



Caribbean Cruising

THE FLORIDA-CARIBBEAN CRUISE ASSOCIATION MAGAZINE

Second Quarter 2007



State of the Industry 2007

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The Caribbean Cruise Market

Economic Factors Behind Price Softness

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President's Letter

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Michele M. Paige with Óscar Berger Perdomo, President of Guatemala, at the Platinum Conference in Guatemala.

"You need to be aware of what others are doing, applaud their efforts, acknowledge their successes, and encourage them in their pursuits. When we all help one another, everybody wins." –Jim Stovall

In any business industry, every part becomes essential to the survival of the whole. Everything is connected in such a way that any effect is universally experienced. In order for the organism to thrive, every cell must perform its proper function. Failure to do so results in an infection that can quickly spread and jeopardize the health of the unit.

The cruise industry can be thought of as a massive tree, a relatively young Redwood that has stood its ground during some storms and reached a good size but continues to steadily extend itself to the sky. This year, 2007, expects to see an unprecedented 12.6 million passengers, with 10.6 million originating in North America, which represents a 4.1% yearly growth. This growth is possible through the contributing efforts of many facets. The destinations act as the roots, constantly spreading themselves in order to supply the proper nutrients. The two develop together; as the industry progresses and yields higher passenger volume, the destinations receive this influx. This itself leads to obvious economic benefits. In fact, the recent Business Research & Economic Advisors study showed that throughout 19 destinations studied during the 2005-2006 cruise year, \$1.8 billion was brought in through direct spending by passengers, crew, and cruise lines. Cruise-related expenditures also generated 41,500 jobs throughout the Caribbean.

As the roots reach out, they gradually improve their absorption rates; thus the destinations look toward increasing cruise passengers. Part of this surplus comes from the branches as they sprout out and display their luscious leaves. Between 2007 and 2010, the CLIA-Member Cruise Lines will invest \$15.2 billion in 29 innovation-laden ships. Besides housing the latest technology, they make room for more passengers, as 100,000-ton berths become an average instead of a momentous feat. The roots of the destinations are prepared to accommodate the spacious ships, though, as many have readied themselves with new port facilities. In addition, the itineraries themselves continue to grow as the roots branch out in order to nourish the whims of the passengers and provide diversity.

This article of Caribbean Cruising presents the continual evolution of the industry and attempts to highlight the multiple sources of growth. The State of the Industry article focuses on the direct growth of the cruise industry while acknowledging this is only possible through the advancement of the destinations and concentrating on their direct benefit. Innovative thinking shifts its view to the recently developed ships and those awaiting release in order to show some of the latest and greatest ideas to hit the water. Other articles showcase FCCA events, such as the Platinum Country Western Ho Down and Gala Dinner Extravaganza.

We hope to see you at our future events.

Respectfully yours,

Michele M. Paige





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BREA has provided specialized consulting support, including market research, economic impact studies and demand analysis, to the cruise lines, port service providers and industry associations. Among BREA's recent clients are: the FCCA, Port of St. Maarten, Port of New Orleans, Tampa Port Authority, Royal Caribbean Cruises Ltd., Carnival Corp., CLIA, Northwest CruiseShip Association and the Atlantic Canada Cruise Association.

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FCCA Platinum Member Country Western Ho Down!

FCCA Cruise Executives and Platinum Members have found a way to visit the Old West while circumventing the Oregon Trail. Though Seatrade week usually brings images of conference halls and boardrooms, many know that the sight of horses and cows signify its start. Michele Paige, President of the Florida-Caribbean Cruise Association once again hosted this annual festivity at her bucolic barn and household, with her team of horses joining those leading the carriage.

The 150+ guests were first introduced by the FCCA team, clad in the appropriate Western attire—cowboy hats, boots, belt buckles, and bandannas—as they made their way to the primary tent,

guided by the DJ located on the stage. After picking their table by location or the company surrounding it, they could make their way to the buffet or bar. This traditional sense of comfort and freedom finds its way conjoined with the affable ambience exuding from the excited party goers, some sharing their surprise from meeting the animals or fellow guests. Don Allee, Executive Director & CEO Mississippi State Port Authority, touches on the importance of the setting, "The annual Country & Western Bar-B-Que that is hosted by Michele and the FCCA has really become the event to look forward to during SEATRADE. It is relaxing, entertaining and good fun. Where else does a port such as Gulfport, in a cruise

development mode, get a chance to just sit, chat and have a few laughs with friends who just happen to be some of the most important cruise decision-makers in the hemisphere."

In addition to traditional networking opportunities, the event permits Members and Executives to share more than wallet pictures of their families with one another. After collecting their children frolicking in the bounce house or riding a trained cow, friends, partners, and co-workers get the chance to introduce their family members to each other, some for the first time, while others get the chance to pick up where they left off. By transcending these work boundaries,

many are able to relate on a deeper level and allow the family compassion to find its way into the industry. Whether those in attendance wanted to spend time with their own families, new friends, complete strangers, or even cherish their individual time, they could likely find ample activities. Completing the transition to the Wild Wild West became possible by hopping on one of the horses that Michele and her team led around. A litany of hooves accompanied by a shrill creak signified the return of a horse-drawn carriage that made its way around the neighborhood, granting a scenic and memorable ride before making its way back. A unique opportunity made its way back by popular demand, as a trained cow was once again available to give rides.

Thomas Kenna, long time Platinum Member from the Panama Canal Railway shares, "The BBQ event at Michele's ranch offers an ideal environment, producing a personal and relaxed atmosphere that seems to slow down time in this fast-paced business. Though the food was delicious, the real treat came from the chance of really getting to know one another." The festivities allowed the attendees to find more common ground than the same industry and some trite hobbies; the event offered the Executives, Members, and their families the opportunity to find their inner child and grant them recess before a taxing week filled with meetings, presentations, speeches, and stress.



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Dolphin Cove Completes New Expansion



Dolphin Cove with its expansion is now the largest marine attraction in the Caribbean with 1700 feet of ocean. In addition to swimming with the dolphins, guest can now interact and swim with sharks.

Enjoy relaxing on Ocho Rios finest white sand beach. Smuggle in the privacy of their cabanas. Guest can captain their own boat to Dunn's River Falls. Intimate snorkeling and swimming with the stingrays.

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The Port of San Juan is the busiest ocean terminal in the Caribbean



The Port of San Juan is the busiest ocean terminal in the Caribbean, and the

second largest cruise port in the western hemisphere. More than 700 cruise ships arrive each year, bringing close to one million passengers to Puerto Rico.

The port's Pan-American Pier offers passengers the best facilities available in the Caribbean. As ships arrive at the port, locals greet visitors with an introduction to the lively music, dance and rich Latin culture of the island. As passengers disembark into the historic streets of Puerto Rico's capital, Old San Juan, they are welcomed with a series of information centers, which provides visitors with brochures, information and walking tours with an experienced guide. Visitors can choose from several themed tours featuring Puerto Rico's shopping, monuments, historic sites and panoramic views.

The narrow cobblestone streets of Old San Juan – a seven-square-block area over 500 years old – are bustling with ancient churches, plazas, historic sites, trendy restaurants, hip boutiques and galleries. Because Puerto Rico is a territory of the US, US citizens do not need a passport to enter the country, the dollar is the official currency and English is widely spoken on the island.

Canaveral Names First Female Director of Operations



PORT CANAVERAL, FL— When Tracy Curry takes the reins as the new Director of Operations at Port Canaveral on June 4, she will make history

locally and nationally. Curry is the first female in the Port's 53-year history to run the department with the largest number of employees. She also is believed to be one of the first women to hold the job at any U.S. port.

"We conducted an extensive search and waited until we found the right person with a mixture of experience, skill, and personality to fill such an important part of our operations," says Stan Payne, CEO of Port Canaveral. "We believe we have found that person in Tracy. Her background will be extremely beneficial as we continue to grow and develop Port Canaveral's world-class operations."

The former Cruise Services Manager at Port Everglades, Curry has a broad range of maritime experience in both the cruise and cargo sectors. She is a former Assistant Operations Manager with Florida Transportation Services and also worked as a Traffic Manager with G&G Shipping and Export.

As the Port's Director of Operations, Curry will be responsible for personnel, vessel traffic coordination, and maintenance of port facilities, roads, and parks.

By accepting the position at Canaveral, she is returning to her hometown area.

Curry holds a Bachelor of Science in Business Management from the University of Phoenix in Fort Lauderdale, Florida.

Belize Tourism Summit 2007



The Belize Tourism Board recently hosted the Belize Tourism Summit 2007 at the Best Western Belize Biltmore Plaza Hotel.



The Tourism Summit is a forum that seeks to provide industry stakeholders with macro perspectives on important tourism development topics and engages local and international experts in their fields as they present their viewpoints for discussion.

Minister Congratulates FCCA Essay Contest Winners



The six Cayman Islands semi-finalists of the Florida-Caribbean Cruise Association Foundation 2006 Children's Essay Contest were recently recognized by the Hon. Charles E. Clifford, Minister of Tourism, for their achievements.

Students from across the Caribbean were invited to write essays on the topic: "Why should your destination be on a Cruise Ships' itinerary". Essays were judged on content/subject, creativity, style/structure and grammar by a local selection committee. "Competitions such as the FCCA Essay Contest help students of all ages to build a greater awareness and appreciation of the tourism industry, hopefully leading to them choosing to enter the tourism workforce," said the Hon. Minister. "I would like to congratulate all of the Cayman Islands semi-finalists whose well written essays were delightful to read and caught the attention of the judges." The Cayman Islands semi-finalists in the Junior Division (age 12 and under) included Aaliyah Webb from Prospect Primary, Clare-Louise McGrath from St. Ignatius Prep and Kyyell Coe from Cayman Prep & High.

Senior Division semi-finalists (age 17 and under) included home schooled Rachael Zimmer, and Stephen Chin and Noelani Bothwell, both from St. Ignatius High. Aaliyah Webb and Rachael Zimmer won their respective age groups, with their essays being submitted to the FCCA for the regional adjudication round. "We were very proud to find out that Rachael Zimmer actually placed second in the Senior Division regionally," said Patrice Donalds, Tourism Training & Development Coordinator for the Department of Tourism. "While Aaliyah and Rachael received cash prizes from FCCA, all of the semi-finalists received certificates and get to go onboard a cruise ship for a special luncheon." "The main reason for my participation in the competition was my desire to challenge myself while seizing the opportunity to promote my country in a positive way," explained Rachael. "The essay honestly did not take much research at all, I simply included the aspects of Cayman which I found the most intriguing and the activities I found the most enjoyable. I believe personal opinion and experiences have a lot to do with writing these types of essays. 'I encourage other young Caymanians to get out there and support our island. I believe that our young people have the potential and talent to take our nation to great heights. A competition such as this one gives young people an avenue to express and promote the unique aspects of Cayman.'"

New Changes at SSA Mexico



Hurricane Wilma is just an unpleasant

memory at SSA Mexico's International Terminal in Cozumel.

Within 3 weeks of hurricane Wilma, the tender's pier was operational and vessels were again arriving to Cozumel. Within one year, the terminal was receiving two vessels simultaneously. Work has continued over the last several months to complete the works and improve the overall facilities in order to better serve the vessels as well as the passengers. The new tender's pier is complete as well as both the inner and outer band. A new dolphin is being constructed to handle the ever increasing vessel needs. When completed, the inside berth will be increased to a length of 395 meters. The outside berth will be increased to 409 meters.

On May 24th, the terminal welcomed the arrival of RCL's new vessel, The Liberty of The Seas. A reception was held to celebrate her arrival. In attendance were a number of distinguished guests, all of whom remarked on the incredible recovery made by Cozumel.

New Duty Free opens in the Port of Progreso



In October of this year, The Port of Progreso in the beautiful Yucatan peninsula welcomed a new addition to its cruise facility. The new Duty Free opened its doors to the passengers on board the Carnival Ecstasy. The new facility, Los Cinco Soles Duty Free is operated by Tiendas del Sur. The store offers 800 square meters of fine shopping. This beauti-

ful well stocked facility will certainly enhance the passenger experience in the Port of Progreso.

In addition, 2007 saw another first for the Port of Progreso. On April 11, 2007, Progreso welcomed its one millionth passenger. Jeanette Keeler of Houston Texas arrived on board the Carnival Ecstasy. She and her husband William Lawson were welcomed by representatives of the State of Yucatan as well as the local Port Authority, SSA Mexico and Carnival Cruise Lines. As part of the celebration; they were given a week's accommodations at a hotel in Merida as well as two round trip tickets from Houston.

On May 11, 2007, Progreso welcomed the return of Royal Caribbean with the arrival of the Rhapsody of the Seas.

With the increasing popularity of Progreso, the two millionth passenger can't be too far away.

River Expands Florida Presence with New Senior Maritime Engineers

TAMPA – River has expanded its Florida team with the addition of Gary Ledford, P.E., and Sandra Rice, P.E. Ledford and Rice bring additional port and maritime expertise to River, which delivers Management, Consulting and Engineering to the Cruise and Maritime Industry.

Rice, who joins River as a Senior Port Engineer, has more than 20 years of experience in ocean and waterfront facilities engineering, specializing in berthing and mooring analysis and design and maneuvering of large vessels in port. "Rice elevates River's level of capabilities in mooring design and vessel handling, bringing significant value to our Clients," states John Bolles, Vice President & General Manager, Tampa. "She is one of a few

engineers with the experience and necessary skills to optimize berthing and mooring accommodations for today's largest commercial vessels and the U.S. Navy's fleet of vessels."

Rice provides technological leadership and expertise using advanced mooring analysis software, including passing ship effects on moored ships and solutions for scour protection from ship propulsion at berth. In recent years, she served as the primary technical consultant for the U.S. Navy's mooring analysis software, FIXMOOR. Rice also executes vessel navigation access and harbor improvement projects working with state-of-the-art ship handling simulation facilities, port authorities and local harbor pilots, vessel operators, U.S. Coast Guard, and the U.S. Army Corps of Engineers.

Gary Ledford, P.E., brings more than 30 years of experience to River, where he serves as a Senior Project Manager and specializes in structural design. Ledford has designed more than 100 structural projects, with the majority focused on port development; including bridge structures, wharf facilities, bulkheads, cruise terminals and cargo facility piers. His experience also includes missile, military and fire training facility projects. "We are pleased to have Ledford join River," states Guillaume Lucci, P.E., Principal Vice President, Ports and Maritime Services. "His structural expertise will help us better serve our Clients in the cruise and maritime industry."

River delivers Management, Consulting and Engineering throughout the world and has six primary offices across the United States. The Florida division, headquartered in Tampa, includes port planners, designers and constructors with over 100 years of combined working experience in the cruise and maritime industry.

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we move the industry forward.



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With another year behind us and 2007 well underway, the cruise industry has once again shown to be a consistent performer. The progress perpetuates in every facet of cruising. Another unprecedented passenger record is forecasted for 2007: 12.6 million passengers, with 10.6 million originating in North America—an increase of 0.5 million guests over 2006, thus representing a 4.1% yearly growth. This follows a year that saw an 8% increase over 2005's 11.18 million carried. This is to be expected in the fastest-growing category in the leisure travel market, though. In fact, since 1980, the industry has experienced an average annual passenger growth rate of over 8% per annum.

For these first-time or frequent cruisers, the cruise product delivers unparalleled customer satisfaction. The experience consistently exceeds expectations on a wide range of important vacation attributes; after all, its overall goal is to convert cruise prospects into new cruisers. By going above and beyond, cruisers will want to return and convince those they know to join them. Word of mouth does account for 38% of the influence for cruising. Perhaps this can be explained when considering that 82% of cruisers expressed that they were “very” or “extremely” satisfied with the product presented to them. There is still a wide market to tap into, as it is estimated that only 17% of the US population has ever cruised.

Those that do make their way on board will notice that it's not only the customer base that has grown. The industry continually evolves in order to offer any amenity one can desire.

Through performing extensive market and consumer research, it becomes possible to breach the psyche of the passengers and understand what they really want and need. This includes exciting new itineraries, many of which will bring some cruise lines, like Disney, into Mediterranean waters for the first time. In addition to the new destinations are proximal U.S. embarkation ports, which allow many to spend the saved money from airfare elsewhere. For some, this convenience alone makes the difference; 68% of polled potential cruisers indicate that having more cruise embarkation points will increase their likelihood of cruising in the next three years.

It's only proper that new destinations are coupled with new ships. Between 2007 and 2010, the CLIA-Member Cruise Lines will invest a staggering \$15.2 billion in 29 innovative and enormous ships. In 2006 alone, seven new ships, from Costa Cruises, Holland America Line, MSC Cruises, Norwegian Cruise Line, Princess Cruises, and Royal Caribbean International will dive into the water for the first time. Some of these will carry up to 3,600 passengers along for the ride. With the growing berth sizes, increased capacities, and diverse itineraries these ships are ready to show what has always been the most important factor of cruising—the destinations. Over 85% of cruise passengers think that cruising is an important vehicle for sampling destination areas to which they may return, and nearly 50% expect to go back to the sample geographical area for a land based vacation.

The industry realizes the importance that the destinations play



and strives to keep them in the best possible shape, from aesthetics to economics. Besides the many restoration projects and humanitarian efforts, the cruise industry brings in cold, hard cash and an influx of jobs. An analysis conducted by the Business Research & Economic Advisors (BREA), which studied 19 participating destinations and the impact the cruise industry had on them, showed that cruise ship calls brought 16.3 million passenger and crew visits to the reviewed during the 2005-2006 cruise year. From this figure, \$1.8 billion was generated in direct spending by passengers, crew, and cruise lines. Average cruise passenger spending per port of call was \$98.01, and average spending by crew members was \$74.56. Cruise-related expenditures also generated 41,500 jobs, which paid \$600 million to the Caribbean residents.

Still, there are many days at sea, especially with the broadened schedules, and the lines have really outdone themselves to ensure that passengers can enjoy those times as well. Ships that have been recently released and in planning include features that surely will make passengers think they're sailing on a dream. They can create their own adventure with items such as surf pools, planetariums, golf simulators, water parks, self-leveling billiard tables, bowling alleys, ice-skating rinks, rock-climbing walls, and bungee-trampolines. Adventure also conjoins with serenity and pleasure with the spa evolution employed by Carnival and Costa, which offers rooms with direct access to relaxation's back door. All of the new ships aim to make each

guest feel like a VIP, with innovations such as increased ratios of outside rooms and balconies, LCD televisions complete with DVD players, Egyptian cloth bath towels, and more.

Family time is another important aspect to passengers, and today there is hardly a big ship that doesn't try to appeal to families. It's not just children's menus and babysitting; it's video arcades, spa treatments for teenagers, kids' karaoke competitions and scavenger hunts, not to mention basketball courts, teen nightclubs and on-board water parks. Many lines offer specialized programs for children under the age of 18. Royal Caribbean's Voyager class ships (Voyager, Adventure, Explorer, Navigator and Mariner of the Seas), offer programs for kids age 3-5, 6-8, 9-11, 12-14 and 15-17, and Carnival's Conquest-class ships (Carnival Conquest, Glory, Valor and Liberty), with programs broken down for ages 2-5, 6-8, 9-11, and 12-17. Disney Magic has a new space just for kids age 10-14 called Ocean Quest, in addition to programs for other age groups.

Cruising is now about choices, flexibility, and value. Today it seems impossible to find a line, ship, or itinerary that won't satiate every whim a passenger might have. Soon enough the passenger might complain that there is too much to do while not enough time, forcing them to cruise more often and extend their duration. Until then, the industry can just continue focusing on fulfilling the cruiser's needs, wants and everything in between.



Quench your thirst for adventure!
Go ahead — take the plunge!

New for 2007, Cayman's largest and most eagerly anticipated tourist attraction, Boatswain's Beach is now open.



Pronounced 'Bo-suns' Beach, this one-of-a-kind, 23-acre adventure marine park promises is one of the most exciting attractions in the Caribbean.

Boatswain's Beach celebrates Caymanians' stewardship of the seas and relationship with nature through tactile, colorful, educational and memorable experiences.

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. In keeping with its cultural heritage, Boatswain's Beach is the new home of the world renowned Cayman Turtle Farm.

As part of the emphasis on Cayman's heritage, the historic Cayman Turtle Farm has made its new home within Boatswain's Beach. The only one of its kind in the world, the turtle farm is home to over 11,000 Green Sea Turtles, ranging in size from six ounces to six hundred pounds each. Visitors can tour an actual working farm, which is both educational and entertaining, and turtles are available for guests to hold for an amazing and unique photo opportunity.

The Cayman Turtle Farm has held a long standing tradition of releasing some of the turtles that have been bred at the farm. This tradition was initially inspired by the Cayman Turtle Farm's commitment to both its conservation initiatives of ensuring the continuation of the species, and of the on-going research that will help biologists learn more about turtle migration and nesting behaviour. Visitors to the island can have the opportunity to actively

participate in an annual turtle release, as this year's annual release takes place early November 2007. This is an once-in-a-lifetime experience and those interested in participating should send an email to info@boatswainsbeach.ky for more information.

The turtle farm breeds the Green Sea Turtles, named for the green colour of the fat deposits inside its skin. Other turtle species exhibited on the farm include the Loggerhead Turtle, the Kemps Ridley, and the beautifully patterned Hawksbill Turtles.

The new expanded facilities at Boatswain's Beach will ensure visitors continue to learn more about these amazing sea creatures, as well as our new additions including the predators, birds, crocodiles, and other exciting creatures. The new park also houses a world-class research and educational facility that focuses on the conservation of sea turtles.

Visitors can now enjoy a refreshing, cool dip in the ever inviting Breaker's fresh water tidal lagoon and dine on a scrumptious meal at Breaker's Snack Shack. Items on the menu include jerk chicken and pork, hamburgers, sandwiches, and desserts amongst other delights. Everyone will enjoy the experience of the finest Caymanian cuisine at a variety of locations throughout the park.

Let your imagination soar as you wander through the beautiful free flight bird aviary or stroll down an historic Caymanian street complete with porch side artisans. Children and adults alike will delight in interacting with starfish, octopus and crabs at the touch pool.

By summer of this year, the park will offer visitors a unique 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 the predator tank and come nose-to-nose with sharks and eels.

For those wanting to take a little of Boatswain's Beach home, visit our 3,500 square foot retail cen-

tre located in the reception building.

The farm is open seven days a week from 8:30am to 4:30pm and is wheelchair accessible. Entry for adults is US\$5.00 and US\$35.00 for children 2-12; children under 2 have free entry in to the park (prices are subject to change). The farm is located on Northwest Point Road in West Bay, just eight miles from George Town.

Boatswain's Beach launched its membership club on December 9th, 2006, providing everyone with the opportunity to receive continuous updates, discounts, travel opportunities around the world, and many other exciting membership only activities at the park. For information on the club, and to receive updates and press releases on the park, contact marshaebanks@boatswainsbeach.ky.

Boatswain's Beach can also cater for functions of all types and sizes. Whether your party is an anniversary, birthday, business affair, Christmas, or New Year function, Boatswain's Beach can host any occasion. As small as a group of 10 or as large as a group of 2,000 people, Boatswain's Beach can make it happen!

With its ability to weave entertainment, education, and conservation together in one cohesive package, Boatswain's Beach will take your next business event to another level. Furnished by an excellent sunset, Caribbean music in the background, an array of delectable foods and the finest wines and spirits, your special event will turn into a beautiful evening that will never be forgotten.

Boatswain's Beach will handle all the details, from catering and decorations to music and entertainment. For more information on having your next event at Boatswain's Beach, please contact the Special Events Coordinator, Mr. Gary Dominguez at 949-3891 ext. 1002 or at events@boatswainsbeach.ky.

For more details on Boatswain's Beach visit www.boatswainsbeach.ky.

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CARNIVAL CRUISE LINES AND THE CARIBBEAN:

35 YEARS OF CONTINUED GROWTH



By Bob Dickinson, President and CEO - Carnival Cruise Lines



When Carnival Cruise Lines began its operations from the Port of Miami 35 years ago with a single ship, its first itineraries were to the Bahamas and Caribbean. Today, three-and-a-half decades later, Carnival is more committed than ever to helping the Caribbean expand upon its position as the world's most popular cruising region.

Indeed, while some other cruise lines have reduced their sailings to the Bahamas and Caribbean, Carnival has actually increased its presence there. In the coming year, Carnival expects to carry a record 2.9 million passengers to the Caribbean/Bahamas – the most in its 35-year history – representing an increase of more than 200,000 guests over last year.

In 2007, 18 of Carnival's 22 ships will be deployed within the region on a year-round or seasonal basis, offering more than a 1,000 voyages to nearly two dozen different tropical destinations.

The reason for the growth in Bahamas and Caribbean cruises is simple – the region offers what consumers look for in a vacation — excellent beaches and other “fun in the sun” activities, warm and gracious hospitality, and exposure to diverse cultures and historical attractions. All this, combined with Carnival's distinctive “Fun Ship” ship-board environment, outstanding value and exceptional service, adds up to an unbeatable combination.

Underscoring Carnival's commitment

to the Caribbean is the line's decision to continue to place its newest and largest ships in the region, including the 2,974-passenger *Carnival Liberty*, which debuted in 2005 and currently operates year-round Caribbean cruises. Its sister ship, the 2,974-passenger *Carnival Freedom*, will begin Caribbean service this November.

In fact, over the past five years, Carnival Cruise Lines has launched seven new ships representing nearly 20,000 total lower berths and all of them currently operate in the Caribbean on a year-round or seasonal basis.

There are several good reasons for Carnival's ongoing commitment to the Caribbean/Bahamas market, but the number one reason is that it's simply the most popular cruise vacation destination for North Americans. Accordingly, Caribbean destinations are featured on nearly half of all cruise itineraries by North American cruise operators, based on statistics from the Cruise Lines International Association.

Further illustrating the tremendous consumer appeal of Caribbean cruises is the 2007 Travel Trends Survey, conducted by Cruise Holidays, North America's oldest and largest cruise retailer, in which participants ranked the Caribbean as the most sought-after cruising region for the third year in a row.

Another reason for the incredible popularity of Caribbean cruises is the region's close proximity for millions of

North American consumers and the dramatic increase in “close-to-home” departure points, both of which have fueled the rapid expansion of the short cruise market.

Most of Carnival's shorter cruises feature Bahamas/Caribbean itineraries, primarily operated on Carnival's eight Fantasy-class vessels — the most successful series of cruise ships ever introduced based on a single design.

In 2007, Carnival will offer 32 short cruise itineraries of five days or less, the vast majority of these sailing to the Bahamas/Caribbean from homeports such as Galveston, Texas; New Orleans; Miami, Tampa, Jacksonville, and Port Canaveral, Fla.; and Mobile, Ala.

Ports of call on these highly popular short cruise routes include Grand Cayman; Ocho Rios, Jamaica; Cozumel, Calica and Costa Maya, Mexico; Grand Turk, Turks and Caicos Islands; and Nassau and Freeport, The Bahamas.

To build on the incredible success of the Fantasy-class, Carnival has initiated a \$250 million investment program called “Evolutions of Fun” to ensure that these vessels continue to provide a fun, quality oceangoing vacation experience.

Many of the components of “Evolutions of Fun,” the most ambitious ship refurbishment and product-enhancement program in the cruise industry, are under way and should be fully implemented by 2009.

New features and amenities include:

- A redesigned pool area and open decks, children's water spray park and creation of the Serenity adults-only deck, with the first ship to be outfitted with these facilities beginning this fall.
- Fully refurbished staterooms and suites, including installation of flat-screen televisions, as well as bathroom upgrades.
- Addition of atrium bars and nine-hole mini golf courses, updated light and sound systems in lounges and dance clubs, new art and photo galleries, and purpose-built conference facilities.
- New, expanded play areas for children in Camp Carnival and Club O2, new custom-designed spaces geared toward 12- to 14-year-olds.
- More than 50 interconnecting staterooms — popular with families
- Remodeled spa and fitness centers, including new private treatment rooms, state-of-the-art exercise equipment and a host of design enhancements.

Carnival Cruise Lines' commitment to the Caribbean/Bahamas market goes well beyond positioning most of its fleet there and offering more itineraries in the region than any other line. The company also has allocated millions of dollars to creating new destinations in the region.

In 2006, Carnival Cruise Lines' parent

company, Carnival Corporation & plc, opened the new \$42 million Grand Turk Cruise Center, an expansive facility featuring a new two-berth pier, a modern cruise terminal with a variety of retail shops and Margaritaville restaurant/lounge. The company also funded upgrades to the island's tourism infrastructure and introduced a host of shore excursion offerings.

In March, Carnival Corporation & plc announced plans to create a \$50 million cruise terminal facility on the island of Roatan, Honduras, which will be featured on western Caribbean itineraries. The “Mahogany Bay – Roatan” project is slated for completion in 2009 and will feature a spacious Welcome Center with retail shops, restaurants and bars, a 60-foot-high lighthouse, a lagoon with cascading waterfalls, and a nature trail.

Following its destruction by Hurricane Wilma, the company is also rebuilding its Puerto Maya pier in Cozumel – one of the best examples of the symbiotic relationship between cruise lines and Caribbean destinations - which is expected to re-open in late 2008.

Carnival's commitment to the Caribbean and Bahamas extends well beyond bringing millions of cruise vacationers to the region every year. The line participates in a number of charitable initiatives in the various ports of call.

For example, Ecstasy crewmembers recently collected and donated more than \$1,000 to the Fundación de



Bienestar para la Gente del Mar de Yucatán, an organization for underprivileged youth in Mexico. The donation was made during a ship-board reception where members of the foundation's board toured the ship and met the generous members of the Ecstasy team.

Crew members from the *Celebration* presented the students of the Beacon School in Freeport, The Bahamas, with a much-needed public-address system for the school along with microphones, a "boom box," MP3 players and speaker stands. *Celebration* team members collected nearly \$900 from several events, including the gift shop's "Find a

Fossil" fundraiser and "Vegas Night" festivities.

For the 11th consecutive year, Carnival Cruise Lines teamed up with the Florida-Caribbean Cruise Association for a holiday gift project benefiting children in the Caribbean.

For the 2006 project, *Carnival Conquest* team members donated their time and talent to providing holiday cheer to underprivileged youth in Montego Bay. In addition to dozens of toys — and a visit from Santa, of course — crew members played games and spent "quality time" with the children.

The Montego Bay initiative was part of FCCA's gift-giving project that provided 6,000 toys to underprivileged children in 28 Caribbean countries.

With its diverse cultures, interesting attractions and, of course, beautiful beaches and picture perfect weather, the Caribbean has earned a well-deserved reputation as the premier cruise industry destination.

Carnival Cruise Lines is committed to working with our Caribbean partners to benefit the region's economy while coordinating programs and initiatives that make an impact on its residents' lives.

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CELEBRITY CRUISES LAUNCHES NEW CRUISE LINE Azamara: A New Journey In Cruising

The launch of a new ship is a momentous occasion for any cruise line, but Celebrity Cruises made the introduction of their latest liner especially significant. Not only did they announce the launch of a 710-guest ship; in doing so they introduced an entirely new, deluxe cruise brand: Azamara Cruises.

While recognizing that the journey is just as important as the destination, the new line strives to offer a supreme, personal product on and off board combined with some of the most exclusive, desired destinations. Released on May 5th, the *Azamara Journey* was designed to offer exotic destination-driven travel experiences and a more intimate experience, and its sister—the *Azamara Quest*—will enter service and begin to service the guests the same way in October.

"We created Azamara Cruises to target an area of the market that we believe is underserved, and an area this product is ideally suited to fill," said Richard Fain, Chairman and CEO of Royal Caribbean Cruises Limited, parent company of Azamara Cruises. "This new line falls into what we consider the deluxe category - a category between premium and luxury."

According to Azamara Cruises President Dan Hanrahan, who also is president of Celebrity Cruises, "Azamara Cruises is expressly designed for travel enthusiasts who appreciate what a cruise vacation has to offer, but are look-

ing for something a little different, and a little more special. And what's special about Azamara Cruises is its distinctive combination of impeccable service, exceptional cuisine and off-the-beaten-path destinations, with truly immersive excursions."

Complementing the exotic Caribbean and Europe itineraries for *Azamara Journey* and *Azamara Quest*, previously announced under the former "Celebrity Expeditions" banner, Hanrahan announced that Azamara Cruises' itineraries will not only take travelers to some of the most desirable locations in the Caribbean, but will also immerse them in Asia, and even transport them around the world. Itinerary details for Azamara Cruises' Asia and world cruises are yet to be announced, but once finalized, the line expects to visit more than 200 ports—most of them new to cruise travelers—in over 70 countries.

While delving deep into the history and culture of remote destinations larger ships can't reach, guests sailing with Azamara Cruises also will enjoy a more exclusive experience. *Azamara Journey* and *Azamara Quest* offer butler service in every stateroom and suite, as well as concierge-style amenities, including fresh-cut flowers, fresh fruit, Elemis toiletries, complimentary use of Frette cotton robes, two complimentary pairs of slippers, plasma TVs and plush European bedding.



Despite the ships' smaller size, each offers two specialty restaurants: On *Azamara Journey*, the Mediterranean-influenced "Aqualina" and the stylish steak and seafood restaurant, "Prime C." Guests staying in suites will receive two nights of complimentary dining in one of the two specialty restaurants, while guests in staterooms will receive one. The ships will not require formal attire for dining, and will feature open seating in the main dining room. Azamara Cruises also presents a wine bar with a spectacular wine cellar offering wine and champagne tastings, seminars, and mini-pairings of food and wine, in addition to its standard menu of fine wines by the glass or bottle.

Azamara Journey and *Azamara Quest* offer an enhanced emphasis on spa and relaxation, with treatments many cruise travelers have never experienced.

Guests in suites can enjoy certain spa services in the privacy of their room. Both ships also will offer an outdoor spa relaxation lounge and an aesthetics suite offering acupuncture, laser hair removal and microdermabrasion.

An onboard "excursion expert" will not only help guests select shore excursions based on their personal interests, but also will serve as a destination guide, offering information about the culture and history of each port of call.

The Azamara retail experience onboard also will be enticing to most experienced travelers, with its focus on fine art, sculpture, photography, jewelry, and upscale resort wear. Just

prior to setting sail on its maiden voyage, the *Azamara Journey* completed a four-week, approximately \$19-million makeover, highlighted by the conversion of 48 staterooms into 32 suites, a complete refurbishment of the dining areas to create the two new specialty restaurants, an expansion of the spa area to include an aesthetics suite, a new Sunset Bar on the aft deck, a new art collection, Cova Café, entirely new carpets and flooring throughout, new exterior decking, new paint schemes, new walls, and entirely new "soft goods," ranging from plush European bedding to cushions, drapes and table linens.

The name "Azamara" is a coined term, rooted in Romance language references to blue ("aza"), the sea ("mar"), and a lesser-known word, "acamar," which, in Classical times, was the southernmost bright star that could be seen from the latitude of Greece. Hanrahan said the company views the new brand as "a bright star on the deep blue sea." Azamara Cruises unlocks the hidden corners of the world for those who desire to immerse themselves in the rich details of every voyage. The deluxe ships—*Azamara Journey* and *Azamara Quest*—offer an intimate experience, while allowing access to exotic destinations experienced travelers long to reach. For the 710 guests on each Azamara Cruises ship, every moment at sea embodies the pinnacle of luxury, and each footstep on shore accentuates the difference between visiting a place and getting a true sense of it. Azamara Cruises presents the best of Bermuda and Panama Canal/South America in 2007, elite Asia and the most captivating Caribbean, South America and Europe in 2008, and around-the-world voyages in 2010.

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FCCA Platinum Conference in Guatemala

The Platinum Member events offered by the FCCA bring together several of the most important figures throughout the tourism industry. By providing a comfortable and interesting setting and activities, it allows them to immerse themselves in their business effortlessly, for the only real indicator of its nature comes through the PAMAC meeting and breakout sessions. With their spirits raised, the Platinum Members and cruise executives find the conversation flowing over bountiful meals, bottomless drinks, scenic bus rides, and the plane journeys that become native to their trade, all the while learning about the natives and their land.

Over the past years, the functions have also targeted a secondary goal. While situating all of these power players in a vast stadium, they get

thrown a ball and the chance to test the terrain. The cruise industry expands rapidly every year, and the demand for new destinations grows alongside it. The only way to truly determine how increasing passenger loads will react to the land is the same how critics can usually gauge how certain movies or restaurants will appeal to the masses—by experiencing it and tapping into their own wealth of knowledge while keeping their audience in mind. Though the FCCA functions always include both entertainment and food, the true test transcends traditional paper, but usually brings those taking the exam to the associated trees. By seeing the sights and venues, through immersion into the land and culture, the proctors begin their assessment, and Guatemala seems to pass with flying colors. “My time in Guatemala provided me with the opportunity to dis-

cuss matters about cruise tourism and Guatemala itself with some of the most important in the industry. Whether we talked over dinner, on top of Mayan temples, or in a meeting, we could do so in a relaxed setting and enjoy the sights along with the sounds of our colleagues,” tells Graham Davis, Manager of Caribbean and Atlantic Shore Operations for Princess Cruises and Cunard Line. Rick Graham, Vice President of Original Canopy Tours - OCT Enterprises Ltd., is also familiar with what many cruise passengers look for when on land and seems to approve, “My expectations for Guatemala were already high before attending. After spending six days here, they were terminally exceeded. Between the Mayan temples, Colonial cities, and friendly people, I believe cruise tourism has a promising future here.”



The Guatemala Platinum Event proved to be as diverse and dynamic as the land and its vibrant, venerated history. Though the PAMAC Conference was scheduled in Antigua from June 4-5, 2007, many flew into Guatemala City on May 31st and provided themselves with the opportunity to explore while others transferred to the 16th century Spanish Colonial Capital of Antigua a bit early. While those in Antigua observed the remains of a powerful Spanish civilization, those remaining in Guatemala City traveled to Tikal and learned about a more ancient society: the Mayans. They climbed the sacred temples, hiked the plush paths, and even engaged in activities that might have

made the inhabitants of that time period consider them worthy of praise as they chose between flying from tree to tree on a canopy tour, viewing the land from a boat tour, or visiting another ruin sight. After briefly returning to Guatemala City again, the group ventured to a local market and got the chance to bargain for some treasures of Guatemala before making their way to what many consider the most beautiful lake in the world, Lake Atitlan.

The two separate entities then joined forces on June 3rd at Hotel Casa Santo Domingo, which seemed to still harbor the peaceful spirits of the nuns who once occupied the structure, as

the weary travelers found serenity upon entry. The following days offered tours of more convents and monasteries, along with other Santo Domingo ruins, and La Azotea, which included three museums, which educated about the local coffee plantations, Mayan musical instruments, and the costumes and customs of the villages surrounding La Antigua. The group also learned about the culture as business was conducted when they met at the ruins of Capuchinas and were presented with a set of ritual dances before making their way to the decadent dinner at the same venue, hosted by Gray Lines tours. Guatemala even allowed the necessity of viewing the port to become a festivity.



The trip to Puerto Quetzal was accompanied by shopping and insightful speeches, by a lavish speech and informative films providing entertainment to those not engaging in their own discussions.

Mike Ronan, Vice President, Government and Community Relations of Royal Caribbean International/Celebrity Cruises, shares some of his experience and the function of the Platinum functions, "As Vice Chairman of the FCCA, I attend all events and witness the invaluable role

they serve by offering the chance to hear the current happenings in the industry from the Platinum Members during business or casual discussions. The events and destinations supply many different settings and activities to allow the easy flow of conversation. Guatemala proved perfect, providing scenic and serene routes on the way to their historic sites and venues."

Because of Guatemala's lush landscapes, vast venues, and abundant sights and activities, it made the FCCA's efforts all the more seam-

less. Once the conversation started flowing about the surroundings it allowed for a smooth transition to that of business—either personal matters between the parties or considering what future visitors might think about the walk in their shoes. Perhaps they could already hear the litany of footsteps and flashing cameras in the background as they accounted for the millions of souls that will soon follow in their footsteps. Still, they had the privilege of silently reflecting on the thought or sharing it with an esteemed cohort.

TAKE A GLANCE AT AN EXOTIC LAND.



Guatemala
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Guatemala is a country with a very diverse setting that offers a wide range of interests to include the dramatic archaeological sites that portray the vestiges of the Maya culture, Spanish colonial towns, a modern metropolis, mountain lakes surrounded by towering volcanoes in a landscape with rushing rivers that meander through lush forests then past cattle, coffee, banana and sugar plantations towards the Pacific and Atlantic coasts. All this landscape encompasses a diverse population speaking many Maya languages as well as Spanish.

A myriad of colorful textiles are available that are hand woven to make the costumes worn by the different ethnic population of the villages throughout the country.

Guatemala has two ports, on the Atlantic you will find Santo Tomas de Castilla and on the Pacific Puerto Quetzal. Both ports house a Terminal to receive cruise passengers with entertainment, shopping for local textiles, jade jewelry, a wide variety of tour options and facilities to try the local delicacies and beverages.



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The FCCA 13th Annual Gala Dinner Extravaganza

More than 500 Cruise Executives and industry partners ventured to the American Airlines Arena. As the band pumped out some traditional Latin music and the Flamingo dancers made their rounds, the participants might have mistaken them for DJ Irie and the Miami Heat Dancers. Once the mirage dissolved, they could finally focus on the actual crowd—that made up of some of the most influential players of their game: the cruise industry.

Just like in the Heat games, the atmosphere created helps the audience to participate. When normally pumped up, the crowd can work together to create a resounding voice that attempts to silence the superstars trying a free throw or to make a come back. The music and dancers once more accomplished the desired effects, but this time the noise didn't come in harmony, though many of the ideas did. Instead of a litany serving to thwart the other team's efforts and exult the Heat, separate voices danced around each other, occasionally merging in unison. The networking offered by the Gala Dinner Extravaganza is just one of the reasons that it has been considered the FCCA's Premiere Event. Richard Sasso, President and CEO of MSC Cruises (USA) Inc. confirms, "I always look forward to the Gala evening. It provides us an opportunity to chat openly and freely exchange ideas to an audience of the most significant nature. The food and festivities always get the conversations flowing."

The FCCA is pleased to offer the trade of the valuable commodity of thoughts and ideas and prides itself in bringing the best players together in attempt to let the game grow as a whole, but the industry isn't the only focus

of this event. The Gala Dinner has become trademarked by the silent auction held annually. Thanks to those donating, such as Park West, Diamonds International, Colon 2000, West End Publishing, The Member Lines, and so many more generous companies, the auction once again raised hundreds of thousands of dollars for the FCCA Foundation's noble cause. It never would have been possible without the Port of Miami, as the event would have been like a ship without water to sail. The winning of multiple vacation and cruise packages seemed apropos, for those bidding received the chance to go to many of the destinations that the auction itself benefited.

Rovel Morris, Managing Director of Bridgetown Cruise Terminals Inc. summarizes the event and some of its functions quite well, "The Gala Dinner Extravaganza was an exceptional event. It really surprised me how easy it was to meet and talk with so many power players in the cruise industry. Though still a work event, those at the Gala were enjoying art, good food, music, and each other's company; it almost seemed that they weren't doing business! This helped me open up and have a great experience with everyone in attendance. I can't find any reason to keep me out of the Gala Dinner 2008!"

As the crowd made their way out of the arena, they might have reveled in the fact that they were the superstars on that night. They didn't get any slam-dunks, but their spirits rose higher than Dwayne Wade could ever jump. Their points couldn't be counted on the scoreboard, for they came from the thoughts and ideas they presented, along with their significant humanitarian contribution.

FCCA Foundation - Gala Dinner Extravaganza





Looking for the perfect blend of beach, water and jungle adventures infused with unique cultural experiences?

Set against the deep turquoise sea, Costa Maya is quickly developing into what will become the Mexican Caribbean's newest travel destination. Located on the Yucatan Peninsula and sheltered by the second largest coral reef in the world, the Costa Maya began operations as a cruise port in 2001.

Planned with unparalleled attention to detail, the port of Costa Maya resembles a Mayan city and stands as a gateway to the ancient culture that once flourished in the region. Within the port's main area, three grand pavilions host cultural and gourmet events. Here, local artisans create unique works of art, and guests can learn to make their own souvenirs.

Beyond the pavilions and their many offerings, Costa Maya provides access to a world of adventure and exploration, offering a window into new and undeveloped areas of the coast.

With acres of unspoiled coastal land and with remarkable historic and cultural influences, Costa Maya offers visitors a true insight into the essence of Mayan culture and the colonial heritage of the Mexican Caribbean.

Mayan Culture

Costa Maya offers visitors a closer look into the ancient Mayan history that surrounds the port with its Mayan Reality Tour. Passengers are whisked away from the port's modern complex into the heart of a true Mayan town where they can visit an actual Mayan family and their

home, experience daily life and learn about traditional herbal medicines.

Guests are also taken to a stunning field and invited to taste local Mayan dishes, including traditional buried earth cooking, hand made tortillas and local exotic fruits and vegetables. Visitors are also able to discover a little of the Sacred Mayan tree and its role in the Cosmos. Guests will also discover the legends, lore and prophesies that are written in the Mayan Calendar.

Diving

For a diver who longs to see intact corals on one of the biggest and most well-preserved reefs in the world, one of the largest atolls on earth and shipwrecks that date back to Colonial times, all on a personalized diving trip with an unbeatable dive master to diver ratio, the up-and-coming place to be is Costa Maya. With miles of unspoiled beaches, pristine waters that average 100 feet of visibility and home to more than 60 species of coral and more than 500 species of fish, it is a wonder that this region has remained one of the best-kept secrets in the diving world.

Costa Maya was recently only reachable by cruise ship, but is now an emerging destination sheltered by the Meso American reef, the second largest coral reef system in the world, and the largest in the Northern Hemisphere. Running from north to south, the Reef is composed of finger formations that create canyons – and the perfect spot for the diving enthusiast.

For thrill seekers and expert divers, Costa Maya lends

itself as a world-class dive site. A Diving Package includes a two-hour boat trip, weather permitting, to Chinchorro Banks, home to the largest coral atoll on the Great Maya Reef. Over 25 miles long, Chinchorro has been described as a “must do before you die” in the diving world. This tour is so exclusive, only about 300 divers a year get to visit this dive site. Because this region of Mexico is vastly unexplored and un-commercialized, it has been able to preserve its exclusivity and the dive sites remain pure, unpolluted and full of flora and fauna. Visitors can stay at the Costa Maya Inn or one of the few family-owned hotels in the area.

For those who visit Costa Maya by cruise ship, the Discover Scuba Program is available for snorkelers who want to learn to dive. For the experienced divers, a two-tank dive program is offered. In either excursion, visitors are taken on a 20-minute boat ride, limited to 12 passengers, to the Reef, which is a WWF priority conservation zone and home to the more than 60 species of coral and more than 500 species of fish. Since Costa Maya diving boasts a 1:6 dive master to diver ratio, far better than most other dive tour operators, the excursions are personalized and instructors can educate the divers about the area's unique qualities, why the Reef is in such good condition and how they plan to keep it that way... even as the dive site's popularity continues to grow. However, most first-timers will agree that a one-day visit to Costa Maya is not enough.

Developing the Land

Before Costa Maya was developed in 2001, this land of breathtaking beaches and lush jungles was a sleepy fisherman village with about 100 inhabitants. While the port

has experienced incredible growth, port executives and tourism officials vow that Costa Maya isn't headed for the overblown, commercialized boom that neighboring cities experienced. This stretch of Mexican coastline will be promoted and built with a careful eye on eco-friendly projects, maintaining its pristine environment and preserving the rich cultural influences of its Mayan roots.

The plan calls for sensitive development of the area and careful integration of the region's resources, as well as careful integration of the members of the Mayan community that populate and have populated the region for centuries. Costa Maya counts with the largest concentration of Mayan archeological sites and existing Mayan population in Mexico, many of which date to the Mayan classical period. Mayan dialects, gum-making and craft-making traditions are also present in the area.

Costa Maya will also be breaking away from the all-inclusive tradition of nearby destinations. Instead, the plan calls for a maximum of 10,000 rooms, all of which will be developed as eco-friendly, 3 stories high -or less- structures. This will ensure a more controlled development of the area, as well as the seamless integration of the architecture to the region.

Ultimately, the Costa Maya region will be mostly comprised of smaller boutique hotels catering to adventure-seeker, cultured-travelers and visitors looking for unspoiled land, sea and beaches.

For more information on Costa Maya, please visit www.costamaya-mexico.com.



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Veragua Rainforest

The Ultimate Nature EXPERIENCE

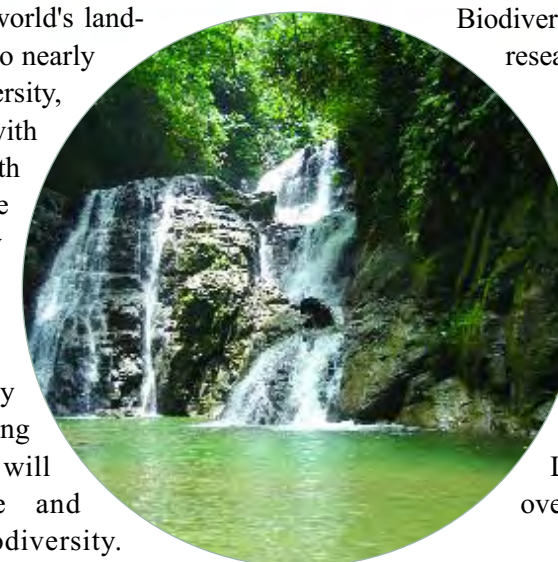
With less than 0.1% of the world's land-mass, Costa Rica is home to nearly 4% of the planet's biodiversity, making it one of the 20 countries with greatest biodiversity in the world. With the birth of Veragua Rainforest, the Costa Rican visitor is able to easily experience this incredible natural wealth first hand.

Veragua Rainforest is a new and highly anticipated tourist attraction, opening for the 2007-2008 cruise season, that will allow visitors to get up-close and personal with Costa Rica's biodiversity. Located in a 190 acre jungle covered with primary and secondary forest, the park will provide the most comprehensive rainforest immersion experience promising to become one of the most exciting rainforest-themed adventures in the Caribbean.

The park is situated on the hills overlooking the Port of Limón, on the Caribbean coast of Costa Rica and can be reached with less than a one hour drive from the port. The drive up to the hills includes passing through several small but very charming towns like Liverpool, Peje and Blanco, so visitors can get a closer look at rural Caribbean life in Costa Rica.

Once at the Veragua park, the complete rainforest immersion experience begins as the highly trained professional guides lead visitors through Costa Rica's best snake, frog and butterfly exhibitions, in an unparalleled interactive set-up, designed and managed under the scientific expertise of the National

Biodiversity Institute (INBio), a world renowned research and conservation organization.



A state-of-the-art open air gondola system will take visitors on an enchanting ride through the canopy level of the rainforest. Passing by humongous 300 year old trees on the way down to the river bank, visitors will be surrounded by uninterrupted views of the largest protected park in Central America, the "Parque Nacional La Amistad" or Friendship Park, with over 355 thousand acres of untouched land.

Upon reaching the river, visitors will be able to disembark and enjoy a leisurely stroll through the "Trail of the Giants" alongside the Victoria River, named after the trees that line the trail, which have watched over the river for centuries. The expedition into the depths of the virgin rainforest is capped off with a visit to the magnificent two tiered, 20 meter tall "Puma waterfall".

The adventure culminates in a visit to the biological research station managed by the National Institute of Biodiversity (INBio). Here visitors will be able to experience the operations of the dedicated researchers and may even be lucky enough to witness the discovery of new plant and animal species, since INBio discovers a new species almost every day!

So when in Costa Rica, remember to visit Veragua Rainforest for an educational and exciting all-in-one nature experience you will not forget.



For more information on Veragua Rainforest:
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The Caribbean Cruise Market: Economic Factors Behind Price Softness

Andrew J. Moody, Principal - Business Research and Economic Advisors (BREA)

“Carnival Corporation & plc Chairman and CEO Micky Arison noted the first quarter continued the trend seen in recent quarters of strong growth in cruise revenue yields from the company’s European brand offsetting pricing weakness in the Caribbean.”
--- Carnival Corporation 2007Q1 Earnings Report

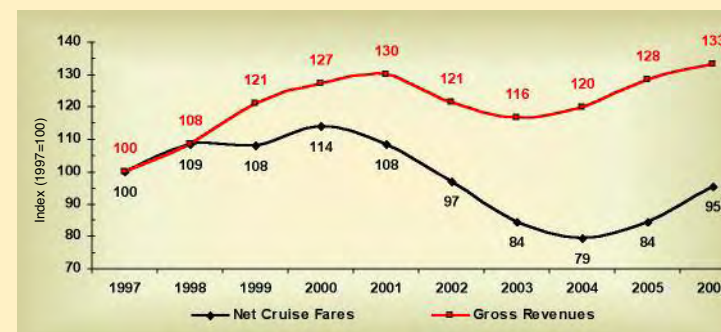
“The demand environment, especially in the Caribbean, has been weaker than expected...The softer Caribbean pricing environment continues through the Spring, and is of a somewhat greater magnitude than forecasted back in February.”
--- Royal Caribbean International 2007 Q1 Earnings Report

“The NCL Group continues to experience a very competitive pricing environment, especially in the Caribbean and Hawaii.”
--- Star Cruise Group 2007Q1 Earnings Report

As indicated in the above excerpts, there is near uniform agreement that the cruise prices in the Caribbean have been weaker than expected. For example, Carnival reported that while revenues from passenger tickets increased by 5.7% year-over-year in the first quarter of FY2007. Per passenger ticket revenues actually declined by 6.6% and ticket revenues per available bed day remained virtually flat. Royal Caribbean reported similar figures with ticket revenues up by 3.3% but down 4.4% on a per passenger cruise day basis. Thus, cruise revenue growth is currently being driven by volume rather than prices.

As shown in Figure 1, this is not a new situation. The industry experienced similar price weakness from 2001 through 2004. The movement of average cruise fares over time is determined by the growth in demand for cruises relative to the supply of cruises (lower berths or available bed days). The initial price weakness was the result of the sharp decline in demand following 9/11 but the weakness in 2003 and 2004 was primarily the result of the strong growth in capacity that occurred as a result of the orders for new cruise ships placed prior to 9/11. By 2005, capacity growth slowed and average prices rose in 2005 and 2006. So, what is causing the current softness in prices and what impact has it had on cruise passenger arrivals in the Caribbean?

Figure 1 – Index of Revenue per Passenger, North American Cruise Industry



Source: Business Research and Economic Advisors

Cruise Demand and the U.S. Economy

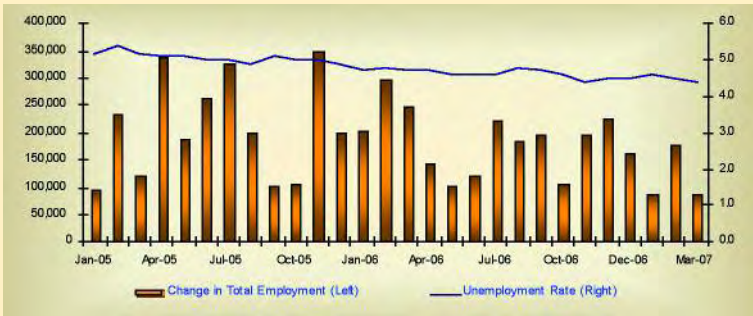
Fundamentally, aggregate cruise demand in North America is driven by the overall strength of the U.S. economy, primarily employment trends and the growth in household disposable income and consumption. Other factors such as household net worth and inflation also play a role. Since mid-2006, the U.S. economy has been generally slowing but has shown both signs of strength and weakness.

Colin Veitch, CEO of Norwegian Cruise Line, presented a compelling presentation on the impact of economic factors on the demand for cruises at the Seatrade Conference in March. In his presentation, **Revenue Environment Caribbean “Softness”: Economic Factors or Fundamental Structural Issue?**, Colin highlighted the importance of a number of economic factors and how they have affected household spending. The following discussion expands on that presentation and incorporates additional information on the supply side.

Strengths is the U.S. Economy

The labor market has remained relatively strong. Employment has increased on a monthly basis throughout 2005 and 2006 and averaged just over 186,000 new jobs per month in 2006. As a result, the unemployment rate has remained virtually flat through 2006 at 4.6%.

Figure 2 – U.S. Employment and Unemployment



Source: Bureau of Labor Statistics

As a result of a positive employment situation, the growth in real (inflation adjusted) wages and salaries and disposable income actually increased in 2006. Real wage income growth increased from 2.1% in 2005 to 3.5% in 2006 while the growth in real disposable income increased to 2.6% in 2006 from 1.2% in 2005.

Thus, the growth in employment and income during 2006 was certainly sufficient to provide underlying support for continued growth in cruise demand.

Figure 3 – Real Wage and Disposable Income



Source: Bureau of Economic Analysis

Weaknesses is the U.S. Economy

However, there were other factors, primarily rising interest rates and inflation that were working to offset the positive impacts of continued employment and income growth. Throughout 2005 and into 2006, the Federal Reserve was steadily pursuing a policy of raising interest rates. As indicated in Figure 4, the result was a substantial increase in mortgage rates. While all interest rates increased over this period, adjustable rate mortgages were hit the hardest increasing by more than 170 basis points. While rates have moderated since, they are still nearly 100 basis points higher than their 2005 lows.

Figure 4 – Mortgage Interest Rates



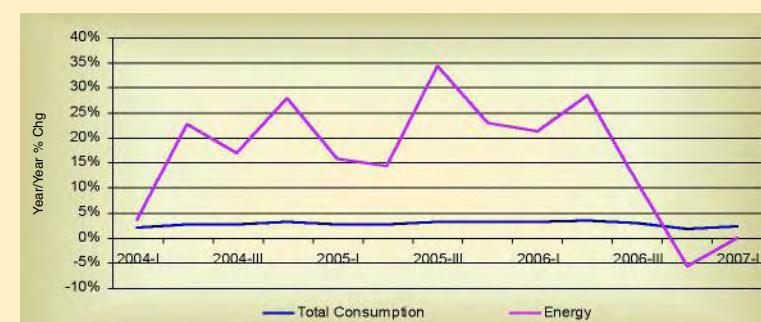
Source: National Association of Homebuilders

Interest rates impact the economy with a 6- to 12-month lag and thus the full impact of rising mortgage rates on the housing market were not felt until 2006. Briefly, the impact was that sales of new and existing homes declined by 18% and 8% in 2006, respectively. The decline in existing home sales then translated into a decline in home prices. During the last six months of 2006, the median price of an existing home had declined by 10%. And finally, the decline in home sales and prices and an increasing inventory of unsold homes, resulted in a reduction in the construction of new homes. After peaking at 2.3 million units in January of 2006, housing starts have trended down and have only recently stabilized at about 1.5 million units, 33% less than the market peak.

With rising interest rates and falling home prices, consumers, especially those with adjustable rate mortgages, have seen their monthly housing costs increase while, at the same time, the net worth of their real estate assets have declined.

On the inflation front, overall inflation remained relatively stable, averaging about 2.8% in both 2005 and 2006 for all consumer goods, but energy prices increased by 22% in 2005 and 12% in 2006. Inflation within the transportation sector, which is an intensive user of energy products, averaged about 3.8% in both 2005 and 2006 a full percentage point higher than overall consumer price inflation.

Figure 5 – Consumer Price Inflation



Source: Bureau of Economic Analysis

While policy makers like to exclude inflation in the volatile food and energy sectors in evaluating the inflation situation, consumers do not have the luxury of eliminating consumption of food and energy products and must deal with rising food and energy costs in allocating their income for consumption.

In his Seatrade presentation Colin Veitch pointed out that with a 200 basis point increase in mortgage rates from 3% to 5% and an increase in gasoline prices from \$1.50 to \$3.00, a household’s “annual cash outflow increases by \$3,804, ...representing more than 6% of disposable income.” This additional spending on mortgages and gasoline must be financed from additional income sources or from transfers from other consumption expenditures.

Simple Example

- Family with \$90,000 gross income, \$200,000 house, and \$160,000 mortgage
- Husband and wife each commute average of 40 miles round trip five days a week

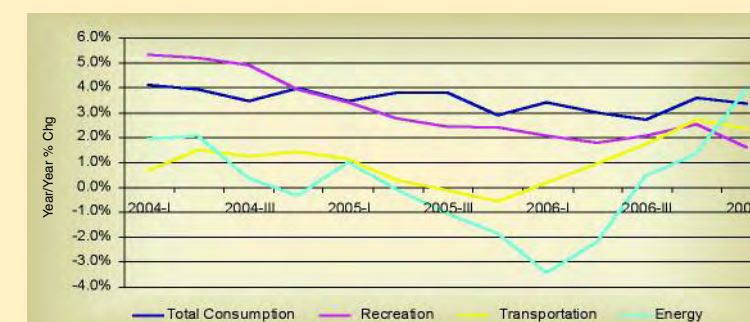
• Mortgage rate goes from 3% to 5%	+\$187/mo
• Gas goes from \$1.50 to \$3.00	+\$30/wk
• Annual cash outflow increases by	\$3,804

> 4% of gross income vanishes
 > 6% of disposable income vanishes

And no more increase in home equity to fund the shortfall!

As indicated in Figure 6, overall, the growth in consumer expenditures has fluctuated in a relatively narrow range, but it has slowed slightly from 3.5% in 2005 to 3.2% in 2006. However, real consumer expenditures for energy (gasoline, fuel oil, etc.) increased significantly during the second half of 2006. At the same time, the growth in real consumer expenditures for recreation has been steadily declining during 2005 and 2006 and dropped sharply in the first quarter of 2007, following the increase in the growth of transportation and energy expenditures.

Figure 6 – Real Personal Consumption Expenditures



Source: Bureau of Economic Analysis

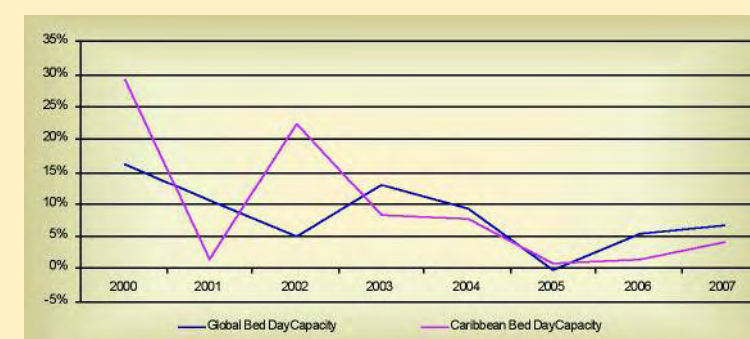
Using recreation expenditures as a proxy for spending on cruises, it appears that when it comes to these discretionary expenditures the negative impacts of rising interest rates and inflation have had a greater impact than the positive impacts of rising income growth. It appears that consumers have shifted discretionary expenditures, such as recreation, to required expenditures for energy and transportation, leaving overall growth in consumer expenditures relatively stable.

Thus, it appears that it is likely that the reduction in cruise fares can be partially explained by a slowdown in the growth of demand for discretionary items, including cruises and other recreation services.

Global and Caribbean Cruise Capacity

As shown in Figure 7, global bed day capacity continued to increase following 9/11, averaging 9.1% per year through 2004. During this same period, the industry was also faced with declining cruise fares as supply growth outpaced the growth in demand. During this same period, the cruise industry significantly reduced its orders for new cruise ships. As a result, industry capacity remained flat in 2005 and increased by only 5.5% in 2006. With this reduced growth in capacity the growth in average cruise fares increased once again.

Figure 7 – Growth in Global and Caribbean Bed Day Capacity



Source: CLIA and Business Research and Economic Advisors

In the Caribbean, capacity spiked upwards following 9/11 as the industry re-positioned ships from Europe to North America. However, since 2002, capacity growth in the Caribbean has generally slowed and lagged behind global growth. As a result, the Caribbean's share of global capacity has fallen from 48% in 2002 to 47% in 2007.

While still below the capacity increases in 2003 and 2004, global capacity has increased by nearly 7% in 2007. Combined with the reduction in demand growth discussed above, this increasing growth in capacity has enhanced the softness in cruise fares. However, given that the industry continues to operate with occupancy above 100%, the increased supply is absorbed and passenger volumes continue to rise. Thus, in essence, when supply growth exceeds demand growth, cruise fares fall to a level required to keep ships sailing at full capacity and this seems to be the current situation. And, in this situation the relatively stronger expansion in supply supports increased passenger volumes even as cruise ticket fares fall.¹

The good news for the Caribbean is that cruise passenger arrivals have continued to increase. For the twenty-two destinations for which the Caribbean Tourism Organization (CTO) provides arrival data, cruise passenger arrivals increased by 1.5% in 2006. While this is certainly slower than the global increase in cruise passengers, it is actually an improvement over the weather-related 2.0% decline in 2005. Preliminary data for 15 destinations through March of 2007 indicate that cruise passenger arrivals increased by more than 10% over the same period in 2006. All of this is consistent with a scenario in which supply growth exceeds demand growth and prices are allowed to fall until the increased capacity is absorbed.

Looking to the future, we should expect more of the same. As Colin Veitch summed up his Seatrade presentation:

- **Caribbean is still attractive**
- **New ships are driving continued growth in demand**
- **Demographics are in our favor**
- **But.... The lower price point consumer is being squeezed in his/her world**
- **We've all been here before.**

On the demand side, we expect that consumer spending will continue to moderate through 2007 before a slow acceleration in 2008. Given the current order book for new cruise ships, we can anticipate that capacity growth will accelerate and once again approach annual increases of 10%. As a consequence, average ticket fares will likely continue to decline so that the additional capacity is fully utilized and the "lower price point consumer" can be accommodated. In the Caribbean, the capacity increases will lag behind the global increase, as other markets, especially Europe and the Mediterranean, increase their market share. This means that passenger arrivals in the Caribbean will continue to increase but at a more moderate rate and certainly slower than the increase in global cruise passengers.

¹ It should be noted that falling ticket fares do not imply falling gross revenues per passenger as the lower ticket fares can be offset by higher onboard spending and other revenue sources.

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CARNIVAL CORPORATION & PLC: THE GLOBAL EXPANSION CONTINUES

By Howard Frank, Vice Chairman and COO - Carnival Corporation & plc

Carnival Corporation & plc has earned its position of world's largest cruise operator by implementing a truly global multi-brand marketing strategy, offering a broad range of cruise styles, amenities and itineraries that appeal to consumers throughout the world.

Although Carnival Corporation & plc is a truly global company with 82 ships operating worldwide itineraries, our origins are in the Caribbean, dating back to the inaugural voyage of our very first ship, Carnival Cruise Lines' TSS Mardi Gras in March 1972 – which sailed to the Caribbean, of course.

Carnival owes much of its success to the Caribbean and the region has a unique symbiotic relationship with our company and industry. In fact, for nearly the first two decades of our company, the Caribbean was featured on nearly every Carnival itinerary. It wasn't until the late 1980s when we began branching out into other market segments did we look beyond North America.

Over the years, Carnival has assembled a diverse portfolio

featuring some of the most recognizable names in travel, beginning with the acquisition of Holland America in 1989, followed by Seabourn in 1992, Costa in 1996, and Cunard in 1998, each of which has a strong international appeal and brand name recognition with consumers.

While Carnival Corporation & plc's brands have always maintained a global presence, our worldwide exposure was taken to another level with the merger with P&O Princess Cruises in 2003.

P&O Princess Cruises' brands – which includes Princess Cruises, P&O Cruises, AIDA Cruises, P&O Cruises Australia, and Ocean Village – are some of the most recognizable names in travel and served to complement to our existing portfolio of brands.

With the merger with P&O Princess Cruises, Carnival Corporation & plc operates the most recognized cruise brands in North and South America, the United Kingdom, Germany, Italy, France, Spain, Holland and Australia.

Collectively, these countries account for nearly 90 percent of cruise passengers worldwide.

In recent years, Carnival Corporation & plc has embarked on a number of strategic initiatives and alliances designed to further enhance its presence internationally and expand upon its distinction as the world's cruise vacation operator.

These include a proposed joint venture with Orizonia Corporación — Spain's largest travel company which operates its own cruise fleet under its Iberojet division — to operate and expand the existing Iberojet Cruceros brand in Spain.

Iberojet Cruceros operates two ships in the contemporary Spanish cruise market and the new joint venture would eventually be comprised of a multi-ship fleet serving the rapidly expanding Spanish vacation sector.

Under the proposed agreement, the two existing vessels would be transferred to the joint venture company and will be complemented by existing tonnage from Carnival Corporation & plc's current fleet. Carnival will own 75 percent of the joint venture with Iberojet owning 25 percent.



Holland America Line



The Yachts of Seabourn



Costa Cruise Lines



Cunard Line



Princess Cruises



Iberojet is the ideal partner for this initiative, with extensive experience marketing in Spain and a keen understanding of Spanish vacation trends Iberojet provides a solid partnership for expanding in this fast-growing region.

China is another region that we are targeting for market development and growth. With longstanding government travel restrictions having been relaxed in China allowing more residents to travel abroad, Carnival launched a new Asian cruise operation last summer designed to capitalize on the country’s tremendous market potential.

The Costa China initiative encompasses five-day cruises from Shanghai aboard the 1,000-passenger Costa Allegra, which was refurbished to serve Chinese and Asian tastes. The cruises from Shanghai marked the first time that a large international cruise company has been licensed by the Chinese government to embark its citizens from Chinese ports.

Although all of our brands are virtually unknown in China, we chose Costa because it is already very international in nature, servicing guests of many different nationalities, languages and cultures.

Since launching the Costa China initiative last year, we have

made a number of modifications to the program for the coming cruise season, including changing itineraries so that we are now able to market China cruises to other Asian countries and Europe.

Also in the works is a proposed joint venture with Germany-based TUI AG, the world’s largest tour operator, to develop, market and operate two cruise brands – Carnival’s existing AIDA Cruises and a new TUI Cruises brand – to cater to the fast-growing German-speaking holiday market. Under the proposed joint venture agreement, a new TUI Cruises brand will be developed and would cater to a more mature market than Carnival’s existing AIDA Cruises brand.

All of these efforts, combined with our aggressive newbuilding program that will introduce a remarkable 16 new ships between now and 2011 – including nine for our European operators – position Carnival for significant future growth.

Despite all of this activity on the international front, the Caribbean remains the single largest cruising region for our company — and it’s no wonder. The Caribbean is the premier cruise destination, offering excellent year-round weather, beautiful beaches, great shopping and a welcome hospitality – all within easy reach of millions of North American vacationers.

In addition to bringing a record number of cruise vacationers to the Caribbean this year, Carnival is investing millions to enhance the region’s strong allure with consumers and developing new port facilities that provide a unique landside experience for our guests.

An excellent example of Carnival’s commitment to the Caribbean is the \$50 million Grand Turk Cruise Center, which exceeded our expectations and hosted nearly 300,000 guests during its inaugural season.

The state-of-the-art facility boasts an expansive recreation area featuring an 800-foot-long beach, swimming pool, cabanas, and a Margaritaville-themed restaurant/lounge. Carnival also worked with island officials in creating several new shore excursions and refurbished a number of local landmarks, including its famous lighthouse.

Earlier this year, Carnival announced the development of a new port facility on the island of Roatan off the coast of Honduras. Scheduled to open in 2009, the \$50 million project will be situated on 20 acres and will include a 35,000-square-foot Welcome Center with retail shops, restaurants and bars, a 60-foot-high lighthouse, a lagoon with cascading waterfalls, and a nature trail.

Carnival’s efforts at bringing more vacationers to the Caribbean also includes rebuilding our cruise pier at Cozumel which was destroyed during Hurricane Wilma. One of the Caribbean’s top cruise destinations, Cozumel has made a remarkable recovery following the storm and is attracting millions of visitors who enjoy the island’s magnificent beaches and watersports and unique local flavor. The pier is expected to be completed in late 2008.

All of these efforts, combined with our various international expansion strategies, will enable our company to provide the appropriate channels to bring in more first time cruisers. Carnival will continue to seek out other strategic initiatives and partnerships that will enable our company to develop emerging markets and further enhance our leadership position within the cruise industry.

And while it is important that Carnival expands its presence beyond North America, the Caribbean remains a vital part of our plans, both now and in the future.

Carnival looks forward to working with all of our destination partners throughout the world to help expose even more consumers to the relaxing, affordable and memorable vacation that cruising provides.

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Innovation: The Next Great Race...

Keeping up with the Jones' has extended its meaning beyond the neighborhood and found itself incorporated into the forward thinking of the cruise industry. In the past, ships were evaluated almost exclusively by their berth size. With the current trend of large ships, it might seem that there would be nowhere to grow. The lines now fill this apparent void by utilizing the increased space with technology laden, innovative new features. Ice skating rinks, self-balancing pool tables, and rock climbing walls are now available to cruisers of the present.

"We're trying to outdo each other in terms of innovation," said Dan Hanrahan, president of Celebrity Cruises. Each line tries to incorporate innovations that flow with their own unique identity. They come in many forms—from adventure-packed activities to lavish luxury. The Norwegian Pearl, which took its inaugural voyage in December, features a multiple lane bowling alley, and patience doesn't seem too virtuous when waiting your turn, as the alley itself is one of the ship's most popular night clubs. Thanks to the partnership made with Nintendo, NCL's new fleet also includes Wii systems on most ships, which allows for other options, like boxing against a 20-foot opponent on the Pearl's Crystal Atrium's bisontine LED screen. Royal Caribbean lets their passengers hang ten as they provide constant perfect waves with the Flowrider, which is on board the Freedom of the Seas, along with the soon debuting Liberty of the Seas and Independence of the Seas. The Freedom line also offers such innovations as an H2O zone, boxing ring, cantilevered whirlpools, and a 14 person Presidential Family Suite.

MSC Cruises continues its tradition of elegance and refine-



Bowling alley aboard the Norwegian Pearl.



Flowrider surf simulator aboard Royal Caribbean's Freedom of the Seas.

ment with its new fleet. The *MSC Poesia* will join its sisters, the *Musica* and *Orchestra*—which have both already launched—in March, 2008. The three boast a central foyer with a three-deck high waterfall, complete with a piano that seems suspended in mid-air, held by a transparent crystal floor above a pool of water. The sisters also feature a 13,000-square-foot spa, complete with chromotherapeutic hydro massage and a Turkish bath along with the Well-Being and Fitness Center Bar to cater the body, while the mind is stimulated or relaxed by the numerous shows presented in the variety of entertainment venues, such as a three-deck theater, secondary show lounge, and disco. The *Musica* already features scintillating European itineraries in its native Mediterranean waters, and the *Orchestra* will feature a series of Mediterranean cruises from Venice. The line also looks forward to releasing its pair of enormous sisters: the *Fantasia* and *Serenata*. Weighing in at 133,500 tons and carrying 3,300 passengers, the *Fantasia* will precede its sibling by over a year as it hits the water and learns to swim in Spring 2008. The pair offers two-class cruising through a Happy Island area, which groups suites around a common concierge, lounge, pool, and elevator. The unprecedented passenger load experiences unsurpassed luxury, and the ships seem to make all cabins spectacular. MSC has decided to transcend, yet incorporate, the mere technological innovations that have found their way onto the new vessels. Passengers can now detach themselves entirely from such features, if they wish, as they step onto their private verandahs, which are featured on nearly all of the outside cabins—a ratio already high at about 80 percent. Remarkably, about 95 percent of the outside staterooms will have balconies. Celebrity’s new line of 117,000 ton, 2,850 passenger vessels will also employ this feature. The three expected ships (*Solstice*, *Equinox*, and *Eclipse*) will have a 90 percent ratio of outside cabins, with 90 percent of those having balconies.

The view is one of the most essential features of a room. Though the evolution of the ships has been geared to keep passengers out and about, they inevitably return to their room, and many want to take their eyes off the television,

even if most ships now do feature LCD screens and DVD players. This trend has led many makers to reduce the amount of inside cabins and increase the ratio of balconies, but Holland America decided to utilize a different concept on its upcoming *Eurodam*; some of its cabins will feature ceiling-to-floor and wall-to-wall panoramic windows.

Costa’s new flagship, the *Costa Serena*, will soon join its ranks next to its sister, the *Concordia*. The prestigious pair weigh in at 112,000 tons and house 3,700 passengers, easily earning them the title as the longest and largest of Costa’s fleet. Though a bit hefty themselves, they concentrate on the wellness of their guests. The Samsara Spa spreads over two decks and covers an area of 20,450 square feet, with a swimming pool in its hub. In total, there are 4 pools on the *Concordia*, 2 of which feature retractable roofs, making it possible to enjoy days at sea even if the skies don’t intend on it. Centered around the stellar structure are the stunning Samsara Suites, which have direct access to the spa. Most of the other cabins will also feature the serenity and relaxation the line aims for, as over 500 will have balconies. Choice is also a prevalent theme, as one has the options of 13 bars and 5 restaurants, 4 swimming pools, 2 of which have retractable roofs, and myriad decks available to catch a tan, sleep, or an amazing view. Costa will reveal three other ships by March, 2010.

Carnival Cruise Lines perpetuates the spa evolution, and their new ship, the *Splendor*, will dedicate itself to making comfort and relaxation convenient and accessible. Sixty-eight staterooms will surround the 21,000-square-ft. health and fitness facility. Cruisers who book these special cabins will have exclusive access to the spa and other perks such as priority spa appointments and free fitness classes. Occupants will also get unlimited use of the thermal suite and thalassotherapy pool, which is covered by a glass dome. The *Splendor* will operate Carnival’s first-ever Northern Europe program, a series of 12-day voyages that will operate July 13 through August 30, 2008; ports of call include Copenhagen, Warnemunde (Berlin), Helsinki, St. Petersburg, Tallin and Amsterdam.

Cunard also focuses on the comfort of their guests, and the upcoming *Queen Victoria* will make that its main goal, while staying true to the line’s heritage. The 800 seat Royal Court Theater was modeled after a West End Theater and includes private boxes on the upper level. There is a 2-level, 4,000 square foot Royal Arcade, inspired after London’s own, which will house an assortment of designer shops. Located next to the pool, the Winter Garden provides a place for relaxation in any climate, as the retractable roof can block out adverse weather.

The Walt Disney Company also plans to expand its fleet, and though it will retain the mouse’s trademark, the additions will make you wonder if Popeye shared some of his spinach with Mickey Mouse. The 122,000 ton sisters are expected to debut in 2011 and 2012. Standing two decks higher than Disney’s existing 83,000 ton ships, they will double the passenger capacity, which is essential to meet the growing demand of family cruise vacations.

Disney isn’t the only line worrying about appealing to families. More than 1 million children under 18 now cruise each year, according to CLIA. While Disney’s cruise ships, which launched in 1998, led the way in making cruising fun for kids, today there is hardly a big ship that doesn’t try to appeal to families. It’s not just children’s menus and glorified babysitting; it’s video arcades, spa treatments for teenagers, kids’ karaoke competitions and scavenger hunts, not to mention basketball courts, teen nightclubs and on-board water parks.

As the industry continues to grow, it acts as a bottle placed in the freezer. The expansion process has been constant and gradual, and each year it places pressure on the container, forcing it to get bigger. This year expects to see 12.6 million passengers, with 10.6 million originating from North America. Though no bottle could hope to contain them, the vessels’ necessity to grow also allows for the innovations that many would never have expected until they were announced. In the current era of cruising, days at sea can be as adventurous as some of the activities offered on shore.



Royal Caribbean International's H2O Zone.



Princess Cruises outdoor movie screen.



Costa Cruise Lines Samsara Spa.



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 considered 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 tourists to enjoy shopping for but not limited to Handcrafts, jewelry and antiques, perfumes, liquor, decorative objects including art pieces made by one of the native artists, 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.

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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Everyone Working Together to Protect Cozumel's Natural Heritage

By Seleni Matus, Conservation International



Cozumel's local government and Conservation International are working with the FCCA to bring cruise industry stakeholders together to develop a practical and feasible Action Plan that will help this world class destination to more effectively manage tourism. The Mayor of Cozumel, Gustavo Ortega Joaquín, comments about the initiative, "As the number one cruise destination in the world, Cozumel takes seriously the challenge of balancing continued growth of cruise tourism with protection of our island's natural heritage. To this end, the local government is spearheading a participatory planning process in which cruise industry leaders from government, private sector, civil society and the cruise lines are coming together to chart new courses for working together on priority issues. FCCA is playing an instrumental role in convening cruise industry leaders." This participatory planning process is being supported by CLIA and the U.S. National Fish and Wildlife Foundation.

A participatory planning process...
 In April, Conservation International facilitated a series of focus group meetings in which each key cruise industry stakeholder group (cruise lines, government, private sector and civil society) met separately to candidly discuss issues related to the sustainable management of tourism in Cozumel. More than 70 leaders from the various stakeholder groups, including cruise executives, identified a host of high priority issues, and agreed to immediately commence tackling two top issues—*improving environmental awareness of cruise passengers* and *improving environmental awareness of the local community*. Cozumel's cruise industry leaders took the meetings seriously, and expressed a sincere openness to work collaboratively to address high priority issues. Aurora Limon, Cozumel's Director of Tourism shared, "The local government of Cozumel is truly inspired by the high level of industry participation in this dialogue and their willingness to jointly address the important issues that this destination is facing."



In May, Conservation International facilitated a one-day multi-stakeholder workshop in which cruise lines and local stakeholders sat together to discuss and reach consensus on collaborative action for addressing the top two high priority issues identified in the focus group meetings. In an unprecedented session, cruise industry stakeholders committed to working together on two projects: (i) an environmental awareness campaign targeting cruise passengers, and (ii) the establishment of a center for environmental training for the local tourism industry. Furthermore, each stakeholder group defined possible sector-level contributions for implementation of these two projects. Javier Pizaña, Director of Sales and Customer Service of Atlantis Adventures and President of the local marine operators' association (ANOAAAT) comments about the multi-stakeholder workshop, "This event provides us with an excellent opportunity to align shore operators' efforts with those of other sectors involved with Cozumel's cruise tourism product. And although, the local community values highly the protection of our natural environment, it is very beneficial to have an external facilitator help to encourage and coordinate collaboration across sectors."

Expected On-the-ground Impacts

Conservation International will work with Cozumel's local Cruise Committee and FCCA over a six-month period (June-December 2007) to flush out details of the environmental awareness campaign and the center for environmental training as well as coordinate implementation of these two projects. These projects are expected to improve the quality of Cozumel's tourism product, and demonstrate measurable improvements in management of visitor flows and visitor impacts. John Flynn, President of Sand Dollar Sports says,

"...All involved are excited to see the mutual interest and commitment expressed in our strategic planning sessions. All sectors have committed to a concrete plan of action that will allow Cozumel to continue to be a world class tourist destination long into the future."

In addition, CI is helping to craft an Action Plan for the Sustainable Management of Cruise Passengers that will outline a host of issues identified as short, medium and long-term priorities through the participatory planning process, present strategic lines of action for addressing these, and detail the two agreed upon projects. The Action Plan will be validated and widely endorsed by all key stakeholder groups. The Action Plan is expected to be complete by August. Cozumel's local government envisions the Action Plan as a blueprint for current and future collaborative action within the cruise industry.

Cozumel as a Regional Champion

This participatory planning process for the cruise industry is the first of its kind in the region, and perhaps the world, making Cozumel a pioneer in demonstrating its commitment to protecting its natural attractions and biodiversity. Jamie Sweeting, CI's Senior Director, Travel and Leisure comments, "The work being undertaken by the people of Cozumel and the cruise lines is truly ground breaking, never before have all the players involved in cruise tourism come together to outline practical steps each of them can take to ensure the protection of the natural environment - this is a world first." Cozumel plans to showcase the lessons learned and preliminary results of the conservation projects with other cruise destinations at FCCA's Caribbean Conference and Trade Show to be held later this year in Cozumel.

FCCA 2007
Cozumel
 14th Conference & Trade Show

See you in Cozumel
2007

October 08-12, 2007

Information: Florida-Caribbean Cruise Association
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 e-mail: registration@f-cca.com

Trinidad and Tobago Participates in FCCA Service Excellence Training Workshops



The FCCA was pleased to collaborate with Trinidad and Tobago's Tourism Development Company (TDC), which seeks a common goal. Their Small Enterprise Project uses their available resources to bestow advice and training upon small tourism operators. Adam Ceserano, Vice President of the FCCA, was more than willing to support this objective and appealed to his expansive training experience to lead the coalition as they offered training workshops that have found success for over a decade: The Service Excellence / Cruise Passengers Equal Profits Program and the Caribbean Taxi Pride Program.



proper attitude required to satisfy the tourist, which then produces greater profits and converts cruise passengers into stay-over guests.

The Caribbean Taxi Pride Program targets the same goal, using videos, workbooks, and other means of hands-on experience to provide entertaining and informative instruction on enhancing customer service. The workshop itself has expanded over time and no longer limits itself to taxi driver. Since it encompasses anyone supplying ground transportation to cruise passengers, many tour operators and vendors joined the audience. The training itself focuses on three main areas to accomplish its

overall goal: courtesy & professionalism, marketing, and rules and safety.

By appealing to our knowledge of the industry and passengers' needs and assisting those who interact with them, all parties reap the benefits. This preparation and information allows the destination to be in synch with the whims of their guests, which correlates to an increase of interest, which makes them want to then spend more time and money there. By teaching tactics on how to handle the passengers, the Foundation hopes to show how to fish instead of just providing a meal or two.

If you have any requests of new projects for the FCCA or are interested in hosting or participating in these seminars, you can contact your local Department of Tourism and request that they make scheduling arrangements with Adam Ceserano, or contact him directly at Adam@F-CCA.com.

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Size & Capacities
Tons: 89,600
Length: 964 feet
Passengers: 2,550
Crew: 987

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Cabins with Balcony: 809
Ocean view cabins: 173
Inside cabins: 275

Facilities

Decks: 13
Pools: 2
Whirlpools Spas: 4

Nationality of Crew

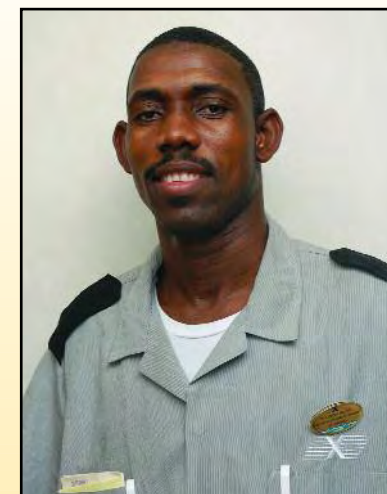
International

Deployment

Eastern Mediterranean

Faces in the Industry

Moore St. Elmore
Assistant Stateroom Attendant
Celebrity Cruises



**St. Vincent
& the Grenadines**

Mr. Moore St. Elmore, a 30 year old gentleman from St. Vincent.

This 6'4" feet tall guy with an exceptionally positive attitude towards life is working for Celebrity Cruises for more than 6 years. He started out as a Cleaner and now he is very proud to say that he is an Assistant Stateroom Attendant on board one of Celebrity's Vessels – *Galaxy*.

As a child he always dreamed about traveling around the world, he says that his dream has come true, although the only place remained to visit on the globe is Alaska. He loves to work in a multicultural environment like the ships are.

His advice for everybody wishing to work on board is to always be positive.

He will never forget his very first time to join the ship, it was Philadelphia, winter time, he was a Caribbean guy and it was the first time ever to travel anywhere where he encountered the hard, cold weather. An experience he will never forget as he almost froze!

The second experience that will always stay vividly in his memory is the first time he got sea sick, but as Mr. Moore says: "You haven't worked on the ship unless you are sea sick at least once in your career." - Well I guess than this makes this gentleman a true seafarer.

Around The Caribbean



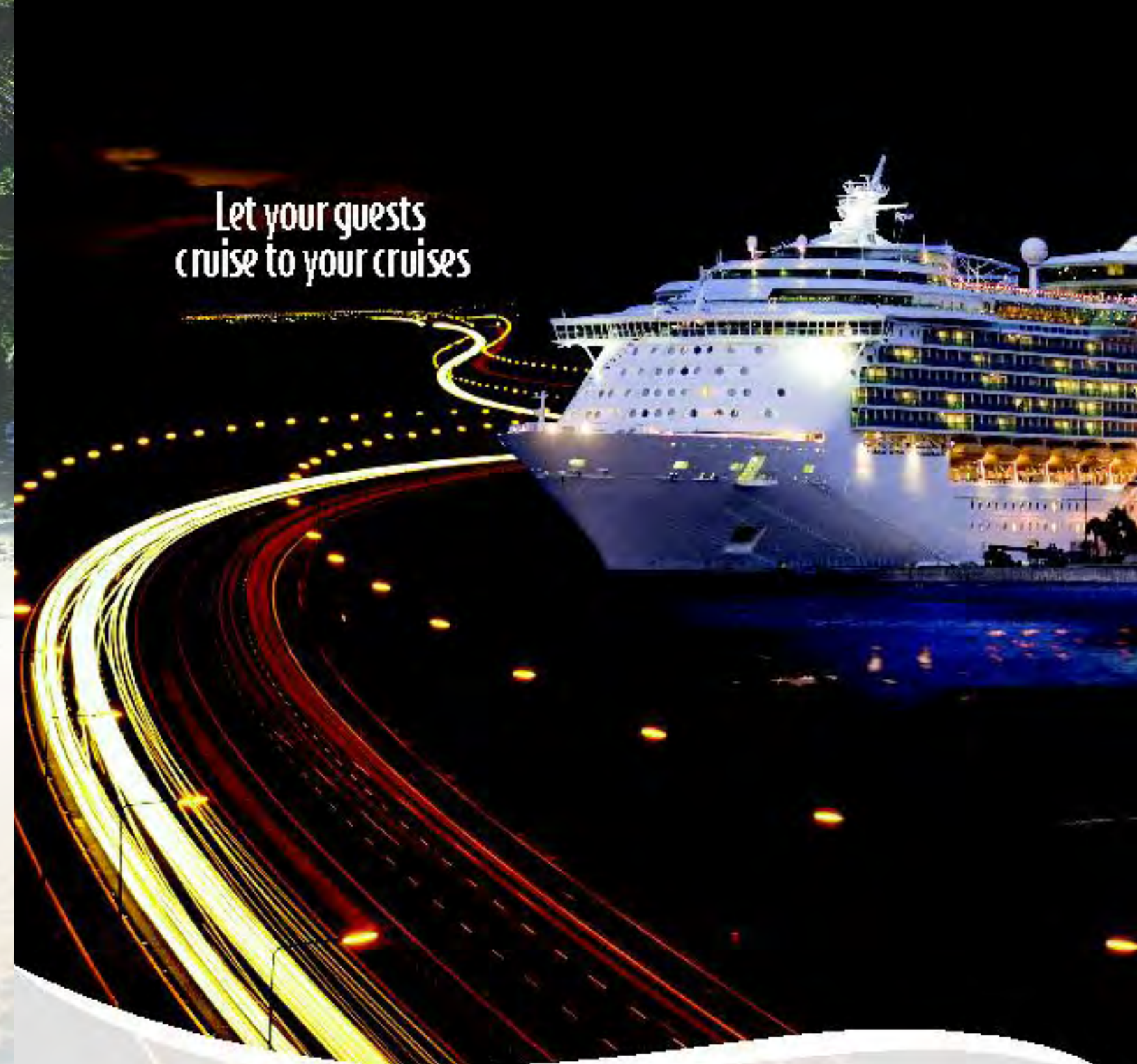
A delegation from Progreso Yucatan, Mexico headed by Secretary of Tourism, Jorge Torres (right of Michele), meets with a committee from the FCCA Member Lines.



FCCA Security Operations Committee meets with Mayor of Playa del Carmen, Carlos Joaquin Gonzalez (3rd from the left).



FCCA check presentation to the Dominica Association of Disabled People hosted by Captain Giuseppe Giusa onboard Carnival Destiny in Dominica.



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