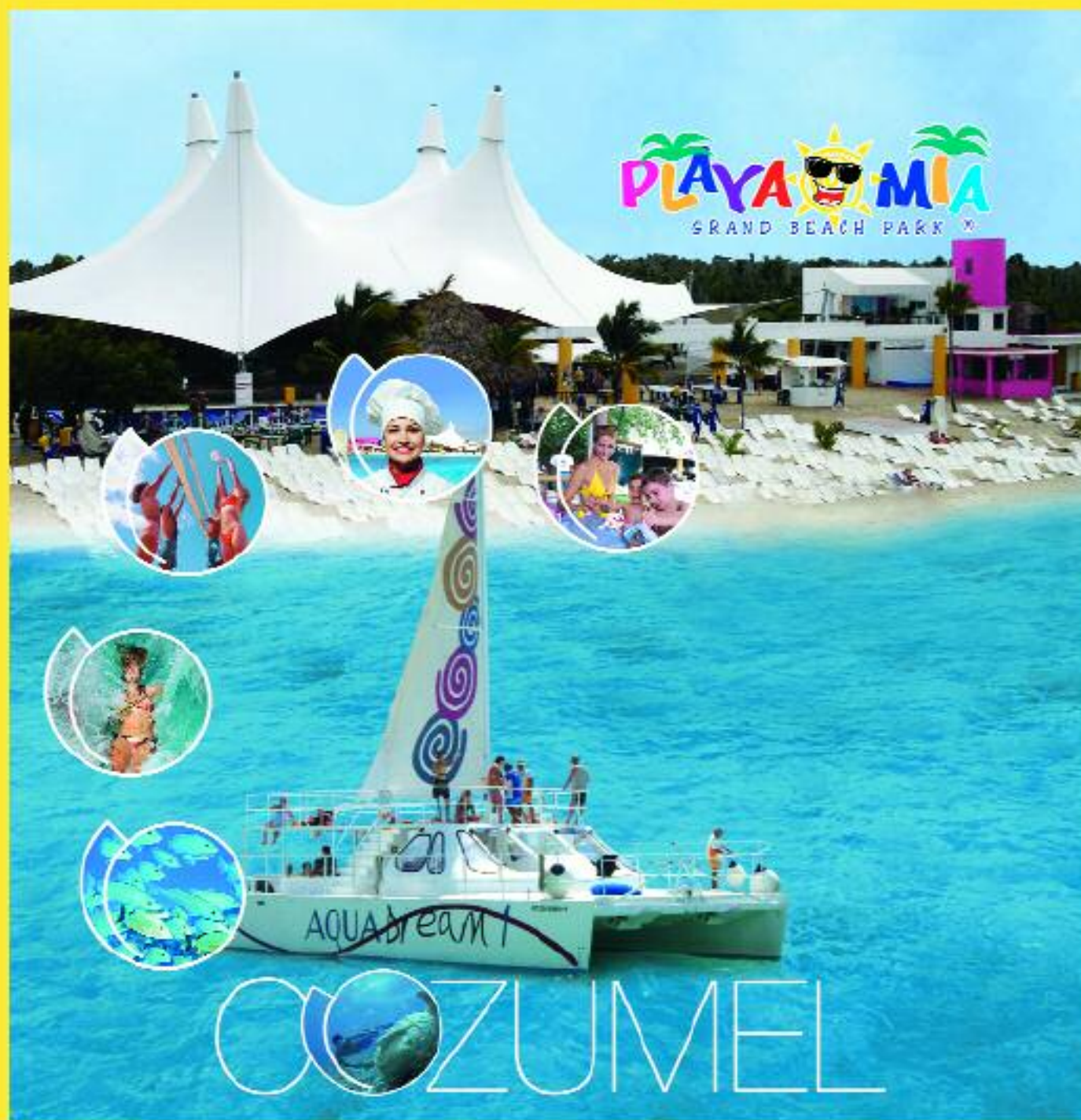




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THE FLORIDA-CARIBBEAN CRUISE ASSOCIATION MAGAZINE
Third Quarter 2007



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THE FLORIDA-CARIBBEAN CRUISE ASSOCIATION MAGAZINE

Third Quarter 2007

FEATURES

- 9 **The 2007 FCCA Caribbean Cruise Conference and Trade Show.**
Join us in Cozumel, Mexico to foster new relationships.
- 12 **A Look Inside Playa Mia Grand Beach Park.**
- 18 **What Destinations Can Learn From Disney Cruise Line.**
By Tom McAlpin, President - Disney Cruise Line.
- 24 **Port Everglades Expands for the Future.**
- 28 **Tours - Thinking Outside the Box.**
By Darius Mehta, Director Land Programs - Regent Seven Seas Cruises.
- 30 **Cozumel - An Island of Cultural Treasures.**
- 34 **RCCL's Patrick Schneider, Director of Shore Excursions Shares His Goals With Us.**
- 36 **Cruise Control - Managing the Cruise Industry.**
By Vincent Vanderpool-Wallace, Secretary General & CEO, Caribbean Tourism Organization.
- 40 **NCL Welcomes New Billion Dollar Shareholder to Freestyle Cruising and the Industry's Youngest Fleet.**
Star Cruises and Apollo Team Up to Boost NCL's Growth.

HAPPENINGS

DEPARTMENTS

- | | | | |
|---|---|-----------------------|----|
| 5 | Cruise Industry News
& Platinum Highlights | President's Letter | 3 |
| | | Faces in the Industry | 56 |
| | | New Ship Profiles | 58 |

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President's Letter

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"The whole is greater than the sum of its parts."



*Michele M. Paige with
Dalila Negrón de Ortega,
President - DIF Cozumel*

As we look ahead to the fall months, we also look forward to a time of the year when people feel more energized and more motivated to tackle tasks. It's just human nature to feel fall is a time to sprint ahead.

In this respect, the timing of the 14th Annual FCCA Caribbean Cruise Conference & Trade Show couldn't be better. We're looking forward to seeing more than 1,200 industry professionals in Cozumel, Mexico, from Oct. 8 - 12.

And one of the keys to success in the coming months, as well as a recurring theme at the Conference, will be teamwork. Success comes through cooperation, and while competition is healthy and often fuels success as well, solo thinking – me-ism – can undermine the best of intentions.

Instead, we will explore cooperative teamwork in which individual skill sets, when combined, open the door for achievements far beyond that of what one person, or one group, can achieve.

We can learn from each other's successes. And there are successes galore occurring throughout the Caribbean and Latin America, as you will see in this convention issue:

- Patrick Schneider, the newly appointed Global Director of Shore Excursions for Royal Caribbean and Celebrity Cruises, discusses his company's intense analysis of why passengers sail and what they want from their cruise – and how their cultural backgrounds often determine their cruise expectations;
- Cozumel offers an endless array of historic and renovated venues for visitors and Conference attendees. A few hints are offered toward possible sites to see – from the historic Public Clock to the Two Cultures Encounter that honors the ethnic roots of these native Mexicans;
- When Disney Cruise Line launched in 1998, as you might expect, there was lots of innovative planning in the process. Tom McAlpin writes about how destinations can learn from Disney's approach to the cruise industry – and its focus on children and adults simultaneously;
- "Think unique, think different" is the watchword from a Regent Seven Seas Cruises article. Take note of what makes your destination or venue or business unique and expand on that. Think out of the box. Look for creative ways to combine what your guests like best about you.

So take a few minutes and read what the experts have to offer in this issue. Then enjoy yourselves while looking for ways to take that idea of teamwork and make it work for you and your destination.

See you in Cozumel!

Respectfully yours,

Michele M. Paige


www.gotopuertorico.com


It's smooth sailing for cruise passengers arriving at Puerto Rico, one of the only destinations in the Caribbean where no passport is required. The Port of San Juan, one of the busiest ocean terminals in the Caribbean, welcomes more than 700 cruise ships and nearly one million passengers to Puerto Rico each year.

As ships arrive at the port, visitors are welcomed with Puerto Rico's warm hospitality, and an introduction to the lively music, Latin culture and rich history of the Old San Juan, the capital of Puerto Rico. Passengers choosing to spend the day in Old San Juan can explore the cobblestone streets and visit ancient churches, plazas, historic sites, trendy restaurants, hip boutiques and galleries.

If time permits, passengers may want to explore beyond the shore and visit the diverse regions of the island. Surf the waves in Rincon, explore the rich culture of Ponce, take a scenic drive through the mountainous central region or hike through Puerto Rico's magnificent El Yunque Rain Forest.

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. For more information about cruise travel to Puerto Rico, contact your preferred travel professional or explore the island online at www.gotopuertorico.com.

Colombia's Reawakening



Since 2001, Colombia has not seen a flow of cruises calling into its ports (Cartagena, Santa Marta & San Andres) as is the case today. Colombia is expected to receive approximately 90 cruises in 2007 or 125 cruises by season (Aug - Apr; 07-08), up from just 50 cruises back in 2005. This outstanding result reflects both the hard work and resolve from Colombia's people and the belief and support from the Cruises' executives and the FCCA, who even scheduled its platinum meeting in Cartagena Colombia in 2006.

The success is not limited to an increase in cruise flow into Colombian ports. Colombia's figures in the tourism sector are now beginning to reflect growing optimism. In year 2006, Colombia greeted 1.5 million foreign visitors, a substantial increase of 50% from the previous year. That figure is now expected to grow 5% in 2007 and to generate close to USD \$12,822 million in revenue, about 6.3% of Colombia's G.D.P. Furthermore, advances for investment are also being recognized by the key firms such as Standard & Poor's, which upgraded the Colombian risk grade to BB+ from BB, and revised the outlook for Colombia from stable to POSITIVE.

Biggest Year in the Caribbean

Who says people are tired of the Caribbean? Certainly not Carnival's customers.

During the 2007 Caribbean cruise season, the line says they will carry a record 2.9 million passengers to the Caribbean, more than any other year in their history.

There has been a lot of talk in the financial community about weakness in the Caribbean market, but Carnival sees it strictly as a result of outside economic factors in the US causing the weakness the industry has seen the last year or so in the region, not disinterest in the Caribbean itself.

Those economic factors have affected the less affluent Americans, and since the Caribbean is overall the least expensive destination, that's the part of the market that's been most sensitive to price. Carnival said today that they are seeing much more strength in their bookings (read that as more bookings at higher prices) for the second half of 2007 and early 2008.

CLIA's statistics still show that the Caribbean is the most sought-after cruise destination by far in consumers' minds.

"The Caribbean offers everything that consumers want in a vacation - picture perfect weather, gracious hospitality, unique sightseeing experiences, great shopping and, of course, gorgeous beaches," said Vicki Freed, Carnival's SVP of sales and marketing. "But there's more to the Caribbean than great beaches - this is one of the most culturally diverse regions in the world, with a rich history dating back centuries, magnificent architecture, and historical attractions and landmarks," she added.

In order to carry those 2.9 million passengers, Carnival will have 18 ships deployed in the Caribbean this season. Fourteen of them remain in the Caribbean year round, and they sail from 12 homeports in the US. (Vicki Freed would remind you that there's

Veragua Rainforest The Ultimate Nature Experience In Limón, Costa Rica

Less than 1 hour away from the Port of Limón in the Caribbean coast of Costa Rica, Veragua Rainforest is the ultimate nature-themed park that offers everything you want to experience in the authentic rainforest!

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one sailing from a port near you.) Those ships combined will sail approximately 1,150 cruises. And when the ships are in port, Carnival offers almost 900 landside tour choices in the region.

With that many choices, who could be tired of the Caribbean?

Holland America Line to Call at the Port of Guaymas

Holland America Line has booked a first call at Guaymas on the Sea of Cortez, joining The World of ResidenSea on the 2009 roster. HAL's chief deployment planner toured Guaymas last week to assess the destination and study plans for the port's new cruise terminal.

Capt. Simon Douwes, HAL's director of deployment and itinerary planning, inspected the area and reviewed the port blueprint with officials including Cesar Patricio Reyes Roel, coordinator of ports and merchant marine for Mexico's Secretariat of Communications and Transport. The port aims to have its new cruise facility operational for the 2008/09 season and would like to see a HAL ship in late 2008.

"So far, the line has firmed only one call in late 2009. The city and port hold a lot of potential especially now that they are investing many millions of dollars to improve the port facilities and the city," Douwes said. As for other HAL calls, Douwes added, "We are still assessing the new developments to see how those might fit in our future plans."

The Port of Guaymas, local tourism officials and authorities from the state of Sonora and at the federal level have been working to attract more cruise business. Port director Jose Luis Castro Ibarra, who earlier helped put Puerto Chiapas on the map, is leading the charge.

A Florida-Caribbean Cruise Association delegation visited Guaymas last February, and the destination will take part in the upcoming FCCA conference in Cozumel.

Cyril Romney, Former BVI Chief Minister, Dies at 76



Mr. Cyril B. Romney was a man who worked his whole life so that his legacy for his grandchildren would be that tourist would come to enjoy and love his homeland – just as he did.

Mr. Romney wanted his legacy to be that his family and his friends and all British Virgin Islanders would live in a country revitalized and vibrant, where people from all over the world would discover the beauty and unique culture of his wonderful Islands.

He was a man who worked tirelessly, to the very end, to achieve recognition not for himself but for his beloved Islands.

In the words of Chief Minister Honourable Dr. D. Orlando Smith, Mr. Romney was "a leader, an icon, a friend."

Mr. Romney died Thursday, July 19, after a long illness. He was 76. His survivors include his wife, Lillian; daughters Debbie, Joanne, Linda, Marnie and Patty, and their families.

Mr. Romney – known as "CB" by his friends – was the British Virgin Islands Territory's third Chief Minister, who served from 1983 to 1986, and he was also a member of the Legislative Council from 1979 to 1995.

The impact of Mr. Romney's career is felt throughout BVI tourism, especially

in the cruise industry, not just in the British Virgin Islands but throughout the region. "The people of the Caribbean have lost a great man who was devoted to tourism, his country, his family and his friends," offered Mr. Matthew Sams of Holland America Cruise Line. "He will be missed"

Virgin Islands Port Authority Crown Bay Center And Cruise Ship Port



The 57,000 square foot mixed-use Crown Bay Center is owned and operated by the Virgin Islands Port Authority. Opened in the fall of 2006, the Center is the newest Cruise Port in the U.S. Virgin Islands. Located on the southwest side of St. Thomas, the Crown Bay Center is only one mile from the Cyril E. King Airport and two miles from downtown Charlotte Amalie. There are three cruise ship berths extending immediately from the Center.

The Crown Bay Center is primed to be a first class shopping and entertainment destination offering both familiar shopping opportunities and some new ones...hassle-free and within steps of the dock. Upon departing the ship, visitors are just minutes away from an exquisite selection of jewelry, electronics, watches, cameras, spirits, and much more. The Center also has several colorful kiosk vendors offering an array of local arts and crafts, t-shirts and other souvenirs.

Dates for your diary...

Marintec China



27 – 30 November 2007 Shanghai New International Expo Center, Pudong, Shanghai, China
The All China Maritime Conference & Exhibition

For further information visit: www.marintecchina.com
E-mail: marintec@cmpasia.com

Seatrade Cruise Shipping Convention



10 – 13 March 2008 Miami Beach Convention Center, Florida, USA
The International Exhibition and Conference Serving the Cruise Industry

For further information visit: www.cruiseshipping.net
E-mail: info@cruiseshipping.net

International Superyacht Symposium



12 – 13 March 2008 Miami Beach Convention Center, Florida, USA
The Business of Superyachting

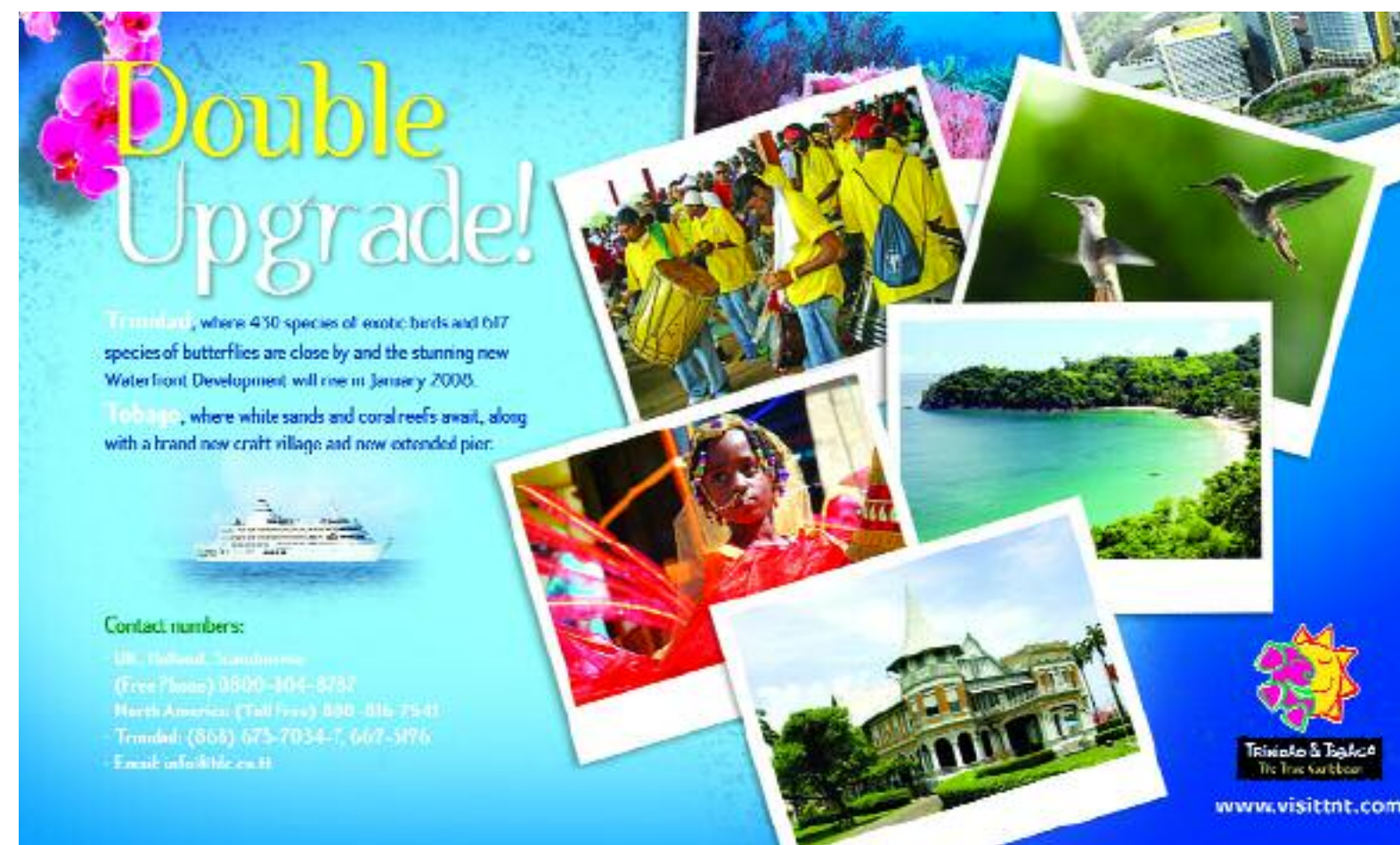
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The 2007 FCCA Caribbean Cruise Conference and Trade Show

Join us in Cozumel, Mexico to foster new relationships

We have packaged the opportunity to come face-to-face with industry leaders and influencers in one neat little package – it's all wrapped up into the 14th Annual 2007 FCCA Caribbean Cruise Conference and Trade Show. It is the one place where all the big players will be in attendance with the same motivation at heart – growth. It represents the learning and sharing of information, the analysis of trends and the direction that the industry, the discussion and debate of current issues, and most of all, the creation and building of both professional relationships and friendships.

The event takes place October 8th to October 12th, 2007 so mark your calendar and consider the prospect of facilitating interaction among cruise industry partners and developing additional ways to work together. Over 100 Cruise Executives from the 11 FCCA Member Lines will be present in this open forum of growth and understanding. This unique forum permits the development of business and social relationships with Cruise Executives from the FCCA Member Lines. This is the opportunity to expose your product and ideas to the industry that can become just as passionate about your business as you are.

The FCCA Conference and Trade Show will offer five stimulating and instructive roundtable discussions led by a multitude of industry experts and guest speakers—specialists in marketing, shore excursions, purchasing and operations to shed insight on the topics. These workshops represent the spirit of mutual understanding, joint problem solving, and



(Left to Right) Lic. Gustavo Ortega Joaquin, Mayor of Cozumel, Richard Sasso, MSC Cruises, Dalila Negrón de Ortega, Dif Cozumel, Michele M. Paige, and Octavio Molina, Operadora Aviomar, show off the conference bags.

collaborative efforts. This year we will be presenting the following topics:

New Tour Operator Orientation

Shore Excursion Executives from the Member Lines will present an overview of the expectation of new Tour Operators. Guidelines set in place will outline the requirements such as tour content, value for the money, pricing, insurance requirements, etc.

Tour Quality

Representatives from the Member Lines will discuss the



Micky Arison and Michele M. Paige meet with the Trinidad and Tobago Delegation at their booth last year.



Rick Strunck, Norwegian Cruise Line, meets with conference attendees for one-on-one meetings.

importance of maintaining the quality of your tour including the following topics:

- Vehicles – proper maintenance and appearance
- Boats – proper maintenance and safety equipments such as life preservers, etc.
- Tour Safety
- Guides
- Tour Content

Tour Guides – Your Best Kept Secret for a Successful Tour
Guest speaker, Bill Fletcher from Jewell Gardens, Alaska, will discuss and provide an audio-visual presentation of the importance of proper training of your tour guides. Your guide can make or break a tour – bring your experience to next level from an ordinary tour to an exceptional experience your guests will not soon forget!

How can the cruise lines and destinations work together to achieve the mutual goal of improving overall consumer demand for the Caribbean, focusing on the following areas:

- Strategies for converting cruise passengers to return destination visitors
- Sharing of best practices - Consumer marketing, Website/E - marketing, Travel Agent support
- Cooperative sales and marketing initiatives

Sharing of ideas for improving the destination experience for both cruise passengers and hotel visitors. Areas of discussion will include:

- Developing / enhancing the destination “brand”
- Current consumer trends for vacation interests and expectations
- Service and hospitality
- Getting the basics right: Cleanliness, safety and security
- Excursion innovation and new opportunities

Not only will this ambitiously jam-packed occasion have deep significance for the development of the cruise industry and Destination Tourism, we are also fortunate enough that it will be held in Cozumel, Mexico with so much splendor, excitement, and culture to enjoy. With a scheduled itinerary chock-full of events ranging from the FCCA Golf Tournament to evening parties and events, you will surely find an atmosphere that stimulates conversation, albeit business or pleasure (or both). Perpetuating the laid-back ambiance even further, Informal Breakout Sessions are also available. These pre-reserved one-on-one meetings enable delegates to privately assemble with some of the industry’s top cruise executives on a personal level. It’s an opportunity to discuss your product, service, destination or anything at all. The executives serve as a sounding board to concerns and issues and as experts on how to break into the industry, further establish your status in the industry, and or increase your share of cruise business.


Make your mark on the industry by leveraging this opportunity. Don’t wait to make a decision that could increase your business to the next level. The Member Lines of the FCCA are committed to maximizing the success of the companies, people and destinations willing to commit to the needs of this dynamic industry. Join us in Cozumel to evolve the industry into the future.

The Conference at a Glance:

Location: Cozumel, Mexico
Anticipated Attendees: 1,200
Dates: October 8th, 2007 – October 12th, 2007
Hotel: Wyndham Cozumel Resort & Spa,
Occidental Grand Cozumel
For more information: (954) 441-8881 and www.f-cca.com





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PLAYA MIA GRAND BEACH PARK®

Empresas Turísticas Nacionales S.A. de C.V. was created in 1984 with the primary objective of supporting the different services that its sister company, Turismo Aviomar S.A. de C.V., was providing to the growing cruise ship market calling to the Island of Cozumel. This concept was named Playasol.

In its early stages, Playasol's services were limited to a beach front with a small restaurant and a few sun loungers. Our initial Staff was composed by a total of 35 persons.

Although our efforts were aimed solely to complement Aviomar's cruise ship customers, other tourism market segments soon began to demand our services. Playasol and its few services were in high demand. Establishments with the same type of options and services in Cozumel were quite limited at the time we must add.

As the years went by the cruise ship industry began to firmly consolidate in the Caribbean. Newer and better services were in high demand. Playasol expanded its restaurant services, implemented new services and attractions like the first zoo in Cozumel, on sight commercial area, motorized water toys such as wave runners and banana boat rides. Snorkel tours to "Palancar" and "Colombia" reefs, the top dive sites of the world's second largest coral reef barrier system were launched. Our first boat the "Trotamundos" was acquired.

Countless stories, anecdotes and events took place during the first years of operations, but at the end of such period, we gladly found that Playasol had satisfied the objectives for which it had been created.

We overcame natural phenomenons, like hurricanes, launched new concepts to the Island of Cozumel, and, most importantly, we created a unique establishment that offer's not only a beautiful beach, but delicious food, innovative services and a cordial group of people able to provide quality services with International standards.

Worthy of remembrance, as a representative fact of the previously said, is the attitude demonstrated by our Staff in the year 1988, when the most powerful hurricane in history, "Gilbert", struck the Island of Cozumel with winds of well over 200 mph. Playasol was virtually devastated.

Remarkably, and with unparalleled effort, our Staff had Playasol back in operation in a record time, including serving cruise ships, in just one week after the hurricane had passed. Determined, quality people with a positive attitude made it possible. Their achievement set a standard which we follow to this date.

Diverse factors like the cruise industry growing market, the



construction of mega hotel developments, the development of the "Riviera Maya" as a new destination, but above all, the undeniable business capability and vision of Don José Trinidad Molina Castellanos, Founder and Chairman of the Board of our group of companies, was the key factor that motivated the development and construction of a new location in the year 1999.

New facilities that would not only provide the services offered until that date, but rather revolutionize and redefine the beach destinations concept by creating the first "Grand Beach Park". A unique place, where all age groups could find activities and services that would satisfy their individual needs.

Thirteen months later on March 29th, 2000 the new location was inaugurated with the largest "Palapa" in the Yucatán peninsula. It was the first themed artificial reef concept, the "Underwater Mayan City", a redesigned zoo area caring for fauna endemic to the island, the largest and most popular privately owned beach front on the island, the first kids club with family traveling satisfaction in mind, and, services and activities that would complement and satisfy the ever demanding and now global market.

The new location would be renamed PLAYA MIA GRAND BEACH PARK. As a result of this concept redefinition, the map for all Caribbean beach destinations has changed. The integration of services sought by cruise ship passengers, and the investment in infrastructure expressly built for such, makes this concept a trend setter for most of the destinations in the region.

In the year 2005, nature once again put, not only Cozumel, but

the Western Caribbean, to the test with hurricane Wilma, a most devastating hurricane. Our region was again affected. PLAYA MIA GRAND BEACH PARK was severely damaged.

PLAYA MIA GRAND BEACH PARK has taken this FCCA Conference as reference to introduce the newest concept for a Beach Park.

Our facilities have been completely redesigned with contemporary architecture. A record investment has been made for a beach destination of this type and, furthermore, market innovation is actualized, by installing the first removable roof structure which covers the 1500 sq. meters of our main dining room. We also have the first successful cuisine tour in the Caribbean with state of the art facilities.

Also, in prevention of future natural disasters, anti-cyclonic concrete has been used for the construction of all structures surrounding the Park.

It is our purpose, to permanently contribute to the development of the Cruise Line industry in the region and to further position the island of Cozumel as a prime destination in the Caribbean. It has been 23 years of hard work, relentless effort, continued investments, of compiling experience.

Today a work force of 190 persons, more than 27 activities and services, an affluence of nearly 300,000 yearly visitors and the endorsement of all major Cruise Lines and Tourism Wholesale Agencies makes us the most visited destination in the island of Cozumel, "PLAYA MIA GRAND BEACH PARK".

We sincerely hope you feel at home.



THE ORIGINAL CANOPY TOUR®
EXPANDS ITS UNIQUE CREATION IN THE CARIBBEAN

The Original Canopy Tour® (OCT), the pioneer and world leader in Canopy-based experiences for people of all ages, has opened 3 new cruise ship oriented attractions in the Caribbean during this past year.

OCT LIMON™ opened in October 2006 at VERAGUA RAINFOREST, located less than an hour from the port. With 9 traverses covering almost 1 kilometer of the most pristine tropical rainforest imaginable, this has already proven to be one of the highlights to cruise passengers arriving to this popular Costa Rican port.

The LA MARQUESA ORIGINAL CANOPY TOUR PARK™ opened in **PUERTO RICO** in August, 2007. This spectacular new tour is located less than 30 minutes from the Port of San Juan. With 8 traverses inside the remarkable La Marquesa Forestry Reserve (owned by the Municipality of Guaynabo) and a spectacular view of the city and port, this brings an amazing new adventure tour to the cruise ship visitors of this island. Include it as a shore excursion from the ships or in a pre or post tour package.

This month, OCT opens in **Antigua, Guatemala** at the **Finca Filadelfia Coffee Plantation**, already a beautiful attraction in itself. This unique tour offers 2 amazing adventures; one, a typical Original Canopy Tour through the cloud forest and the other, a more adventurous journey across a valley of the coffee plantation, with traverses over 500 meters (1,500 ft) long and 300 meters (900 ft) high.

So what makes The Original Canopy Tour® unique? First of all, it is NOT a zip line; in fact OCT's systems make "zip lines" obsolete, as they have much higher safety standards in design, materials and operation, putting them miles ahead of anything else available in the marketplace.

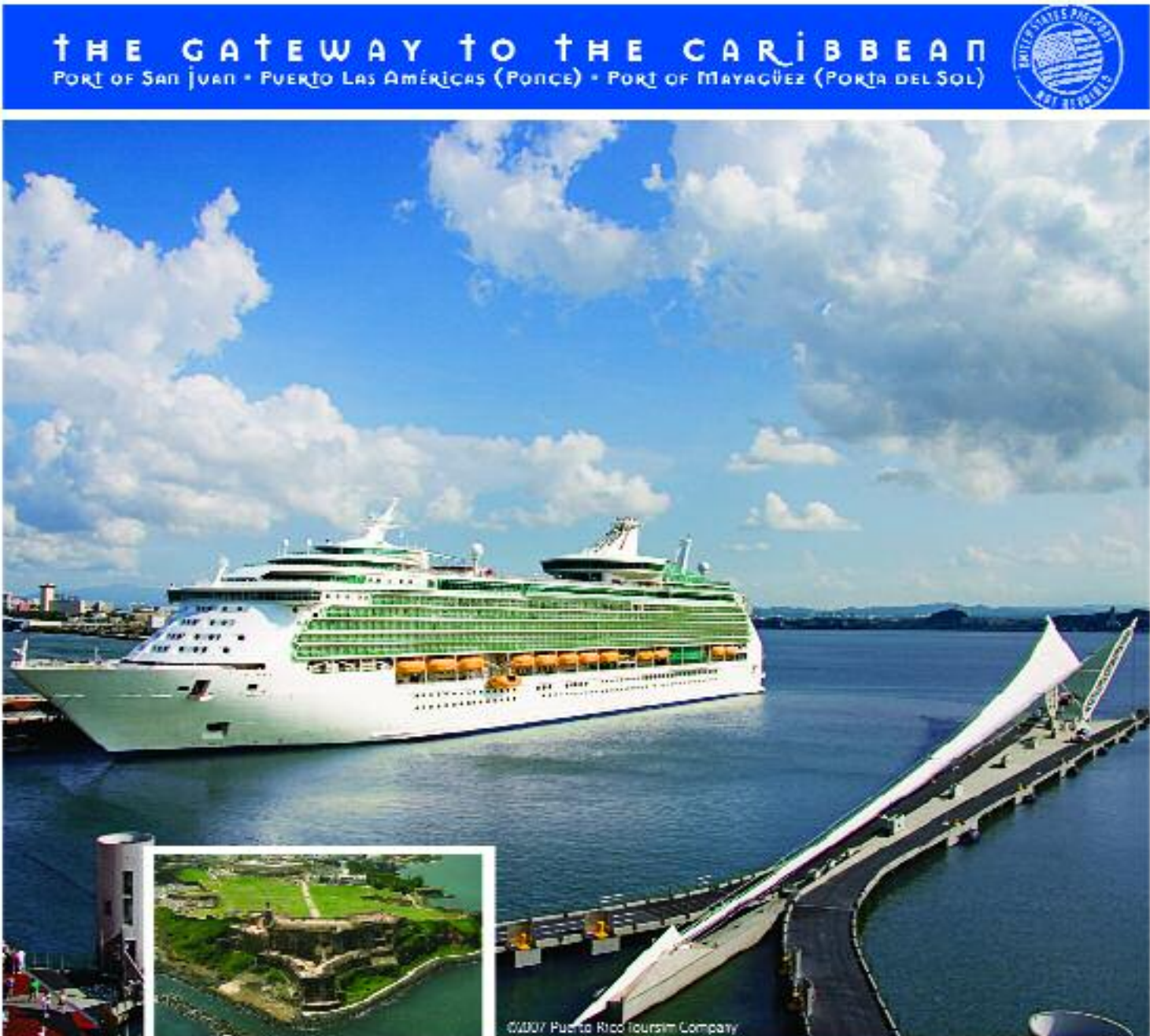
Not all “canopy tours” are created or operated equal.

Consider this: OCT's **15 years of experience** in this activity will provide you with the security that the tour program you provide to your clients is safe, exciting and educational and will be an attractive tour option for your shore excursion program.

- The Original Canopy Tour® starts with **safety in the design**; a unique design for each location is made with the safety of your clients in mind. Although OCT's tours may 'feel' scary, they are actually safer than walking on the ground.
- OCT is the **first** in the marketplace with a **patent-pending Dual Line System** of traversing from tree to tree, which guarantees your clients the safest possible excursion, from start to finish.
- OCT does not use dangerous steel wire cables, as they corrode, conduct electricity, experience metal fatigue and are limited in the way you can operate a tour. The use of OCT's **patent-pending Hrope™ technology** gives your clients a quiet ride with no annoying "zip" noise. Your clients will feel like they are actually flying through the rainforest canopy. The Hrope™ lines are adjusted to achieve minimal rider effort and little need for braking.
- OCT does not cut trees during the design or installation process. All routes are planned with the ecosystem in mind. OCT's **unique platform systems** allow for the platforms to be literally suspended from the trees. There is no need for nails or screws into the trees, leading to a healthier ecosystem and all platforms have emergency escapes built in.
- OCT's expert System Operators receive over 200 hours of training BEFORE they can work with clients. With OCT's **copyrighted training program and operations system** it means your clients will be guaranteed a safe and educational journey. All system operators are trained in safety practices *and* in the unlikely event of an emergency, in **high angle rescue**.
- OCT's **maintenance program** is second to none. Daily, weekly and monthly inspections are performed and reports are maintained on site.
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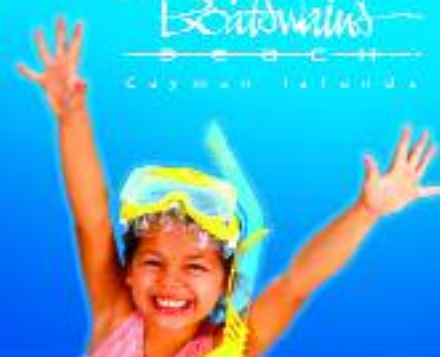
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New for 2007, Cayman's largest and most eagerly anticipated tourist attraction, Boatswain's Beach is now open.

Boatswain's
BEACH
CAYMAN ISLANDS



Pronounced "Bo-suns" Beach, this one-of-a-kind, 25-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 Turtle, named for the green colour of the fat deposits inside its skin. Other turtle species exhibited on the farm include the Loggerhead Turtle, the Kemp's Ridley, and the beautifully patterned Hawksbill Turtle.

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 light bird aviary or stroll down an historic Caymanian street complete with porch side artisans. Children and adults alike will delight in interacting with starfish, sea urchins 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\$75.00 and US\$35.00 for children 2-12; children under 2 have free entry into 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 has also fed 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 919-5891 ext. 4002 or at events@boatswainsbeach.ky.

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

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WHAT DESTINATIONS CAN LEARN FROM DISNEY CRUISE LINE



By Tom McAlpin, President - Disney Cruise Line
& FCCA Executive Committee Member



Disney Cruise Line set sail in 1998 as the first cruise experience with new ships designed specifically for the family. In order to set ourselves apart, we knew that we had to do things differently. We specifically designed areas and activities for every member of the family allowing for both quality time together and wonderful individual experiences. Today as the market for family cruising grows, we continue to provide guests with an immersive Disney vacation experience not found anywhere else.

Our attention to the family started at the very beginning as we laid plans for the business and the ships were being built. Designers created areas throughout the ship to cater to specific age groups. For example, nearly an entire deck is devoted to activities just for children. Teens also have their own dedicated space and most importantly, adults have areas and activities that are just for them. We knew that if we took care of the children it would give the parents peace of mind and the opportunity to have fun as adults.

However, it has also been important for us to provide guests with areas and activities they can experience together as a family, giving them the opportunity to create vacation memories that will last a lifetime.

Guests want unparalleled entertainment that captures their imaginations. As a company known for entertainment, this became a logical area of focus for Disney Cruise Line. The live spectacular stage shows with Disney characters and amazing talent provide entertainment the entire family can enjoy together. Guests also have the opportunity to not only see our beloved Disney characters, but to interact with them.

Dining aboard Disney Cruise Line is also unique, and has been carefully structured to take care of the family, both together and separately. The innovative rotation dining concept gives guests the opportunity to try different restaurants each day, while keeping their same tablemates and servers. And reserved exclusively for



adults is Palo, the intimate restaurant with panoramic views and northern Italian cuisine.

Similar to our ships, Disney's idyllic private island, Castaway Cay, was designed with specific beaches for the family, teens and adults. Convenience was also an important factor for Castaway Cay. We were the first cruise line to build a dock at our private island. That makes it easy for guests to leave and re-board the ship without relying on a tender boat.

While all these things contribute to the overall family experience of Disney Cruise Line, there is one differentiator that stands out above all the rest and that is our crew. Crew members make the magic happen onboard for our guests. They create the immersive experiences that our guests talk about and remember and are actually the number one reason our guests tell us they want to sail with us again.

This doesn't happen by accident. It's a strategy that we have worked hard to develop and fine tune. To start, we have a commitment to hiring and developing great leaders. We recruit from around the world and search out the best talent possible...but our efforts don't stop there. We're committed to investing in our crew with continuous training. Our goal is to provide unparalleled guest service with genuine enthusiasm that not only meets the expectations of our guests, but exceeds those expectations.



While there are many keys to our success in becoming the leader in family cruising, many times it's not what you do, but rather what you don't do to differentiate yourself. For Disney Cruise Line, the decision not to have casinos onboard proved to be a smart business decision. We regularly get feedback from families that they like the fact that the Disney ships don't have casinos.

So what can your destination do to better accommodate families?

The first step is to adopt the vision and core values of your partners. At Disney our core values are safety, courtesy, show and efficiency. We weave these ideals into every aspect of the cruise experience. Our guests expect them to be upheld whether they are on a Disney cruise vessel or off visiting a port of call. These expectations are high and in turn, we look for these similar values in the port and tour operators that we work with.

For instance, the safety in the port of call is obviously our number one concern. Appropriate surrounding facilities for guest and crew in addition to the transportation infrastructure are important assets that go along with ensuring the safety of our guests. It is important for tour operators to extend the Disney courtesy our

guests find onboard our ships and integrate this into their operation. They also must have an operation that is efficient, organized and timely. There is also the overall look and feel of the experience, the quality of it and the expectations guests have of it. This means evaluating everything from the eyes of the guest.

Secondly, it is extremely important to know your audience. Know if you will be dealing with families, adults, kids or all the above and tailor the experience for each audience, because they are all completely different. It's a given, different audiences will want different things, have different needs and have different perceptions of the experience itself. To be successful, you must cater to the

audience and anticipate what guests want.

Third, be flexible and offer variety. Offer the experience that is unique, different and compelling. This is what gets people talking about your business.

Fourth, work together with the cruise lines to create new experiences. This could mean completely new activities, or it could also mean adding new elements for existing excursions.

Finally, ensure you have friendly and knowledgeable staff that represent your destination and provide guests with outstanding experiences. Like I mentioned before, it is people who make the difference.

For all of us at Disney Cruise Line, finding consistency between our onboard operation and those experiences in our ports of call is vitally important. In fact, it's a huge part of our success. From the moment our guests step aboard the ship, until the moment they debark at the end of their cruise, they expect excellence. The products and services provided by destinations and tour operators are an integral part of making the experience great. This is why we must work together to provide consistent service and excellent experiences for the continued success of our industry.

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SIX CRUISE SHIPS JOIN PORT EVERGLADES FLEET FOR 2007-2008 CARIBBEAN CRUISE SEASON

Broward County's Port Everglades will welcome six cruise ships to its fleet this winter, three of which are making their United States debuts. In total, Port Everglades, which is located in Greater Fort Lauderdale, expects to host 3.2 million passengers (embarking and disembarking) sailing aboard 40 cruise ships from 15 cruise lines this coming winter cruise season.

"Cruise lines customarily send their newest and most grand ships to Port Everglades to replace their older, smaller ships," says Port Everglades Director Phillip C. Allen. "We look forward to introducing these new ships and their guests to our sunny South Florida hospitality."

New ships sailing from Port Everglades this year include: Costa Cruises' *Costa Fortuna*, Cunard Line's *Queen Victoria*, Hapag-Lloyd Cruises' *Bremen*, Princess Cruises *Emerald Princess* and *Royal Princess*, and Royal Caribbean International's *Navigator of the Seas*.

Inspired by Italian design, the 2,720-passenger, 102,500-ton *Costa Fortuna* will make her U.S. debut at Port Everglades on November 17, 2007. *Costa Fortuna* will sail its inaugural Caribbean season while the *Costa Mediterranea* offers new Saturday departures. In addition, Costa will continue as the only cruise line offering direct routes to Bermuda from Port Everglades. Given the popularity, the itineraries will feature an additional day in the island destination's port of King's Wharf.

Cunard Line's newest luxury cruise ship *Queen Victoria*, will grace Port Everglades on January 16, 2008, just one month after making her maiden voyage in Europe. This will be the 1,980-guest, 90,000-ton luxury ship's only visit to Port Everglades this season.

Hapag-Lloyd Cruises' intimate 164-passenger *Bremen* will stop at Port Everglades on May 19, 2008, before embarking on a 15-night journey to Halifax.

Princess Cruises is sending its two newest cruise ships, *Emerald Princess* and *Royal Princess*, to homeport at Port

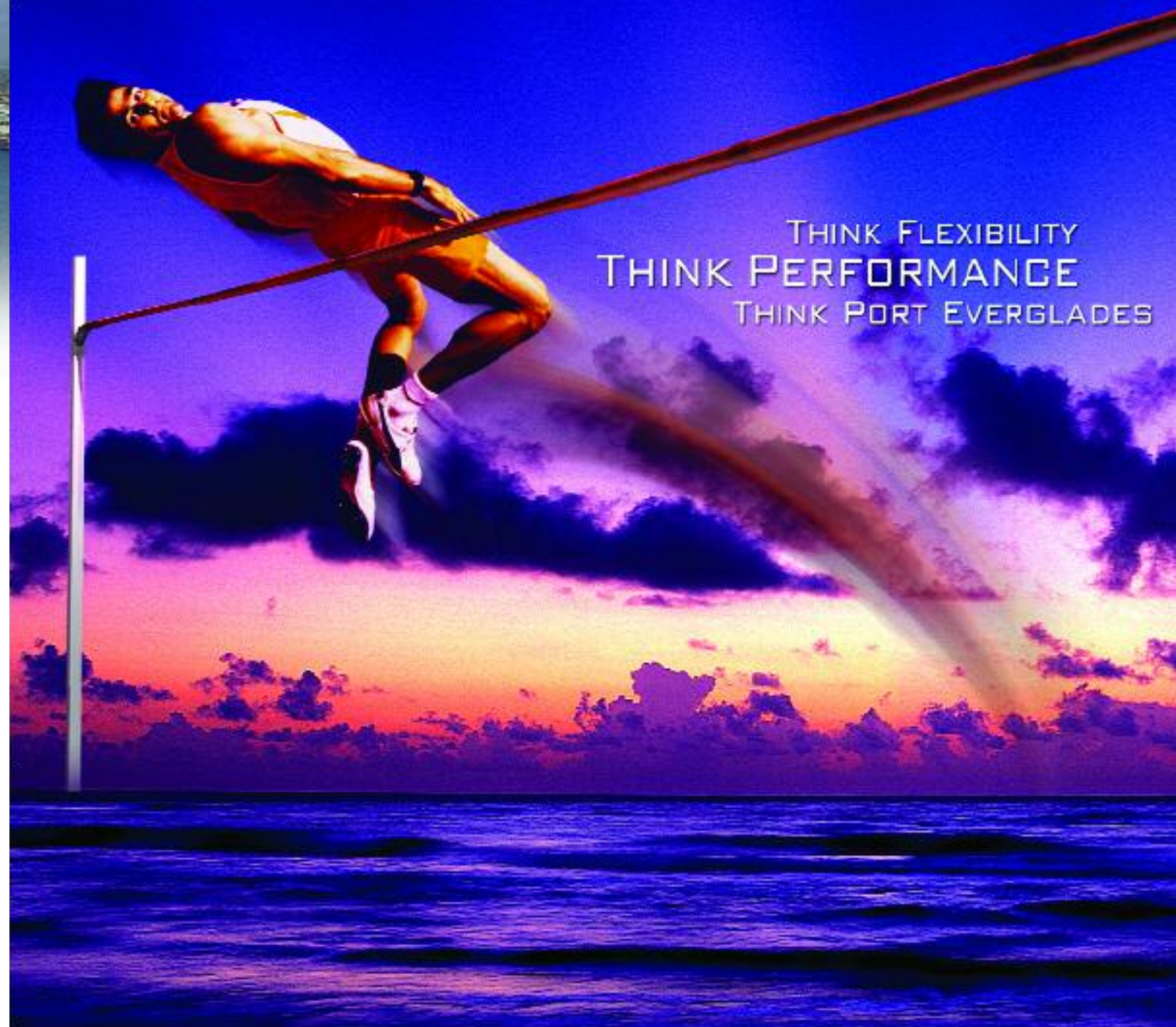
Everglades this winter on sailings to the eastern and southern Caribbean. The 2,600-passenger, 113,000-ton *Emerald Princess* will begin sailing from Port Everglades on October 27, 2007, include the many innovations featured aboard sister ship *Crown Princess*, including a dramatic piazza-style atrium with an International Café and wine and seafood bar; an adults-only Sanctuary retreat and the Crown Grill steak and seafood restaurant with an open, theater-style kitchen.

The intimately sized 710-passenger *Royal Princess* takes the name of a much-beloved former Princess ship, and debuts at Port Everglades on December 22, 2007. The 30,000-ton ship originally entered service in 2001 as a Renaissance vessel (named *R8*) and later as Swan Hellenic's *Minerva II*.

Royal Caribbean International's *Navigator of the Seas* will sail on four- and five-night itineraries from Port Everglades to the eastern and western Caribbean beginning November 18, 2007 through April 2008. The 3,114-passenger, 138,000-ton *Navigator of the Seas* contains some of the cruise industry's most innovative guest features — a rock-climbing wall, a basketball court, an ice-skating rink, an in-line skating track, a five-story theatre, a casino, miniature golf and a spectacular three-story dining room.

Fifteen cruise lines sail from the South Florida seaport including: Carnival Cruise Lines, Celebrity Cruises, Costa Cruise Lines, Cunard Line, Discovery Cruises, Hapag-Lloyd Cruises, Holland America Line, Imperial Majesty Cruise Line, MSC Cruises, Princess Cruises, Regent Seven Seas Cruises, Royal Caribbean International, The Yachts of Seabourn, SeaEscape Cruises, and Silversea Cruises.

The Port's ever-expanding fleet of cruise ships provides guests with an array of cruise vacation choices from the sunny Greater Fort Lauderdale area including everything from sampler-size day cruises to around-the-world cruises. Details on the latest cruise offerings are available on the Internet at www.broward.org/port.



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2007 FORECAST

Rank	Change From 2006	Port or Destination	Sector	Potential passenger throughputs, 2007			
				Embarking	Disembarking	Transit	Total
1	nc	Miami	Florida base	1,739,980	1,737,868	1,363	3,479,211
2	nc	Port Everglades	Florida base	1,593,680	1,595,550	2,598	3,191,828
3	nc	Cozumel	Western			2,345,651	2,345,651
4	nc	Port Canaveral	Florida base	1,166,000	1,166,000	6,244	2,338,244
5	+3	Nassau	Bahamas	105	105	1,886,647	1,886,857
6	-1	Grand Cayman	Western			1,863,212	1,863,212
7	-1	San Juan	Eastern	530,484	530,200	786,381	1,847,065
8	-1	St. Thomas	Eastern	5,559	5,555	1,725,607	1,736,721
9	nc	St. Maarten	Eastern	13,094	13,090	1,300,144	1,326,328
10	nc	Galveston	Gulf base	500,024	500,457		1,000,481
		Galveston	Port est.	528,000	528,000		1,056,000
11	+6	Costa Maya	Western			918,083	918,083
12	+1	Bridgetown	Southern	130,213	130,653	622,863	883,729
13	+17	New Orleans	Gulf base	396,495	396,495	462	793,562
14	nc	Tampa	Florida base	372,900	373,183		746,086
15	-4	Ocho Rios	Western			727,587	727,587
16	+4	Tortola	Eastern	1,560	1,560	706,479	709,599
17	+2	Antigua	Eastern	2,653	2,653	690,754	696,060
18	+4	St. Lucia	Southern	1,263	1,263	658,375	660,901
19	-4	Belize	Western	317	317	560,446	561,080
20	-4	Aruba	Southern	30,991	31,020	468,526	530,537
21	-3	Montego Bay	Western	37,474	37,400	403,284	478,158
22	-10	Key West	Western			443,951	443,951
23	-2	Dominica	Eastern			357,757	357,757
24	nc	Curacao	Southern	75	75	327,111	327,261
25	nc	Grand Turk	Eastern	46	46	323,917	324,009
26	nc	Roatan	Western			271,275	271,275
27	+2	Grenada	Southern	2,948	2,970	262,800	268,718
28	-1	Jacksonville	Florida base	122,595	122,595		245,190
29	+5	Mobile	Gulf base	119,790	119,790		239,580
30	+3	St. Kitts	Eastern			228,375	228,375
31	+1	Puerto Limon	Western	75	75	213,672	213,822
32	New	Calica	Western			208,230	208,230
Dominican Republic							
-		¹ La Romana	Eastern	34,225	34,100	100,494	168,819
-		² Other ports	Eastern	21,010	19,030	209,053	249,093
Dominican Republic total				55,235	53,130	309,547	417,912

¹In 31st place in 2006.
²Principally Santo Domingo and Puerto Plata.

Sources GP Wild (International) Ltd. from various sources and participating ports



Chichen Itza
90 min.



Dzibilchaltun
20 min.



Uxmal
90 min.



Merida
30 min.





Tours – Thinking Outside The Box



By Darius Mehta, Director Land Programs - Regent Seven Seas Cruises

Regent Seven Seas Cruises, as the No. 1 luxury cruise line, has really put a focus on how we present the port to our guests who yearly are becoming more learned and more discerning. Looking for that unique experience is the goal of

most luxury cruise guests these days. We have striven hard to re-educate the ground operators to think out of the box, and in some cases, we have made changes from a cruise-specific operator to incentive and FIT operations.

The most important thing, though, is not to just copy what someone else is doing. Think unique, think different.

The starting point should be: What is unique about your destination? Brainstorm this idea and however bizarre or outlandish some of the ideas may be, filter these down to three or four workable excursions.

Everyone is doing cooking classes now, for example. Everyone is doing visits with a local family. What we do is a cooking class and a family with a difference. The family is not your everyday household. It is the family of a government minister in Peru, and he has knowledge of local politics and the economic trends of his country that our intelligent, well-educated guests want to hear. The cuisine is local and

guided by the chef of one of the best restaurants in town. Our sommelier accompanies the group and provides suitable wines of the region.

Would you expect to go Formula One racing in the Middle East? Well, you can in Bahrain, a tiny island principality where we offer the opportunity to learn about the sport and participate in a race. Everyone has heard about flying Mig jets in Russia, but who goes behind the scenes at the famous Hermitage and sees work in the restoration rooms where ancient wall frescoes are being pieced together by experts who share their passion for saving great masterpieces.

Another example of a common excursion going unique is a visit to the famous Terracotta Warriors in Xian, China. Every cruise line offers the regular tour. What we do is actually take a select group into the trenches, face to face with these ancient masterpieces.

More and more, with some application and determination from ground operators, local museums and attractions can be encouraged to open their doors for behind-the-scenes access. All these unique experiences can be sold at a premium and almost guarantee guest satisfaction, and though they may be for a select few, these unique experiences cast a glow over the whole program, enhancing everyone's perception of the programs offered.

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Cozumel - An Island of Cultural Treasures

Cozumel shows a new face to all visitors this year. The Rafael Melgar Avenue by the shore (known as Malecon) is more splendid than ever with beautiful gardens and a fresh coat of paint. In the main plaza you will see a kiosk with lush and colorful gardens to welcome arriving tourists.

To make the promenade along the Malecon even more attractive, a collection of monuments have been restored and built for the enjoyment and benefit of both our visitors and our inhabitants.

Cozumel is an island of cultural treasures; although a pirate's refuge in the past, today lives as a modern treasure full of natural jewels, but above all of cultural riches. We invite you to come and discover them!

The traditional and picturesque downtown of San Miguel de Cozumel has an icon that is almost two centuries old, the Public Clock. It was built in 1910 and inaugurated on September 15th same year, as part of the celebration of our National Independence. On week days, there are folkloric dance performances as well as pre-Hispanic ballet performances by the main square.

There is an ambitious project currently in development that plans to renovate this traditional area. An investment of 3.5 us million dollars is planned. The first phase will conclude by the end of this year and beginning of 2008.

The investment is composed of contributions from the National Tourism Fund, the State government, and the Municipal government. Plaza del Sol, the most popular and characteristic building in the main square that includes the flea market and public offices, will be remodeled with the inspiration of an old Cozumel downtown.

The project include wider sidewalks to make tourist walk areas safer and more comfortable, street lighting, benches, trash cans, and short-term parking. The most important work will be to restore and reintroduce public and private buildings within the look of the area's traditional architecture. The owners of businesses around the plaza will be motivated to improve the images of their shops as well.

The church of San Miguel, another traditional icon of the island, was confirmed as a catholic church in 1946 and dedicated to the saint patron of the island. It was built by US Mariknoll Missionaries to replace the old church destroyed



by the Carranza troops during the Mexican Revolution in 1915. Catholic services are available daily.

Leaving the plaza and taking the Malecon Avenue, the main pier in town is located where the first original wooden dock was built back in 1936. It was a fishermen pier. Destroyed through the years by hurricane attacks, the structure we see today has been updated to meet the present needs of vessels. This pier is the connecting point for the ferry boats crossing to the mainland (at Playa del Carmen) daily and for the glass bottom boats that make daily snorkel trips.

Heading north, the first stop must be the Diver's Fountain Monument comprised of bronze arch simulating a reef with a diver in the bottom of the sea emerges. Multicolor lights at night can be appreciated as the spouts of water escape from the bottom. This monument was remodeled and inaugurated last April.



To continue on the promenade, you will pass by the Museum of the Island. The building hosting the museum was the luxury hotel in 1938. It has four exhibit rooms, a library, a Mayan house and a restaurant upstairs with an incredible bay view.

The next monument, El Mestizaje, is dedicated to Gonzalo Guerrero. It pays tribute to our rich heritage. It shows Spanish Gonzalo Guerrero assimilating the Mayan world, his native wife and children. It was remodeled and inaugurated last April. It is a nice place where tourist and locals gather to enjoy the beautiful sunsets and to feel the sea breeze. It has become an must-see stop for a magical picture.

The last monument in this tour is the Two Culture Encounter. This magnificent monument symbolize the moment when the first catholic mass was celebrated in Mexican lands, upon the arrival of Spanish Captain Juan de Grijalva in Cozumel.



Three bronze sculptures symbolize the encounter of two worlds: the Spanish and the Mayan. One sculpture represents a Spanish priest, the other an ancient Mayan man, and the third a native woman and a child. The main landmark of the park is the Ixchel sculpture in the middle of a fountain. Ixchel was a sacred Mayan goddess of fertility, moon and water. Around the fountain there are extracts of narration from the book of Bernal Diaz, describing the discovering of Cozumel.

An investment of \$300 thousand was made with contributions from Federal, State and Municipal governments. This work represents the remembrance and historical identity of San Miguel.


A few steps north, there is an old combat airplane at the entrance of the Military Air Base, as a memorial to the Air Squadron 201 and its heroic members. Since the 1950's, Cozumel was base of the famous Mexican Air Force Air Squadron 201. The Air Squadron 201 has been the only armed contingent from Mexico who fought abroad, during Second World War in the Pacific Ocean.

The tour ends there, but not the various attractions that Cozumel offers to visitors. Tours are a very important part of

what Cozumel has to offer its guests.

There are tours for different ages and interests, offered by professional and reliable tour operators. If you want to explore the jungle, famous ATV's, jeeps and buggies are available. If your choice is the beach, tour the island by bus, stop in a shopping mall for a folkloric show in a nice air conditioned theatre and then go shopping. If your passion is diving or snorkeling, options are numerous – explore famous reefs along our Mesoamerican Reef Barrier where you can see the splendid toad fish. If you only want to see the beautiful bottom of the sea from the surface, very the brand-new sea spi will soon be available! It is a unique motorized machine with underwater view glasses. If you are an adrenaline addict, dare yourself behind the wheel of a speedboat gliding through the waves of the island's turquoise sea. If you want to learn about Mexico and the most famous and historic monuments and archeological sites then visit Discover Mexico, a cultural theme Park.

As you can see options are endless. Come to Cozumel! Be part of the magic in the Mexican Caribbean. See you in Cozumel for the FCCA Conference and Trade Show 2007!



See you in Cozumel 2007

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A Quick Look into the Goals of Patrick Schneider

Director of Shore Excursions, Royal Caribbean International and Celebrity Cruises



Patrick Schneider isn't a new face to the cruise industry. He's been in the business with Royal Caribbean and Celebrity for 15 years and counting. He began his career onboard Celebrity vessels as Shore Excursion Manager, with voyages through Alaska, South America, Baltic, Mediterranean, Bermuda, and with four of those years in the Caribbean. Within the RCCL/Celebrity family, he found himself and his responsibilities increasing and expanding—off of the ships and on land in their corporate offices. As Manager of Caribbean and Central American shore excursion programs, Schneider grew to become an expert in his field.

His most recent promotion in April, 2007 to the **Director of Shore Excursions, Royal Caribbean and Celebrity Cruises**, opens the door for Schneider to jump head first into global cruise itinerary and tour planning, development, and expansion. Replacing him as manager, and working along with him, is Paul Loughrin. As he looks ahead, the Caribbean, Schneider says, “is a prime focus”.

Eyes on the Caribbean

With ships as large as they are today, only limited ports of call can accommodate them leaving many cruise itineraries similar season to season and year after year. “There is a challenge in accommodating large groups. They (passengers) are cruising now for our ships, not nec-

essarily our destinations. We need to give them reasons to get off the ships in the ports-of-call. They need to understand that it isn't just a ship,” he explains. “Only certain ports are large enough to accommodate the large ships in our fleet. Part of the challenge is making the destinations new, different and exciting even to repeat guests. It becomes more and more challenging each season because people have already been to the destinations. We have to give them reasons to want to get off the ship even if it's a return visit.”

Schneider cites that the tours that are adventurous in nature are the most popular trend helping to arouse their clientele. He notes that shore excursions such as the canopy tour, ATV and Jeep tours, and tubing are what passengers are going for. He also credits the “innovation and cutting edge” creativity of the tours to the collaboration with the private tour operators themselves. “They constantly bring forward new ideas to try and test out. We provide feedback and they respond. It's all very collaborative,” he says.

Another answer to the challenge of diversifying destinations is the new cruise line launching this September, Azamara. The high-end luxury line will host up to 700 passengers, unlike the heavy-weights of its RCCL sister that holds 4,375 passengers. The smaller ships will fit into smaller, exotic ports of call that their other ships cannot—including fifteen ports in the Caribbean. Destinations on the itinerary include Santa Marta, Bocas del Torro, and St John, V.I.

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NOTES FROM A PRESENTATION MADE AT THE INAUGURAL BELIZE SUMMIT ON TOURISM

“Cruise Control – Managing the Cruise Industry”



Vincent Vanderpool-Wallace
Secretary General & CEO
Caribbean Tourism Organization

Honourable Ministers, Ladies and Gentlemen, thank you for inviting me to be a part of your Inaugural Summit. Before I get too far along, I would like to welcome especially the students from the University of Belize who are here today. I understand that as a part of your course work, they have had to suffer through the last presentation that I made here. Please accept my apologies even though I had nothing to do with it.

I am sure that you will have seen a noticeable increase in positive word of mouth since my last visit to Belize. I assure you that a significant proportion of that increase over the last year is owed entirely to my incessant bragging about Belize.

After listening to the luncheon presentation of my Chairman, Allen Chastanet, I need to make an addition to my contract at CTO. It now says that I will not be required to speak after animal acts and young children because those acts are normally impossible to follow. I now need to add the name of my Chairman to that list. At the same time, Minister Chastanet commented to me after Minister Smith's presentation at the beginning of the conference that his obvious grasp of the issues was astonishing. It is a delight to be in the presence of two Ministers who clearly know what they are talking about, and because they do, they are prepared to have full and frank discussions on all of the most important issues.

Please allow me two minutes tell you a little bit about where we are at CTO. As I mentioned last time I was here, we are now focusing on eight important issues. These are:

1. Data collection, information management and knowledge building
2. Training and development
3. The development of a consumer web site

4. The development of a membership site for the exchange of information and best practices
5. A focus on publicity and public relations
6. Promotion of our web addresses
7. Development of our relationship with our Diaspora
8. Focus on sustainability and private/public sector coordination and cooperation in all that we do

We believe that CTO is very much on the right track and is very focused on the execution of these eight items, and we are confident that they will lead to significant improvements in the benefits to our member states and to our Caribbean people.

Now to the subject at hand: "Cruise Control – Managing the Cruise Industry."

There is always a great danger in speaking after my Chairman because of the risk of my delivering a different opinion from that which he just expressed. I am therefore always tempted to begin my presentations with the disclaimer that the opinions about to be expressed are entirely my own and do not necessarily represent the views of the Chairman or the Board of Directors of the Caribbean Tourism Organization. I do not believe that I have to insert that disclaimer today, but there was clearly a time when I should have done so.

About fifteen years ago at a CTO function at a hotel property for which I was the general manager on Paradise Island in The Bahamas, CTO had the temerity to ask me to speak about this very same subject. Here is how I began: "Good afternoon, Ladies and Gentlemen. From this day forward, we will begin to see the Bahamas and the Caribbean as the OPEC of the cruise industry and the Bahamas is Saudi Arabia."

At that time we had a very large casino and a four hundred seat Cabaret theatre that depended quite heavily on the patronage of cruise passengers. When I returned to my office feeling quite good about myself, my telecopier, as the fax was known in those days, was overflowing with the continuous feed of paper with the identical letters from all of the cruise companies canceling their bookings to my theatre show. My boss, who was enthusiastically supportive of the presentation that I ran by him before I spoke, had a sudden attack of amnesia and

disavowed any knowledge of, or association with, my "scurrilous" remarks.

On reflection, I realized then, and I realize now, that the cruise industry has been the whipping boy of our tourism industry. At the risk of offending most of you, including the students in the audience, recall that a "whipping boy" is the boy who is punished whenever we cannot punish the real object of our wrath.

You see, the fact is that land-based tourism businesses are often upset with the cruise industry because cruise companies managed to get what the land-based entities have failed to get. We envy the cruise companies' labour agreements, we envy their organization, we envy their purchasing power, we envy their tax structure and more than anything else, we really, really envy their profitability. We whip them because we envy the significant business advantages that they have managed to wrangle for themselves when we really want to whip our governments to secure the lowest possible operating costs. Tourism is an export, and I know of few countries that knowingly reduce the competitiveness of their exports by increasing prices through heavy taxation. That is why I was most pleasantly surprised and, frankly, it was most refreshing, to hear Minister Smith mention during his opening presentation that perhaps the government of Belize needs to look more closely at the taxes on land-based tourism entities to make them more competitive in what is now the world's most competitive business: tourism. Let me make it very clear, I am convinced that the economic benefits that will flow to our countries from tourism will increase substantially if, as the cruise companies have done, we find a way to make this export more competitive in price on the world stage.

The latest FCCA study conducted by Business Research & Economic Advisors, released late last year about the cruise industry in the Caribbean, shows that the Caribbean is still dominant with 41% of the global share of the cruise business. The primary reason for this is simple. God blessed us with the ideal variety of destinations located in the greatest area of the world with a climate that is conducive to cruising year round. Eighty-two percent of this business comes from the US, 11% from Canada, 5% from the UK. What that study does not tell you is that the estimated **profitability** to the cruise lines of the Caribbean part of the cruise industry exceeds the **total expenditure** of all cruise passengers visiting the Caribbean. So let's face it. Much of the heat producing discussions about the cruise industry has to do with profit envy. Hoteliers and other land-based operators wish they had access to the same labour agreements, access to the same purchasing power and access to the same tax structure, etc. of the cruise companies. All of these advantages lead to what land-based tourism entities envy most: profitability.

Unfortunately, in the Caribbean, most of the passionate discussion about the cruise business is precipitated by hoteliers because many believe that all cruise passengers are potential

hotel visitors and if the cruise passengers disappeared, their hotels will be full.

That is a crock.

On the other hand, the cruise industry counters by telling hoteliers and governments that cruise passengers, once they have a wonderful experience at a port, are all potential land-based visitors at some point in the future.

That is also a crock.

The truth is somewhere in the middle, and the truth varies from destination to destination. Today, I would like to remove the emotion from this discussion and address it as dispassionately as possible. Emotion tends to produce more heat than light, and light is really what we need to get at the facts in examining these issues. I am always reminded about the statement: "It ain't so much the things you don't know that hurt you; it's the things you know that just ain't so."

Let us first look at the numbers. That 41% of the global cruise business represents approximately 5 million people in total, not the 18-20 million that is often reported. This higher figure is the result of counting the same passenger at each destination on a multi-destination cruise. The fact is that we have 18-20 million opportunities to impress these 5 million people. Remember that this number compares to our more than 20 million true stopover visitors.

From our observations, there are at least six categories of passengers on most Caribbean cruise ships:

The first category covers people who cannot afford the Caribbean except if they came on a cruise ship: those people cannot afford to be converted.

The second category covers people who could not afford the land-based equivalent of the kind of multiple destination vacation offer provided by cruise ships: those people have no interest in being converted. We do not like to admit it, but what many people buy on a Caribbean cruise is a multi-destination vacation. Has anyone tried to price such a land-based multi-destination vacation, even if the air connections work?

The third category covers people who prefer to cruise. They too have no interest in being converted. If cruise ships did not exist in the Caribbean, they might go elsewhere entirely.

The fourth category covers people who can afford a land-based vacation and can even afford a multi-island vacation, but they far prefer to experience it on a cruise because of the convenience. They also have no interest in being converted. They have no interest in the packing and unpacking and the multiple



airport experience required by a land-based multi-destination experience. This contrast has only been exacerbated by the recent security rules at airports.

The fifth category covers people who have never been to the Caribbean before but who, with sufficient evidence and experience, can be converted to take their next Caribbean vacation on land at a single destination instead of a cruise ship.

The sixth category covers people who are neither land-inclined nor cruise-inclined. They are vacation-inclined, and they switch back and forth between cruises depending on their whims. These include meetings, incentive groups, honeymooners, weddings and other niche groups.

Let me make it clear that even though it appears that four out of these six categories are difficult to convert, we do not know the size of each category, so we do not know if the numbers that can be converted are greater or smaller than the numbers not inclined to be converted.

But here are several conclusions that I know for sure. The first conclusion is that at some level, cruise expenditure is incremental expenditure for the destination; it is not dilution of expenditure by people who might have stayed in a hotel. The second conclusion is that of those who can be converted to a land-based vacation, they might be a relatively very, very small proportion when compared to the total number of stopover visitors to the Caribbean, so the dilution effects might be minimal.

The third conclusion is most important. Frederick Reichheld published the results of a study in the December 2003 edition of the Harvard Business Review in which he concluded that there is one number that any company or country needs to grow. That number is the number of people who will recommend your product or service to their friends and relatives. So, to a very large degree, recommendation is much more important than conversion. So the cruise passengers experiences are important to the extent that it leads to a recommendation of your destination to their friends and relatives. If you don't believe me, ask the cruise companies how many of their own passengers return to their ships every year. They, too, rely very heavily on recommendations instead of returns.

The fourth conclusion is also important. Forget the average expenditure of cruise passengers compared to the average expenditure of stopover visitors. Remember that the total expenditure of cruise passengers at a particular destination is very, very concentrated and therefore very, very important to some small but important sectors of our economies. You know which ones they are.

I am a long-time admirer of FCCA because they understand far more than we do today the power of networking. They understand the power of people with common interests working for

common causes and working toward common goals. I have asked before why there is no FCAA, Florida Caribbean Airline Association. Few people know that in the recent lobbying on the Western Hemisphere Travel Initiative regarding the implementation of new rules for US travelers to the Caribbean, the airline industry was not only opposed to postponing the implementation date for air travelers; they actively lobbied against the possibility of an extension. Are we then surprised that cruise passengers to the Caribbean are not required to have a US passport until June 2009 and the requirement for air passengers went into effect on January 23rd of this year?

I am similarly surprised that there are not regular meetings of the destinations on a particular cruise itinerary. The FCCA study shows where you stand on a particular itinerary among the passengers. The passenger understanding of our world is not the entire Caribbean. They only understand the Caribbean that they visited and they rank the ports. You don't want to be last. But I will bet you that few destinations know where they rank compared to the ports visited on a particular cruise. You should also not forget to ensure that the ship's crew members have the best possible impression of your destination. If you were on a cruise ship, whose opinion would you value most about a particular destination? Clearly, the persons who have been there several times. The crew.

Finally, I have asked many hotel executives the following question: Why is it that if the vice president of marketing for a hotel tells his president that the hotel will run 70% occupancy, he is applauded, but if the vice president of marketing for a cruise line tells her president that they will run 70% occupancy, she gets fired? Imagine what our economic conditions would be like if we filled the vacant room nights in our destinations and grew our business closer to 100% utilization of our inventories. There is clearly a different mindset operating in the cruise industry compared to the land-based industry, and there is much to be learnt from the cruise side of the equation.

Only you can decide two things. Only you can decide how much rent you wish to charge for your cruise-attracting asset, bearing in mind that the cruise ship has choices. Only you can determine the carrying capacity for cruise ships at your ports and cruise passengers in your cities. That is why I will not dare to comment on those areas.

Today, the Caribbean cruise is the low-cost, high-quality vacation provider that also offers the best pre-packaged multi-destination vacation. So the most effective way to control the cruise industry is to present much more competitive land-based products in terms of both cost and quality for those two categories of persons on cruises who can be converted to land-based vacations. The objective should not be to raise the cost of cruises. The objective should be to lower the cost of land-based vacations in all of our destinations so that we are much more competitive globally with cruises and, more importantly, with other land-based options. We agree with Minister Smith, government

taxes on the land-based industry need to be reviewed. It is entirely possible that by lowering some taxes, products become more competitive, volume increases and the total taxes collected by the government also increases.

We need to remember that the cost to get to our destinations is very much a part of the cost of the total vacation for our visitors, so we have to work relentlessly to become a low-cost, high-quality provider of air transportation to become much more competitive overall. In many cases, the cost to get to the entire cruise is much, much lower than the cost to fly to our destinations. Most vacationers would rather spend their money enjoying their vacation, not getting to their vacation.

We need much better training and development programs across the board to become more competitive. We have already heard about the level of service that is now experienced on many ships.

We need to find ways to make multi-destination travel available, easier and less expensive. This is a significant advantage on the side of cruise lines, and cooperation between destinations is the only way to become more competitive in this area.

Most importantly, we need to measure performance relentlessly. Every cruise ship uses its customer evaluation surveys to identify problems and trends and address them as rapidly as possible. Far too many of our destinations are flying by the seat of their pants in

an age when flying with facts is becoming less costly by the day. We need to emulate the cruise lines in this area so that we identify and fix immediately those items that irritate our customers. That is a most important tool on the road to increased competitiveness.

I know that many people came here today to hear how we can control these cruise ships that are taking our business away. Contrary to what many people believe, the total number of cruise passengers plying the seas of the Caribbean annually is of the order of 5 million, not the 20 million that is often reported. Contrary to what many people believe, cruises are not only not taking our business away; they, in fact, **deliver incremental business to our destinations.** Contrary to what many people suggest, I do not believe that all cruise passengers are convertible to stopover visitors. Contrary to what many people believe, instead of conversion, **we should focus on getting cruise passengers and the crew, by reason of their experiences, to recommend our destinations far and wide to their friends and relatives.** Contrary to what many people believe, the cruise companies employ many practices that we should emulate on the land-based side. When we remove the emotion and look at the facts and act on the facts, then and only then will we become more competitive not only against cruise lines in the Caribbean but against the rest of the world.

"It ain't so much the things you don't know that hurt you; it's the things you know that just ain't so."



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NCL Welcomes New Billion Dollar Shareholder to Freestyle Cruising and the Industry's Youngest Fleet Star Cruises and Apollo Team Up to Boost NCL's Growth

NCL Corporation Ltd ("NCL"), parent company of Norwegian Cruise Line and NCL America, recently announced that private equity group, Apollo Management, LP ("Apollo"), has agreed to make a \$1 billion cash equity investment in NCL.

The new investment, in the form of common stock alongside NCL's existing sole shareholder, Star Cruises ("Star"), is designed to strengthen NCL's balance sheet and its ability to continue to expand what is fast-becoming the youngest fleet in the industry, and to evolve further the company's successful Freestyle Cruising concept first introduced in 2000.

"To have an investment on this scale by one of the very top names in the private equity world is a huge vote of confidence in the new NCL we have created since Star Cruises became the owner in 2000," said NCL Corporation's President and CEO Colin Veitch.

Steve Martinez, Partner at Apollo Management, added, "We are very excited to be forming this partnership with Star Cruises and the existing management team of NCL. Our investment will help NCL complete its transition into

the youngest fleet in the cruise industry, with a truly original next generation product with its F3 concept ships. We believe the NCL brand has significant growth potential over many years to come."

Under the terms of the proposed investment, which includes an agreement for additional future distributions to be made directly by NCL to Star, Apollo will become 50 percent owner of NCL and will name a majority of the NCL board with certain consent rights retained by Star. Star will retain all of its existing stock in NCL and will, like Apollo, be 50 percent owner of the recapitalized company.

Star Cruises Chairman and CEO Tan Sri KT Lim, welcomed the new partner and remarked on the opportunities that lie ahead: "Apollo's significant financial commitment in NCL's common stock means we have an equal partner who believes in the business as much as we do. This is a powerful validation of what we have achieved so far and of our vision for the future. It is also truly the start of the next - and most exciting - chapter for this great company." strong shareholders who believe in the business as much as we do. This is a powerful validation of what we have achieved in the last seven and a half years and of our vision for the future

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glucci@riverconsulting.com
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809-465-6867

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matthews@slaspa.com
758-452-2893

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954-653-0081

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mpridham@gmail.com
340-774-9809

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St.Vincent & The Grenadines
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340-774-1780 x202

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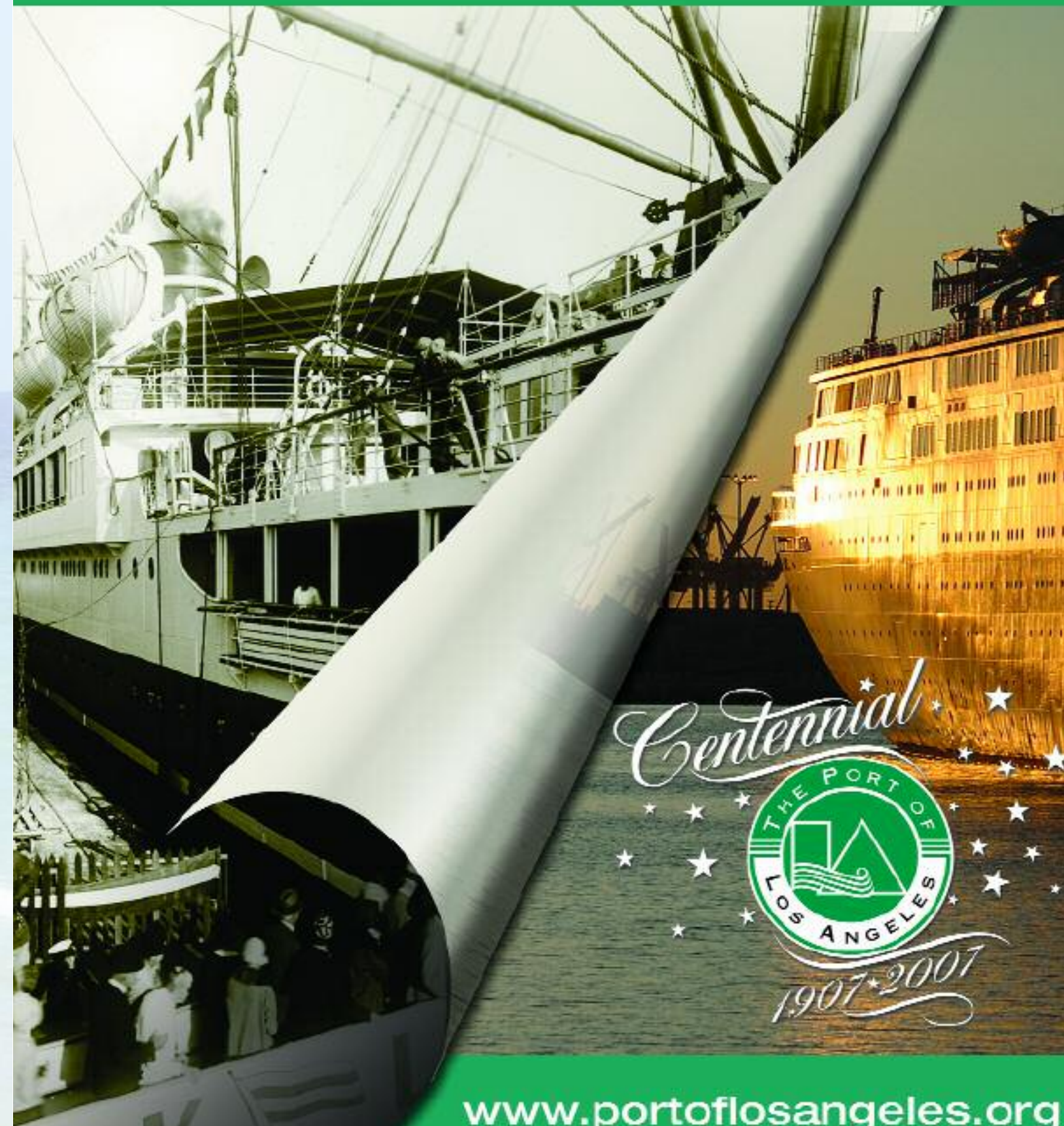
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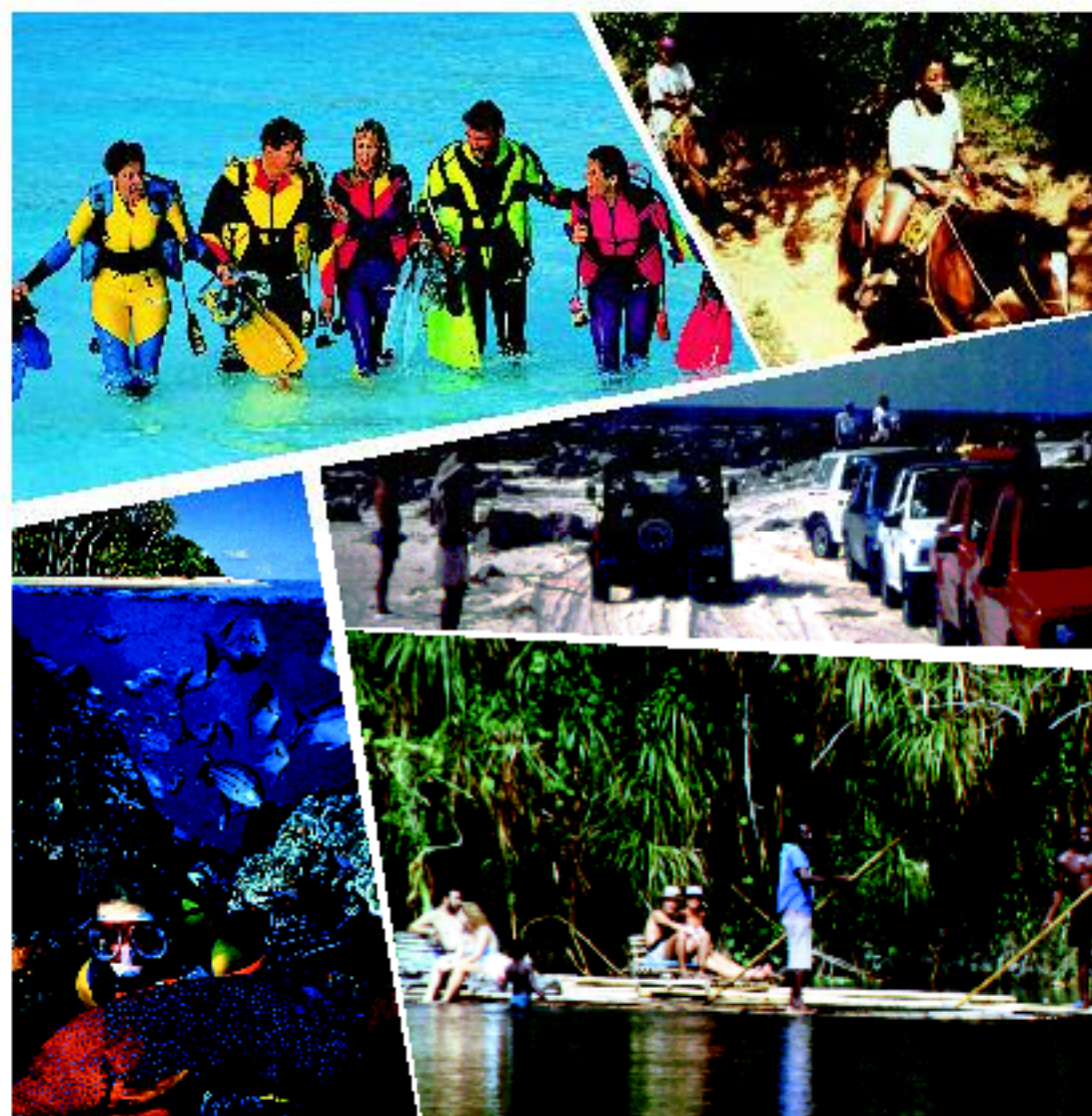
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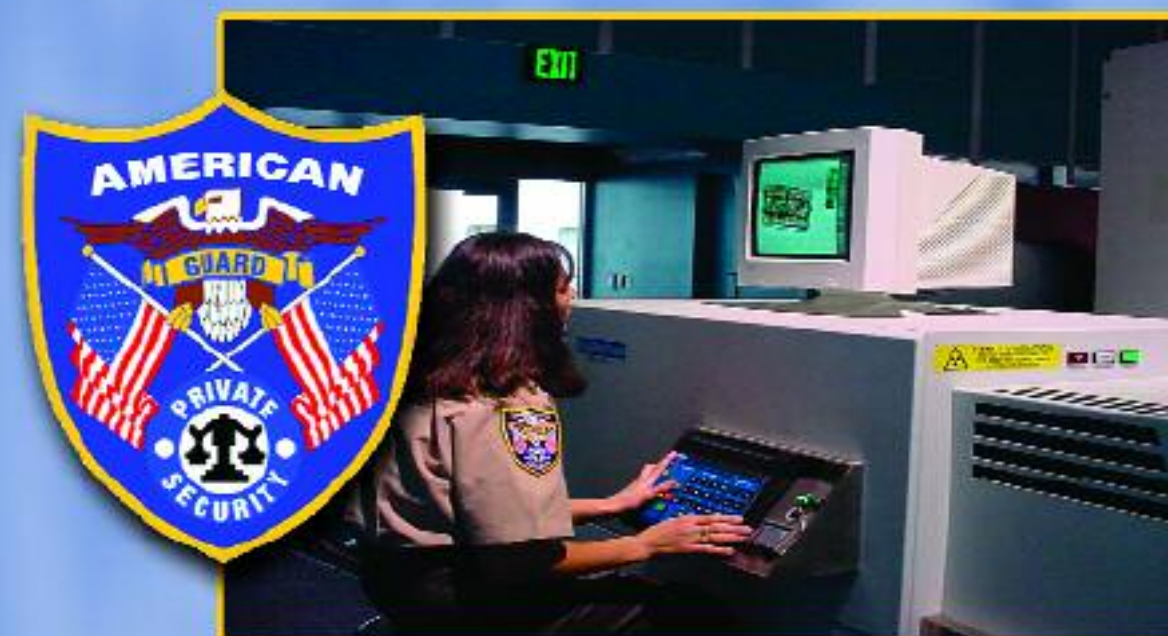
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Faces in the Industry

Rodolfo Wright Russell ***Housekeeping Manager*** ***Carnival Cruise Lines***



Costa Rica

I was born in Port Limon in Costa Rica, currently I reside in Trinidad & Tobago. I joined the Carnival Cruise Lines family in 1991 in the capacity of Wiper in the Engine Department, after 4 months I joined the Hotel Department and worked my way up the different levels in management and became housekeeping Manager in 1996. As a housekeeping Manager I am responsible for the laundry operation, cleanliness of the entire ship and the guest & crew accommodations.

Working on the ships is a joy for me and every day I strive to become a better Manager and person. Carnival has provided me with the proper training and courses to assist me in achieving my goals.

I am proud to have the opportunity to be one of the original team members of six Fun Ship's inaugural cruises that involved us going to Italy and Finland and setting up the ships from scratch. We proudly achieved the success of providing the best service to our Guest. This is an experience that I will never forget.

Elliott Moncrieff ***Asst. Food & Beverage Manager-Bars*** ***Princess Cruises***



Jamaica

Elliott Moncrieff is from Montego Bay, Jamaica and has been working for Princess Cruises for the past three years. He began his career as a Bartender, and after attending numerous seminars and leadership training courses, was promoted to the position of Assistant Food & Beverage Manager-Bars, which he now holds.

Elliot credits his success to having previous experience in F&B at a managerial level with other cruise lines. Coming to Princess Cruises was an "eye opener" for him as he quickly saw how the Princess name exemplified service excellence through their C.R.U.I.S.E. program, allowing each and every passenger to "Escape Completely."

Elliot says that it is important to note that once promoted, one's learning experience does not stop. He believes that your success in your future endeavors depends on your training, wealth of experience, support team and your drive and commitment to get the job done.

In the future, Elliott aspires to move into an F&B position as Staff First Purser.



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Ship Profiles



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Shipyard Location: Italy
Country of Registry: Panama
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Length: 952 feet
Passengers: 2,974
Crew: 1,150



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