

DREAM



Spring 2010

WORLD CRUISE DESTINATIONS

LEAD STORY

Will regulation halt growth?

ARISON

Not afraid of the F* word...FUN

FOSCHI

Warns of over-capacity

VAGO

Finds audience for his views on ports

PIMENTAL

Immerses himself in Azamara

WATSON

Goes for off-track experiences

SUSTAINABLE TOURISM

Academics and passengers disagree

NICHE OPERATORS

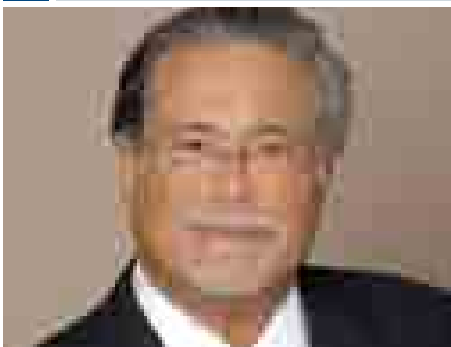
Can older ships survive higher operating costs?

AWARDS

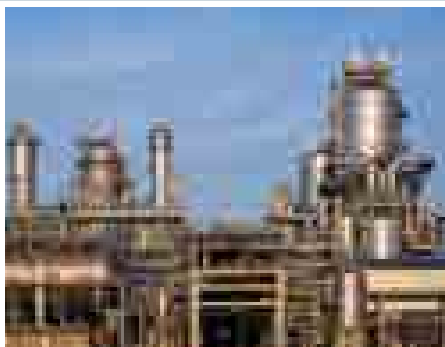
Results of the 2009 Ports and Destinations survey



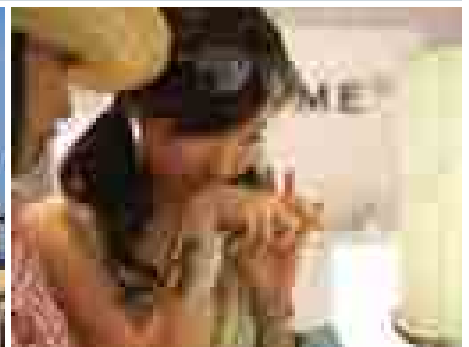
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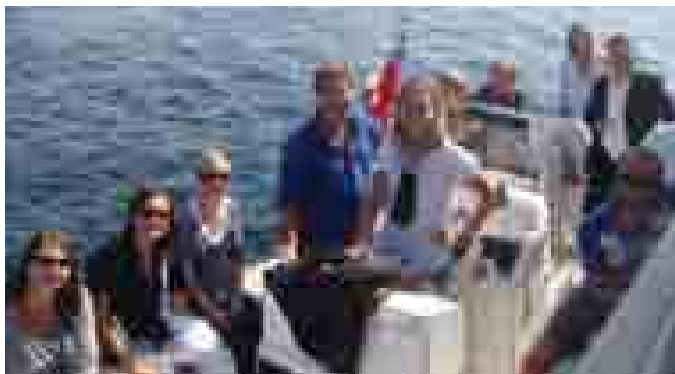
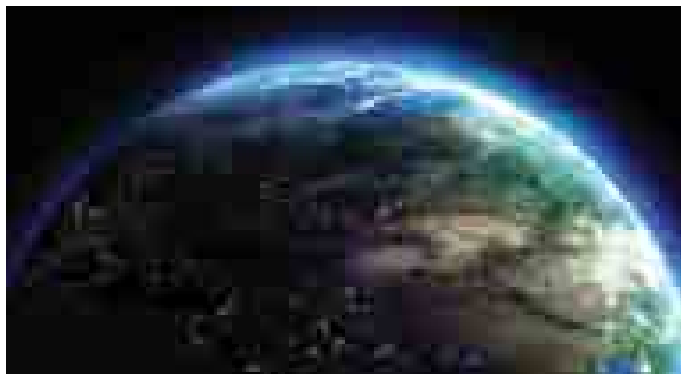
Theresa Baine talks to Michael Crye and Ted Thomson of Cruise Lines International Association about regulatory conditions in America – and how they fit in with the direction of European regulation.

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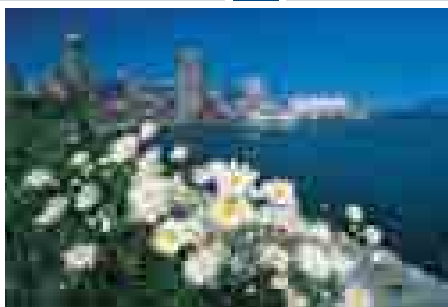
Passengers' dwell time behaviour at airports and railway stations can create an opportunity for cruise terminal operators to boost revenue by giving passengers an attractive retail proposition, as consultant Nigel Dolby tells Maria Harding.





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'Beach and barbie' chill-out days on the 'private islands' featured on Caribbean cruise schedules consistently attract top ratings in terms of passenger approval. So how can shoreside attraction owners in other destinations – like the Mediterranean – boost cruise tourism earnings by replicating the laid-back experiences these islands offer? Maria Harding investigates.

111 That's entertainment...

Cruise lines are increasingly moving to ditch traditional 'fishnets 'n' feathers' cruise shows in favour of snazzier entertainment more relevant to today's interactive multimedia and reality TV-savvy cruise travellers. What are the latest trends, and how can shoreside entertainment attractions get in on the act? Maria Harding reports.

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DWCD's Tony Peisley takes another look at how the consumer media has been covering the cruise industry – this time focusing on the aftermath of January's devastating earthquake in Haiti.





Norwegian fjords are rated best

National Geographic Traveler has published its most recent survey of the performance of destinations based on their sustainability and stewardship. The survey – mainly involving specific areas, regions or countries in some cases – scores the Fjords region of Norway top of the 22 destinations placed in the highest category named 'Best Rated Places' with a score of 85. In third is the

Gaspe Peninsular area of Quebec together with South Island, New Zealand. Slovenia is in equal sixth place with Spain's medieval Grenada and the Alhambra. The Highlands of Scotland is placed tenth with a score of 77 and Portugal's Douro Valley scored 76, as did Wales. One point below these were Bruges' Historic centre, Corsica and Brittany.

Europe's Museum of the Year

The Museum of Portimão, inaugurated in 2008, was recognised by the Council of Europe this year as the Museum of the Year. The museum captures the city's rich cultural heritage through an impressive display of artefacts and exhibits cleverly housed in a former fish canning factory – to provide a fascinating glimpse into the

community's past. And the museum is located just a short walk from Portimão Cruise Terminal and the city's bustling commercial and leisure zone. Portimão is ideally located at the far south-western tip of Europe and is now a popular call for cruise ships sailing between northern Europe and the Mediterranean.

Oceania Cruises announces inaugural itineraries for *Marina*

Oceania Cruises has unveiled the inaugural itineraries for its new flagship, *Marina*, which begins cruising at the end of January 2011. After a maiden voyage which sees her cross the Atlantic to Miami, *Marina* will transit the Panama Canal and head to Los Angeles and San Francisco via Cartagena Colombia, Puntarenas Costa Rica, and the Mexican ports of Puerto Chiapas and Cabo San Lucas. The

return voyage to the east coast takes in San Diego and Cayman Islands before a Caribbean offer which includes British Virgin Island, St. Barts, Dominica, St. Lucia and Grand Turk. A short cruise up the eastern starboard is next with visits to Charleston and Savannah before arriving for an overnight stay in New York. *Marina* then returns to Europe via Bermuda and Funchal, Madeira for its summer season.

■ The Red Sea port of Aqaba

has plans for a new port to support its aim of doubling the number of cruise calls to 200.

■ 'Gateways of the Sea' project awarded prize

The Port of Ponta Delgada's *Gateways of the Sea* development, which includes the new cruise terminal, has been awarded 1st Prize for 'New Public Projects' by Turismo de Portugal, the central public authority for Tourism. This award is seen by the Azorean government as recognition of its commitment to developing tourism in general and cruise tourism in particular.

■ Hurtigruten reaches out to the Arctic

Hurtigruten is offering itineraries this year on board its expedition ship *MS Fam* which allows passengers to visit research stations, track wildlife, participate in field studies and meet with some of the field's top research scientists. Highlights include Norway's Tromsø, Honningsvåg, North Cape, Gjesværstappan and Spitsbergen.

■ RCI, NCL, Carnival and Disney go head-to-head

The announcement by Royal Caribbean International (RCI) that the company intends to deploy *Liberty of the Seas* to Barcelona for a summer season next year will place it head to head with *Norwegian Epic*, *Carnival Magic* and *Disney Magic*. RCI make a habit of going head-to-head and clearly see rich pickings there.

■ Indonesian ports set for 44% growth

During the 2010 calendar year a total of 203 cruise ship calls have been scheduled to Indonesian ports. This represents an increase of 44% compared to 2009. The major beneficiaries are the ports of Nusa Tenggara with 74 calls projected (80% growth) and the port of Sulawesi with 23 calls (109% growth). Bali with 43 scheduled calls (up 39%) and Java's 35 calls (up 9%) are the other destinations which contribute the most to the country's cruise tourism. P&O Cruises, Costa Cruises and Princess Cruises will between them bring over 80,000 passengers to Indonesia's ports.

■ **Cabo San Lucas**, on Mexico's Pacific coast, plans to build a dock to replace its tender service.

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increasing extent of the regulations regarding the use of the much more expensive low-sulphur fuel (marine gas oil or MGO) in order to reduce the impact of sulphur oxide (SOx) emissions.

In the Emissions Control Areas (ECAs) of the Baltic and North Sea, the allowed sulphur content of fuel used by ships will drop from a maximum of 1.5% to 1% this July, and then to 0.1% in 2015.

The fuel maximum for ships in EU ports (docked or anchored off) has already fallen to 0.1% from the beginning of this year. The requirement at sea within the EU is a maximum of 1.5% for passenger vessels 'on regular service' – something which the cruise industry claims does not apply to its vessels, but the interpretation has been left up to each EU member nation.

The proposed North America ECA, which – if approved this month (March) – will extend 200 nautical miles from the US and Canadian coastlines excluding foreign territorial waters, the Arctic Circle, Puerto Rico and the US Virgin Islands in the Caribbean, the Western Alaska Aleutian chain and Pacific island territories, including the eight larger Hawaiian islands. It will start in 2012 with a sulphur in fuel maximum of 1%, dropping to 0.1% in 2015.

The International Maritime Organisation global requirement will – subject to review in 2018 – be for a 0.5% maximum from 2020.

"At 0.5%, we can still use residual fuel, but 0.1% means MGO, which is roughly double the price," said Dingle. "The ECAs will, therefore, become significantly more expensive regions in which to cruise." There has even been talk of the limit falling as low as 0.001% further down the line.

Earlier this year Carnival Corporation estimated the North America ECA would initially add US\$50–70 million to its annual fuel costs, with the existing Baltic and North Sea ECAs already having a similar impact.

That total US\$100–130 million impact is not described as being significant in the context of the group's overall costs; but this is only the beginning, with those sulphur limits all scheduled to be further reduced in the future.

"I can see Canada/New England cruises being significantly affected by a North America ECA, but the Caribbean should hardly be affected – unless the region goes down its own ECA route. Even ships homeporting in US ports do most of their Caribbean cruising outside the proposed ECA area." There is, though, a possibility

of both Mexico and the Bahamas being incorporated into that North America ECA.

Dingle pointed out that cruising is far from being the only shipping industry sector concerned, in particular, by the developing European regulation situation. "Ferry companies are fighting against some of the proposed limits because they believe they will create an inter-modal shift in the traffic from ferries to road haulage, because the land transport cost will not be similarly inflated by such onerous emissions controls.

"This, of course, would lead to higher rather than lower SOx emissions, which is hardly in line with the EU's Motorways of the Seas policy initiative."

The reality, though, is that this emissions control trend is a juggernaut that is unlikely to be brought to a halt. So, while still lobbying for more helpful regulation going forward, the cruise industry has to prepare to change some of its ways. This includes the itinerary-planning equation, especially within Europe.

The escalating cost of fuel in recent years has already made cruise speed a key element, which needs to be taken into account far more than in the past – despite the fact that companies are now using every technological measure to improve the energy efficiency of their ships.

"With the 0.1% limit when in port, our costs there are also going up so staying longer at destinations is not really the answer," Dingle said. "The two options we have if we want to ensure cost-effective itineraries are either cruising closer to home, or slowing the ships down and/or reducing the number of ports."

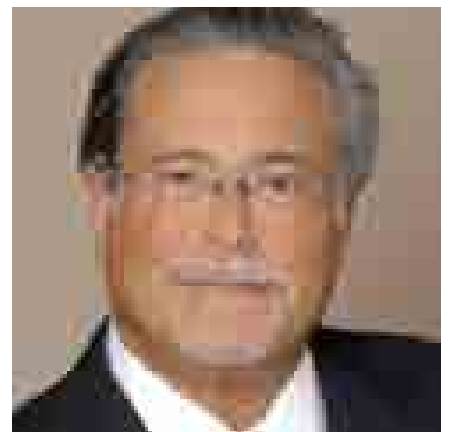
Here he was talking primarily about transatlantic crossings and cruises out of the UK which, he said, had been gradually adding ports to 14/16-day itineraries. These would have to start shedding a few.

"It will be the same for all of us," he said. "So there will be no fear of putting your brand at a competitive disadvantage."

Carnival Corporation Chairman and CEO Micky Arison agreed that the requirement for this kind of itinerary changing would depend on the region and the operator.

"Cunard has trialled seven-day transatlantics, and these will become the norm," he said. "This will be a major change, but one that means a much greener as well as a lower-cost operation."

"For other brands, there may be occasions in some parts of the world



Arison: Cunard has trialled seven-day transatlantics, and these will become the norm. This will be a major change, but one that means a much greener as well as a lower-cost operation."

where they reduce the number of ports; but mostly not, I think. It will just take better planning. After all, we have the original Seabourn Cruises ships which cannot travel at more than 14 knots anyway but, although slower than most other ships, they have always been able to offer full and very interesting itineraries."

There is no doubt, though, that the fuel issue is creating a sea-change in the way itinerary-planning is approached by all cruise companies. Celebrity Cruises President and CEO Dan Hanrahan spelt it out: "When I joined the company 11 years ago, I cannot remember being at a deployment or itinerary meeting and fuel ever being mentioned. Now it is an important part of the decision.

"It certainly does not – and will not – dictate deployments, but it will influence them and the individual itineraries. It is now a balance between reducing fuel cost and delivering cruises that people want to book, and there is no doubt that the spread of ECAs is making it more difficult to plan deployments ahead.

"This is why finding a technological solution to reducing or removing emissions is currently our industry's holy grail."

Norwegian Cruise Line (NCL) Executive Vice President Marketing, Sales and Passenger Services Andy Stuart said: "Fuel costs are going up anyway, even apart from the sulphur issue, and this is bound to play a big part in deployments and itineraries from now on.

"When we introduced our innovative winter Caribbean programme out of New York, we did not really think about fuel too much – now it is a major issue. Also, our decision to switch the base port for Baltic cruises next year from Dover to Copenhagen is primarily – although not exclusively – fuel-driven.

"It cuts down on the distance travelled and the speed required, but it also means we can offer nine-night rather than 12-night flycruises. It saves on fuel but we also believe we are more of a one-week cruise line. We are in the mass market where – particularly in North America – once you start offering vacations of more than a week the market potential drops sharply.

"The fact is – even in this new situation – we still have to weigh fuel against the passenger experience and our ability to market the cruise itinerary.

"Similarly, port overnights work against

us on a seven-day cruise as they reduce the number of ports offered and therefore, potentially, the appeal of the cruise. They also reduce the on-board revenue.

"We used to have four ships (seasonally) in New England/Canada but we have gradually reduced so that, next year, we will have just one. Again, this is partly driven by fuel cost; but it also part of our brand strategy to have fewer different deployments within a year for an individual ship.

"New England/Canada is a short season, so the crew and the travel trade have just got used to a ship being there when it leaves.

"It is more difficult and costly to market different deployments within a year, and it is also easier to maintain a high quality on-board experience when on the same rotation. We are really talking about a return to our roots – we started out by just operating year-round from Miami."

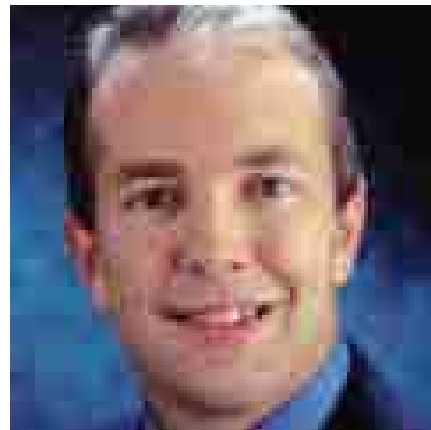
MSC Cruises CEO Pierfrancesco Vago takes a more pragmatic line on the fuel question. "We have to switch to low-sulphur if we stay longer than two hours in port, so there is no real option there. Itineraries are dictated by distances between ports and speeds, so I do not see us dropping ports to save fuel."

The cruise industry has long benefited from its ability to turn a negative into a positive, and already some of its more creative operators are using the fuel issue to create an edge for themselves in the marketplace.

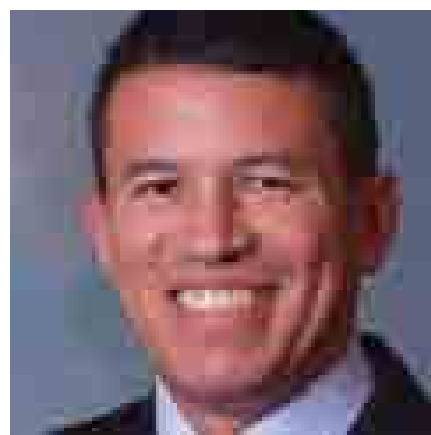
When he was parachuted in to relaunch Azamara Cruises, new President and CEO Larry Pimental did not settle for just changing its name (to Azamara Club Cruises). He decided to change its itineraries to include longer port stays (see interview with Larry Pimental on page 59). This is being marketed as "destination immersion" to appeal to those travellers who have previously complained that cruise calls are never long enough for passengers to get a proper feel for the place being visited.

But Pimental admitted that this was not solely a marketing-based decision. "It was definitely also driven by fuel cost concerns," he said. "We are part of a major corporation (RCCL) which is looking at cost control throughout its operations.

"Having fallen back a year ago, fuel costs are rising again and, although it is difficult to be certain, it does seem likely to



Hanrahan: There is no doubt that the spread of ECAs is making it more difficult to plan deployments ahead."



Stuart: Our decision to switch the base port for Baltic cruises next year from Dover to Copenhagen is primarily – although not exclusively – fuel-driven."

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from Dream World Cruise Destinations Magazine

Dream World Cruise Destinations

2009 AWARDS

Most Improved Port Facilities

The most relevant improvement to; fenders, pier, or berth; or to infrastructure; or parking spaces.

Winner

Civitavecchia, Italy

Limassol, Cyprus

Malaga, Spain

Shanghai, China

St. Petersburg, Russia

St. Thomas, USVI

Most Efficient Port Services

Most efficient combination of pilotage, port agency services, customs clearance and good working relations with the operations departments of cruise lines.

Winner

Barcelona, Spain

Helsinki, Finland

Kiel, Germany

La Romana, Dominican Republic

Muscat, Oman

Port Everglades, USA

Rotterdam, The Netherlands

Vancouver, Canada

Best Port Welcome

The best welcome to passengers coming ashore.

Winner

Dos Bocas, Mexico

Guadeloupe

Nagasaki, Japan

Saguenay, Canada

Most Responsive Port

The port with a cruise team that responds quickly to requests for information, and finds solutions to the challenges and demands of the cruise lines.

Winner

Auckland, New Zealand

Barcelona, Spain

Hong Kong

Santa Cruz de Tenerife, Spain

St. Maarten

Stockholm, Sweden

Best Turnaround Port Operations

Port with the best berths, terminal or covered passenger facility, efficient services such as security; customs; baggage handling communications; passenger services; link with the airport; logistics capability; stevedoring; storage; ship services including provision of fresh water and disposal of waste.

Winner

Barcelona, Spain

Dubai, UAE

Hong Kong, China

Kiel, Germany

Montreal, Canada

Palma de Mallorca, Spain

Port Everglades, USA

Shanghai, China

Southampton, UK

Most Improved Terminal Facilities

Most improved terminal whether through construction of new building or as a result of refurbishment delivering: new technology, bonded baggage services, or improvements to security, communications, or services to the passenger.

Winner

Amsterdam, The Netherlands

Barcelona, Spain

Dubai, UAE

Port Everglades, USA

Port Luis, Mauritius

St. Petersburg, Russia



Most Efficient Terminal Operator

Most efficiently managed and operated terminal.

Winner

Barcelona, Spain
Dubai, UAE
Kiel, Germany
Kobe, Japan
Vancouver, Canada

Most Improved Destination

Improvement to tourism product and/or infrastructure; eg city/town centre landscaping; traffic flow; provision of transport; access to tourism information; new attractions/experiences.

Winner

Acapulco, Mexico
Dubrovnik, Croatia
Klaipeda, Lithuania
Muscat, Oman

Best Turnaround Destination

The best combination of airlift and airport capacity, transport links (road/rail), ground handling, hotel stock, tourism appeal, and seamless transfers to seaport.

Winner

Hamburg, Germany
La Romana, Dominican Republic
Montreal, Canada
Palma de Mallorca, Spain
Singapore

Best Destination Experience (Independent)

Destination where the quality of the experience derives from passengers making their own arrangements for their time ashore.

Winner

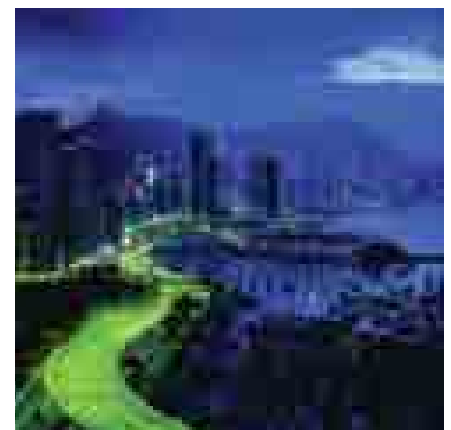
Barcelona, Spain
Copenhagen, Denmark
Limon, Costa Rica
New York, USA
Quebec, Canada
Singapore
St. Maarten
Tallinn, Estonia
Venice, Italy
Willemstad, Curacao

Best Destination Experience (Organised)

Destination where the quality and delivery of the product includes an organised tour booked through the cruise line.

Winner

Aqaba, Jordan
Bangkok, Thailand
Charleston, USA
Cozumel, Mexico
Koper, Slovenia
Kotor, Montenegro
Limon, Costa Rica
Norwegian fjords
Rome, Italy
St. Petersburg, Russia



Dream World Cruise Destinations

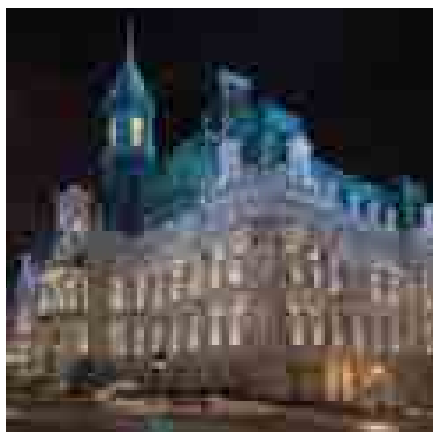
2009 AWARDS

Service Companies

Companies recognised for outstanding service to passengers, crew or ships.

Commendations

Aaragon Tours, UK	McKay Shipping, New Zealand
AAT, West USA and Hawaii	Norway Cruise Handling
Alexander Parrish, Antigua	Operator Elite, Montenegro & Croatia Isles
Aquila Tours, Saint John, NB, Canada	Petra Tours, Egypt
Arctur Travel, St. Petersburg, Russia	Port Authority of St. Maarten
Arctur, St. Petersburg, Russia	Port of Kiel, Germany
Atlas Travel, Slovenia	Rais Hassan Saadi, Dubai, UAE
Aviomar, Mexico	San Juan Garbage Collector, Puerto Rico
CCS, Jamaica	Santos Garbage Service Provider
Central Romana, Dominican Republic	Savona Garbage Collector, S.V. Portservice
Cruise Line Agency, Alaska	SEA Tours, Bangkok, Thailand
DDP Incentives, Italian Riviera	SeaSong Tours, Turkey
Elite Travel, Dubrovnik	Serene Holidays, Mumbai, India
European Cruise Service, Norway	Shore Tours, Lisbon, Portugal
FK Warren, Montreal, Canada	Shorex, Costa Rica
Go Vacation, Bangkok, Thailand	Specialized Travel Services, Ireland
Helsinki Grey Waters Collector, Finland	Trumpy Tours, Italy
Intercruises Shoreside and Port Services	Viet Excursions, Ho Chi Min City, Vietnam
Lima Tours, Chile	Walker Tours, Sri Lanka
LSS, Helsinki, Finland	Zaatarah Tours and Travel, Jordan



Best Attraction Experience

The best combination of product and friendly, professional staff and efficient organisation.

Commendations

Ariau Towers, Amazon, Brazil

Boatride, Icefjord, Greenland

Boatride, Lagoons, Bora Bora

Canyoning, Costa Rica

Capri, Italy

Catamaran & Turtle, Barbados

Chichen Itza, Mexico

City Walks, Valletta

CityTour Kotor, Montenegro

Cliffdivers, Acapulco

Dolphin Cove, Cayman Islands

Flaam Railways, Norway

Helicopter flight to Ile d'Orleans, Quebec

Moorea Boat Tours, French Polynesia

Pyramids of Guimar, Santa Cruz de Tenerife

Seawings, Dubai, UAE

Best New Attraction

The best new development/product.

Commendations

Gatun Eco Adventure Center, Colon

Oceanarium, Lisbon

Rainforest Sky Rides, Jamaica

River Tubing, Dominica

Segway Experience, Lisbon

Special Vesuvius Tour, Naples

Stingray and Shark Encounter, French Polynesia

Tea Time, Emirates Palace, UAE

Whale Watching, Reyjavik

Destination with Best Tour Guides

Destination where the quality and professionalism of guides is considered outstanding.

Commendations

Barcelona, Spain

Charleston, USA

Dublin, Republic of Ireland

Puerto Limon, Costa Rica

Saint John, New Brunswick, Canada

St Petersburg, Russia

Walvis Bay, Namibia

Are port associations worthwhile?

There has been a proliferation of port associations set up over the past few years, with varying objectives. Are they providing a worthwhile service? Susan Parker reports.

The cruise lines have long been saying that port associations are an effective way of doing business, and the message has taken hold. However the world is a patchwork of different associations, and associations within associations, which at times is confusing. For example there are something like 11 different networks operating in the same region as Cruise Europe, with many of the ports being members of more than one association.

Disney Cruise Line Port, Security Operations and Maritime Affairs Director Russell Daya has been actively involved with – and has praise for – both Cruise Baltic and Cruise Norway when planning the new Baltic itineraries for Disney. “I think there is no harm in another group of ports getting together, because they are really getting down to the details of the smaller ports,” he says. “Sub organisations can complement the bigger ones.” He adds that for a company going cold into an area, having a one-stop shop is extremely helpful and time-saving. MedCruise too was “very proactive” when the company was planning itineraries in the Mediterranean.

From an association point of view, the myriad associations has its challenges too. Bo Larsen, Director of Cruise Baltic (27 ports, ten countries) says: “We can feel that we are under more pressure to give value and get return on investment, because

we have members who are members of more than one cruise association. It is a very, very healthy experience to go out to destination A and explain why we are up to ten times more expensive than another association.”

He is aware that, when it comes to budgets, some ports may find it “easier to get rid of the most expensive one in the short term”. But, he cautions, “you don’t get any business from just being there [in an association].”

Constant innovation is the key to

Trepanier: We need to show the places and light the fire of interest – that is part of our responsibility.”

keeping members, says Larsen, as well as being able to explain the return on investment. The old adage ‘you get what you pay for’ rings true here. The three annual steering group meetings get 90% attendance. Pursuing environmental solutions in the Baltic Sea has been key in every meeting, and also organising the ‘green ship visits’ in 2009. Common service standards have been implemented across the region, which has grown by one million passengers since 2004. “We

have increased the visibility of the region dramatically,” says the proactive Larsen, and there is no doubt that this is true.

Certainly there are associations which are more pro-active than others – and it’s not rocket science to see that, on the whole, those with dedicated managers achieve more. However when requesting information the rapid response and comprehensive data received from most of those targeted was impressive, although there were a few notable exceptions.

Seabourn Cruise Line Itinerary Planning & Development Director Peter Cox, who has years of experience in this field, says: “Port associations, at least those in Europe, have become increasingly efficient and professional in their dealings with the cruise lines, and are willing to listen to our needs in trying to balance the ports’ and cruise lines’ interests – which are not always equal. A rapidly growing cruise industry, with ever increasing ship sizes, puts enormous pressure on ports. Varying local and regional political and social sensitivities and an ever more complex operating environment should make the associations even more important in the future to the cruise industry.”

In his eyes “The most successful port associations are Cruise Baltic, Cruise Norway and MedCruise.” He adds: “The efficiency and success of several more recent alliances in the UK and Atlantic



Europe remains to be seen. It is regrettable that the St Lawrence, Canada and New England associations are not united in a common regional association. The associations in South America, the Indian Ocean and Asia seem to be having a difficult time establishing themselves and becoming relevant."

It is not a common association, but a Canada New England Cruise Symposium is held annually at which visiting executives and ports came together to learn from each other, tackle issues and forge new ways forward to grow the entire region in the most successful way. It has certainly worked hard and successfully in recent years to put itself on the cruise map.

Rene Trepanier, Executive Director of Cruise the St Lawrence – which offers one voice representing nine ports on the Canadian river, says that branding the destination, rather than listing individual ports, as well as working with relevant partners has contributed to the rise in calls in the region.

CruiseMaineUSA and Cruise Atlantic Canada are also part of the symposium, along with Massport Boston and New York City. Amy Powers, founder of CruiseMaineUSA, comments: "Working closely together shows our dedication to the success of the region wholly, not just the success of our own association."

As far as Maine is concerned it will host

nearly 300 cruise visits at ten members ports in 2010. Its newest deep draught port, Rockland, was inaugurated by Royal Caribbean International (RCI)'s Jewel of the Seas in 2009. "My work with Diane Block and the itinerary development team definitely helped to move along the communities' goals, and helped them to achieve hosting Jewel," says Powers. The association is now working hard to push Eastport for adventure lines, with CruiseWest visiting this year. Powers has also done some waste stream management tours on Holland America Line and RCI ships, and is now focusing on fam trips to the less-well-known ports.

The mission of Cruise Atlantic Canada (CAC) is to nurture, grow and develop the port infrastructure and destination experiences in line with cruise line needs – and judging by the growth in the region in recent years it is getting it right. The number of passengers visiting has almost doubled in six years to 800,000 in 2009, and the economic impact has increased from C\$26.7 (US\$25.6 million) to C\$80 million (US\$76.7 million), stresses CAC Marketing Manager Berni Wood.

Cruise Norway is an example of a cruise association that is "firing on all cylinders" according to Holland America Line Deployment & Itinerary Planning Manager Timothy Little. "Their excellent publication and website make it easy for me to look up a (new) port, and lowers the threshold for including said port in an itinerary," he says. "Aside from that the leadership is very pro-active and has established a great working relationship with the industry." He also cites Cruise the St Lawrence, Cruise Baltic and Destination South West, UK, as "really setting the standard", adding: "Their accessible and informational websites speak for themselves."

Having completed four days as an instructor on a MedCruise Association port development course that included 50 ports this February, Princess Cruises Shore Excursions & Port Operations Vice President Bruce Krumrine – who is actively involved with many cruise associations including MedCruise, Cruise Europe, China Cruise and Yacht Industry Association and Cruise Down Under – said: "The associations provide an important and constructive forum for both ports and the cruise lines, resulting in a better mutual understanding and closer cooperation."

MedCruise has now put on two port

Larsen: It is a very, very healthy experience to go out to destination A and explain why we are up to ten times more expensive than another association."

Krumrine: The associations provide an important and constructive forum for both ports and the cruise lines, resulting in a better mutual understanding and closer cooperation."

Mehta: The least effective associations are the ones that try to cover too many ports over a number of regions."

development courses for its members, bringing in speakers from cruise lines, the EU and others to help its members understand the needs of the cruise lines and to encourage dialogue between all parties.

Silversea Cruises Associate Vice President Air & Land Programs Darius Mehta says that the most effective associations are those that not only include the local development office but also the port authorities, all working as a team to promote cruise. This is echoed by many cruise executives, and certainly there are many ports that have got their own networks ensuring that the whole community is working together to make cruise a success.

Mehta is a little wary of associations suggesting itineraries as "they invariably want to include association ports which tend to be in closer proximity". He also thinks "The least effective associations are the ones that try to cover too many ports over a number of regions." He has a special plea for the UK "to get their act together and come up with an effective organisation". Certainly work is being done in this respect, with cruiseBritain, having recently agreed a constitution, now working on a handbook. The plan is to concentrate more on networking events and raising awareness in 2010.

"Important benefits the associations create for the cruise lines," says Seabourn's Cox, "are their efforts to promote and share best practices between the well established and new, less experienced members, while their efforts to grow their membership help the development of new ports of call, especially in the increasingly congested Mediterranean and Northern Europe."

Many comment on the value of fam trips. "The ability of cruise associations to host fam trips and site inspections to a selection of multiple ports is an additional advantage," says Littley. "It will maximise the effectiveness of the trip and increases participation."

Being able to meet lots of ports in one place is a real bonus for busy cruise executives, as Costa Cruises Port Operations Manager, Marine Operations Elisabetta De Nardo explains. "At this time of financial crisis, when no budgets are dedicated to visiting ports unless it is really necessary, attending meetings/assemblies of port associations is doubly important."

She says that the chance to meet many ports at the same time is invaluable, and less time-consuming than seeing individual ports at an office – which is also more expensive for the ports.

Cruise Europe's annual general meeting provides an opportunity for cruise lines to meet people from many of the 102 member ports and give their opinions on needs and wishes when their ships visit the destination, explains Cruise Europe executive Vibeke Jorgensen.

Some of the associations are actively working together with the industry to solve local problems. Cruise Norway (CN), for example, had a close cooperation with the European Cruise Council, the Passenger Shipping Association and the Norwegian government during the NOx fund negotiations, says Managing Director Wenche Nygard. There are also quality guidelines that members must adhere to. Right now CN is working on an early warning system so that cruise lines will be able to search three years ahead on ports, days and weeks.

And what of the value of an association to a port? As the self-confessed 'new kid on the block', Bodø says CN's collaboration as it set itself up as a new cruise port has been invaluable. In addition the association has introduced the port to representatives for cruise lines, agents and media – which would have taken several years to accomplish on their own. It has also provided them with bona-fide cruise ship bookings through their sales meetings with cruise lines. CN workshops and seminars have helped them in their knowledge of the industry.

There is no doubt that ports, particularly the lesser-known ones, have received calls thanks to membership of an association which has helped to give them a profile amongst the cruise lines – and also the knowledge to deliver a product. Narvik in Norway, for example, has gone from zero calls in 2006–2008 to seven this year.

The Atlantic Alliance was set up two years ago to offer a new cruise destination to the industry, and Chairman Dirk Moldenhauer says that the region has already attracted AIDA Cruises to sail year round from Hamburg to the English Channel from February 2010. AIDA Senior Vice President Michael Ungerer backs this up when he says: "The Atlantic Alliance is a perfect example of how an innovative idea can be packaged and marketed as a new product."

De Nardo: At this time of financial crisis, when no budgets are dedicated to visiting ports unless it is really necessary, attending meetings/assemblies of port associations is doubly important."

Ungerer: The Atlantic Alliance is a perfect example of how an innovative idea can be packaged and marketed as a new product."

Cruise Wales, which has been working alongside the Welsh Assembly, Visit Wales and International Business Wales, has played a major part in bringing 21 calls and 12,529 passengers to Wales in 2010 compared to 11 calls and 5,445 passengers last year, explains Sue Blanchard-Williams of its secretariat.

Recognising the calls for new cruising areas, Bothnia Cruise Ports was set up in 2004 and now numbers seven ports. For lines wanting to further develop Baltic Sea itineraries, the association's regular visits to their offices and the provision of a collective information bank aids discovery of this less-well-known part of the world.

Established in 1994, Cruise New Zealand has been "pivotal in the growth of the cruise industry from 27 voyages carrying 19,400 passengers in the 1996/7 season to 96 voyages carrying 118,976 passengers in 2008/9", says Marketing Manager Raewyn Tan. More specifically, she says, the country has its first homeport ship this year with P&O Cruises Australia basing *Pacific Pearl* in Auckland for seven months. Although destination marketing remains the primary objective, the association is now taking a greater role in destination management which includes infrastructure, regulatory and environmental issues to ensure the country remains internationally cost competitive. Being the only association in the country it is the 'go-to' organisation for all things cruise in New Zealand.

A similar evolution has taken place at Cruise Down Under (CDU) which now has a much broader focus. It incorporates infrastructure

development and both state and federal government interaction for future planning projects, according to General Manager Jill Abel. The association publishes an annual economic impact study and works with Qantas to increase the focus of shipping in the region. CDU has assisted in the development of round-Australia cruising, with an extended season, as well increasing port calls, says Abel.

Indonesia is an archipelago of 17,500 islands with three marquee destinations and 62 others being visited by cruise ships in 2010. The Minister of Culture and Tourism (MOCT) works with the cruise industry to understand their needs and future planning, and also with other cruise destinations to understand better how to develop successfully, says consultant Hugues Lamy. It is also working with local government, stakeholders, communities and ports to ensure all parties understand what is required by the cruise lines. MOCT is coordinating the development of new destinations with the ability to accommodate cruise ships alongside or at anchor with adapted landing facilities.

Cruise Scotland was only launched in 2009 but has already commissioned a national cruise study and infrastructure audit – from GP Wild (International) Ltd – to include a rigorous assessment of everything from harbour/port facilities to local transport, tour guides, shore attractions and the quality of welcome to passengers. "Cruise tourism has been growing steadily in recent years and generates an estimated £35 million annually to the Scottish economy," says Chairman Richard Alexander.

"We know that the only way for Scotland to maintain and indeed increase its share of this lucrative market is to offer world class facilities and services. Cruise passengers enjoy the highest levels of service on board ship, and we must all do all we can to ensure that their shore experience in Scotland matches those standards." And that just about says it all. **D**

WHAT IS THE SINGLE MOST IMPORTANT THING THAT YOU DO FOR THE CRUISE LINES?

Atlantic Alliance: Presenting the ports as a new destination attractive enough to engage and employ more ships in the region, even homeporting here.

Bothnia Cruise Ports: Keep them informed about each destinations' various product developments, and new events coming up.

Cruise Atlantic Canada: Working in partnership with cruise lines. We believe in joint partnerships, both in marketing and in training their reservation agents to sell our product.

Cruise Baltic: We react fast on requests from cruise lines on behalf of a whole region and not just a few ports, which are always recognised by all cruise lines we deal with.

Cruise Down Under: Provide a one-stop shop for all cruise-related questions on destinations, port facilities, personnel and new opportunities to develop itineraries.

Cruise Europe: Give them easy access to information about European ports and destinations.

Cruise Maine USA: Local advocacy.

Cruise New Zealand: Facilitating cruise lines' concerns to New Zealand stakeholders so that New Zealand remains a cruise-friendly and cost-competitive destination that cruise lines will want to continue investing in.

Cruise Norway: Probably a simpler process. They know they can get all the information they need about Norway in one place, and it is objective.

Cruise Scotland: A one-stop shop for all information about Scottish ports.

Cruise the St Lawrence: The fam tours. Once we have cruise executives seeing the place and enjoying the uniqueness of our destination, it is as though most of the sales pitch is done; our duty ends there. After that it falls into the hands of the ports/destinations to deal with the lines directly.

Cruise Wales: To ensure the cruise lines and passengers have a first class experience, thus encouraging them to return to Wales.

MedCruise: Hosting and sponsoring events and fam trips and publishing information throughout the year, to provide opportunities for meeting and visiting ports and working together to solve issues.

Minister of Culture and Tourism of Indonesia: Coordinating the development within the Indonesian archipelago and promoting the destinations to cruise lines. Getting facilities on line with international standards in all the ports which handle cruise ships, before coordinating the development of the tourist offer with the local stakeholders.



'Fam' trips: Do they deliver?

Lofoten Islands

Increasing numbers of ports and cruise clubs are using fam trips as part of their promotional armoury. Susan Parker finds out the reasons for their popularity, and whether the effort is rewarded.

Cruise Norway (CN) hosted its first familiarity (fam) trips in 2009, and will be repeating the experience this year. "I am convinced that fam trips are the best way to market and promote Norway," says Managing Director Wenche Nygard Eeg. "We will continue arranging these tours every year, as long as the cruise lines want to participate."

Everyone participating in this Arctic Norway trip recommends that this type of activity should be repeated by other destinations, as the chance to experience a destination firsthand is invaluable.

Seabourn Cruise Line Destination Development/Planner Barbara McComb says: "The main benefit was my 'familiarity' with so many areas I've been working on for so many years, and can now finally feel confident in assessing tours and the real value (or not) of specific sites."

And Norwegian Cruise Line Marketing Analyst, Itinerary Planning Jennifer Marmanillo says: "When we are scouting new ports that we don't currently offer, it's a great way to become familiar with the options that would be available to our guests."

Last year 21 representatives from ten cruise lines took part in two site inspections in Norway: an Arctic trip including Oslo, Lofoten, Tromsø and North Cape; and a

fjord tour including Ålesund, Geirangerfjord, Olden/Nordfjord and Bergen, with a post trip to Flam and Stavanger.

Although itinerary planners and shore excursion executives have different interests, the trips catered to both – though that this meant some long days in order to fit everything in. An easy trap to fall into is placing all the emphasis on the shore excursions, which are undoubtedly more 'glamorous'. However it is equally important to visit the port, as without the

Littley: An ideal visit will have me leaving with no more than a couple of dozen business cards and a memory stick."

necessary port infrastructure there will be no cruise call. Communities that are working as one tend to have a better understanding of this.

On the Arctic trip there were a couple of places where we were unable to visit the port, although in Honningsvåg the harbourmaster was contacted and joined us for dinner. This demonstrated the community's enthusiasm for cruising, and its ability to cater to its demands at short

notice. However Marmanillo highlighted the need to see the port itself: "Honningsvåg was the only place we were not able to visit the port facilities, which is important to itinerary planners and port operations."

The Arctic trip demonstrated that there are huge benefits for both host and guest. Continuous dialogue took place during the week, with Nygard saying: "The cruise lines' and customers' needs are of high importance to the Norwegian market. We got a lot of important feedback from the shorex and itinerary people. Feedback on how important it is to have a local cruise network in place, the importance of cooperation between the ports, agents and destinations companies."

This was repeated time and again: fam trips are a great way to demonstrate to a community just how important the industry is to them, but also how they must work together. Holland America Line Deployment & Itinerary Planning Manager Timothy Littley says: "Meeting the local representatives and authorities also allows me to determine their sincerity and enthusiasm for the cruise industry."

Ingrid Maderni, Saga's Shore Excursion Executive for Norway, UK, Iceland and Greenland, comments: "Bodø came across to me as a destination that was working well together to promote itself, and where I can be sure our passengers will receive a really warm welcome."

Although not perhaps having as much to



Nygaard: "We got a lot of important feedback... on how important it is to have a local cruise network in place and the importance of cooperation between the ports, agents and destinations companies."

offer as some, the enthusiasm and energy of some teams lead you to believe that they would do anything possible to help make things happen. Silversea Cruises Silver Shore Specialist Stephanie Servaites

has a different view: "Bodø was not very effective in proving itself a good destination. I don't believe they are ready for cruise passengers – simply not enough to offer."

This example demonstrates that not everyone is looking for the same thing. Responses to a survey following the Arctic trip showed destinations highlighted as presenting themselves well: Bodø, Ålesund, Oslo, Lofoten, Honningsvåg, Tromsø. And those that did not: Bodø, Aa, Tromsø, Honningsvåg, Svolvær. These apparent contradictions highlight the fact that shorex and itinerary planners are seeking different things to reflect the requirements of their particular brands.

Timing is everything, and getting this right

1. Jennifer Marmanillo, Norwegian Cruise Line
2. Sandra Bratland, Norwegian Cruise Service
3. Timothy Littley, Holland America Line
4. Altea Palmer, Royal Caribbean Cruises Ltd
5. Barbara McComb, Seabourn Cruise Line
6. Tine Delmann, TUI Cruises
7. Maria Elenea Artusi, Costa Cruises
8. Elisabeth Whewell, Saga Shipping
9. Ingrid Maderni, Saga – *Spirit of Adventure*
10. Joni Lunsford, Royal Caribbean Cruises Ltd
11. Knut Volden, Nordic Cruise Services
12. Wenche Nygård Eeg, Cruise Norway
13. Susan Parker (Fam Trip author)
14. Dan Viggo Vårum, Guide, Arctic Cruise Service
15. Lily Urrutia, Norwegian Cruise Line

Attended but not in photo: Stephanie Servaites, Silversea Cruises

CRUISE THE ST LAWRENCE

For Cruise the St Lawrence, fam trips are "way up at the top of the list of priorities in our action plan" according to Executive Director René Trepanier. To say that money is no object is not quite correct, but it does demonstrate just what importance is given to the fam trip. He says the issue is more to persuade people to come and find a time frame in their schedules. This association of nine ports has organised two press and eight fam trips to date, hosting seven cruise lines and 15 executives. Trepanier says the optimum size for a trip is five plus a guide, and five days is about the right duration.

There is no doubt as to the success of the trips: Norwegian Cruise Line now calls in Sept-Îles and Holland America Line in Baie-Comeau, Îles de la Madeleine, Gaspé and Sept-Îles. The ports have also benefited from feedback in terms of facilities:

for example Havre-Saint-Pierre took advantage of comments made by Carnival Cruise Lines and made some alterations to the berth construction.

"I think each visit has brought a lot of precious information," says Trepanier. "The cruise executives tell the truth, and will say if an attraction is appealing or not. They will help to put a price, a value on a specific experience or product offered by the destination. They will tell if the place has the capacity to host a big volume of passengers or not."

Trepanier: The cruise executives tell the truth, and will say if an attraction is appealing or not."

Oelmann: Be well prepared, save us from boring general information, and just let us have the news and highlights and not too much paper."

on a fam trip is difficult. Executives cannot leave the office for too long, so the general consensus seemed to be that a week is about right. However this can result in a port a day which makes the itinerary exhausting, especially for those flying in from America and having to deal with jetlag.

Although it is tempting for a destination to show everything it has to offer – it is a one-off opportunity with a captive audience, after all – in this case less is probably more. One or two hand-picked highlights along with a visit to the port is sufficient.

The advice of Holland America's Littley is straightforward: "Prepare the visit and stick to the playbook. There is never enough time so use what you have in the most effective possible way. And never forget that the participants on a fam trip are only human. If the travel schedule is too full or

tight it will not benefit the destination, no matter how well it is presented."

TUI Cruises Head of Port Operations, Shore Excursions & Groundhandling Tine Nathalie Oelmann has this to say: "Be well prepared, save us from boring general information, and just let us have the news and highlights – and not too much paper."

Indeed the latter became an increasing problem as we went from one place to the next collecting brochures, books, gifts, etc. It is important to remember that all of this has to be packed and carried on a daily basis.

Littley, who did receive all the information he needed on the trip, sums it up well: "The information we really need can probably be summarised on just one or two pages. The Cruise Norway publication already does an excellent job at this. An ideal visit will have me leaving with no more than a couple of dozen business cards and a memory stick."

As far as shore excursions were concerned, Cruise Norway had taken a different approach. Rather than taking executives on the same tour as the passengers, a sample of a tour was offered with alternatives/extras being explained. Executives could ask about

other options, and the site got feedback on what might be done differently. In a couple of places we visited possible new attractions to see whether they might be of interest to the cruise lines – for example the Planetarium in Tromsø, which it was agreed was not yet ready for cruise passengers.

Almost everyone came away with new ideas for shore excursions, particularly Elisabeth Whewell, Shore Excursions Executive for Saga's Spirit of Adventure. Examples include a fjord cruise out of Stavanger, with a local artist sketching the guests with the fjord as a backdrop; an art tour with specialist guide in Oslo to the Munch Museum, the National Gallery and Vigeland Sculpture Park; a scenic drive to Flakstadøy with stops at the blacksmith in Sund and the fishing village of Nusfjord out of Leknes; a rib boat ride from Svolvær in search of sea eagles around the Lofoten Islands; Norwegian Aviation Museum in Bodø and helicopter tour over Saltdal and the Svartisen glacier; adding the botanical garden and Polaria in Tromsø and the Gallery East of the Sun in Honningsvåg.

But a fam trip does not end when the plane leaves. Nygard asked for feedback from all the participants, which was then sent on to the member ports and tour operators. "We have encouraged them to develop new products according to the cruise line needs," she said. And although Cruise Norway received "100% satisfaction" with the trips, next year's will be improved according to the feedback given. Rather than running two of them back-to-back, a Fjord Norway will be hosted in 2010 and an Arctic Norway in 2011.

This will please Seabourn's McComb, who was keen for the trips to be run on alternate years. "I would recommend to other associations thinking of implementing fam trips, to keep them short (one week maximum) and alternate destination areas," she comments. "Spain does this with maybe three to four different regions which they rotate throughout the year."

And Littley sums up: "Ideally all destinations (or cruise associations) should be hosting at least one fam trip a year, with a mix of planning and shore excursion participants. This is the best investment a port or group of ports can make. A successful fam trip can open the door to cruise business or further grow existing business." □

INDONESIA

The Minister of Culture and Tourism of Indonesia (MOCTI) has organised four fam trips over the past four years, with one each year planned going forward. Director General of Marketing Sapta Nirwandar has been instrumental in promoting cruising since 2002. The best way to organise these, he says, is to fix the date with a particular line about two to three months in advance and then invite other operators along, with six being the optimum group size.

The tour usually includes marquee destinations such as Komodo, Bali, Semarang or Lombok together with new potential cruise destinations. MOCTI consultant Hugues Lamy explains that one of the latter is Kura Kura in the Karimunjawa archipelago, which is now becoming popular as a cruise call. Another one is Waikelo in Sumba, which he believes "should be included in 2011 itineraries by some cruise operators".

Lamy carries out a preliminary investigation and then a personal inspection before including any new port on a fam trip, and now has three new destinations undergoing evaluation: Bangka, Belitung and Probolinggo. The strategy behind this is simple, as Lamy explains: "We consider that the more cruise ports we develop in Indonesia, the more we can offer to cruise operators. This process will therefore boost the development of Indonesia as a cruise destination."

Lamy also recommends including a half-day cruise seminar in the programme so that cruise lines can present their companies. This helps local authorities and stakeholders to understand that the cruise industry is "not one, but is made of segment markets".

Although a fam trip is "certainly the best way for promoting destinations to cruise operators" Lamy cautions others thinking of doing the same. "It can be counter-productive if the infrastructures are not up to basic international standards, or if the visit goes through areas which are not nice or interesting." He adds that the person organising the trip has to be an expert in handling an international group of visitors.



Time ashore for groups

Group bookings are big business for cruise lines – what is the opportunity for destinations and shore excursion companies? Maria Harding reports.

Group bookings are much sought-after by cruise lines, not just because they provide a good base load of advance business and thus minimise the need for last-minute discounting, but also because affinity groups can attract new people into the marketplace. Such people – having tried a cruise to participate in a family reunion, play golf or pursue some other special interest – will be sufficiently hooked to come back for more under their own steam.

Competition for group business is therefore fierce, and group organisers – mainly travel agents or tour operators – are courted with a plethora of 'one free cabin for every so many sold' incentives, cabin upgrade schemes and other perks – like dedicated onboard drinks parties, 'meet the captain' bridge tours, and a complimentary bottle of bubbly in every group member's cabin.

And the effort pays off. Group business now accounts for around a quarter of bookings, says Mark Pilkington, Head of Sales for Carnival UK (which has the P&O Cruises, Cunard Line, Ocean Village, Seabourn Cruises and Princess Cruises brands in its stable).

It's a similar story across the Atlantic.

Norwegian Cruise Line Executive Vice President of Global Sales and Passenger Services Andy Stuart describes groups as a very important part of the line's business, and says they are booking well across all its destinations this year. But they are particularly useful for filling repositioning sailings.

"Our groups break down into two categories: speculative – i.e. agents and operators selling to their client database, and affinity groups, which include large families, special interest societies and sports associations," says Stuart.

"Special interest groups in particular are a good source of bookings for repositioning sailings, as they enjoy a higher proportion of days at sea on which they can enjoy gatherings associated with their interest – bridge tournaments, film shows or whatever."

NCL General Manager UK Stephen Parks says British groups are booking US destinations strongly this year, with cruises around Alaska, New England and Canada faring particularly well. "That's because a lot of our group business comes from tour operators, who combine a cruise with land packages to put together an attractive proposition for groups," he said.

Mediterranean and Baltic itineraries

Parks: A lot of our group business comes from tour operators, who combine a cruise with land packages to put together an attractive proposition."

are also selling well this year, but Parks said group organisers for these are predominantly travel agents taking along a disparate group of local clients, having been offered advantageous rates on a particular departure.

Some travel agents are, of course, more imaginative than others and actively create their own 'special interest' cruise groups.

Celebrity Cruises Head of UK and Ireland Sales Michael English knows many such enterprising agents, including one who organises an annual cruise for a group of Chinese restaurant owners (and translates the chosen ship's daily programme into Chinese for them), and another who organises regular jollies at sea for a gang (if that's the word) of retired senior policemen.

But however they may be drawn together and whatever their interest, one thing's for sure: groups don't just provide good business for the cruise lines that carry them, they're also potentially great news for local businesses in the destinations they visit.

"We've very interested in talking to destinations about new and exciting shore experiences for our group customers, because the more we can 'sell' the destination to them the better," says NCL's Stuart.

"Destinations should also look beyond large-volume tours, as there is growing demand nowadays for more exclusive experiences. One thing we try to do is offer upscale experiences for small numbers of people – not only organised groups but also occupiers of our top-range suites and garden villas.

"The key to success is for destination managers to think creatively about what they can offer that's unique, offbeat and appealing."

That said, NCL – like most cruise lines – doesn't involve itself in the nuts and bolts of shoreside arrangements; it leaves that in the hands of port agents and other local partners. "We stick to what we're best at, running ships," says Stuart.

So it's important for destinations trying to market themselves to groups to ensure

they're talking to the right people for the service they're selling. Looking to promote a local restaurant or attraction to groups on an exclusive basis? Then liaising with a port agent or shore excursions organiser would probably be the best approach.

Or if you have a carnival, music festival or other themed event which might be of interest to a special interest group, it's worth approaching cruise lines which visit your local port and asking which special interest tour operators they work with.


Carnival UK's Pilkington says cruise associations which liaise with travel agents, like the UK's Association of Cruise Experts (ACE) or America's Cruise Lines International Association (CLIA) are also worthwhile points of contact for local suppliers looking to build group cruise business.

His advice is to think outside the box when highlighting local attractions which could be of interest to special interest groups. "Obviously big amenities like championship golf courses will be of interest, but have a good think about what else lies within reasonably easy reach of the cruise port," he says.

Demand and levels of interest will vary depending on the type of group involved. But group travel is a broad church, so anything from a visit to a local artist's or beekeeper's house to a birdwatching walk could be an interesting proposition for a group organiser somewhere long the line.

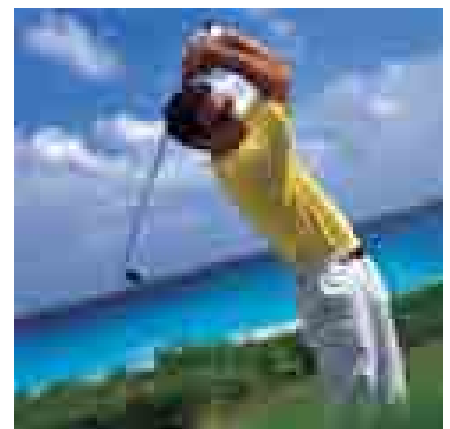
Celebrity's English suggested scanning special interest magazines to see what type of activity or attractions might be of interest. For example, soaring interest in cookery has prompted many lines to feature on-board demonstrations, and some small-ship lines offer passengers a chance to visit the local market to watch their chef negotiate for produce. These could be replicated for special interest groups, with a guide explaining how ingredients are sourced for local specialities.

"Destination managers should be alert to all possibilities, as it's surprising how passionate people get about their interests," English says. "We're currently in discussion with a TV shopping channel which specialises in selling kit for craftwork and needlework, with a view to putting together a crafts cruise."

That presumably would be one on which a visit to a lacemaking factory or crafts museum would be of interest. 

English: Destination managers should be alert to all possibilities, as it's surprising how passionate people get about their interests."

Stuart: We've very interested in talking to destinations about new and exciting shore experiences for our group customers."





North American cruise port developments

Last year could prove to have been a turning point for San Francisco's cruise port aspirations. Not only were calls boosted from the expected 51 to 62 thanks to Mexican Riviera itineraries having to be rerouted due to the H1N1 swine flu scare but the redevelopment of Pier 27 was given the go-ahead after several years of debate and delay.

A company has since been chosen to convert a warehouse used as a temporary cruise berth at Pier 27 into a fully-fledged mixed-use cruise terminal complex. It is due to open for business in 2012.

The berth was already long enough (414m) for the largest cruise ships, and has previously been used as alternative dock – but part of an existing shed will now be converted into a waterfront plaza, with good access to the road system.

This conversion will use \$18 million of the total \$60 million port redevelopment budget. After its completion the port will still maintain Pier 35 as a cruise dock – and has invested in a new roof for the terminal.

The number of calls will fall in 2010, but will be boosted in 2011 with an inaugural visit from Disney Cruise Line and Oceania Cruises' new Marina. Crystal Cruises also returns to the port.

Another leading Californian cruise port, San Diego, opens its \$28 million Broadway

Pier cruise terminal at the end of 2010 and, as reported in the last issue of DWCD, Los Angeles has given the green light to its \$1.2 billion San Pedro Waterfront terminal complex. The cruise facility within this, able to berth at least four ships simultaneously, should be operational by 2014. As a result the port is expecting cruise traffic to reach 1.6 million revenue passengers by 2022.

Environmental issues are key to US

Vancouver's new \$9 million shore power installation (a joint Princess/Holland America Line development with several Canadian companies) is the first use of this technology in Canada".

West Coast ports being cleared to expand in cruising (and other shipping areas), so these ports have been leading the way in one key cruise-related 'green' issue: shore power. Both Los Angeles and San Francisco have already gone down that route, as have Juneau, Seattle and Long Beach.

Seattle's new cruise terminal also has

a shore power facility, while Vancouver's new \$9 million shore power installation (a joint Princess/Holland America Line development with several Canadian companies) is the first use of this technology in Canada.

The next port is likely to be San Diego, which has been offered a \$2.4 million state grant to install shore power by 2011. And the Port Authority of New York has been awarded a \$2.8 million federal grant, via the Environmental Protection Agency, to install a shore power system – but has no immediate plans to do so. Alaska's Ketchikan is also considering incorporating shoreside power into its major cruise dock redevelopment.

Miami grew its cruise traffic again in 2009 – the ninth year out of ten that it has done so. Over the decade revenue passenger numbers have grown by about a quarter but, within the next two years, it will almost certainly have been overtaken by Port Everglades.

The arrival of Royal Caribbean International's two Oasis-class vessels will bring nearly 1.2 million revenue passengers to the port when both are operating year-round. Port Everglades spent \$75 million on improvements to handle the increased traffic, including the quadrupling in size of Terminal 18.

CAPITAL INVESTMENT IN CARIBBEAN SEA CRUISE PORTS

The Dominican Republic's Sansouci terminal at Santo Domingo opened in 2009, and there are long-term plans for three berths and two more terminals.

The Bahamas is going ahead with the splitting of cargo and cruise traffic on New Providence Island, but in a reduced-cost scheme. Instead of a new \$300 million new container port on the southwest of the island, a \$100 million facility on an island in Arawak Bay will now be completed by the end of this year.

The government is providing the land, but private developers are raising the money for building the port. Its completion will allow the current Nassau port to be used just for cruise traffic, and there are plans to upgrade the facilities and surrounding environment.

Plans to build berths for the tendering port of Grand Cayman are still under consideration, and the major expansion at Bridgetown, Barbados, which has already resulted in two new piers handling up to five ships at a time, will be completed by 2015.

Trinidad plans to expand its Port of Spain cruise berths and turning basin, improve its roads, and introduce a water taxi service; while Tobago continues its evaluation of a new pier and terminal at either Plymouth or Charlotteville.

The US Virgin Islands port of St Croix has struggled to attract cruise vessels in recent years because of crime and other quality issues for passengers, but the ships are beginning to return now the cruise pier and other facilities have been upgraded and enlarged.

An extra Oasis-sized berth may be included in the redevelopment of the St Johns waterfront in Antigua following discussions between government, the port authority, Royal Caribbean Cruises Ltd. and Bermello, Ajamil & Partners.

In the French Caribbean, Martinique has lengthened the pier at Pointe Simon so that ships up to 345m long with 10.2m draft can dock. This is part of a €72 million investment at a port which was expecting a 31% increase in passenger numbers to 123,000 in 2009; but it lost cruise traffic due to general strikes early in 2009, which also affected Guadeloupe.

Curaçao is experiencing strong cruise growth, but is now looking at whether more cruise traffic is sustainable in terms of the island's infrastructure and quality of life.

Mexico's Costa Maya (pictured) took the opportunity of the rebuilding it had to do after the 2007 hurricane to extend its berths to cater for Oasis ships, and Royal Caribbean International duly switched the planned Jamaica call for *Oasis of the Seas* to Costa Maya when it became clear that the new cruise port at Falmouth would not be ready in time. The development of Falmouth, Jamaica into a purpose-built cruise port has been delayed, and it will not now open for business until the end of this year. There are separate plans to expand Montego Bay and Ocho Rios cruise facilities.

Elsewhere in Central America, Carnival opened its new facility at Mahogany Bay, Roatan, Honduras at the end of 2009. The Belize government has launched a \$13.5 million sustainable tourism project which includes the enhancement of facilities and access to Belize City from the cruise port.

Like New York, the port has long-term plans for shore power; but it wants to wait until there are enough ships with the right power connections before it sanctions the investment.

Cape Liberty Cruise Port in Bayonne, which was opened by Royal Caribbean Cruises Ltd. as an alternative homeport to New York, is currently seeking US federal economic stimulus money to help fund a second berth.

Other North American cruise port developments include a new Welcome Centre at the main cruise dock (Pugsley) at Saint John, New Brunswick, where there are also plans for a new cruise complex at the Long Wharf dock.

Saguenay, Quebec is emerging as a major new port, as it has recently invested in new infrastructure which allows large cruise ships to dock for the first time. The C\$28 million Bagotville Wharf opened in 2008, and the C\$6 million terminal became operational in September 2009.

Also within the St Lawrence region, Sept-Iles is building a downtown dock with a 315m pier and 11m draft, which should be ready in time for this autumn; Trois-Rivières has plans for a new terminal on its recently restyled waterfront; and

Gaspe also plans to extend its pier. Havre-Saint-Pierre has revamped its port, and Baie Corneau has opened a new Glacier Exploration Centre. 