshore tours and shopping.

## THE LUCRETIVE SYSTEM OF ONSHORE COMMISSIONS

### COST OF ONSHORE TOURS PURCHASED IN ADVANCE OR ON LOCATION



### COST IF PURCHASED ON BOARD CRUISE SHIPS

**AS MUCH AS 100% MARK UP**



**Cruise line commissions therefore constitute pay-to-play cash flow back to the cruise lines and a significant loss of revenue for local businesses and cruise destinations like Key West.**

## 4. The cruise industry fails to compare cruise passenger versus land-based visitor spending:

The real significance of cruise passenger spending comes into sharpest relief when it is measured alongside the spending by land-based visitors in Key West and elsewhere in the Caribbean. Typically, cruise industry-commissioned studies do not include this important comparative data.<sup>29</sup> However, an examination of cruise passenger and visitor spending in Key West for two different years – one based

on an independent study and the other based in part on a cruise industry data – reveals that cruise passenger and crew onshore spending constitutes just 5.9% in 2003-2004 or 6.2% in 2017-2018 of total tourism spending, while, in those same years, land-based tourism accounts for 94.1% and 93.8% of the total (Table 2).



**Table 2: Comparison of Cruise Passenger and Land-based Visitors in Key West, FY 2003-2004 & 2017-2018<sup>30</sup>**

	Cruise Passengers					Land-based Visitors				
Year	Total # of Cruise Passengers	Average Onshore Cruise Passenger Spending	Total Spending by Cruise Passengers	Total Onshore Passengers & Crew Spending	% of Expenditure by Cruise Tourism	Total # of Land-based Visitors	Visitor Spending per Visit	Visitor Spending per Day	Total Spending by land-based visitors	% of Expenditure by Land-based Visitors
2003-04 <sup>f</sup>	906,697	\$32.10	\$28.4 M	\$51.5 M	5.9%	1.5 M	\$439.53	\$102.22	\$659.3 M	92.8%
2017-08 <sup>g</sup>	865,909	\$72	\$62.3 M	\$73M	6.2%	2 M	\$540	\$97.83	\$1.1 B	93.8%

These findings in Key West are on par with the Caribbean as a whole. In 2015, for instance, 28.7 million stayover tourists and 24.4 cruise passenger arrivals visited the 32 Caribbean countries that belong to the Caribbean Tourism Organization (CTO), generating a total visitor expenditure of about \$30 billion. Of this, only 8%, or \$2.4 billion, was spent by cruise passengers and 92%, or \$27.6 billion – **12.5 times more** – was generated by stayover tourists.<sup>31</sup>

**The economic evidence is clear: Land-based tourists spend far more per day and per visit than do cruise passengers. To maximize revenue into the local economy, Key West should therefore focus on strengthening higher value stayover tourism rather than low value cruise tourism.**

<sup>f</sup> **Notes for 2003-2004:** Key West city official passenger arrival numbers are slightly higher - 922,903 – than the figure from Murray’s report. Murray’s figure is used since other statistics are based on it. Land-based visitors includes day trippers who spend the least -- \$111 per visit as well as overnight visitors. Those who stay a week or more were found to spend on average over \$3600. Average length of stay for all categories of visitors was 4.3 days, compared with average length of stay for cruise passenger which was just 3.1 hours.

<sup>g</sup> **Notes for 2017-2018:** The figure of \$72 in passenger spending was published by CLIA (August 2020), but its source is not clear. The 2003-2004 spending figure of \$32.10 adjusted for inflation is \$43. While the \$72 figure may well be too high, even when it is used, onshore spending still contributes just 7.2% to tourism spending in Key West, interestingly the same as it did in 2003-2004, according to Murray’s independent study. Land-based visitor data is based on the 2018 Rockwell Analytics study and includes four categories: day trippers, stayover leisure, business, and VFF (Visiting Friends and Families). According to one of the analysts involved in the study, it therefore undoubtedly undervalues the spending of stayover leisure travelers since they, in general, spend more than the other three categories. Visitor spending per day is based on an average stay of 5.52 days as published in Insights, Inc.

## 5. The cruise industry erroneously claims cruise passengers ‘convert’ into overnight visitors:

One final financial benefit touted by the cruise industry and its supporters is the unsubstantiated claim that cruise passengers return to ports of call as overnight visitors. The industry contends that passengers use cruises to sample destinations such as Key West and then they return for longer, more valuable, stayover holidays. In the debate over the Key West referendums, a Chamber of Commerce official using this argument to warn that if the voters say ‘Yes’ and large cruise ships stop coming to Key West, “It’s going to remove what’s been a free advertisement for this city that has undoubtedly resulted in follow-up business from overnight travelers.” This, he added, “would hurt Key West economically.”<sup>32</sup>

In fact, according to a UN World Tourism Organization study, cruise passengers visiting Caribbean islands are far less likely to convert into overnight visitors than cruisers on Mediterranean itineraries.<sup>33</sup> Even cruise industry studies in the Caribbean reveal that most passengers surveyed say they are unlikely to return as overnight visitors. For instance, a January 2015 CLIA study found that “86 percent of cruisers planned to take another cruise in the next three years.”<sup>34</sup> In a 2006 study, also commissioned by CLIA, passengers in Key West said they were “only somewhat likely to return themselves” for a resort vacation in Key West.<sup>35</sup> Anecdotal evidence also suggests that few cruise passengers return to Key West as overnight vacationers. As one person who works in a Key West guest house wrote, “The idea that cruise ship passengers come back and stay in hotels? Forget it — I could count them on one hand in 10 years.”<sup>36</sup>

**The truth is that the overwhelming majority of cruise passengers on Caribbean itineraries do not convert into overnight tourists. Rather most will take their next vacation on another cruise ship.**

**86% OF CRUISERS PLAN  
TO TAKE ANOTHER CRUISE  
IN THE NEXT 3 YEARS**



The above findings debunk the glowing financial picture and misleading economic data promoted by the cruise industry, including in its campaign to defeat the three community-led referendums currently on the November ballot. The reality is that that cruise tourism in Key West is far less valuable than either the cruise industry portrays or than land-based, overnight tourism. In fact, Key West ranks low compared to other US and Caribbean cruise ports in the revenue it receives in both port fees and onshore passenger spending. In Key West and across the Caribbean, cruise tourism generates many times less in revenue from onshore spending than does overnight tourism. Further, like many other ports, Key West tour operators and stores must pay a 100% commission to do business with the cruise lines, thereby reducing the amount of cruise earnings retained in Key West. Finally, contrary to cruise industry claims, there is no evidence that cruise passengers who come ashore in Key West return as overnight visitors. In fact, surveys would support the opposite conclusion: that if cruise ship passengers return to Key West, it will likely be on another cruise.

These economic realities, combined with the grave dangers posed by cruise ships as super-spreaders of the novel coronavirus, suggest that the best way for Key West to generate maximum revenue is to focus on promoting higher value, sustainable, overnight and small ship tourism rather than lower value, riskier, large-scale cruise tourism.



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Claire Campbell and Brendan Gardner contributed research for this piece.



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- 4 Jessica Glenza. (October 1, 2020). “We want our island back’: the group taking on cruise ships in Florida Kays.” The Guardian.
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- 9 “Paradise doesn’t come easy.” (August 4, 2020). BigPineKey.com. <https://www.bigpinekey.com/tuesday-august-4-2020/>.
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- 13 Raftelis. (July 16, 2018). pp. 10, 11.
- 14 Gwen Filosa and Taylor Dolven. (October 5, 2020). “Cruising is on the ballot in Key West this year. Will voters reject big ships?” Miami Herald.
- 15 Over the past several years, this author has repeatedly tried without success to contact either of the two principals at BREA using the contact information on the BREA website: <http://www.breanet.com/breacapabilities.html>.
- 16 Burc Kayahan, Brian VanBlarcon, and Ross Klein. (2018). “Overstating Cruise Passenger Spending Sources of Error in Cruise Industry Studies of Economic Impact.” Tourism in Marine Environment. Vo. 13, No. 4. Pp. 193-203.
- 17 Murray. (April 8, 2005). p. 1.
- 18 Arlo Haskell, Treasurer. Treasurer. Key West Committee for Safer, Cleaner Ships. (September 2020). Author’s email communications.
- 19 Murray. (April 8, 2005). pp. 1-2, 10-44.
- 20 In addition to the sources listed in the footnotes for this table, the cruise passenger arrival numbers come from: “Comparison of FY2001 through FY2020 cruise ship and passenger arrivals in Key West.” (October 14, 2020). Information provided by port official, City of Key West to author.
- 21 Murray (April 8, 2005). p. 9. Unlike many other cruise ports in the Caribbean, Key West today still has no significant duty free shopping.
- 22 Murray. (April 8, 2005). p. 20.
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- 27 Key West tour operator that runs tours sold by the cruise lines. (September 2020). Communications with author.
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- 29 The one exception is the August 2020 Oxford Economics study on Key West, produced for CLIA, that presents statistics that argue that approval of the 3 referendums will have severe negative consequences for Key West. While this brief report does admit, “Cruise visitors (\$72) spend less per visit than overnight (\$620) or other day-trippers (\$96),” it goes on to use the highly unorthodox measurement of per hour passenger and visitor spending in Key West. The report states that overnight visitors spend \$6.34 per hour while cruise passengers spend \$9.34 per hour. The sources for this and other statistics was not clear and the calculations appear to be wrong. The author’s several emails to Oxford Economics requesting clarification about their methodology and data were not answered. As another economic analyst who specializes in economic impacts of tourism commented after reviewing the CLIA report, “No one collects comparative tourism spending data by the hour. How did they come up with these numbers? CLIA is opaque in terms of its data.”
- 30 Sources for this table are:
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