



Caribbean Cruising

THE FLORIDA-CARIBBEAN CRUISE ASSOCIATION MAGAZINE

Fourth Quarter 2005



Record Attendance at the 2005 FCCA
Caribbean Cruise Conference & Trade Show in St. Kitts

State of the Industry

Opening of New Cayman Tourist Attraction

New for 2006

After years of planning, September 2005 saw the opening of the first stage of Cayman's newest and largest tourist attraction – Boatswain's Beach. Pronounced 'Bo-suns' Beach, this one-of-a-kind, 23 acre adventure marine park promises to become one of the most exciting in the Caribbean.

The Park allows visitors to experience the rich history of Caymanian life in a fun and safe environment while providing opportunities to observe and interact with native flora and fauna.

The opening of Boatswain's Beach first phase includes the Reception Building, the Turtle Breeding Pond and the new Turtle Display Tanks.

For those wanting to take a little of Boatswain's Beach home with them, the Reception Building houses a 3,500 square foot Gift Shop featuring a host of high quality Boatswain's Beach and Cayman Turtle Farm souvenirs.

Every restaurant at Boatswain's Beach has been inspired by Cayman's relationship with the sea and its natural environment. The first restaurant to open is the Turtle Crawl Deli which is located in the Reception Building. The Turtle Crawl Deli serves up a bounty of fresh and light meals such as sandwiches, wraps, salads, soup and fresh baked desserts. For those wanting to experience a taste of Cayman the Deli also serves salt fish dip, marinated conch and a selection of heavy cakes.

Passing through the Reception Building guests are immediately able to see the largest turtles in the impressive Turtle Breeding Pond. These giant sea turtles can reach up to six hundred pounds.

Under the supervision of friendly park staff, guests can stop and actually pick up young turtles in the easily accessible Turtle Display Tanks – a feature sure to be a big hit with younger visitors. All guests will want to ensure they take a photo holding one of their new turtle friends.



The second stage of Boatswain's Beach opens in Spring 2006. The full opening will offer visitors the opportunity to swim and snorkel with fish and other marine life in its 1.3 million gallon salt water lagoon. Guests can also peer into a predator tank and come nose-to-nose with sharks, eels and other large fish.

For those less adventurous, they can wander through the beautiful free-flight bird aviary, walk the nature trail, marvel at the dinosaur-like iguanas, or stroll down an historic Caymanian street complete with porch side artisans. Children and adults alike will delight in interacting with starfish, urchins and crabs at the tidal touch pool. Everyone will enjoy the experience of the finest Caymanian cuisine at different locations throughout the park.

"We look forward to welcoming everyone to Boatswain's Beach, the new home of the world renowned Cayman Turtle Farm," said Managing Director of Boatswain's Beach, Mr. Kenneth Hydes.

"Boatswain's Beach will offer our visitors a unique opportunity to interact with the many fascinating flavours of Cayman. With the full opening in 2006 our guests options for fun and adventure will be endless and they will leave the park with lifelong and precious memories about the Caymanian experience."

The park is open year-round, from 8am till 5pm and is located on Northwest Point Road in West Bay, just eight miles from George Town.

Quench your thirst for adventure!



Come nose to nose with a shark. Smile at an iguana. Swim with fish.



Prepare to be amazed and enchanted at Boatswain's Beach - Cayman's unique animal adventure and new home of the Cayman Turtle Farm.

Beneath the sea - snorkel amid thousands of tropical fish and keep a close eye on our toothy sharks. On dry land - get acquainted with our feathery friends and meet our dragon-like iguanas.

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THE FLORIDA-CARIBBEAN CRUISE ASSOCIATION MAGAZINE

Fourth Quarter 2005

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Passenger volume has nearly doubled in the past six years to nearly 11 million in 2005 and Caribbean cruising is still the world's leading destination.
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FCCA Member Lines

*Carnival Cruise Lines • Celebrity Cruises • Costa Cruise Lines • Cunard Line
Disney Cruise Line • Holland America Line • MSC Cruises (USA) Inc.
Norwegian Cruise Line • Princess Cruises • Radisson Seven Seas Cruises
Royal Caribbean International • Topaz International Cruises • Windstar Cruises*

Two definitions of a great cruise destination:

- 1. Cruising in The Grenadines
- 2. Going ashore in St. Vincent.



The Port Kingstown Terminal in St. Vincent opened in 2000 and has already gained considerable prestige and received a major surge of cruise visitors attracted by stunning St. Vincent & The Grenadines. The terminal itself is another good reason for passengers to enjoy their trip to St. Vincent. It includes a tourist information office, attractive shops, a cafe, mail, and telephone facilities.

The terminal is managed jointly by the St. Vincent & The Grenadines Port Authority and the private sector and consists of two berths. The larger currently accommodates cruise ships up to 260 meters long and 70,000 tons, although the water depth is generous enough to allow vessels of up to 100,000 tons to dock, enabling the largest cruise ships in the Caribbean to utilize Port Kingstown. Smaller vessels can berth at the other terminal, which accommodates vessels up to 100 meters in length and 4,500 tons.

We look forward to welcoming you.

For more information, call us today at 1-800-729-1726 or visit www.svgtourism.com



President's Letter

The Essence of a New Day...



Michele with Madeleine Arison at the 2005 FCCA Caribbean Cruise Conference & Trade Show.

"This is the beginning of a new day. You have been given this day to use as you will. When tomorrow comes, this day will be gone forever; in its place is something that you have left behind...let it be something good."

Now that the year is nearly over, you're probably thinking about all the different things that have taken place and what you've accomplished in 2005... and getting some rest and relaxation in preparation for the New Year. Soon you'll have to start getting motivated again and make your plans for the long year ahead, and if you are like many people, you may be considering making some changes in your life.

No matter who you are, the basic steps you need to take in order to get what you want out of life are the same: explore the possibilities, determine what changes you should make, create an action plan, find some support and finally – take action.

Taking the first step with your action plan is how you get from the dream to the reality. Change takes both time and work, but with the right tools and motivation, you'll soon be on your way to getting what you want.

St. Kitts took action in 2005 by hosting the 12th Annual FCCA Caribbean Cruise Conference & Trade Show. They came away with the satisfaction of having done a very good job and now have the promise of some positive changes in the future. They were not alone, a record number of over 1,000 cruise industry partners attended this year's Conference in an attempt to positively changing their lives and having "something good" happen.

In this issue of Caribbean Cruising you will be provided with insights into the Conference, including an article on one of the most highly attended sessions, the State of the Industry Address. In addition, we feature three other workshops: Natural Disaster Preparedness, Looking Into the Future and Converting Cruisers to Land-Based Vacationers. Finally, we present some highlights of our Platinum Member events and introduce a new FCCA Foundation for the Caribbean fundraising effort.

We wish you all the best life has to offer, may this coming year bring positive changes in you lives... see you next year in the Cayman Islands, October 31 – November 3, 2006.

Getting what you want out of life is really pretty simple; it's just not easy!

Respectfully yours,

Michele M. Paige



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New Platinum Associate Members

www.f-cca.com



Belize Tourism Board

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Belize's tourism vision is to develop a vibrant and progressive tourism industry through a responsible approach, which embraces a strong "eco-ethic" and effective destination management that seeks to improve the quality of life for all Belizeans.



Sand Dollar Sports

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 Website: www.sanddollarsports.com

Sand Dollar Sports is celebrating its 21st year working with the cruise lines offering shore excursions in Cozumel, Riviera Maya and Cancun. We specialize in watersports and land based eco-adventure tours. "Excellence is our standard"



Beaumont Park Ltd.

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Beaumont Park's vision is to become, "the premier horse racing track in the Caribbean." This new racing facility is presently under construction at Beaumont Estate, located on the White Gate lands and is scheduled to be completed by June 2006.

The FCCA Foundation for the Caribbean is excited to announce the 1st. annual

"Princess for a Day Luncheon"

January 21, 2006

aboard

Princess Cruises, *Caribbean Princess*

Port Everglades

11:00 am - Silent Auction ~ 12:30pm - Luncheon

\$50 per attendee

All guest will receive a gift bag valued at \$100, items include Tortuga rum cake, sample beauty products, spa gift certificates, kaleidoscope, radio, etc.)

Men are welcome to attend

The FCCA has compiled a catalog of all auction items with a brief description. Items for auction has a starting bid price and a "Buy Now" price. Auction items include an ATV, Speed Boat, Many Hotel Packages, Cruise Packages, Jewelry and much, much, more.

Proceeds from this event will support the FCCA Foundation for the Caribbean programs, whose mission is to provide a tangible mechanism for the cruise industry to improve the lives of Caribbean citizens through the funding of humanitarian and social causes. Since its inception in 1993, the Foundation has donated over \$2.5 million dollars to various charities. Some of the beneficiaries include the Caribbean Special Olympics, Holiday Gifts for underprivileged children and other children programs, Hurricane Relief, numerous programs for the elderly, environmental education and others.

With the support of our industry partners, the FCCA Foundation can continue to help those in need.

All Information on the event, including a registration form and a catalog of auction items, please visit our website at www.f-cca.com/auction. The site will provide the procedure for bidding on items in the catalog prior to the event.

If you require further assistance please contact Ms. Victoria Lalta at vlalta@f-cca.com or (954) 441-8881.

Colombia Welcomes the Cruise Industry FCCA Customer Service Training Workshops...

SAN ANDRES ISLAND IS GETTING BETTER; WE HAVE A NEW PIER AND MUCH MORE...

Today San Andres with its unique landscaping of beaches, which blend with the exotic vegetation of the islands, a free port, and a new pier is OPEN TO NEW BUSINESS with cruise lines.

Carrying the name Seaflower, to honor the ship that brought the first pilgrims to these lands, the archipelago of San Andres and Providence is located 480 miles North-West of the Colombian mainland in the Caribbean Sea, in close ecological and archaeological contact with the northern part of Colombia, Central America and other islands in the Caribbean. It is made up of the islands of San Andres, Providence and St. Catherine; Bolívar and Albuquerque islets; Cotton, Haynes, Johnny, Roncador, Serrana, Serranilla, Quitasueño, Rocky, and Crab cays and Alicia and Bajo Nuevo sand banks.

It was declared a biosphere reserve by Unesco's program Man and Biosphere (MAB) in November 10th of 2000, reaffirming the natural magic of its green lands, rich submarine biodiversity and multicolored seas that at a distance resemble a melting pot of life immersed in the Caribbean.

The above can be explored at the diversity of tourist destination within the island including but not limited to:

- The aquarium: An unspoiled natural spot dedicated to fish watching activities.
- Pirate Henry Morgan's Cave: The famous pirate Henry Morgan was resident in the archipelago and it was from here that he planned various assaults on galleons laden with gold destined for Europe. It has not been established exactly where his treasure was hidden, but some islanders affirm that it was in Morgan's Cave, a small deep lake within a cave of coral rock.

- The Blowing Hole: It is located on the southern most tip of the Island. This natural phenomenon, the Islander's pride and joy, is produced by a series of subterranean tunnels in the coral reef that come together at this point just a few meters from the sea. At high tide when a wave comes in through the tunnels with sufficient force, the compressed air in the tunnels comes rushing through the hole.
- Johnny Cay: A small cay that can be seen from downtown San Andres and represents the essence of San Andres, music and unique beaches.
- The Poxe Hole: The sea has carved out a natural swimming pool in the coral rock, which is great for swimming, snorkeling and diving. It is to the southeast of the island, next to the Tom Hooker road.
- Downtown San Andrés: is locally known as North End, here is where the tourist, business and shopping zones (free port), government offices and the main beach are situated. Musical concerts are organized on the main beach, and the majority of the restaurants are in this area. The architecture is modern, although a few island houses remain as a reminder of days gone by.
- Shopping area: San Andres is consider a shopping paradise, where the value added tax is yet unknown, and therefore, not charged to the consumer. In addition, the island has the privilege of being a free port allowing tourist to enjoyed shopping for but not limited to Handcrafts, jewelry and antiques, perfumes, liquor, decorative object including art pieces made by one of the native artist, clothing's and much more.

In resume, unique multicolored beaches, calm waters, natural pools, idyllic keys, touring riding a horse along nature pathway, variety of water sports and tours by boat or by car are just a sample of the intense tourist activity of this Caribbean paradise.



Taxi drivers at seminar.

The Colombian tourism community participated in their first FCCA Service Excellence/Cruise Passengers Equal Profits and the Caribbean Taxi Pride training workshops, led by Adam Ceserano, Manager of Marketing for the FCCA, on December 1-2, 2005. This training event marked a significant step by the Colombian tourism industry to learn and adapt to the intricacies of cruise passengers.

Numerous prominent Colombian government officials joined together to support and coordinate of the training seminars, including Libardo Simancas Torres - Bolivar Department Governor; Trino Luna Correa - Magdalena Department Governor; José Francisco Zúñiga Riascos - Mayor of Santa Marta; Mauricio Gomez O. - Colombian Trade Commissioner in the USA; Captain Alfonso Salas - General Manager - Port of Cartagena and Jorge Gonzalez - Director - Taxi Driver Association.

The FCCA workshops are in-depth explorations into the mind of the cruise passenger. They educate in how to provide a positive experience. The tourism professionals that work on the front

lines with guests single-handedly have the power to make meaningful impressions on visiting cruise passengers. They are literally the "face of the industry," even their most casual interactions can make lasting impressions. Each service professional must understand and appreciate the significance of their role.

"I'm very pleased that we could make this training possible. For Cartagena and the port, this information is vital since it tells us what is missing and how we can improve our services to the cruise industry. We hope that with this information we can get all tourists in love with our city and make them come back. We need more training like this one," Captain Alfonso Salas said.



Workshop attendees at Colombia's first FCCA Customer Service Workshops.

Collectively, Colombia feels grateful for this training opportunity specifically because they are up-to-date on the important points of providing good customer service, educated about the guidelines to improve customer service, and involved taxi drivers and guides so they know just how important they are to the industry.

"This training is very important for every single person that has contact with tourists since it gives us the correct information to help us improve. We need to do this training in every cruise destination in Colombia, such as Santa Marta and San Andres... We invite you to visit our city, Santa Marta. Please come back," Trino Luna Correa commented.

In the initial phases of their cruise destination development, Colombia especially values the opportunities that the cruise industry can bring to their country. In today's competitive market, the prospective benefits of increasing Colombian cruise tourism is a high priority for Colombia. They want their industry professionals to be well educated in the principles of outstanding customer service. Not only will proper training improve the visitor's overall experience, but it will further the possibility of repeat visits to their island and promote positive word-of-mouth feedback to new visitors, the highest influencer of vacation travelers.

Consistent periodic FCCA training seminars are recommended for each region. They keep the local workforce abreast of the evolving industry and refreshes their knowledge of customer service in relation to how to cruise passengers.

"This is very important for our city to have this type of training as it provides us the tools to improve and be on the same path as other Caribbean destination... We hope we can have more training like this one in the near future. We should do this training every semester," Libardo Simancas Torres shared.

We invite you to provide your passengers the opportunity to experience diversity and passion in one place, come and visit us...



For more information, please contact Maria Lacouture at the Colombian Government Trade Bureau Proexport USA at 305-374-3144 or mlacouture@proexport.com.co





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The Freestay Caribbean Program Growing, Enjoying Successes Along The Way

Working in partnership, Seaboard Marine and Tropical Shipping have brought the Freestay Caribbean program to yet another island destination – Jamaica!

"This launch is a significant milestone for Seaboard Marine and Jamaica," said Corah Ann Robertson-Sylvester, chief executive officer of Seaboard Marine. "When more tourists come to Jamaica, this means more income, an improved economy and more international trade."

The Jamaica program officially launched this September at the Hilton Kingston under the honorable patronage of Tourism and Industry Minister Aloun Assamba. The Freestay Caribbean program garnered endorsements from the Jamaica Hotel & Tourist Association, the Port Authority, the Florida Caribbean Cruise Association and the Jamaica Tourist Board.

The growth of the program has been phenomenal, with participating destinations now including Antigua, Belize, Dominica, Grenada, the U.S. Virgin Islands, St. Kitts, St. Lucia, St. Maarten and, of course, Jamaica!

As new destinations come aboard – and online at www.freestaycaribbean.com – existing partners are finding new and ever-improving ways to spotlight the program. St. Maarten is a great case in point.

The popular island destination has embarked on an ingenious promotional campaign to highlight the program by employing a 'Treasure Chest' motif for displaying the Mardi-Gras style doubloons given to cruise ship passengers in the port and strategic retail outlets. "It is a wonderfully innovative approach for distributing the coins as well as information about the Freestay Caribbean program," said Tropical Shipping's Assistant Vice President of Government Affairs, Jennifer Nugent-Hill. "We are very pleased with what St. Maarten is doing with the program."

Information provided by Tropical Shipping

It is just that type of commitment that is spurring the program's continued growth – and is equally pivotal to making a positive impact on the Caribbean destinations Freestay Caribbean serves. Tropical Shipping has made a commitment to the long-term success and reciprocal value of the program, and is measuring program milestones through the website the company built specifically for the program, www.freestaycaribbean.com.

The website features information, contact numbers and emails, as well as special incentives to travelers from hoteliers, restaurateurs, tour operators and other merchants participating in the Freestay Caribbean program. From hotel and restaurant accommodations and sightseeing tours to jewelry shopping and automobile rentals, www.freestaycaribbean.com makes it easy for the land-based Caribbean vacationers to find exactly what they are seeking.

The website has also been enhanced, making it even easier and faster for travelers to use. With comprehensive online forms in place at www.freestaycaribbean.com, travelers can now communicate directly with participating merchants and vendors to get information and make reservations. The forms make getting information as easy and fast – for the traveler and the participating merchants. Over time, these website enhancements will be used to track the website's performance and help make the Freestay Caribbean program more robust each year.

Tropical Shipping President Rick Murrell has correctly called his company's Freestay Caribbean "Come back and stay in the Caribbean" program a 'win-win' situation. With an ever-increasing number of participating destinations and merchants, the Freestay Caribbean program will continue to bring even more cruise ship passengers back to the Caribbean as land-based vacationers.

State of the Industry Address

Interview with John Tercek, Vice President, Commercial Development - Royal Caribbean Cruises, Ltd.



At the 12th Annual FCCA conference, the topic of the "State of the Industry Address" panel included trends and developments in the cruise industry as well as a specific focus on growth in the Caribbean.

Several FCCA member lines participated in the discussion, including John Tercek, Vice President, Commercial

Development - Royal Caribbean Cruises, Ltd. Tercek presented a brief presentation outlining the current state of the industry. He looked at passenger growth trends, the size and trends of the world cruise fleet, financial statistics of the Big 2, and trends affecting Caribbean Cruising.

Passenger Volumes

Tercek pointed out that cruise passenger volume has increased an average of 8% every year since the beginning of the cruise industry in the 1970's. He highlighted growth since 1999, showing passenger volume has nearly doubled in the past six years to nearly 11 million in 2005. He focused on Caribbean cruising as still the world's leading itinerary destination. Considering all of the itineraries in North America (including Alaska, Mexican Pacific, etc.), the most popular routes are Caribbean, led by the Western Caribbean with 32.9% of all North American cruise passengers, Bahamas with 15.2% and Eastern Caribbean with 12.9% of the North American cruise volume.

Cruise Ship Fleet Trends

He presented a summary of the current oligopoly of the world cruise industry: Carnival Group and Royal Caribbean represent nearly 80% of the industry, with 79 ships and 30 ships, respectively, as of year end 2005. NCL-Star is the third largest in the industry, with 16 ships representing about 10% of capacity. All of the other cruise companies collectively represent 10% of industry capacity.

Overall new ship construction has slowed considerably in the

past two years. Newbuilding production had been adding over 15% new capacity annually in the early 2000's; in comparison current building orders are adding only about 6% new capacity per annum. "The big two have slowed down growth: for example, Royal Caribbean is only producing one ship annually during the next four years, compared to four new ships in 2003. Outside of the Big 3, only MSC is adding capacity at a higher rate, with the goal of making the industry a "Big 4."

Significantly, although the number of ships being delivered annually has reduced considerably, (from 11 ships in 2003 to 4 in 2008), their size has increased dramatically. Tercek pointed out that in 2002, average new ship capacity was 2,200, and by 2008, the average new build capacity will exceed 3,100, nearly a 50% increase in average ship capacity in six years!

The larger ships are inevitable, as they offer the increasing mix of amenities that customers increasingly desire and expect, while delivering increasing economies of scale.

Tercek explained that RCCL's Voyager Class, carrying about 3,100 passengers, was being expanded to the Freedom class which will carry about 4,000. The larger Freedom class will offer exciting new amenities, such as a wave surfing machine, but due to design improvements will also consume less fuel than the Voyager class.

This trend is not unique to RCCL, but market leader Carnival is building increasingly larger vessels and upstart MSC has announced its "big-time" arrival, recently placing orders for two very large ships.

Expanding Market Niches

Although the statistics suggest the industry has completely consolidated, Tercek pointed out that there are continuing new players in the market, targeting niches. Examples include Oceana in the high-end sector, Pulmantur and Iberojet in the Spanish speaking market, and MSC in the Italian and US markets. He noted the fantastic publicity that "Stelios" has achieved with the EasyCruise concept, a new niche product targeted at a younger crowd, which despite the public relations splash in fact consists of just one 150 bed refurbished vessel. It seems likely that this niche-market expansion trend will continue, as new product ideas attract

consumers that previously may not have considered cruising on the mainstream offerings.

Tercek is encouraging in his outlook, "It's not just about the Big 2 or 3 since there's plenty of room to grow in this industry. We expect more new players are likely to enter this growing vacation market and it will be interesting to see which new ideas find their market."

Solid Financial Footing

The numbers support his thesis of steady growth. The two companies with visible financial statements, RCCL and CCL, both show impressive returns for the year so far despite concerns about the economy, fuel prices and natural disasters. CCL forecasts a 2005 net income of \$2.3 billion; RCCL, \$620 million; both companies registering significant increases in net income as compared to 2004. Gross revenues at both companies have grown more than 400% over the past decade.

"The tourism economy is great, and the cruise industry is doing fantastic, but the stock market is not recognizing it. Net income is up significantly, even with higher fuel costs, but share prices have been trading in a range over the past two years as Wall Street maintains its skepticism about this dynamic industry..." Tercek observed.

Expanding Revenue Sources

The cost of a Caribbean cruise for two on a quality ship now averages \$1,400 for an interior cabin, and \$2,200 for an exterior, only a moderate increase compared to five years ago. Higher percentage growth has occurred in the amenities and entertainment offered to guests. Where it used to be just basic spa, bingo, casinos, beverages and shore excursions, many cruise brands have expanded their optional services to include ship board shops, a shore shopping program, art auctions, photographs, internet, instructional classes, upscale dining options, and more.

"The newest trend is Wi-Fi and cell phone technology; we've learned our customers will pay to stay in touch." says Tercek. "These amenities are an increasingly important component of the business- the onboard revenue. It has a significant growth aspect; onboard revenue is growing faster than the ticket price. The industry continually finds creative ways to invite guests to enthusiastically spend their money.

"An example is 'Acupuncture at Sea,' I'm never going to do that at home; I'm too busy, but on a cruise, I said, 'What the heck?' I tried it, enjoyed the experience, and paid \$90 for it!" Not every idea works. A few years ago, many ships installed

"Cigar Bars". With the waning of the cigar fad, most such bars have been scotched. But all the lines watch to see what works on other brands.

Themed Cruises and Marketing Trends

Another trend is the themed cruises, targeted at getting large groups with common interests on the cruise ships. "This is a growing thing - themed cruises-with many of them being about enrichment: spa, cooking, culture, enrich the mind - about six cruise lines use the word "enrichment" in their promotional materials," says Tercek. "There's also the Royal Caribbean Harley Davidson cruise which was a big hit- bikers actually loaded their hogs onto the ship and took them off to tour the islands; Carnival's Donald Trump 'Apprentice' cruise and World Poker Tournament cruise; Forbes' 'Stock Market Gurus' cruise on Crystal, all used as a means of marketing cruises, especially in the shoulder seasons."

Some brands have been working new angles to promote cruising with upscale branding like "Be treated famously..." by Celebrity, "Escape Completely" by Princess, and "Journey of a Lifetime" by Cunard to get ahead of the game while the big three are sticking to tried and true slogans like NCL's "Freestyle Cruising" Royal Caribbean's "Get Out There" and Carnival's "a million ways to have Fun Ships". All the slogans and themes are seeking to drive new travelers to the ships, even as the average cruiser demographics have gradually changed over the last ten years.

"The average age of cruisers has steadily been coming down, and we're now reaching a broader audience. A new trend is girlfriend only vacations- my wife did one of those this year cruising the Galapagos with three gal pals. Kids also- over 1 million kids cruised this year! Another popular trend is the multi-generational vacation - grandma, grandpa, kids, parents can all cruise together," says Tercek. "It's a great family vacation - no planning, cooking, driving, or making beds and everybody can go at the pace they want - if you think about it, there are not too many comparable vacation alternatives that everyone can agree on."

It seems though, many people can agree on a Caribbean cruise, with the whole Caribbean holding over 50 percent of the market share and nearly 6 million visitors in 2005. Since 9-11 the industry has taken the ships to the customers, now operating from 18 North American homeports, with most deep-water ports having some cruise ships. Despite the diversity of homeports, interestingly the traditional Miami/Fort Lauderdale based ships still command premium pricing, as do the West Caribbean itineraries.

New Challenges

Despite the success and resilience of the industry, Tercek observed there are challenging trends that could constrain continued growth. Fuel costs have doubled in the last 18 months. The cruise lines are creatively mitigating, operating the ships slower when possible, considering shorter itineraries and longer times at sea, designing larger more fuel-efficient ships for the future to save fuel costs. The good news is that if fuel prices retreat at some point, as is likely, these new efficiency measures will increase operating margins.

Another unpredictable trend is hurricanes. While ships typically sail around storms, homeport ships must return to their base port on the scheduled day. Tercek pointed out that the biggest impact to date was in September 2004 when hurricanes by coincidence hit on two successive weekends in Florida, leading to logistical challenges of unloading ships in different ports on unscheduled days. "Those disrupted turnarounds cost millions to accommodate the customers and now Katrina in New Orleans will disrupt an entire season. Although the ship assets are safe and no customers have been

harmed from the many storms we have experienced in the last two years, making changes costs money."

"At some point this hurricane trend could impact our retail prices - we may have to entice people to cruise in the September-October hurricane months, getting a lower paying clientele with less money to spend on board and in ports. Also, ships in Europe or Alaska may return later in the Autumn to the Caribbean to avoid the hurricane season."

Finally, there is continuing urgency on the need to expand port infrastructure. Tercek commented, "Cozumel will exceed three million passengers this year and prior to the hurricanes had as many as 16 ships in a day, and Grand Cayman has 12 ships in one day (all at anchor and tendering). Not many more ships can be accommodated in those ports on those days; the visitor experience is starting to deteriorate. In recent years, many ports have improved their infrastructure to accommodate the increasing volume of calls and ship capacity. Nevertheless, there will be a continuing need for infrastructure expansion, dredging, and improving port operations and logistics."

FCCA Upcoming Events

- | | |
|----------------------|--------------------------------------------------------------------------------------------------------------------|
| January 21, 2006 | FCCA Foundation for the Caribbean Princess for a Day Luncheon aboard Princess Cruises, <i>Caribbean Princess</i> . |
| January 26-29, 2006 | Platinum Associate Membership Advisory Council Cruise aboard Carnival Cruise Lines, <i>Fantasy</i> |
| March 12, 2006 | Platinum Associate Membership Advisory Council Bar-B-Que at the residence of Michele M. Paige, President, FCCA |
| March 15, 2006 | 12th Annual FCCA Foundation for the Caribbean Gala Dinner & Entertainment Extravaganza, Miami Fl |
| March 17, 2006 | Platinum Associate Membership Advisory Council Meeting, Cruise Line TBA |
| March 17, 2006 | FCCA Associate Membership Luncheon, Cruise Line TBA |
| June 28-30, 2006 | Platinum Associate Membership Advisory Council Conference, Cartagena, Colombia |
| Oct. 31-Nov. 3, 2006 | 13th Annual FCCA Caribbean Cruise Conference & Trade Show, Cayman Islands |
| November 2, 2006 | Platinum Associate Membership Advisory Council Luncheon at the FCCA Conference, Cayman Islands |
| November 3, 2006 | FCCA Associate/Platinum Membership Tour & Luncheon at the FCCA Conference, Cayman Islands |

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CARIBBEAN
CRUISE
ASSOCIATION

Spend an Evening with the Stars...
Wednesday ~ March 15, 2006



*The Member Lines of the FCCA
Invite You to Attend the 12th Annual
FCCA Gala Dinner Extravaganza*

Benefiting the FCCA Foundation for the Caribbean

Spend an Evening with the Stars... *At the FCCA Foundation Gala Dinner*



The date and location for the premier social event on the FCCA calendar has been set – **Wednesday, March 15, 2006.**

The 12th annual FCCA Foundation for the Caribbean's "Evening with the Stars" Gala Dinner Extravaganza will be held at the American Airlines Arena in Miami, Florida. The fundraising dinner promises to be an event not to be missed once again, with over 60 of the cruise industry's top executives confirmed to be in attendance. Cruise executives from the FCCA 12 Member Lines, including Managers, Directors, Presidents and CEOs have set their schedules to allow them to act as table hosts for this highly regarded international cruise industry event.

As the foremost fund raising event for the FCCA Foundation for the Caribbean, the annual Gala Dinner has proven to be an excellent opportunity to network with dozens of cruise executives in a social setting. You will also have the opportunity to dine and exchange views and ideas with the executive of your choice in a convivial setting... while simultaneously supporting the FCCA Foundation's social and humanitarian efforts.

The *FCCA Foundation for the Caribbean* was established in 1993 as a tangible vehicle for the cruise industry to improve the lives of Caribbean citizens through the

funding of humanitarian causes. In its 13th year of existence, with the support of the cruise industry's best partners, the FCCA Foundation has impacted the lives of thousands of people by providing over \$2.5 million in funding to worthy causes and charities throughout the greater Caribbean Region.

The Gala Dinner is scheduled during the annual Seatrade Cruise Shipping Convention in order to provide cruise industry partners from around the world with the opportunity to participate. Industry leaders from Asia, Europe, South/Central America, USA... have acknowledged that this event is the perfect vehicle to support a worthwhile cause, while providing them with the opportunity to interact with some of the cruise industry's top executives.



It is through the support and participation of organizations like yours that the annual FCCA Foundation for the Caribbean's Gala Dinner is able to raise additional funds and expand its humanitarian efforts. The Member Lines of the FCCA look forward to seeing all our good friends and partners on Wednesday, March 15, 2006 - Please mark your calendars.

For more information, please contact the FCCA today... with your help, we intend to grow and accomplish even more!

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The ship has come in to the much-awaited Mobile, Alabama Cruise Terminal. Conveniently located in downtown Mobile, the terminal is close to numerous hotels, restaurants and attractions and is less than a mile off Interstate 10. Cruise-goers will enjoy the ease of the Port City, less than a day's drive from a number of major cities including Atlanta, Birmingham, Baton Rouge, Chattanooga, Huntsville, Memphis and Nashville. Vacationers will enjoy attached parking, a pedestrian tower and covered passenger pick-up and drop-off along with customs and border protection inside.

To learn how to launch an exciting relationship with the South's Easy vacation port, contact Al St. Clair at the Mobile Alabama Cruise Terminal at 251-338-7447 or visit www.shipmobile.org.

The 12th Annual FCCA Conference Unites Cruise Industry

The 2005 FCCA Conference and Trade show brought over 1,200 attendees, including 100 cruise executives, to St. Kitts the week of September 26, 2005. The number of attendees marks the largest Conference to date for the FCCA, passing the previous highest attendance of 2003 by 200 guests.

During the 12th Annual FCCA Conference, cruise executives and attendees spent five days exploring St. Kitts' luscious landscapes and unspoiled natural resources that still offer all the amenities that the 21st Century traveler may desire. In addition, all Conference delegates explored the many facets offered to today's cruise industry.

"The Conference could not have been better. From the moment you stepped off the plane, you could sense that the entire country was welcoming us with open arms. It was easy to recognize that St. Kitts is in cruise tourism and that all sectors of their tourism potential stepped up to embrace our future opportunities together," says Richard Sasso President & CEO, MSC Cruises and Member of the FCCA Executive Committee.



Workshop attendees during the FCCA Conference and Trade Show.

While in St. Kitts, attendees connected while addressing current trends and needs. From start to finish, St. Kitts displayed the wealth of their hospitality as a gracious Conference host.

"I found the recent FCCA Conference held in St. Kitts to have been extraordinarily successful. Government representatives, cruise industry partners and vendors came together with the same intension to discuss issues of mutual interest to insure that the outcomes would benefit everyone. I believe these expectations were not only met but exceeded. The Government of St. Kitts and the FCCA should be commended for all the successful arrangements," says Stein Kruse, President and CEO, Holland America Line.

The Business of Cruising

A major educational draw of the FCCA Conference is the range of perspective and industry insights shared during the seminars. This year's seminars included nine topics that helped lay the foundation for successful partnerships with the cruise industry.

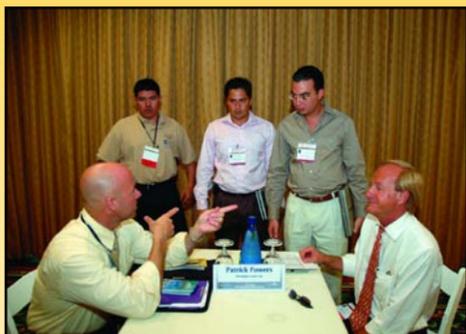
On day-2 of the Conference, the CEO/Presidents and Ministers meeting took place. This significant gathering covered a range of high-profile industry topics including a presentation from President Alvaro Uribe Velez on the latest status of Colombia as a cruise destination, and also the status and future of the Port of New Orleans, plus an overview of the purchasing initiatives between the FCCA and CHA, and the emerging collaboration of the "One Caribbean" CTO platform.



The official Grand Opening Ceremony jump-started the week's events on Wednesday, September 28, 2005. Micky Arison, Chairman & CEO, Carnival Corporation and also FCCA Chairman, welcomed attendees with his opening remarks and state of the industry address including such topics as Hurricane Katrina relief efforts and effects on the industry, research initiatives for 2006, the newly formed FCCA Women's Association, the forming the CHA partnered purchasing scheme, and the support of the cruise industry to purchase more from the Caribbean.

FCCA Partners @ The 2005 FCCA Conference And Trade Show





Patrick Powers (NCL), far left, meets with FCCA Conference attendees for one-on-one meetings.



Richard Fain (RCCL), far right, stops at the FCCA Trade Show and talks with participants.



One-on-one meetings with executives, makes the FCCA Conference unique.



John Tercek (RCCL), far right, stops and talks with Conference attendees.



The Panama delegation having some fun at the Trade Show.



Rick Sasso (MSC), second from right, leads the winning team for this year's golf tournament.

“One Caribbean Brand”

Vincent Vanderpoole Wallace, Secretary General, CTO presented his thoughts on the concept of “One Caribbean” saying, “Our starting point was the recognition that the Caribbean is the world’s best known unowned brand. We decided that CTO with Government members and CHA with private sector members should jointly own the Caribbean brand.”

They will establish “One Caribbean,” not one public sector Caribbean and one private sector Caribbean. The intention is to brand the Caribbean as one place – with one logo, one consumer website, one membership website and essentially one marketing plan.

Wallace wants the Caribbean to join together and focus on the importance of reputation jointly. He also recognizes that that tourism is the only enterprise in which every industry person involved has the power to make a difference. Wallace said, “It is our collective job to ensure that their experiences (tourists) are so good that we keep them moving around our region with high recommendations.”

Cruise lines and hoteliers have come to an understanding that cruise passengers are important visitors. He shared, “We believe that cruising has at least three categories of passengers – those who choose to cruise and if the Caribbean cruise did not exist would have chosen somewhere else to cruise, those who see the cruise ship as an enormous value in terms of being able to deliver multiple destinations at a reasonable price, and those who could have been persuaded to take a land based vacation but chose to cruise instead. So, in fact, the convertible passengers is a subset of all passengers on each ship and the remainder deliver incremental revenues to our destinations including jobs and render opinions about our

destinations. Furthermore, much of the spending of these incremental revenues is concentrated in a relatively small sector of our economies making it very important to this small sector of our societies.”

The memorable closing to Vincent’s commentary was, “This is the first time in history that we have had women at the heads of FCCA, CTO & CHA. It is clear to me that if we want to fight, we get men. If we want to cooperate, we should get women.”

The State of the Industry

The State of the Industry Address was moderated by Terry Dale, President & CEO - Cruise Lines International Association (CLIA) and Andy Stuart Executive VP, Marketing, Sales & Passenger Services - Norwegian Cruise Line and Chairman of CLIA. The workshop reviewed recent CLIA cruise passenger statistics, the most recent industry trends, and a look ahead at the next 30 years for the cruise industry. The industry was united with the goal of future growth and discussed the long-term focus in the Caribbean.

“This year’s FCCA Conference was the best ever. The overall attendance was outstanding and well represented from all our partners in the Caribbean. It is really great to see the progress we are making in working together on many important sales and marketing goals,” says Terry Thornton, VP, Market Planning - Carnival Cruise Lines and Chairman of the FCCA Marketing Committee.

Delegates were offered a behind-the-scenes look at creating a successful tour program in Session 2, moderated by Mico Cascias, Director, Tour Operations - Carnival Cruise Lines. They were walked through the process from start to finish. Important components included:

- Tour proposals: insurance, pricing, items included and incorporated a new tour
- Continuing assessment of tour product
- Importance of a strong reservation staff
- Marketing materials such as brochures
- Training of on-board staff.

Purchasing Power

Alvin Dennis, VP, Purchasing and Logistics - Norwegian Cruise Line and Chairman of the FCCA Purchasing Committee moderated questions from delegates in a session on purchasing, sharing their first-hand advice on purchasing and sourcing with Conference attendees.

“A lot of people were interested in the produce and fresh dairy product, mainly wanting to know how to do business with cruise lines. Each representative took the time to explain so the audience left with a better understanding of what the requirements are: quality, service, expectations and so on. It’s harder to use smaller suppliers because the quantity isn’t consistent, but through the entire Conference we made ourselves available, and it was a really good experience to be there and see what’s available and what support we can give as an industry,” said Dennis.

Hurricane Awareness and Response

In light of the recent extremely busy hurricane season, one highly anticipated topic was Natural Disaster Preparedness and Best Practices, led by Gordon Buck, Vice President, Port Operations - Carnival Cruise Lines. The seminar focused on the recent Caribbean and the US hurricane devastation and its effect on tourism. They stressed the importance of awareness and setting an industry standard of emergency planning “best practices” including preparation, mitigation, response, and recovery measures.

“Thanks to FCCA, this workshop’s timing was perfect by providing a forum to discuss the most relevant information this year. A most timely and important workshop for all members, - Disaster Preparedness,” says Charles Towsley, Port Director - Port of Miami.

Key Components of the Industry

The Converting Cruisers to Land-Based Vacationers session moderated by Terry Thornton, VP, Market Planning – Carnival Cruise Lines, reviewed the importance of targeted marketing initiatives that will drive cruisers to become return visitors to port-of-call destinations. Destinations discussed current programs and provided insight into how to measure results. Discussions on implementation, overcoming obstacles, and future improvement initiatives were also discussed.

Edward Thomas, President - West Indian Co. Ltd., a panelist for this session, explained the growing relationship between the cruise industry and hoteliers, saying that by the 90s, “managers and attitudes in both sectors changed and there was a realization that both sectors could complement the cruise product.”

The Changing Face of Travelers

Today’s cruise and Caribbean traveler demographics have changed, with more specialty type vacationers, as well as multigenerational travelers, being seen more and more over the last ten years.

Also moderated by Terry Thornton, the Marketing session entitled Demographics, Psychographics, Purchase Behaviors and Trends, profiled cruise and Caribbean travelers, that outlined who are and what motivates vacationers to purchase the cruise product, the demographics and psychographics of the consumer base, and purchase behaviors and trends. The

group identified the "hot-buttons" that the industry uses to increase first-time and repeat business.

Safe Sailing

Moderated by Eric Benedict, Manager, Destination Services - Norwegian Cruise Line, the afternoon session focused on key points of tour safety, with topics including:

- Emergency plans
- Boat and snorkel safety
- Tour Operators response to emergencies
- Communication in an emergency
- Risk Management
- Having a plan for guest security planning
- Onboard tour purchasing incentives

And it was also stressed that having a plan in place will make guests feel secure on organized tours.

Ten-Year Outlook

The second half of Session 5 looked at the evolution of the cruising industry with a ten-year outlook. Changes in the industry to assure expectations were discussed, and new means of marketing a tour, cruise or destination, such as utilizing the internet, were presented.

"I'm really proud of the way we've grown as an industry, and if the numbers from the last few years are any indication of our growth over the next ten years, we're going to be looking at incredible opportunities, both financially and in terms of what the industry offers the customer. This Conference was outstanding, and the networking done will give the industry the extra tools needed to continue working with our partners," says Micky Arison, CEO, Carnival Corporation.

The Power of Networking

The FCCA Conference effectively combined socializing with educational seminars, meetings and a trade show. The Conference has become a powerful networking tool for industry executives and representatives to meet, mingle and converse. Although the majority of Conference engagements revolved around the business, there were also numerous planned social and industry events designed to facilitate networking and partnerships. Some of the highlights included the Business Card Exchange, The Welcome Party at The Marriott's Grand Plaza, the St. Kitts Night Extravaganza at The Brimstone Hill Fortress, and the Conference Closing Party at Port Zante.

There was also a range of activities planned for attendees to experience St. Kitts first-hand and get a taste of the island

and an exclusive catamaran tour for FCCA Platinum Members to Nevis.

"As a recently approved Platinum Member, I was able to access some of the decision makers that would allow me to see where the lines are going. Sand Dollar Sports has been working with the lines for 22 years, so having access to the shore excursion executives is not a problem, but what I needed to know is where the possibilities lie for expansion and I believe some of the contacts that were made during the Conference this year could prove to be very fruitful. I look forward to the following year and believe it will be a fruitful one," says John Flynn, President, Sand Dollar Sports.

Looking to the Future

The Looking into the Future session, moderated by Michael Ronan, Regional Vice President, Global Government & Community Relations - Royal Caribbean International & Celebrities Cruises, discussed the evolution of tours and destinations in the next ten years including:

- Interactive and theme tours
- The evolution of the shore excursion program
- The evolution of guests during the last ten years
- Destination enhancements to assure guests expectations are met
- Creating excitement about tour programs through the Internet
- How to market your tour
- How to market your destination.

"The 12th annual FCCA Caribbean Conference held in St. Kitts was beyond expectations. St. Kitts proved to all of us that they are truly in the first class vacation business. The Marriott St. Kitts Resort offered an outstanding venue to not only conduct the business we were there for, but to do so in a very relaxed and comfortable setting. To arrange for the President of Taiwan and the President of Colombia to fly all the way to St. Kitts to address our Conference was an unexpected tribute, says Stephen Nielson, VP, Caribbean & Atlantic Shore Operations, Princess Cruises.

Undoubtedly, the 2005 FCCA Conference facilitated prospering industry relationships, strengthened partnerships, sharing of knowledge, and proactive and future planning. The FCCA brings together a dynamic and growing alliance of cruise lines, destinations, tour operators, and vendors that embody this ever-evolving industry. The FCCA prides itself with the philosophy of "your success is our success" and that motto, founded in partnership, was alive in the minds of all Conference attendees.



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Disaster Preparedness - Examples of Best Practices

When it comes to disaster preparation, the fundamentals are generally understood: board windows, secure potential flying objects, and stock up on food, batteries, water, and gasoline. Though an ounce of prevention is worth a pound of cure, there is inevitably a good deal of work to be done once the disaster takes place, and most public sector entities, companies, and individuals have detailed, executable plans for recovery.

Due to the prominence of disasters, these plans are necessary. As the table shows, over 2004 and 2005, many countries suffered significant damage and economic losses as a result of the impact of a diversity of hazards (e.g. hurricanes, earthquakes, and floods). In addition the loss of the priceless commodity of human life, the disasters damage the GDP of the countries, ranging from 8% to over 200 percent in Grenada.

The disasters have not been targeting a weak point of the countries; they have been going straight for the heart: tourism. Tourism is definitely the main circulatory organ of the Caribbean, accounting for 16% employment, 22% capital investment, 18% total exports, and 9% government expenditure. The majority of the rooms and supporting infrastructure for this sector is situated in the coastal areas, vulnerable to such catastrophes as a hurricane or coastal flood. Table 2 and Figure 2 show how the impact can directly and indirectly affect facilities and revenue.

It's evident that the natural disasters impose a perpetual threat; though they alternate in season, their return is both predicted and feared. Yet, if one were to ask any company about their recovery plan, they would most likely be hearing a reiteration of the preparation actions aforementioned rather than the essentials for a recovery.

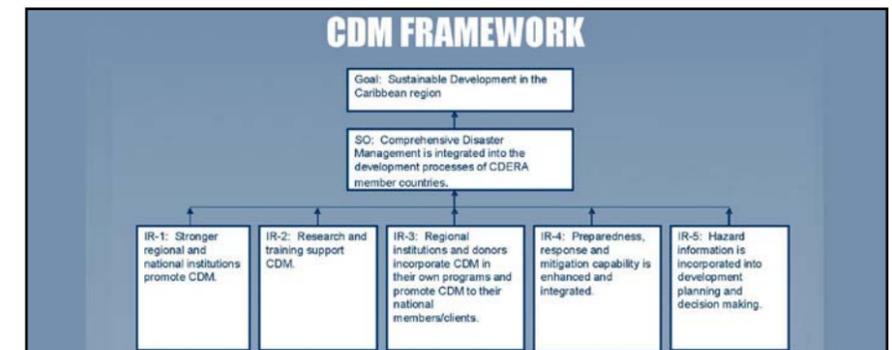
The key issues are relatively rudimentary and unlike certain resources, abundant in any area an impending disaster may hit.

Country	Disaster	No. of Occurrences	Total Fatalities	Economic Losses (1998 \$m.)	Economic Losses as % of GDP (1995)	Source
Jamaica	Hurricane Charley	1	N/A			OECS, 2004. Grenada: macro-socio-economic assessment of the damages caused by Hurricane Ivan, September 7, 2004.
	Hurricane Ivan	17	336,896.3M	\$595M	8%	ODPEM, Jamaica, 08/12/04
Saint Lucia	Hurricane Ivan		EC\$6,981,800	\$2.6M		ECLAC, UNDP, P10J, 2004. Assessment of the socioeconomic and environmental impact of Hurricane Ivan on Jamaica. LC/ME/L.636; LC/CAR/L.22
Saint, Vincent & the Grenadines	Hurricane Ivan	-	EC\$109.7M	\$40.6		NEMO St. Lucia Report 09/10/04
	Strong Tropical Wave		EC\$137,039	\$50,755.00		NEMO SVG 09/09/04
	Tropical Depression #2		EC\$62,700	\$23,222.00		NEMO SVG 08/17/04
	Tropical Storm Earl		EC\$342,338	\$126,792.00		NEMO, SVG Report 08/17/2004
Trinidad & Tobago	Hurricane Ivan	1	N/A			NEMO SVG 08/17/04
	Mud Slide	2	TT\$100M+			NEMA T&T 09/07/04
Guyana	Floods	5	N/A	16M		Guyana Information News Agency (GINA)

Value of Economic Losses from Disaster in CDERA Member Countries 1970-1999

Country	No. of Occurrences	Total Fatalities	Economic Losses (1998 \$m.)	Economic Losses as % of GDP (1995)
Antigua & Barbuda	7	7	105.7	18.1%
Bahamas	4	5	290.4	9.5%
Barbados	5	3	148.4	6.3%
Belize	6	5	33.8	5.4%
Dominica	7	43	133.4	55.0%
Grenada	4	0	30.1	9.5%
Guyana	5	0	29.8	4.6%
Jamaica	19	271	1,988.1	29.3%
Montserrat	5	43	323.7	899.0%
St. Kitts & Nevis	7	6	312.5	116.5%
St. Lucia	8	54	1,554.6	272.3%
St. Vincent	9	5	47.0	16.5%
Trinidad & Tobago	8	9	16.7	0.3%

From Table 1.10 in the IDB Research Department Report, "Natural Disasters in Latin America and the Caribbean: An Overview of Risk, October 2000"





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Conference Workshop

Obviously, basic necessities such as food, drinkable water, gasoline, etc. are needed, but one of the most essential commodities is the people. Governments frequently have tunnel vision and forget that the people are the single most important aspect for a successful recovery in the aftermath of a disaster. Resultantly, the plans developed talk about securing key infrastructure items and property but don't focus on the people.

Governments need to employ methods that are not included in traditional preparation; a dramatic improvement is necessary in their planning. Involvement with the private sector is essential. The public sector provides food and shelter for the mass of inhabitants on a daily basis, so their participation should be overwhelming in disaster recovery. Governments need to lend a helping hand opposed to keeping their fists clenched. There have been numerous occur-

rences of donated water, ice, and generators being turned away because of Customs and government rules. Governments severely need to establish successful recovery actions, schedule annual preparation meetings, and confirm that all recovery players know what actions must be made.

Companies need to center on the people and make their employees a more important priority than the fixed assets and properties. Home Depot has figured this out, bringing in outside workers to fill the void of those affected and allowing them to focus on their families and homes. Companies need to communicate the expectations of the employees in the aftermath of a disaster. Similar to the governments, the companies also need to have recovery plans rehearsed and ready.

Information provided by Jeremy Collymore, Director - Caribbean Disaster Emergency Response Agency (CDERA) & Rick Murrell - President, Tropical Shipping



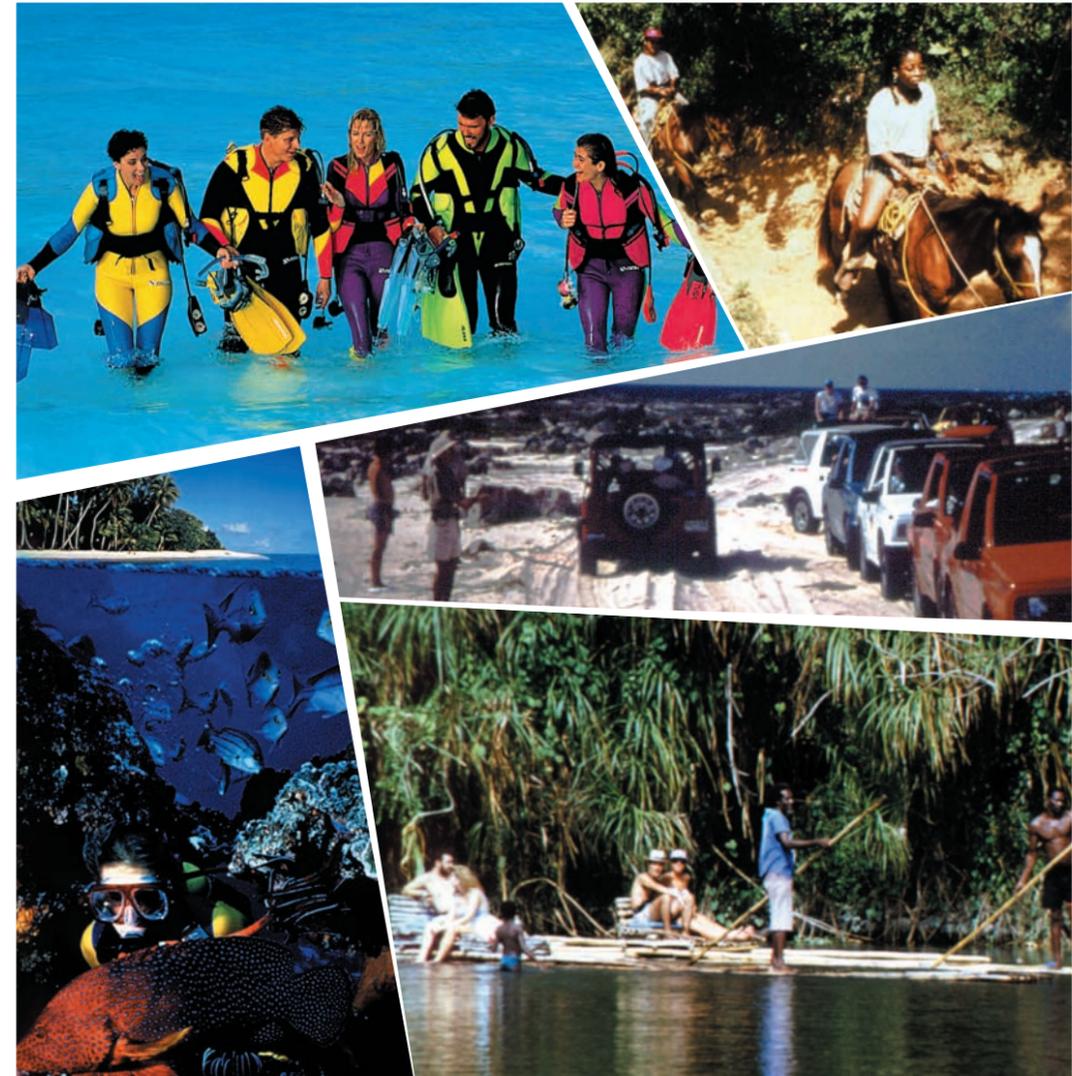
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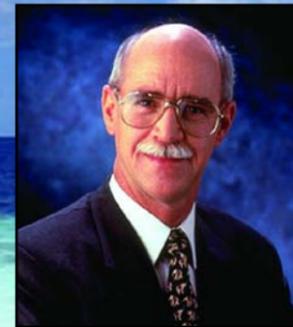
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Step aboard the future



By Michael Ronan - Regional Vice President, Global Government & Community Relations, Royal Caribbean International/Celebrity Cruises

Looking Into The Future, Staying Hungry

At this year's conference in St Kitt's, we were asked to provide a panel discussion on the future of excursions and destinations as it relates to cruise operations. As moderator, I first checked with my crystal ball but found after further investigation that the panelists that we asked to participate would definitely be able to offer better advise than my not so clear crystal ball.

Our panel consisted of Sylviane de Tracy from Radisson Seven Seas Cruises, Joanna Boxall of P&O Cruises, and Mark Melville from Chukka Adventures. We had hoped for a representative from a destination tourism department as well, but failing that, I was prepared to offer some insights into key elements for passengers not on tours. Our mixture of panelists offered the opportunity to hear from perspectives not tied only to the larger higher volume ships carrying predominately US passengers but rather both smaller ships and non-US passengers. I was able to intermix comments relative to the larger vessels and Royal Caribbean's experiences as well as general destination tourism elements.

Sylviane began by providing an excellent description of not only how

Radisson Seven Seas Cruises looks for and develops its overall shore excursion programs, but more uniquely, how they are now providing an online and onboard style of travel concierge. She explained that this service has been very well received by their well traveled guest base. This insight provides an opportunity for the guest to design their own shore activities schedule and to take advantage of Radisson Seven Seas Cruises destination relations' experience and buying power to confirm all details in advance with the confidence that it has all been coordinated through the cruise line. She went on to explain that although still new, the web based and printed collateral supporting the program is going well and that they are getting more and more insight into their customer's wants and needs which is helping them to work with the destinations on new future product development simultaneously. Hats off to Radisson for the initiative and to the destination operators for embracing and supporting change.

Joanna provided a different view of the guest/destination relation while Informing the audience of how their primarily UK and European clientele have also been changing in their views

toward family cruising and more active self directed options in their effort to get to experience the destinations. She informed us that the demographic of their guest continues to become younger and more active. The challenge has been how to attract these guests to participate in ship sponsored tours. The answer has been to seek out and find excursions that offer more interaction with the local culture and more active roles for the guest. This shift appears to be a growing segment for P&O and one that they see expanding as they continue to grow their fleet worldwide. As noted, some of these tours may be identical to those offered to US guests while others may be modified or completely changed to better match the unique interests of the P&O passenger. Again reflecting on how to achieve results from thinking how to best to match guest expectations with the destination's ability to provide unique memorable experiences.

Coming from the tour provider side of the equation, Mark offered insights into how their companies develop new tours and choose to update or eliminate existing ones. With the roots of their organization in Jamaica, they have had the advantage of being in a country rich in



cultural expression, one of natural beauty and long-standing consumer recognition. Their challenge has been to identify the “next” new activity; its potential demand and its deliverability against their high standards. After all, “It has to be a viable business or it should not be undertaken”, said Mark. In the same way, they constantly monitor existing tours to measure passenger demand and satisfaction to determine needed changes or in the most extreme cases the deletion of a tour whose cycle has run out.

Mark further provided some insight into their expansion to other destinations. He explained how important it is to partner with the right local resident companies and to be sure the product appropriately presents the destination as it uniquely is and not as merely a product superimposed on a new destination. They also take careful consideration to not introduce tours already being offered by other companies, preferring to be on the creative leading edge. His comments further reinforced the importance of consumer awareness research, good business plans, creative thinking and the uniqueness of each destination. All of which has led to their success as quality tour suppliers.

Through all the presentations there were also common threads that have changed and will continue to change

the face of cruise shore excursion programs and their relations with the destinations. One of the most dominant of them is the impact of the internet on the development, promotion and ultimate sale of the excursions themselves. Workshop participants were encouraged to review existing cruise line and destination web sites to appreciate how destinations and the lines are marketing themselves to consumers and how the cruise lines are presenting the resulting tour products. This also led to discussions on the increasing lead-time for tour pictures and descriptions as well as the importance of carefully worded tour descriptions and even tour names.

Another common element brought into the discussion is the historical fact that all successful destinations and tourism products go through cycles.

Most analysts agree the destination cycle is around 25 years with tourism products typically lasting shorter time frames, sometimes as little as five years. This is significant because the modern cruise industry as we know it is about 35 years old. Had it not been for the constant process of innovation incorporated into the ships designs and onboard programming the industry would not be positioned as well as it is today. This led to discussion about the approximately 50% of our passengers who do not take ship organized tours.

We questioned whether they are experiencing the renewed products those on tour get. The challenge is in how to address this in the areas of taxis, the arrival and departure experience, dissemination of information, quality control, food and beverage offerings, cultural events etc. One of the major issues identified is that there is no principal “Owner” of these important destination product aspects. As a result, it is more difficult to create consensus, develop training, attract interested local companies to become involved etc. Though no clear answers were identified, a challenge was rolled out that those businesses and agencies that are actively and commercially involved today need to be the catalysts for future change. Apart from managing their own businesses, they need to get involved and to support needed changes in the destination, while monitoring visitor responses too. A successful destination requires that all visitors go away satisfied with their experience, not just those on tours.

In conclusion, it was agreed that the challenge for the future of the destinations, product suppliers and cruise lines will be to constantly work together to keep the overall experience fresh and exciting. To do that, the destination must continue to embrace change and “Stay Hungry” for new business. Clearly the ones that don’t will be overtaken by those that do.

St John - St Croix - St Thomas

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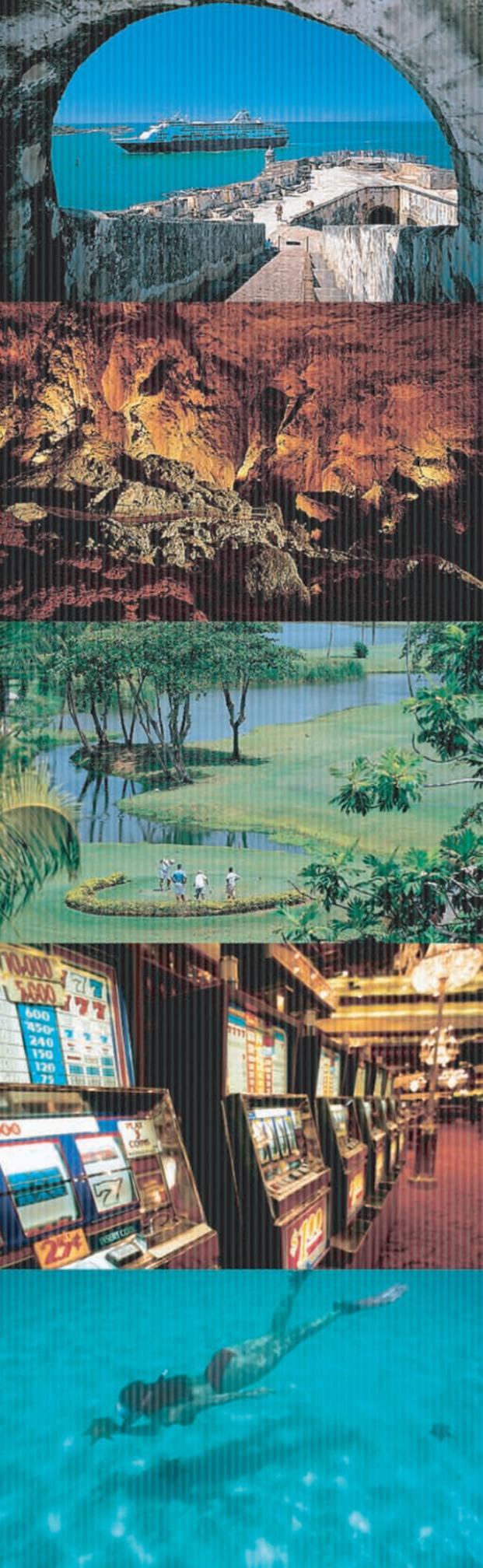


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Q. What's the Puerto Rico advantage for you?

A. Puerto Rico: The gateway to the Caribbean

Discover Puerto Rico, a dream come true; a destination that delivers something for everyone, from families and couples to honeymooners to singles.

- Convenient non-stop air service from 56 gateways around the world.
- Year-round tropical weather with an average temperature of 82F degrees.
- High client satisfaction rate will ensure repeat business for you.
- Vast array of lodgings - resorts, all inclusive, Paradores, small inns, guest houses.
- A diverse topography and lush flora offers adventures in biking, spelunking, hiking golfing (21 courses), and more.
- 235 miles of breathtaking beaches to enjoy every water sport.
- Magnificent monuments and museums reveal a heritage of over 500 years.
- Casinos and Latin music during our many year round Festivals and Concerts.
- International cuisine and delicious local dishes that offer a culinary fusion of Spanish, African and Taino influences.


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Puerto Rico Participates in FCCA Service Excellence Training Workshops



On October 12th-13th, 2005, Adam Ceserano, Manager of Marketing and Customer Service Development for the FCCA, traveled to San Juan, Puerto Rico to lead the *FCCA Service Excellence/Cruise Passengers Equal Profits* and the *Caribbean Taxi Pride* training workshops. The seminars were organized and scheduled through the Puerto Rico Tourism Company for local tourism industry employees.

“The seminars were offered to taxi drivers, ground transportation personnel, tour operators, hotel concierges and tourism information center personnel. The Puerto Rico Tourism Company has received very positive feedback from the seminar participants and has begun to see positive results, specially regarding the video that focused on the tools to enhance the quality of customer service,” Janice Colon, Director Cruise Line Relations, Puerto Rico Tourism Company, said.

The FCCA workshops offer informative insight into the mind of the cruise passenger. They also share techniques in how to provide a positive experience to their guests. The tourism service professional that works on the front lines is the face of the industry; they maintain valuable interaction with tourists and have the power to make lasting impressions. Each service professional must understand and appreciate the significance of their role to ensure that the impression they make is a positive one.

The Caribbean continues to rein as the

most popular cruise destination out of US ports, primarily Florida. Over 85% of Cruise Passengers believe that cruising is an important vehicle for sampling destination areas to which they may return. Of this pool, nearly 50% fully expect to return to the sample geographical area/destination for another type of vacation.

In this increasingly competitive market, the Puerto Rico Tourism Company values the Cruise Industry and understands the potential benefits of satisfied Cruise Passengers for their destination. They want their industry professionals to be well educated in the principles of outstanding customer service. The PRTC recognizes that these positive interactions will further the possibility of repeat visits to their island and promote positive word-of-mouth advertising to new visitors, the highest influencer of vacation travelers.

“For Puerto Rico, cruise lines are a key in the tourism industry. For this reason, the Puerto Rico Tourism Company offered these seminars, understanding that through proper training, the quality of service for our visitors is enhanced,” explained Colon.

Periodic FCCA training seminars refresh industry professionals with the knowledge of how to perform at the optimal capacity in the minds of Cruise Passengers. Annual training is recommended for destinations that want their tourism employees to operate at the top-of-their-game.

“The PRTC is considering to offer another seminar to more operators next year,” confirms Colon.

Training Workshop Overviews

Service Excellence/Cruise Passengers Equal Profits

The workshop explores the intricacies of customer service from greetings and

proper etiquette to statistical research and data reinforcing how critical each passenger interface can be in a guest's overall experience. The group discusses the needs and expectations of the consumer and tactical ways to provide customer satisfaction in many situations. The seminar is geared to empowering the audience to make an impact with a positive and helpful attitude. A happy guest will return and communicate their experience to others. The power of their results equals profits!

This seminar is approximately 2 hours long and usually conducted in groups of 50 to 200 people. It is ideal for any employee that interacts with cruise passengers during their visit.

Caribbean Taxi Pride

The workshop is designed to speak to taxi drivers or any tour operator or vendor that provides ground transportation to Cruise Passengers. The workshop leader aims to relate to the audience with relevant actionable keys to success. The programs use a variety of media including videos and workbooks to provide engaging, hands-on information in a captivating and motivational presentation. The overall message focuses on three main fundamentals to providing superior customer service, courtesy and professionalism, marketing, and rules and safety.

This seminar is approximately 2 hours long and is usually conducted in groups of 100 to 200 people. It is an ideal learning experience for taxi drivers and all ground transportation professionals.

If you are interested in hosting or participating in FCCA seminars in your region, please contact your local Department of Tourism. Request that they contact Adam Ceserano at the Florida-Caribbean Cruise Association to make scheduling arrangements.



Port Canaveral, A Partner For Success

Marketing Our Niche

Since Port Canaveral is located just 50 miles from Orlando—home to the most popular attractions in the world, with more than 46 million tourists annually—we focus our cruise marketing message on the ultimate Florida vacation experience—combining a trip to Orlando and Florida’s Space Coast with a cruise out of Port Canaveral. And because Orlando is a name recognized worldwide, we refer to the Port as Orlando’s Fun Port. Our very successful advertising campaign “One Trip Two Vacations, Twice the Fun,” targeted at both travel professionals and consumers, is in its sixth year. The campaign also promotes Orlando’s Fun Port as closer to the drive market for 3-, 4-, 7-day or longer cruises.

Ahoy Orlando

One trip, two vacations, twice the fun!

In Central Florida, discovering fun and relaxation at sea is as easy as finding theme-park thrills on land. Simply combine Orlando and Florida's Space Coast attractions, including 72 miles of beaches and Kennedy Space Center, with a daily gaming cruise or a 3-, 4- or 7-day island getaway to the Bahamas, and the Eastern and Western Caribbean—all departing from Port Canaveral.

Offer your clients two vacations and twice the fun with one trip combining a cruise from Port Canaveral with Central Florida attractions. For your FREE Travel Agent Resource Kit which includes cruise itineraries and maps call 1-877-FUN-PORT (386-7678).

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Sterling Casino Lines
SunCruz Casinos

Port Canaveral
www.portcanaveral.org

Regional Partnerships Help Fill Staterooms

We partner with regional tourism and planning organizations to leverage our marketing efforts. Our combined resources help us reach travel professionals and the cruising public with a frequent and consistent message that helps fill staterooms.

Electronic Signage Provides Guests Quick and Easy Access

We believe your guests should have the best cruise experience possible and that's why we've designed a state-of-the-art, electronic signage system to make it easy for your arriving passengers to find our terminals.

Plenty of Secure Parking

Port Canaveral has a six level parking garage that can accommodate 1,200 vehicles. This is the first garage of its kind to feature eight 100-foot panels of hand painted artwork featuring marine life on Florida's Space Coast. The garage has already been acclaimed as Brevard County's largest public arts project.

Fully-Dedicated, Island-Themed Terminals

Once inside our custom-designed terminals, your guests will experience a pleasant, island atmosphere with tropical foliage, cascading waterfalls and a panoramic ocean view

of your ship. Our intention is to help your guests shift into a cruising mood even before they cross the gangway to your cruiseliner.

Port Canaveral is proud to be the homeport and port-of-call of the leading cruise lines and welcomes the opportunity to discuss how we may be able to be a **“Partner for Success.”** For additional information contact Bobby Giangrisostomi, Vice President of Business Development.



P.O. Box 267, Cape Canaveral, FL 32920 • Ph: 321-783-7831 • Bobby@portcanaveral.org • www.portcanaveral.org

Ship Profiles

www.f-cca.com



ms Noordam

Inaugural Cruise: February 22, 2006
Shipyard: Fincantieri
Shipyard Location: Monfalcone, Italy
Country of Registry: Netherlands
Cruising Speed: 24 knots

Size & Capacities
Tons: 81,769
Length: 935 feet
Maximum Draft: 26 feet
Passengers: 1,918
Crew: 800

Accommodations

Passenger Cabins: 959
(806 outside / 153 inside)
Balcony Cabins: 641

Facilities

Passenger Decks: 11
Swimming Pools: 3
Whirlpools: 1

Nationality of Crew

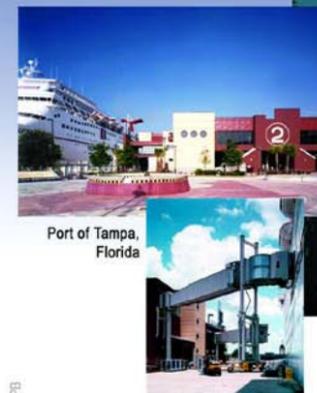
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Eastern and Southern Caribbean

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Faces in the Industry

Camille Ramsey Royal Caribbean International

My name is Camille Ramsey and I am from Trinidad and Tobago. I have worked for Royal Caribbean since October 1999, when I started as a Trainee cook on *Sovereign of the Seas*. However my love of front of house operations made me change direction and I quickly found my niche in the Officer Mess, where I enjoy the interaction with my guests...the Officers and crew. Altogether I have worked on six ships in the RCI fleet and I have had the pleasure of being chosen to join three brand new ships since their launchings in Finland, the *Navigator of the Seas*, *Mariner of the Seas* and my current home, *Jewel of the Seas*. I enjoy watching a new vessel take shape and become part of the dynamic teams onboard. A ship is a ship, however the crew gives it soul and I really enjoy being part of that process.

It has always given me great pleasure to serve my fellow crew members, so much so that I have opted time and time again to stay in the Mess because of my love of the job. I believe that my love for my job and my hard work and dedication has been evident to my colleagues since I have been nominated and won Employee of the Month twice, once onboard *Splendour of the Seas* in 2001 and on *Jewel of the Seas* in December 2004.

In the future I hope to continue to work for Royal Caribbean International but perhaps in a different capacity, possibly as a member of the Youth Staff. I really love children and this would enable me to continue working and interacting with my guests even though they are a little smaller... after all they are all future full time cruisers.



Trinidad and Tobago



La Place Caranage

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There's nothing else like dockside La Place Caranage in the Caribbean! Two air-conditioned floors filled with boutiques offering jewelry, clothing, souvenirs, liquor, perfumes, tobacco, hand-painted ceramics, art and craft, all at substantial **tax-free** prices, an internet cafe, balconied restaurant featuring



St. Lucian cuisine -- plus tour desk, taxis and information centre.

But what makes La Place Caranage such a memorable shopping experience is its new **IYANOLA EXPERIENCE**— featuring a unique 20-minute light and sound show that immerses visitors, enwraps them, enlightens them with the dramatically portrayed history of St. Lucia.

Great shopping and a great show – only La Place Caranage offers so much!



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Our cruise facilities include seaside and boulevard promenades, bus and taxi operations, car rental, tours, banking, internet service and full communication services, information services and opportunities for conversion to hotel based visits.



Around The Caribbean



Hon. Roosevelt Skerit, Prime Minister, Minister of Finance, National Security & Overseas Nationals & Senator Yvor Nassief, Minister of Tourism, Industry, & Private Sector Relations of Dominica, meet with FCCA's Security Operations Committee.



Michele receives the first edition of "Aruba Days" during the Platinum luncheon at the FCCA Conference in St. Kitts from Kathleen Rojer; Executive Director of Aruba Cruise Tourism.



Gustavo Ortega Joaquin, Mayor of Cozumel (center) & wife Dally (on his left) brought representatives from Cozumel to meet with FCCA executives at the recent FCCA Conference.



St. Kitts Prime Minister Hon. Dr. Denzil Douglas (3rd from left) took the opportunity during the FCCA Conference to meet with the Mayor of Cozumel (on left) & wife Daly (on his right) & Secretary of Tourism of Cozumel Federico Ruiz Pina (2nd from right).



Roger Blum, Vice President, Cruise Programming - Carnival Cruise Lines (right), presents Hon. Pamela C. Richards, Commissioner of Tourism - U.S.V.I., and CTO Chair (2nd from left) & Hon. Harold E. Lowell, Minister of Tourism, Foreign Affairs, International Transportation and Trade - Antigua & Barbuda, with a check for the FCCA Foundation for the Caribbean.



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