



# Caribbean Cruising

THE FLORIDA-CARIBBEAN CRUISE ASSOCIATION MAGAZINE

Fourth Quarter 2007

*The FCCA Holiday Gift Project: Fostering the Joy of Giving*



**State of the  
Cruise Industry**

**The Economic Impact of  
Cruise Tourism in the Caribbean**



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# Caribbean Cruising

THE FLORIDA-CARIBBEAN CRUISE ASSOCIATION MAGAZINE

Fourth Quarter 2007

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*Michele M. Paige with  
Hon. Theo Heyliger, Commissioner of  
Harbour and Public Works, St. Maarten*

## "The future is at hand."

Some people say that a new year has that fresh, unused scene to it, like a new car – or a new cruise ship. As we look ahead to 2008, we see an enthusiastic, optimistic cruising industry. New ships are on order. New venues are being established. New embarkation ports are being added.

Also feeding this momentum is our 14th Annual FCCA Caribbean Cruise Conference & Trade Show, held last October in Cozumel, Mexico. For the more than one thousand attendees who are committed to the cruising industry, the Conference provided fresh facts that underscore the continued expansion of the industry and new techniques and policies to embrace in the coming first quadrate of 2008.

It is clear from the Conference workshops and expert panelists that we can all strive to embrace a new appreciation of the cruising customer, acknowledging the importance of fostering in that customer a desire to return again and again to our many destination partners shores.

Throughout this issue, you will find a rich variety of industry expertise. And you will find that our industry is vibrant, healthy and worthy of our best efforts:

- The cruise industry has matured from the "Age of Sightseeing" to the "Age of Experience." As noted by Bill Fletcher, a 25-year veteran of the Alaskan cruise industry, this new demand by cruisers for experiencing a destination, not just gazing at it, requires a new approach to customer interaction – a renaissance of industry-customer relationships.
- This year is forecast to see a 4.1 percent increase in net passenger capacity (based on bed days), according to Dan Hanrigan, President & CEO, Celebrity Cruises and Azamara Cruises and Chairman of the Marketing Committee for CLIA. That's up from 12.1 million passengers in 2006. The vast majority of these passengers come from North America.
- A successful cruise experience is in the shore excursion, according to the "Successful Tour A-B-C's" workshop. The fundamental factors that must be in place for such success are Tour Safety, Tour Quality and Tour Content. It's that simple and that challenging.
- Two BREA studies, commissioned by FCCA, found that passenger and crew spending at 26 Caribbean designations were up – amounting to \$1.7 billion during the 2005-2006 cruising season. The average per passenger spending reached a high of \$176.69. Crew spending averaged a high of \$159.55.
- Our Conference may have been the most effective one ever, thanks to the hard work of scores of FCCA and industry staffers. "This is the best venue of the year," noted Matthew Sams, VP Caribbean Relations, Holland American Line and Chairman of the FCCA Operations Committee "I get more accomplished during this Conference than all of the other events combined."

I am confident you will find much to contemplate in this issue and you will come away sharing the forward-thinking enthusiasm that is a hallmark of our industry. Enjoy the issue. Please let us know here at FCCA if you have any comments or feedback.

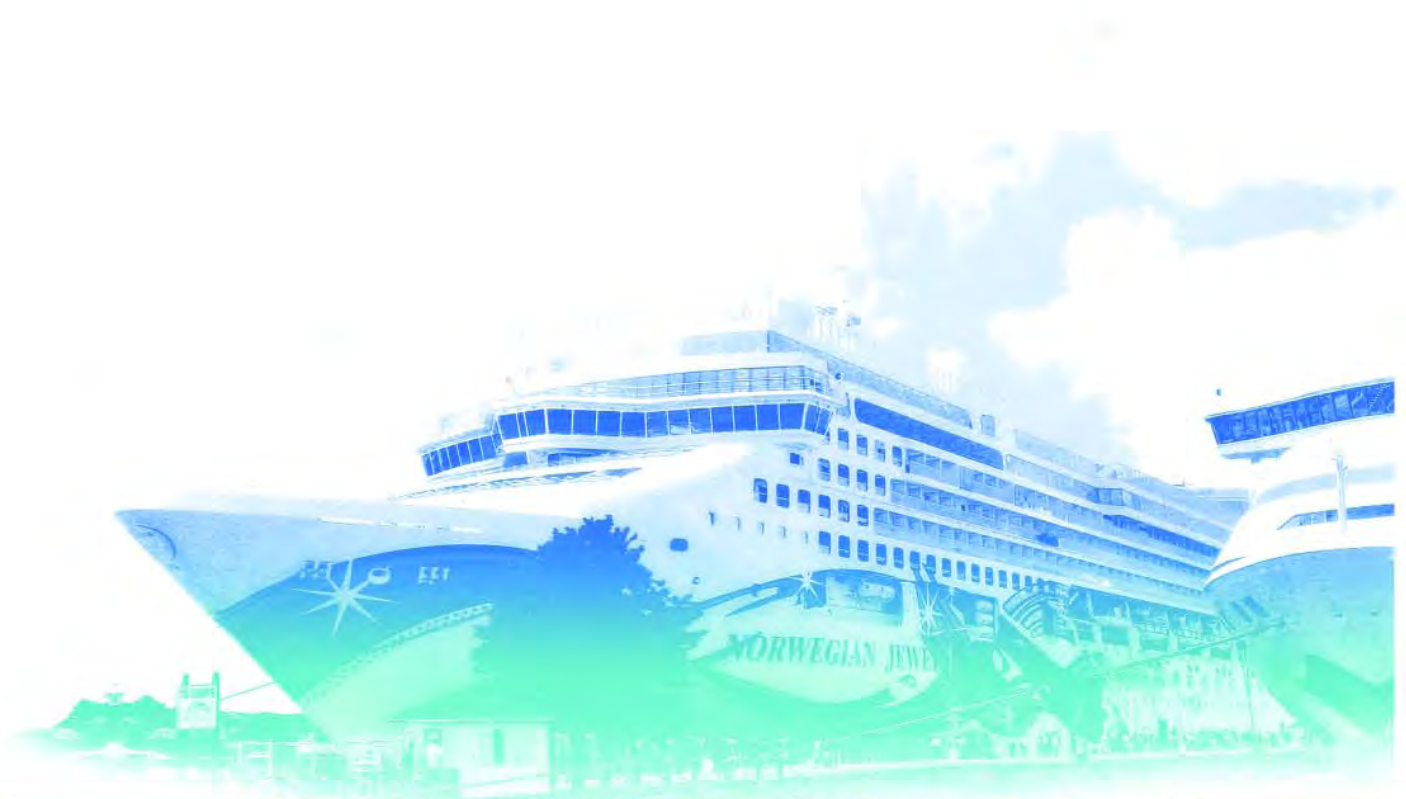
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Michele M. Paige







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### Chukka Caribbean Adventures Wins 2007 World Travel Award as "Caribbean's Leading Nature Adventure Excursion Operator"



Chukka Caribbean Adventures, the region's number one nature-adventure tour provider, is proud to announce that they are the winner of the prestigious 2007 World Travel Award as the "Caribbean's Leading Nature Adventure Excursion Operator." The World Travel Awards, called the "Travel industry's equivalent to the Oscars" by the Wall Street Journal, are the most comprehensive and prestigious awards program in global travel industry today.

"This is an incredible honor for Chukka Caribbean Adventures as we head into our 25th anniversary year," says John Byles, co-managing director. "At Chukka we always take our lead from nature and develop our tours with sustainable tourism in mind; it's wonderful to be acknowledged by our travel partners for that effort. We also see this win as an opportunity for Jamaica to put itself forward as a leading nature adventure destination. As Jamaicans we know what a beautiful country we live in -- we are lucky enough to be able to experience her natural wonders from the beaches to Cockpit Country everyday -- and we'd like the rest of the world to know it too. It is a privilege for Chukka Caribbean Adventures to now share the stage with the other World Travel Award winners that have made Brand Jamaica one of the top tourism products in the world. Congratulations to all of Jamaica's winners."

As a regional winner Chukka Caribbean Adventures will automatically be entered into the World competition, and winners will be announced at the Annual World Travel Awards Gala Ceremony in Turks & Caicos, December 12, 2007.

### Norwegian *Spirit* Set to Cruise from New Orleans

Norwegian Cruise Line's 1,966-passenger Norwegian *Spirit* recently made its inaugural cruise from the Crescent City.

The Norwegian *Spirit* succeeds NCL's Norwegian *Sun*, which sailed from New Orleans last season. The 880-foot balcony cruise ship sails seven-day Western Caribbean itineraries, with port calls to Roatan, Honduras; Santo Tomas de Castillo, Guatemala; Belize City, Belize; and Cozumel, Mexico. The Norwegian *Spirit* will sail regular seven-day cruises from the Port of New Orleans' Erato Street Cruise Terminal through March 30.

"It is great to welcome back Norwegian Cruise Line to New Orleans and to continue to build upon this valued partnership," said Port of New Orleans President and CEO Gary LaGrange. "We are encouraged by the swift return of cruising to the Port and proud of the economic impact it has on the City's tourism industry and rebounding economy."

NCL was the first home-ported cruise line to return to New Orleans following Hurricane Katrina when the Norwegian *Sun* began sailing seven-day cruises from Erato Street on Oct. 15, 2006.

An economic impact study conducted in 2005 found the cruise industry contributes \$226 million annually to the regional economy and supports more than 2,800 jobs. The Norwegian *Spirit* joins the 2,056-passenger Carnival *Fantasy*, which sails four- and five-day Western Caribbean cruises year-round from the port.

### Port Everglades will be home to World's Largest Cruise Ships

Broward County's Port Everglades is expected to become the world's top cruise port within the next five years with

confirmation today that Royal Caribbean International, a cruise brand owned and operated by Royal Caribbean Cruises Ltd. (NYSE/OSX: RCL), will be home-ported its two new 5,400-passenger "Project Genesis" vessels in Greater Fort Lauderdale.

The agreement between Royal Caribbean and Broward County is expected to be finalized by the cruise line company's Board of Directors and the Broward County Commission on or before December 19, 2007.

Royal Caribbean's Project Genesis ships will be the largest cruise ships ever constructed. The first of the 220,000-gross-registered-ton ships is scheduled to begin sailing year-round from Port Everglades in fall 2009, with the second sister ship to begin year-round sailings one year later. Each Project Genesis ship, being constructed at Aker Yards in Turku, Finland, is projected to generate approximately 584,000 in passenger traffic annually at Port Everglades.

"We look forward to growing our outstanding relationship with Port Everglades," said Adam Goldstein, president and CEO, Royal Caribbean International. "It's very exciting to see our plans come together for these two amazing ships. The bold designs, daring innovations and technological advancements planned for these ships will thrill our loyal guests and help generate new devotees to our brand."

As part of the agreement, Royal Caribbean will reimburse up to \$37.4 million in capital expenditures for expansion and related infrastructure needs of Terminal 18, which is already one of the largest cruise passenger terminals worldwide. Along with sister brands Celebrity Cruises and Azamara Cruises, Royal Caribbean International will generate approximately 17 million in passenger volume (embarking and disembarking) at



Port Everglades during the first 10-year term of the contract.

"Royal Caribbean has achieved great success with its year-round sailing schedule at Port Everglades," said Port Everglades Director Phillip C. Allen. "Now we can expect an average of 3.6 times more Royal Caribbean passengers, which is phenomenal."

An economic impact study conducted by Martin and Associates as part of the Port Everglades Master/Vision Plan, projects that homeporting the Genesis ships at Port Everglades will create more than 3,844 jobs, generate \$172 million in personal income and \$15.9 million state and local taxes. In addition, the analysis anticipates that more than 858 new construction jobs will be created during Terminal 18 expansion.

## Speedy Recovery Ahead for Costa Maya



With a speedy recovery underway following the advent of Hurricane Dean in August 2007, Costa Maya, Mexico's fastest growing destination and cruise port is expected to reopen by September 2008 with an enhanced experience for travelers and cruise passengers.

The first phase of reconstruction and cleanup began on September 17, 2007 focusing on returning ship berthing positions one and two to full operational mode by September 2008. Reconstruction of the port's third berthing position will follow with an expected completion by early 2009.

"Costa Maya is committed to a speedy recovery," said Teofilo Hamui, Costa Maya's president and chief executive officer. "We are diligently working to ensure we serve the cruising industry with an innovative and rewarding experience for cruise passengers. We are raising the standards we previously set for ourselves when we unveil an enhanced Costa Maya."

In addition, the rehabilitation and improvement of Mahahual, the beachside town that surrounds Costa Maya, is also underway. The project, funded with 18 million Mexican pesos or more than 1.5 million U.S. dollars by Fonatur, Sectur and the Government of Quintana Roo, includes the creation of a new boardwalk along Mahahual's beach.

Costa Maya has collaborated with the local government to improve Mahahual's infrastructure since 2001. Together, they have paved roads, brought electricity and

phone services to the area, and have constructed hundreds of homes for those who live and work in the region.

Since its inception in 2001, Puerto Costa Maya has become Mexico's second most popular port of call. Its pristine beaches, exciting excursions and preservation of the area's cultural heritage have helped attract over two million cruise passengers.

In September 2007, Costa Maya was recognized as Port of the Year by Seatrade Insider Cruise Awards 2007 in Europe. The Port's responsible growth, unique offerings and significant improvements to infrastructure has set it apart as this year's winner.

To learn more about Costa Maya and its unmatched beauty, please visit [www.costamaya-mexico.com](http://www.costamaya-mexico.com) or call 011 52 (998) 267 7700.

## New Platinum Associate Members



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# “State of the Cruise Industry”

Presentation at the 14th Annual  
FCCA Cruise Conference & Trade Show  
October 8-12, 2007 - Cozumel, Mexico



By Dan Hanrahan, President & CEO,  
Celebrity Cruises & Azamara  
Cruises and Chairman of the  
Marketing Committee for CLIA.

*Editor's Note: At this year's Conference, we had some venue issues and Dan Hanrahan had to cut his remarks short. We're printing the full speech below.*

Cruising is leisure travel market's fastest-growing category, which presents a lot of opportunity for FCCA members and partners.

The average annual passenger growth rate has been over 8 percent since 1980. Over 103 million consumers have taken a 2-day or longer cruise since 1990. Here's another way to

slice and dice the data: 75 percent of cruisers came aboard in past 10 years; and more than 45 percent cruised in the past five years.

This year, CLIA is forecasting an increase of 4.1 percent in net passenger capacity (based on bed days), from 12.1 million passengers in 2006, to 12.6 million passengers in 2007. Eighty-four percent of those passengers will be sourced from North America. We fully anticipate continued occupancy levels well above 100 percent.

Of the 2007 total passengers, 10.2 million were sourced from North America. This exceeds CLIA's original forecast of 11.7 million guests, due to high occupancy levels and strong growth in the number of internationally sourced guests.

Between 1995 and 2005, the number of Europeans taking cruise holidays around the world more than tripled, from 1 million to 3.3 million, according to the European Cruise Council. The growth is expected to continue with 4 million Europeans taking cruise holidays by 2010, and 5 million by 2015.





Right now, the shipyards are maxed out; with 30 ships under construction between 2007-2010 in CLIA member fleets. According to the European Cruise Council, the European shipyards are building ten large ships a year for the next two years and have orders for over 95 per cent of new cruise ship orders between now and 2010, worth more than 18 billion.

#### **Guest demographics of tomorrow**

Amidst all this growth, it's easy to forget that it is made up of many demographic groups, each with their own preferences.

Interestingly, the largest segment of the North American population planning to take a cruise vacation is Gen-Xers, age 28 to 42. They are established in the workplace, have stressful careers, and appreciate the relaxation and value of cruise vacations. In a recent CLIA survey, 56 percent of travel agents said Generation Xers now represent the largest group of honeymoon and wedding cruise guests. With the industry's incredibly high satisfaction ratings, once Gen-Xers take their first cruise, we are confident they will come back again and again.

In studying guest preferences, we've noted some North American consumer trends worth addressing. For example, the research is showing a greater emphasis on collecting experiences versus possessions; and passengers wanting cultural and historical opportunities in addition to relaxation. Cruisers want varied excursions, from active to educational. Family travel, with more than one generation traveling

together, is more common. Shipboard weddings and honeymoons are growing. And we've all seen more affinity groups booking group travel - from 70's music cruises, to deaf groups, to genealogy cruises.

With the growth in our industry, the high guest ratings that our members have worked so hard to achieve are positioned to keep paying off with diverse audiences.

According to a CLIA survey of travel agents in March 2007, our region rates high guest satisfaction:

- 93 percent of agents surveyed predict 2007 sales totals will surpass 2006
- 90 percent of agencies report clients were "very satisfied" or "extremely satisfied"
- Agents cited climate, ambience, ports, beaches and shopping as key attributes

This high guest satisfaction packs an economic wallop in the areas we visit. We combined the data from two studies by the Business Resources and Economic Advisors: one on the economic contributions of cruise tourism in Mexico, and one on the economic impact of cruise tourism on the Caribbean economy, to add up the complete impact.

In 2006, research shows that the 19.5-million passenger and crew port visits, to 27 destinations, generated \$2.1 billion in our region. That translates into 49,800 jobs and \$641 million in wages to the region's residents<sup>1</sup>.





We are also closer than ever before to knowing the true worldwide economic impact of our industry. In the U.S., CLIA's research found that the direct spending by cruise lines and their passengers was \$16.2 billion in 2005. Recently, figures became available for the first time for Europe through the European Cruise Council. Not including Asia and Australia, the cruise industry's direct expenditures worldwide in 2005 totaled \$29 billion. This spending generated more than 559,000 jobs paying \$22 billion in wages.

#### **Partnering for growth**

For shared continued success and economic growth, homeports and destination ports are more important than ever.

Cruise lines continue to chart new waters, transporting travelers to an ever-increasing array of destinations that ensure itineraries are perpetually reborn. CLIA member lines now visit more than 500 ports worldwide. And new ports are being added in the Caribbean, Asia, Africa, Europe, South America, the Middle East and the South Pacific.

New and expanded homeports, such as Norfolk, Virginia and Red Hook, New Jersey also play a role in attracting first-time cruisers because of increased convenience and a lower cost to get to the ship.

In our region, several destinations are investing to support our industry.

- **St. Maarten:** New pier and cruise terminal tripled visitors in four years; have committed to further expansion.
- **Costa Maya:** Mexico's second busiest port; have committed to rebuilding and are re-opening September 2008.
- **Grand Turk:** New 13-acre, \$42,000,000 cruise center near top scuba areas and active excursions.

Each passenger visit at a European port generates just over 100. In the United States, the average passenger spends approximately \$105 per homeport and per U.S. port-of call visit. Average per passenger expenditures across the Caribbean destinations total \$98 per visit.

Mexico is investing more than \$300 million to upgrade cruise terminals over the next five years. The country is building 13 new piers, three new airports and expanding cruise terminals to support tourism. It's no wonder: cruise passengers have zoomed from 2.3 million guests in 2002, to 6.5 million in 2006. In fact, Cozumel is still the world's leading cruise port. With more than two million visitors annually, and more than 70 different tour options, cruise tourism expenditures totaled \$254 million last year.

Despite the overall growth of our industry, the Caribbean region does have a few challenges. For example, with heightened competition worldwide, we need to work at attracting more international guests to our region. We need to find ways to deliver to a more diverse audience. We're now homeporting well beyond Florida: Mexico, Caribbean, Central America,





Gulf, Southern California, and the northeast U.S.

Our collective responsibility, as always, comes down to satisfying our customers: Guest satisfaction equals destination revenue. We need to keep sharing positive messages about the cruise industry to consumers and governments throughout the region.

### **‘Greening’ our operations**

At the same time we’re focused on growing markets, there is a growing awareness that consumers have more questions and concerns about the environment. In the cruise business, we have a special responsibility to protect our marine ecosystems, especially through water handling and air emissions. Clean oceans are good for the environment, good for our guests and good for our business.

We continue to develop wastewater purification systems and are also focused on doing our part of reducing air emissions. The ports of Seattle and Los Angeles are offering ‘cold ironing’, or providing temporary electrical power to ships at dock to reduce and eliminate air emissions from idling diesel engines. There are also several studies under way to examine scrubber technology for cruise ships. This technology is expected to partially reduce nitrogen oxides, almost entirely eliminate sulfur dioxide and significantly reduce particulate matter.

Being more environmentally responsible goes way beyond ship operations. The Image Group features onboard photography with env-friendly process, International Paint and Jotun Paints offers environmentally friendly coatings, Vickers Oils supplies biodegradable and non-toxic oils, and Thordon Bearings offers biodegradable lubricants, to name just a few.

We also seek partnerships with those with a shared interest in protecting the environment. CLIA is continuing the industry’s work with Conservation International.

Together, we are leading innovations in the maritime industry so we can be sure to protect the beauty of the oceans we sail upon and the destinations we visit.

### **SIDEBARS/CHARTS:**

#### **2007 Passenger Forecast**

- 12.6 million passengers (+500,000)
- 10.6 million North American passengers
- 2 million international passengers

<sup>1</sup> Sources: *Business Research & Economic Advisors, FCCA and CLIA*

Sidebar graph:

#### **Cruising’s total economic impact in 2006**

U.S. - \$32.4 billion

Europe - \$25.1 billion (€19.1B)

Caribbean - \$3 billion

Total: \$60.5 billion

#### **Economic impact: Top destinations**

Five destinations with direct cruise tourism expenditures over \$150 million<sup>1</sup>:

- U.S. Virgin Islands: \$362 million
- Cozumel: \$254 million
- St. Maarten: \$246 million
- Cayman Islands: \$180 million
- San Juan: \$170 million

#### **Consumer spending in the Caribbean<sup>1</sup>**

- \$98.04 per guest, per port
- \$74.56 per crew member, per port

#### **Consumer spending in Mexico<sup>1</sup>**

- \$84.41 per guest, per port
- \$46.99 per crew member, per port





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Puerto Chiapas is located in southwestern Mexico close to border to Central America and only 15 miles away from Tapachula City, the second most important city in the state. The principle port facilities are for cruise ships, general cargo and containers, as well as the fishing fleet that is also working out of the port. Tourist attractions include the local culture that has influenced the area, archeological sites and nature.

The port was officially opened on Feb. 9, 2006, and its debut as cruise port took place on Jan. 16, 2007, with the arrival of the Holland America Line's Ryndam. The cruise

line gave Puerto Chiapas a satisfaction score of 8.29 out of 9. "I'm delighted to say that this destination exceeded our expectations" said Timothy Littley, deployment and itinerary director for Holland America.

Puerto Chiapas is also developing its own unique features based in amber (fossil resin) and Marimba (a musical instrument), which are unique to Chiapas.

We will continue to develop new products and work hard to provide an unforgettable visitor experience. Visit Puerto Chiapas and we will introduce you to our multicolored culture and the spectacular natural beauty that surround the port.





# HIGHLIGHTS ISSUES:

## Downtown

Guided tour to Tapachula's downtown, visiting museums and representative sites of the local culture

## Izapa

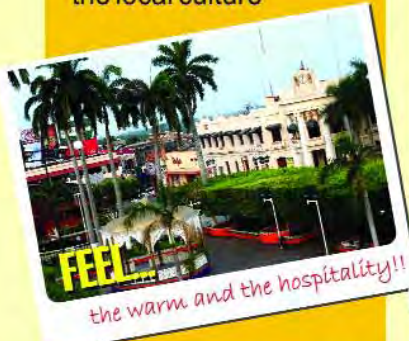
Guided tour to the archeological zone of Izapa, one of the oldest ceremonial civic centers on the Pacific Coast.

## Coffee

Guided tour through coffee plantations where visitors learn about the culture and history of coffee production and flower growing process. fauna.

## Pozuelo's Mangrove

Cruising tour through mangroves known as the highest mangroves in North America, with a diversity of endemic birds.



## Mexican Charro Festival

Colorful festival, a great example of the deep-rooted Mexican traditions and folklore.



## Cruise Terminal

Representation of the Chiapas' folklore, full of history and tradition, showing the hospitality and culture of its people.



## Products (Tropical Fruits & Exotics Flowers)

Educative tour through a variety of economic activities in the region.



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## *The FCCA Holiday Gift Project:* Fostering the Joy of Giving.

All of us like to receive gifts. Even as adults, the child in each of us that enjoys receiving gifts never grows up. Instead, each holiday season, we anticipate the joy of opening brightly wrapped packages, pulling apart the bows, ripping the paper, tearing into the box or package inside. It is the joy of discovery, the joy of something brand new, the joy of being surprised – and especially the joy that comes from knowing that someone cares about us. Even if it's Santa Claus.

For thousands of children throughout the region served by the FCCA and its members, this joy would be missed except for the generosity of spirit that is generated each year by FCCA member cruise lines and their crew. These anonymous Santa's Helpers deliver the gifts that are provided to 8,000 children in 28 destinations.

Coordinated by the FCCA Foundation, the 12th annual FCCA Holiday Gift Project sounds much more formal in title than the actual human experience. Just as children all over the world look eagerly to the skies for the sight of Santa and his reindeer, thousands of children living in the Caribbean and Latin America look to the seas for a different kind of gift-laden sleigh.

These good-will ambassadors rarely know the children they are giving to. Many do not even speak the same language. Yet each year, the crew and staff of FCCA member lines deliver enough gifts for the estimated 8,000 children living in such institutions as orphanages, homeless shelters, foster homes and schools.

The enthusiasm cruise line crew members feel for this annual





holiday project can be seen in a comment by Crew Member Michael Rodriguez of Royal Caribbean International's *Monarch of the Seas*:

"The event was enjoyed by all, and it was a heart-warming experience truly representative of what Christmas is all about – giving," he said. "Thank you for letting us be part of this wonderful event, and we look forward to it again next year."

The FCCA Foundation, in its 14th year, continues to improve the lives of citizens in the Caribbean and Latin America through projects such as this. The Foundation has impacted the lives of tens of thousands, providing over \$3 million in funding to a variety of organizations and causes.

Throughout the month of December, the following destinations and cruise lines worked together to deliver Christmas joy:

#### **Carnival Cruise Lines**

Cabo San Lucas, Mexico  
Cozumel, Mexico  
Freeport, Bahamas  
Montego Bay, Jamaica  
Ocho Rios, Jamaica  
Progreso, Mexico

#### **Celebrity Cruises**

St. Kitts

#### **Costa Cruise Lines**

Dominican Republic

#### **Disney Cruise Line**

St. Maarten

St. Thomas, U.S. Virgin Islands

#### **Holland America Line**

Eluthera, Bahamas

San Juan, Puerto Rico

#### **Norwegian Cruise Line**

Antigua

Belize

Roatan, Honduras

#### **Princess Cruises**

Barbados

Dominica

Grand Cayman, Cayman Islands

Grenada

St. Lucia

#### **Royal Caribbean International**

Aruba

Curacao

Ensenada, Mexico

Nassau, Bahamas

Mazatlan, Mexico

Puerto Vallarta, Mexico

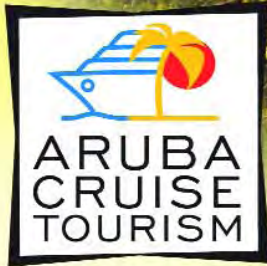
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# What's Your Story & Who Tells It?

## The Best Kept Secrets of Successful Tours

By Bill Fletcher of Jewell Gardens & Glassworks

***Author's note: The following is essentially a condensed how-to manual for setting up a tour operation to meet and exceed the expectations of both today's cruising clientele as well as cruise line executives. If an operator has not already mastered fundamentals such as consistent timeliness, guides with basic public speaking skills, clean and professional staff and equipment appearance, etc., what follows will be of little use – you have to know how to walk before you can learn to run!***

The Age of Sightseeing is over. Once upon a time cruise passengers were content to be shown the sights of a port through a bus window, with a faceless driver rattling off pertinent facts and the points of interest as they went by. Thankfully, these days are long gone and we now live and work in the Age of Experiential Travel – an era that has flung open the doors of exciting and creative excursion possibilities.

It is a time of renaissance in the cruise and shore excursion industry, and a whole new set of rules apply to those aspiring to be successful. While the myriad of adventure tours that

have come into play around the world since the early 1990's are certainly symptomatic of this market shift, there is much more to the story. Superlative experiences simply do not happen without careful choreography and great guides - no matter how adrenaline-pumping the activity may be.

The good news is that virtually any excursion can be re-invented as a great experience that complies with today's new rules for success - even the most basic 'sightseeing' tour. The key to remember is that *an excursion is only a compelling experience if it tells a meaningful story AND engages its participants*. This true whether it is a high adventure tour, an educational or entertainment based excursion, or even a simple city tour.

What is your story? Surprisingly few tour operations have ever taken the time to ask themselves this fundamental question – rather they see a niche, start a tour, and spend the rest of its life trying to grow and refine it as best they can. While this approach has worked well for many over the years, in the Age of Experiential Travel it is not enough to qualify you as





a frontrunner in our very competitive world marketplace. Involving your front line in the discussion about what your story is and how you want to tell it is in itself a powerful way to elevate the quality and consistency of your guest experience. What are your tour's themes and how are they woven into your story? How does the experience relate to your destination? Who is the target demographic? These are but a few of the questions that can generate very constructive dialogue among your ranks – and imparts ownership of the results where it matters most.

Understanding the story you are trying to convey enables you to choreograph the tour experience to be much more than the sum of its parts. Again, this is best done in collaboration with your front line guides and other representatives who are, after all, the 'actors' who tell your story. Discussion topics include identifying and making the most of a tour's 'moments of truth', ensuring smooth transitions on multi-modal or multi-guide tours, ideas about how to develop personal connections with clients, as well as how to make it a two-way interactive experience whenever possible.

And finally, here's a hot choreography tip that is guaranteed to work wonders: identify at least one special highlight or value-added extra feature that you agree not to brag about in your marketing of the tour. Building in this 'under promise, over deliver' component is like the proverbial icing on the cake – it will propel an otherwise 'great' excursion experi-

ence into the rarefied air of 'unforgettable'!

All of the above strategies are meaningless without the most important ingredient of all: Great Guides to tell your carefully choreographed story. Recruiting, training and retention of the best available talent must be a top priority of any tour organization in today's market.

The good news is that Great Guides want to work for Great Tour Operators. The investment of effort in crafting a meaningful client experience will itself help create a culture that attracts top talent. From the time of the first interview, let guide candidates know how highly you value excellence on the front line. Soon, your reputation will precede you and you will be held as an example by the cruise lines and other operators aspiring to take their business to the next level.

Similarly, top-performing guides should be held high as an example for the rest of your own front line. They are the perfect candidates for leading the discussions mentioned earlier about defining and choreographing your story. Likewise, they should be compensated according to their contribution. Too often guides – even great ones – are among the lowest paid staff within a tour organization. This is not to say that all front line staff deserve a raise, but rather that there should be some provision within your pay structure to reward greatness where it affects the client experience most directly.





The essence of all this is that great stories told by great guides create great tour experiences – which in turn creates a self-perpetuating culture of pride within a tour operation...and an aura of excellence recognized by peers and customers alike.

So whether you are entering the business of operating tours for the first time or are looking to breathe new life into old programs that have lost their sizzle, do yourself a favor and

see what huge returns are possible when you commit to making these investments of time and energy.

*Bill Fletcher is a 25-year veteran of the Alaska cruise industry and currently manages Jewell Gardens & Glassworks in Skagway, Alaska. Bill has been a guest speaker at several FCCA Conferences and consults with companies on all aspects of tour operations. Bill can be reached at [williamwfletcher@yahoo.com](mailto:williamwfletcher@yahoo.com).*

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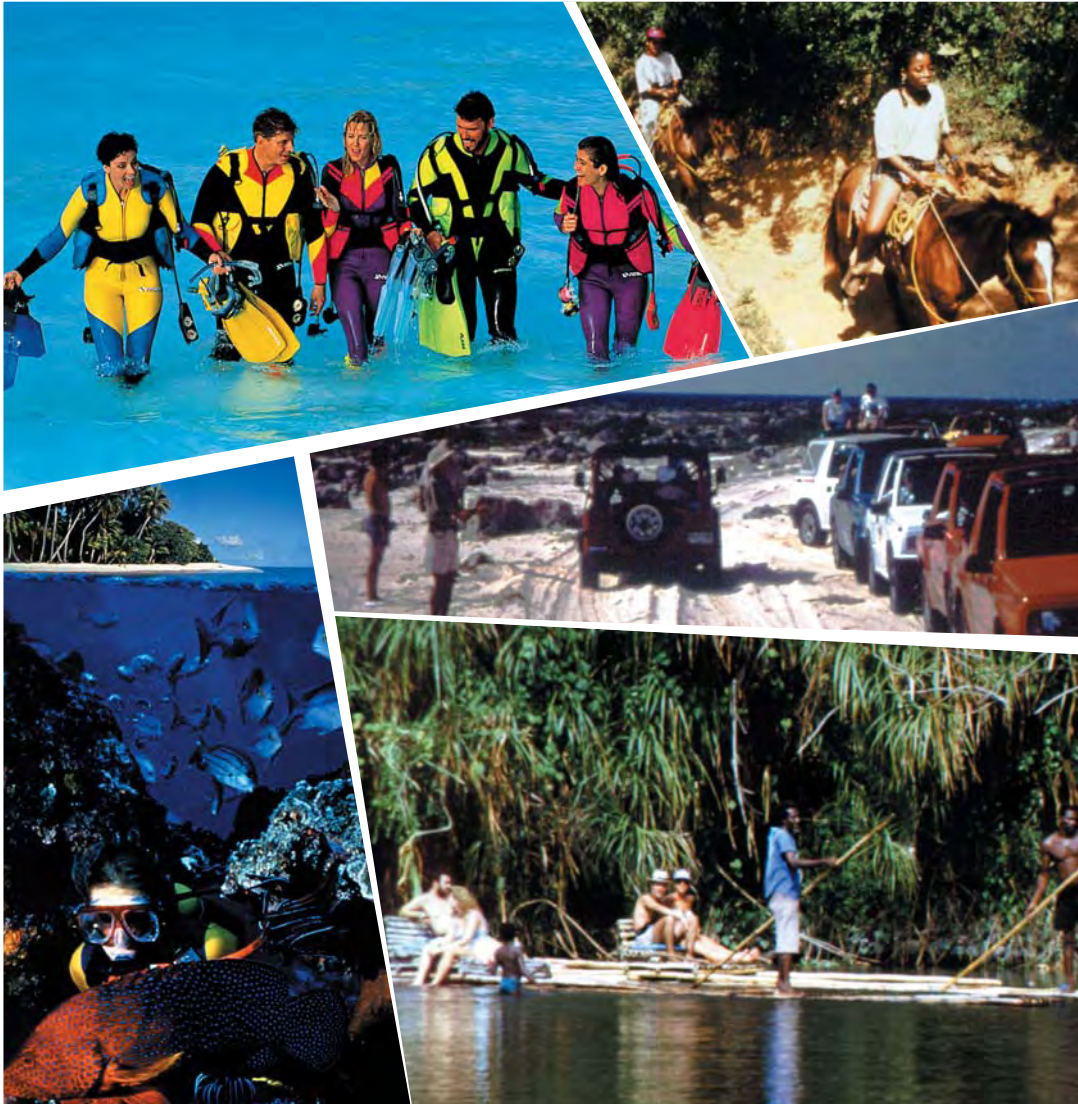
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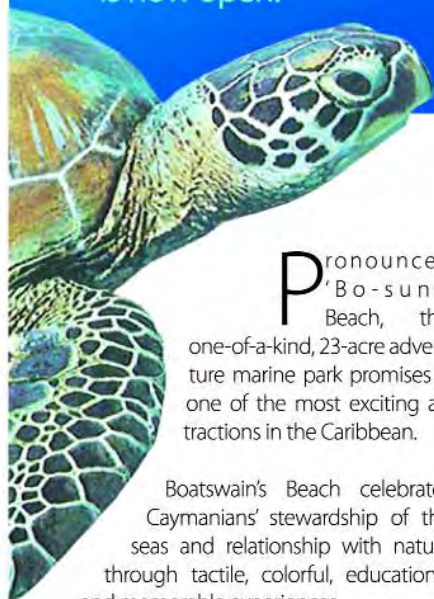
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# Quench your thirst for adventure!

## *Go ahead – take the plunge!*

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



**P**ronounced '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](mailto: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 Kemps 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-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, 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 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](mailto: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 eccentric 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 949-3894 Ext. 4002 or at [events@boatswainsbeach.ky](mailto:events@boatswainsbeach.ky)

For more details on Boatswain's Beach visit [www.boatswainsbeach.ky](http://www.boatswainsbeach.ky).



A large cruise ship is docked at a port at night. The ship's lights are on, and its reflection is visible in the water. In the foreground, a highway with multiple lanes is shown with long-exposure light trails from cars, creating a sense of motion. The sky is dark with some clouds.

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# The 14th Annual FCCA Cruise Conference & Trade Show

An audience of over a thousand gathered in Cozumel for the Florida-Caribbean Cruise Association's 14th Annual Conference and Trade Show. The diverse attendance of industry experts included Platinum and Associate Members, cruise executives, government leaders, port officials, tour operators, along with tourism agencies and suppliers.

The venue becomes essential in any FCCA function; it really sets the stage and gives the show the proper mood. A proper setting is needed to let ideas and conversation flow between characters. The serene but engaging environment could almost be seen in Cozumel's calm, crystal clear water.

Because of this, meetings whether casual or formal, were relaxed. The event also allows the influential visitors to explore the destination, and the luscious landscapes along with the superfluous sights help let the group forget they're on a business trip and reminds them why Cozumel remains one of the most heavily traveled cruise destinations.

Matthew Sams, Vice President of Caribbean Relations for Holland American Line, noticed and commented on the importance of the location, "This is the best venue of the year. I get more accomplished during this Conference than all of the other events combined."



*"This is the best venue of the year. I get more accomplished during this Conference than all of the other events combined."* Matthew Sams, Vice President of Caribbean Relations for Holland American Line.

Though Cozumel had suffered from a catastrophic hurricane season in 2005, the group was able to witness the renovation. Since many had participated in hurricane clean-ups around the area, they could almost look on as a proud parent watching their child grow. The new structures clashing with the Mayan ruins even represented the group itself, as the new businesses looking to get their feet off the ground contrasted the venerated veterans.

The forecast of the function was far more accurate than the weather prediction, though the usual year-long consistency attracts many tourists. No newscasters were needed to inform that the trip would bring an onset of

partnerships, a cleared front of friendships, along with a downpour of ideas. There was no special report telling that foreign government officials would visit the land, which allowed for the chance to work with these dignitaries to advance business through these connections or learn through past experiences. The festivities began Monday night at Jimmy Buffet's Margaritaville in Downtown Cozumel, where the food and drinks loosened up the bidders for the auction, as did the President of the FCCA, Michele Paige, as she assisted the auctioneer, helping raise extra money for a cause close to her heart—the FCCA Foundation. A total of

\$62,000 was donated, with the highest bid going for a game of golf with the Chairman of the FCCA and CEO of Carnival Corp., Micky Arison. Though giving to charities might have felt good, the pirates and crew made sure to provide everyone with a good time as they sauntered their stuff and got everyone dancing through the evening.

The function kicked off with a tee off, as many members met for an early morning golf game. Though they may have encountered some rain, no spirits were dampened and the tournament continued swimmingly. Those remaining at the hotels could take advantage of informal breakout sessions, which allowed for shore excursion and tour



# FCCA Partners at the 2007 FCCA





# *A Cruise Conference and Trade Show*







operators to meet with over 100 cruise executives, industry partners, and government officials. Hydi Webb of the Miami Dade Seaport Authority commented on this informal format, "I found the Conference to be well-attended and productive. FCCA events continue to provide one-on-one time with industry friends in a less formal environment. It provides a forum to discuss future business opportunities and growth opportunities in all aspects of the cruise industry. I congratulate the FCCA staff on another successful event!" This casual networking became available once again at the Trade Show.

The Opening Ceremony took place at Playa Mia Grand Beach Park, which offers an Underwater Mayan City, a zoo area which cares for fauna native to the island, a kids club, and—of course—a beautiful beach. The ceremony showed why Playa Mia caters to diverse age groups who go to enjoy the activities and food, as the catering was only matched by the available amenities.

Wednesday was productive for work and pleasure. In the morning, the bulk of attendees went to workshops which focused on many beneficial aspects of the industry and how to better actualize tours, along with the destination itself. It's said that you learn something new every day, and with such highly qualified panel moderators and speakers, one is hard pressed to find how those in atten-

dance didn't fulfill the idiom. Sergio Briceño, General Director of Explora Tours shares some of his thoughts on the workshops, "As a tour operator, I need to constantly stay updated on current trends. The FCCA workshops allow for this and so much more. They truly know the cruise passengers and share their knowledge with us so that they are better serves, which allows for happier customers and repeat visitors."

Wednesday night featured the Cozumel Extravaganza, hosted by the City of Cozumel. The inside of the Convention Center was transformed into a small city with strolling musicians, acrobats, stilt walkers, dancing children, and Mayan costumed warriors. The ceiling was covered with a rainbow of FCCA banners. Every local food was offered as well as local specialty drinks. Along with the music, they helped provide an amiable atmosphere, allowing everyone to get to know each other, making new alliances or renewing old friendships.

Work and play was fused once again on Thursday, as more workshops and informal breakouts took place. The Annual Silent Auction also occurred, which serves as the greatest contributor to the FCCA Foundation. The opportunity to bid on cruises for a reduced rate gave the participants a chance to serve themselves along with the community.

The closing ceremony at Dolphin Discovery was set outside with a beautiful moonlit sky. Dolphin Discovery Cozumel is located in Chankanaab National Marine Park. As well as offering world-class diving and snorkeling, this beautiful park hosts a spectacular sea lion show, a lush botanical garden, great reproductions of famous archaeological sites, and a typical Mayan village. You also can swim the underground river and the tropical lagoon teeming with brightly colored tropical fish and there are also restaurants, bars and a dive shop. The beginning of the evening was an impressive nighttime dolphin show. Though no lady may have sung to let the audience know it was time to leave, the event was closed with native Mayan tribesmen performing ritual dances.

The FCCA Conference effectively combined building personal relationships with educational seminars and meetings. It facilitated networking, which strengthened partnerships, shared knowledge, and provided future planning along with the understanding of current affairs. The FCCA allows the alliance of cruise lines, destinations, tour operators, and vendors in attempt to bring mutual success to attendants. Now there is just the 15th Annual Conference in Trinidad to look forward to. Only through your attendance can the event properly thrive, so we hope to see you there.



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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.

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**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.

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# The Successful Tour A-B-C's

"An ounce of prevention is worth a pound of cure."



By Graham Davis, Manager, Caribbean & Atlantic Shore Operations - Princess Cruises

It was standing room only for one of the key workshops on tours and tour operators for cruise passengers at the recent FCCA Cruise Conference & Trade Show. The panel was led by Graham Davis, Manager of Shore Operators, Caribbean- & Atlantic for Princess Cruises.

More than 70 attendees filled the chairs and stood for the 90-minute workshop which focused on tour safety, tour guides, tour content, vehicles and boats.

On the panel were Patrick Schneider, Royal Caribbean International; Marc Melville, Chukka Caribbean; Adam Ceserano, Florida-Caribbean Cruise Association; Larry Staufer, Disney Cruise Line; and Mico Cascais, Carnival Cruise Lines.

## A. Tour Safety

Tour safety is of foremost importance, the panelists empha-

size. "It is imperative that your excursions are safe, secure and suitable for the age and physical abilities of the participants. All excursions must be operated according to the highest professional standards and must utilize high quality, properly maintained equipment," the panel said.

Tour safety is a matter of making an honest and complete risk management assessment, making sure that any and all potential risks have been identified and addressed. Be proactive, the panel urged. Make sure that any risks are removed or minimized.

"And effective communications . . . ensure that all participants are made aware of any potential dangers," the panelists said. Such risks might include unfenced viewpoints, slippery walkways, uneven terrain and busy roadways that passengers will need to cross.

In other words, "trip, slip and fall" make up the majority of





accidents, and many of these can be prevented with good risk management practices. Such self-risk assessment should be done at least once a year, the panel emphasized, for each and every tour. "The only way you can get a true assessment is to take the tour with the mindset of a passenger and with Murphy's Law in mind: 'If it can go wrong, it will,'" the panel cautioned. And it is vital to establish and verify the number of passengers on tours, especially water-related excursions and remote tour venues.

Also, have a major emergency plan in place and practice it at least twice a year, the panelists suggested. "If you haven't had a major emergence, you will one day. You're in a numbers game," one panelist noted.

### **B. Tour Quality**

Of course, tour quality is also paramount. Cruise lines spend a lot of money monitoring tour quality and following up on tour quality issues. And tour quality is directly related to the "perceived value" of a tour by the passenger. If the tour quality is high, the passengers will feel they got their money's worth.

Cruise lines are interested only in quality tours, no matter what the price point. Their passengers have a quality experiences onboard and that is what the passengers expect in the tours they purchase.

Much of the success of a tour rests with the tour guide. The guide simply makes or breaks the tour as it related to tour quality. An outstanding tour guide can shape a tour and make it earn a high rating; an average tour guide can sink a tour, even one with high content.

"The tour guide is the ambassador for your destination/country," the panel noted. "Most passengers will form their opinions of the tour and the destination due, in a large part, to how they feel about the guide and the time that is spent with the guide."

The guide must, of course, be knowledgeable about the subject matter and never make up content or guess at an answer.

There may be an expert in that field on the tour and the guide will lose all credibility.

The guide should have many of the same qualities as a Boy Scout. The guide should be clean, well-dressed in a uniform, wear a name tag, be personable and entertaining and be fluent in English. And a good tour even knows when to be silent and let the passengers relax (especially on long bus tours).

### **C. Tour Content**

Tour content creates the first impression most passengers make about a tour. Tour transportation and equipment, i.e., snorkeling equipment, helmets for horseback riding, and the like must be clean, sanitized and in good repair. Venues and roads used by tours must be clean of trash, abandoned vehicles, etc. Of course, all tour venues must be safe.

Restrooms are very important on tours. Tours must anticipate the bathroom needs of passengers, from toilet paper to liquid soap.

Food and beverages are also key to passenger comfort and tour quality. Tour guides should also carry insect repellent (both DEET and non-DEET). And a tour guide must consider whether specific equipment, like binoculars, fishing cards or even contests with prizes and awards, would enhance a tour. Make sure there's enough to go around, the panel cautioned.

Finally, the vehicles, both on land and on water, must be in good repair, clean, efficient and properly licensed by local authorities, if application. Ease of entry and exit of transportation is important, too, so plan on step stools for land transportation and secure gangways for boats.

Ultimately, all these elements of a successful tour – from safety to content to guide to vehicles – must be well planned out and reviewed periodically. The goal is always to give passengers the best possible experience. Nothing less is acceptable.





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# The Economic Impact of Cruise Tourism in the Caribbean

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

*At the FCCA Caribbean Cruise Conference and Trade Show held in Cozumel this past October, Mr. Dan Hanrahan, President of Celebrity Cruises, presented highlights of the economic impact of the cruise tourism in the Caribbean. This article provides some additional detail on these impacts based upon the research conducted by BREA on behalf of the FCCA and the participating destinations.*

BREA was engaged by the FCCA and participating destinations to conduct two economic impact studies focused on the impacts of cruise tourism during 2005 and 2006. The 2005 study focused on 16 Caribbean destinations while the 2006 study concentrated on 10 destinations in Mexico. Both studies were based upon primary research data on passenger, crew and cruise line expenditures. Passengers and crew were surveyed onboard cruise ships following calls at the participating destinations during study period. Data on the expenditures by the cruise lines for ships' stores, port fees and other goods and services for 2005 and 2006 were collected from the FCCA-member lines. For the purposes of this article, the expenditure and economic impact data from the two studies were aggregated to provide an awareness of the magnitude of the impact of cruise tourism throughout the Caribbean.

## Passenger and Crew Spending

During the course of the two studies approximately 39,000 passenger and 18,200 crew surveys were collected following selected cruise calls at the 26 Caribbean destinations. As indicated in Table 1, the average cruise passenger spent \$97.48 per onshore cruise visit while the average crew member spent \$70.24 per call. There was a fairly significant range in average passenger and crew expenditure rates. Passenger spending ranged from a high of \$176.69 per passenger in the U.S.V.I. to a low of \$39.95 in Martinique. Crew spending ranged from a high of \$159.55 per crew member in St. Maarten to a low of \$18.23 in Belize. The diversity in spending is largely attributable to shopping and tour options available to cruise passengers and crew, with greater diversity generating a higher level of expenditures; the availability of duty-free shopping, especially for jewelry; the number of hours spent shore by passengers and crew; and the general price level in each destination.

In aggregate passengers and crew spent \$1.7 billion annually in the 26 destinations during the 2005-2006 period, with passenger expenditures accounting for 88 percent of the total. Six destinations had passenger and crew expenditures in excess of \$100 million:

- U.S.V.I - \$339 million
- St. Maarten - \$236 million
- Cozumel - \$206 million
- Cayman Islands - \$150 million
- San Juan - \$134 million
- Bahamas - \$102 million



Combined, these six destinations accounted for two-thirds of the all passenger and crew expenditures among the 26 Caribbean destinations. The remaining twenty destinations accounted for one-third of passenger expenditures. This spending averaged nearly \$29 million per destination, ranging from \$3.5 million in Martinique to \$62 million in Costa Maya.

**Figure 1 – Passenger and Crew Expenditures by Destination**

Destinations	Passenger Onshore Visits (Thousands)	Average Expenditure per Passenger	Total Passenger Expenditures (\$US Millions)	Crew Onshore Visits (Thousands)	Average Expenditure per Crew	Total Crew Expenditures (\$US Millions)	Total Passenger and Crew Expenditures (\$US Millions)
Acapulco	225.0	\$87.41	\$19.70	56	\$59.71	\$3.30	\$23.0
Antigua	391.4	\$84.00	\$32.90	78.9	\$52.47	\$4.10	\$37.0
Aruba	478.6	\$113.26	\$54.20	89.6	\$78.45	\$7.00	\$61.2
Bahamas	1,585.5	\$60.54	\$96.00	279.8	\$19.96	\$5.60	\$101.6
Barbados	405.3	\$111.82	\$45.30	82.8	\$76.18	\$6.30	\$51.6
Belize	610.4	\$87.77	\$53.60	72.1	\$18.23	\$1.30	\$54.9
Cabo San Lucas	405.0	\$78.98	\$32.00	38	\$40.24	\$1.50	\$33.5
Cartagena	32.4	\$114.73	\$3.70	5.2	\$43.64	\$0.20	\$3.9
Cayman Islands	1,671.5	\$82.73	\$138.30	261.7	\$45.92	\$12.00	\$150.3
Costa Maya	703.2	\$76.28	\$53.60	171.2	\$50.25	\$8.60	\$62.2
Cozumel	2,080.0	\$89.14	\$185.40	432.4	\$48.77	\$21.10	\$206.5
Curacao	253.8	\$53.34	\$13.50	42.1	\$39.17	\$1.60	\$15.1
Dominica	190.0	\$51.20	\$9.70	35.4	\$74.80	\$2.60	\$12.3
Ensenada	612.0	\$58.74	\$35.90	160	\$39.28	\$6.30	\$42.2
Grenada	246.2	\$53.82	\$13.20	50	\$26.07	\$1.30	\$14.5
Huatulco	72.0	\$55.09	\$4.00	9.3	\$40.24	\$0.40	\$4.4
Martinique	77.5	\$39.35	\$3.00	18.8	\$28.20	\$0.50	\$3.5
Mazatlan	315.0	\$126.29	\$39.80	44.3	\$49.23	\$2.20	\$42.0
Progreso	148.5	\$53.09	\$7.90	21.4	\$40.24	\$0.90	\$8.8
Puerto Vallarta	418.0	\$104.80	\$43.80	57	\$40.24	\$2.30	\$46.1
San Juan	1,186.6	\$96.94	\$115.00	203.9	\$91.13	\$18.60	\$133.6
St. Kitts	93.8	\$57.40	\$5.40	19.5	\$20.61	\$0.40	\$5.8
St. Lucia	345.7	\$82.62	\$28.60	76.3	\$31.01	\$2.40	\$31.0
St. Maarten	1,304.3	\$145.15	\$189.30	289.8	\$159.55	\$46.20	\$235.5
USVI	1,631.5	\$176.69	\$288.30	351.5	\$143.83	\$50.60	\$338.9
Zihuatanejo	76.5	\$60.00	\$4.60	8.5	\$40.24	\$0.30	\$4.9
<b>All Destinations</b>	<b>15,559.7</b>	<b>\$97.48</b>	<b>\$1,516.7</b>	<b>2,955.5</b>	<b>\$70.24</b>	<b>\$207.6</b>	<b>\$1,724.3</b>

Source: Business Research and Economic Advisors

Passengers were asked to provide their cruise party expenditures for a variety of categories as shown in **Table 2**. The per party expenditures in each category were divided by the average size of the expenditure party to arrive at the average spend per passenger. This, in turn, was multiplied by the percentage (share) of all onshore visits to arrive at the weighted average spend per passenger. Total passenger expenditures by category is equal to the weighted spend per passenger multiplied by total passenger visits, 15.6 million passengers.

The analysis of the passenger surveys showed the following major attributes of passenger onshore spending:

- The typical cruise passenger spent an average of \$97.48 at each destination call during their cruise vacation with total passenger expenditures in the 26 destinations reaching \$1.5 billion.
- Just over 78 percent of passenger expenditures were made in four categories: watches and jewelry, shore excursions, clothing, and food and beverages. Combined, cruise passengers spent an estimated \$1.2 billion in these four categories.



- The most popular expenditure was for shore excursions with nearly two-thirds of all passengers making such a purchase. Local tour operators received an average of \$32.35 per passenger directly from cruise passengers and cruise lines (**see Note below table**). The weighted average expenditure was \$21.13 per passenger. Total payments to tour operators in the 26 participating destinations were an estimated \$320 million.
- Passengers that purchased watches and jewelry spent an average of \$141.06 on such purchases. Since only 25.6 percent of passengers purchased watches and jewelry the average jewelry expenditure per passenger was \$36.11. Total expenditures on watches and jewelry were an estimated \$590 million.
- Approximately half of the cruise passengers purchased clothing and food and beverages. On average, visiting passengers spent \$7.68 on food and beverages and \$11.16 on clothing at each port call. Combined, passengers spent a total of \$275 million in these two categories.

**Table 2 – Passenger Expenditures by Category**

	Average Spend per Passenger (\$US)	Share of All Onshore Visits	Weighted Average Spend per Passenger	Total Passenger Expenditures (\$US Millions)
<b>Shore Excursions*</b>	\$32.35	65.30%	\$21.13	\$320.4
<b>F&amp;B at Restaurants &amp; Bars</b>	\$14.16	54.27%	\$7.68	\$109.4
<b>Clothing</b>	\$22.10	50.50%	\$11.16	\$165.3
<b>Local Crafts &amp; Souvenirs</b>	\$14.40	40.73%	\$5.86	\$85.8
<b>Taxis/Ground Transportation</b>	\$12.81	33.10%	\$4.24	\$65.4
<b>Other Purchases</b>	\$21.29	26.37%	\$5.61	\$77.7
<b>Watches &amp; Jewelry</b>	\$141.06	25.60%	\$36.11	\$589.5
<b>Retail Purchases of Liquor</b>	\$17.36	11.23%	\$1.95	\$32.7
<b>Entertainment/Night Clubs</b>	\$48.12	2.33%	\$1.12	\$19.3
<b>Telephone &amp; Internet</b>	\$4.98	2.23%	\$0.11	\$2.0
<b>Lodging**</b>	\$169.10	0.93%	\$1.58	\$31.0
<b>Electronics</b>	\$126.11	0.73%	\$0.93	\$18.3
<b>Total</b>			<b>\$97.48</b>	<b>\$1,516.7</b>

**Source: Business Research and Economic Advisors**

\* The average shore excursion expenditure is a weighted average of direct onshore purchases by passengers and the net payment of onboard purchases made to local tour operators.

\*\* Lodging expenditures only apply to the passengers who embarked on cruises in San Juan.

As indicated in Figure 1, there was a significant positive relationship between passenger satisfaction with their shopping experience in a destination and their average spend in that destination. Passengers were asked to rate their shopping satisfaction on a scale of 1 to 10 with 10 being extremely satisfied. The average scores by destination ranged from 3.9 in Martinique to 7.8 in Aruba while average spend per passenger ranged from \$39.35 in Martinique to \$176.69 in the U.S. Virgin Islands. The trend line in the figure highlights the positive relationship between satisfaction and spending. In fact, the slope of the line implies that for every one point gain in shopping satisfaction, per passenger spending increases by \$19.47. Thus, a one point



increase in passenger shopping satisfaction will increase onshore passenger spending by \$1.9 million for every 100,000 onshore passenger visits.

**Figure 1 – Passenger and Crew Expenditures by Destination**



Source: Business Research and Economic Advisors

### Total Spending and Its Economic Impact

Including the purchases of the cruise lines for stores, ship supplies and port fees and taxes, which accounted for nearly 15 percent of total expenditures, cruise tourism generated \$1.9 billion in total expenditures among the 26 Caribbean destinations. On a per passenger basis, then, cruise tourism generated an average of \$121.74 in total onshore spending per destination visit. Thus, a 2,000-passenger ship generated \$243,480 in total onshore spending for each port visit.

As shown in Table 3, cruise tourism generated significant economic benefits to the 26 participating destinations. Cruise tourism generated \$2.0 billion in direct expenditures, 48,515 jobs and \$606 million in employee wages in the 26 destinations. Five destinations had direct cruise tourism expenditures in excess of \$150 million. The U.S. Virgin Islands led all destinations with \$362 million, followed by Cozumel with \$254 million, St. Maarten with \$246 million, the Cayman Islands with \$180 million, and San Juan, PR with \$170 million. Combined, these five destinations accounted for 60 percent of the total cruise tourism expenditures in the 26 destinations.

The remaining twenty-one destinations accounted for 40 percent of the cruise tourism expenditures. This spending averaged just over \$37 million per destination, ranging from \$4.0 million in Martinique to \$144.4 million in The Bahamas.

The economic analysis of cruise tourism revealed the following impacts for the top five destinations:

- The U.S. Virgin Islands, with the highest per passenger spending rate, had the highest economic contribution. The \$362 million in cruise tourism expenditures generated an estimated 6,165 jobs paying \$136 million in wage income.



**Table 3 – Total Cruise Tourism Expenditures and Economic Impacts by Destination**

<b>Destinations</b>	<b>Total Cruise Tourism Expenditures (\$US Millions)</b>	<b>Total Employment</b>	<b>Total Employee Wage Income (\$US Millions)</b>
<b>Acapulco</b>	\$29.1	820	\$4.6
<b>Antigua</b>	\$41.0	1,215	\$10.4
<b>Aruba</b>	\$66.2	1,710	\$24.6
<b>Bahamas</b>	\$144.4	3,965	\$60.9
<b>Barbados</b>	\$57.3	1,635	\$16.8
<b>Belize</b>	\$64.2	1,885	\$19.9
<b>Cabo San Lucas</b>	\$38.4	1,100	\$6.7
<b>Cartagena</b>	\$4.5	140	\$0.8
<b>Cayman Islands</b>	\$179.7	3,705	\$66.0
<b>Costa Maya</b>	\$69.8	1,890	\$11.1
<b>Cozumel</b>	\$254.4	7,070	\$41.4
<b>Curacao</b>	\$18.0	420	\$7.5
<b>Dominica</b>	\$13.8	390	\$3.0
<b>Ensenada</b>	\$52.6	1,430	\$9.4
<b>Grenada</b>	\$16.3	485	\$3.1
<b>Huatulco</b>	\$5.0	170	\$0.8
<b>Martinique</b>	\$4.0	115	\$0.8
<b>Mazatlan</b>	\$46.6	1,450	\$7.6
<b>Progreso</b>	\$11.0	310	\$1.6
<b>Puerto Vallarta</b>	\$52.7	1,590	\$9.4
<b>San Juan</b>	\$170.0	3,865	\$55.4
<b>St. Kitts</b>	\$6.7	205	\$1.5
<b>St. Lucia</b>	\$34.8	1,035	\$6.7
<b>St. Maarten</b>	\$246.4	5,590	\$99.3
<b>USVI</b>	\$361.6	6,165	\$135.6
<b>Zihuatanejo</b>	\$5.8	160	\$0.9
<b>All Destinations</b>	<b>\$1,994.3</b>	<b>48,515</b>	<b>\$605.8</b>

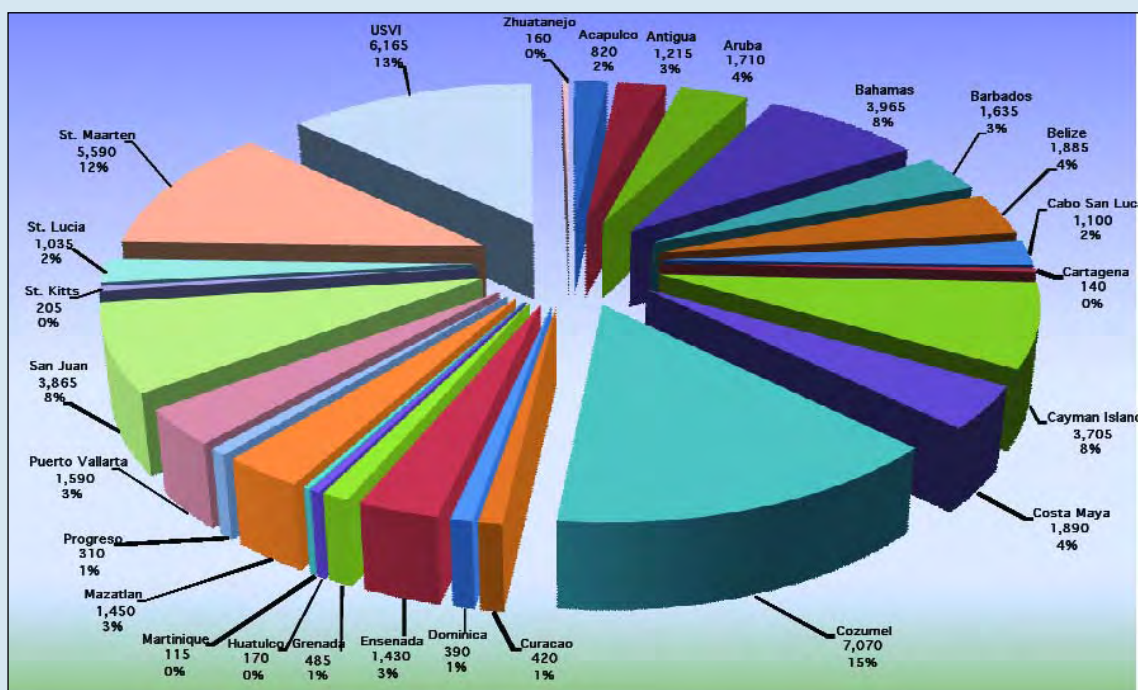
Source: Business Research and Economic Advisors

- Despite the disruptions caused by Hurricane Wilma which limited passenger and crew visits due to the destruction of the cruise ship piers, Cozumel still led the Caribbean in the number of passenger visits. In Cozumel the \$2514 million in total cruise tourism expenditures generated 7,070 jobs and \$41.4 million in wage income.
- The \$246 million in cruise tourism expenditures in St. Maarten generated total employment of 5,590 residents and wage income of \$99.3 million. St. Maarten had the second highest per passenger spending rate and the highest average crew expenditure rate.



- The Cayman Islands, with the second highest number of passenger visits, ranked fourth in direct cruise tourism expenditures. The \$180 million in cruise tourism spending in the Cayman Islands generated 3,705 total jobs and \$66 million in wage income.
- San Juan benefited from \$170 million in total cruise tourism expenditures which, in turn, generated 3,865 jobs and \$55.4 million in wages. San Juan was the only destination in this study in which the economic benefits were generated by both homeporting and port-of-call cruise ships.

Figure 2 – Total Employment Impacts by Destination



Source: Business Research and Economic Advisors





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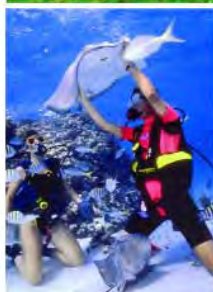
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# Freestay Cruise Coin Conversion

“Partnership: It starts with two”



By Terry Thornton, Vice President, Marketing Planning - Carnival Cruise Lines,  
& Chairman of the FCCA Marketing Committee

Partnerships are crucial to a successful business relationship, and this fact was never more apparent than during a workshop on marketing and “tour points” at The Fourteenth Annual FCCA Cruise Conference & Trade Show in Cozumel, Mexico, last October.

The FCCA Marketing Committee was honored to host a panel to discuss how the cruise lines and destinations can work together, in partnership, to achieve the mutual goal of improving overall consumer demand for the Caribbean. Our distinguished panelists provided informative details and examples from the perspective of both destination and cruise tourism.

The presentations focused on widely varied topics in an effort to share “best practices” in product development and innovation, consumer marketing, public relations and distribution initiatives. A central theme was the critical need for cruise lines and destinations to be customer-focused and to consistently deliver a quality experience at every customer “touch point.” This philosophy included the absolute requirement for consistent and effective hospitality training.

An additional important topic covered by the panelists was the development and execution of strategies for convincing cruise passengers to become return destination visitors. Jennifer Nugent Hill, who is with Tropical Shipping, provided an informative recap of the Freestay Caribbean program. There have now been a number of “success stories” with destinations that have executed this programs, and we are looking forward to working with other destinations to achieve similar strong results.

“The Freestay Cruise Conversion Coin Program is about

partnership. It is about believing that all of us in the region have a stake in the success and in the sustaining of this tourism industry. We are all in this industry together, even if our business is cargo transportation, retail, tour operation or running an intimate hotel property,” Jennifer Nugent Hill stated to the panel and attendees.

“The success of this program is when the tour operators are with the visitors. We must engage and “Wow!” our visitors so that they can tell their friends and families about returning to the destination. This program is not a silver bullet, but it is a sure shot in the right direction.”

We were very fortunate to have a great audience for this panel. The questions and interaction with this group are what made this event so successful. Valuable insight was gained from all the participants, and the workshop served as a great learning experience for all involved.

We are especially grateful for the time and expertise provided by our guest panelists, without whom we would not have been able to share so much: Colin Murphy, Vice President, Land Services & Destination Development, Norwegian Cruise Line; Beverly Nicholson Doty, Commissioner of Tourism, U.S. Virgin Islands; Jennifer Nugent-Hill, Assistant Vice President, Government/Public Affairs, Tropical Shipping; Hon. Theo Heyliger, Commissioner of Harbour and Public Works, Island Government of St. Maarten; and Terry Dale, President and CEO, Cruise Lines International Association (CLIA).

We want to thank Michele Paige and the FCCA team for the opportunity to participate in this year’s Cruise Conference. By all accounts, it was a tremendous event and we are looking forward to the 2008 Conference.





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## Trinidad and Tobago to Host the 15th Annual FCCA Cruise Conference & Trade Show

Nestled between the Southern Caribbean and Latin America, Trinidad and Tobago boasts of an energetic culture shaped by a people with lineage to Africa, India, China, the Middle East and Europe. From October 27-31, 2008, participants in the 15th annual Florida-Caribbean Cruise Association's (FCCA) Cruise Conference and Trade Show will get a chance to experience this cosmopolitan paradise, which offers much more than the traditional sun, sea, and sand formula. The FCCA is pleased to host the 2008 conference and trade show in this twin-island state, which basks in its duality of bustle and serenity.

Trinidad, the larger and livelier of the islands, is an industrial giant with exciting nightlife, a robust energy sector and a growing manufacturing industry. Cruise industry partners will be hosted at Trinidad's newest, 428-room hotel, the

Hyatt Regency Trinidad Hotel, which is located on the picturesque waterfront of Trinidad's capital city, Port of Spain – the sole port of entry for cruise ships. The Hyatt is the perfect location with opportunities for business and leisure at its doorstep. Having almost 43,000 square feet of available conference and meeting space, it can host the entire Caribbean Cruise Conference and Trade Show. Trinidad also has other excellent conference and hotel options, which are central to the country's appeal as the ideal conference and meetings capital of the Caribbean.

FCCA participants will also sample what cruise ship passengers enjoy here. A distinctive urban setting, Port of Spain offers an expansive boardwalk with chic shopping, dining, tours and recreation. Personal indulgences and high-tech amenities are also easy to find. Then there's





the exciting nightlife. Visit Ariapita Avenue, and a strip of restaurants, bars, casinos, and live entertainment can be found on any night. You can also enjoy the city's upscale dining, sample the street cuisine in St. James, take in theatre or dance the night away at the 51 degrees club on Cipriani Boulevard or Club Zen on Keate Street to name a few.

Trinidad is known for its hustle and bustle and is the economic tiger of the Caribbean region. Yet with all the trimmings of modernity, it still coexists in harmony with nature. Along the Northern Coast Road, you have a breathtaking view of the Caribbean Sea, and sumptuous local cuisine to sample along the way. Central Trinidad also hosts the Scarlet Ibis and other exotic species at the Caroni Swamp. Despite the fact that Trinidad is very metropolitan, upon deeper exploration you'll find proof of its ecological and geographical diversity – a product of its one-time attachment to Venezuela's South American mainland. With over 450 species of birds, 600 types of butterflies, and 23,000 species of flora and fauna, Trinidad and Tobago is rich in biodiversity. The beauty of the two islands lies in their individual abilities to offer distinctive, yet equally enjoyable experiences.

Tobago, Trinidad's sister island, continues to move in a time warp where you can count the beauty of each second. Just a 15-minute flight or two-and-a-half-hour ferry ride from Trinidad, it is the quintessential Caribbean island. Secluded beaches, quaint villages, sumptuous cuisine, and charming hotels make it a perfect escape. Nature lovers can also enjoy scuba diving, eco trails and bird watching. Some eco resorts and villas also have

nature reserves and bird sanctuaries right on the property.

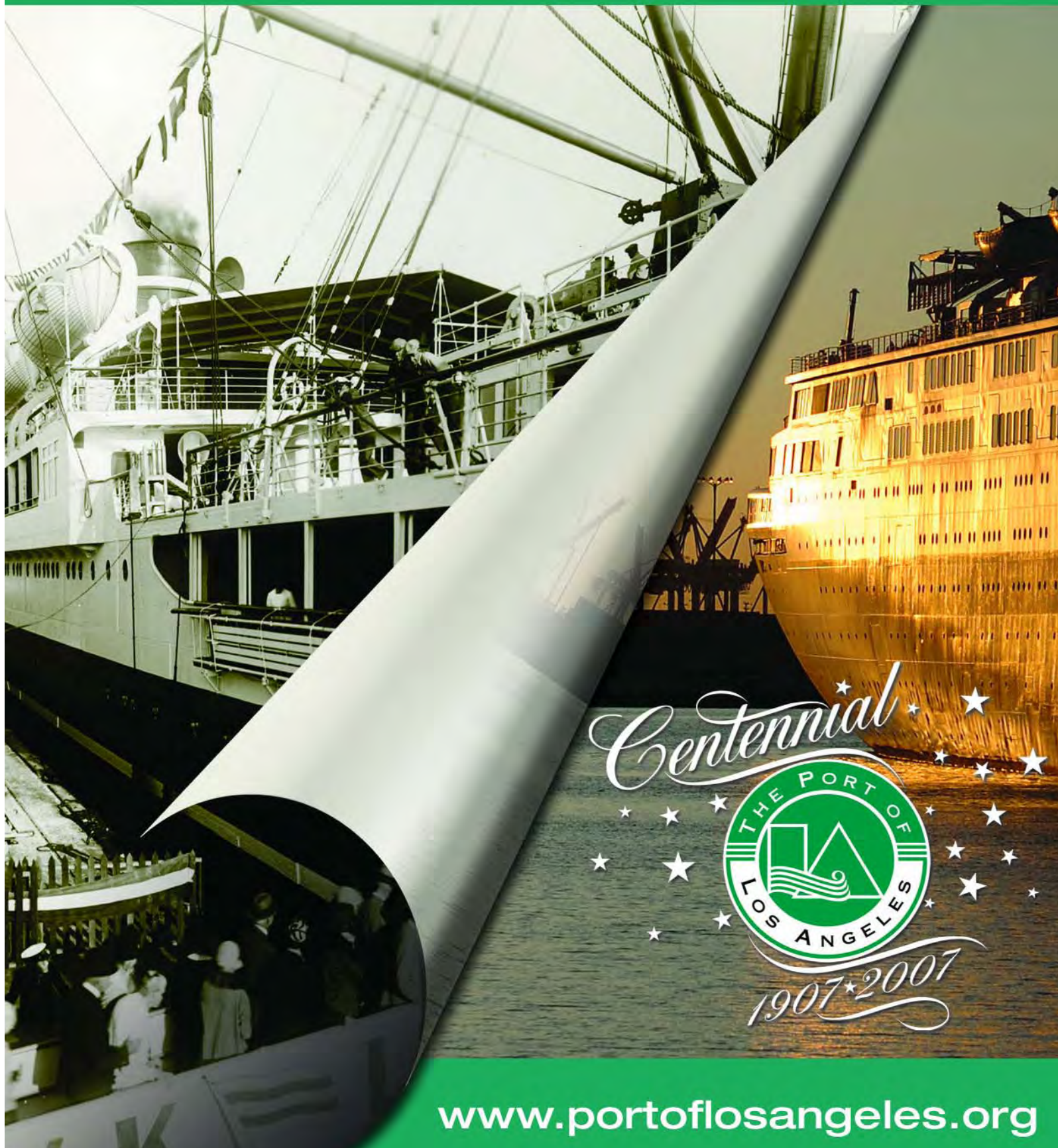
Tobago has some of the best diving in the Caribbean, and a wide variety of marine life. Adventurous divers will love the North-eastern fishing village of Speyside with its lush reefs, and the smaller islands off of Tobago – Goat Island and Little Tobago – which provide plenty of shelter. Meanwhile in the South-West of the island, there's much easier diving for the casual diver with good reefs and wrecks to visit, and calmer dives. Tobago is also home to the oldest protected rainforest in the Western Hemisphere.

Trinidad and Tobago has endless ways in which to charm travellers, and FCCA is confident that cruise industry partners will be equally thrilled. The islands' rich culture and ethnic diversity are reflected in their cuisine, music, and heritage, which are constantly celebrated in numerous festivals year-round. The most popular of festivals is Trinidad's Carnival, which spawns a season of revelry, culminating in two days of uninhibited celebration in the pre-Lenten season. Major cities across the world continue to pay homage to Trinidad's Carnival, by hosting smaller Carnivals, all in an attempt to recapture its magic.

Trinidad and Tobago is intent on giving you a true Caribbean, FCCA experience – one which makes you fall in love with travel and tourism all over again. We hope that you can join us in Trinidad, as your participation is the heart of our success.



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### ***Beguesse Fitzpatrick*** ***CFM Welfare Assistant*** ***Celebrity Cruises***



#### **Trinidad & Tobago**

Mr. Beguesse Fitzpatrick is from Trinidad and Tobago.

Born and raised on board *Galaxy*, as he likes to point out because he likes long contracts and short vacations. Enjoying the life on vessels so much he's been already thinking of changing his permanent address.

Mr. Beguesse started as a cleaner three years ago with Celebrity Cruises and is now CFM Welfare Assistant on board *Galaxy*. (CFM – Celebrity Family Member; author comment).

“My job as CFM Welfare Assistant is to make all the crew members on the ship happy” says Beguesse with a big smile. And how does he do that? By organizing various activities and parties for the workers on board, by taking ownership of their needs and answering their queries instantly.

Diversity on the ships has the biggest impact on this gentleman from the Caribbean: “I really like to encounter other cultures, discover different ways of life, different way of thinking to hear different music...”

He will never forget a day on board a year ago when one crew member decided to wash a t-shirt and hang it to dry on the fire sprinkle and broke it.. All sprinkles on deck 4 went off. Everybody on that deck were instant participants in a wet t-shirt competition...

### ***Lorenzo Gutierrez*** ***1st Cook*** ***Princess Cruises***



#### **Mexico**

Lorenzo Gutierrez began his career with Princess Cruises eighteen years ago onboard the original *Island Princess*. A native of Acapulco, Mexico, Lorenzo first joined as a regular cook in the galley and has worked his way around all sections of the galley, learning all aspects of Princess' culinary operations.

He now serves as head of the Crew Galley, which he says he thoroughly enjoys. “I have a great team and I'm proud to be part of the galley brigade.”

He was honored to be named Employee of the Month aboard Sea Princess last year.



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**Liberty of the Seas**

**Inaugural Cruise:** May 19, 2007  
**Shipyard:** Kvaerner Turku  
**Shipyard Location:** Finland  
**Country of Registry:** Bahamas  
**Cruising Speed:** 21.6 knots

**Size & Capacities**  
**Tons:** 160,000  
**Length:** 1,112 feet  
**Passengers:** 4,375  
**Crew:** 1,360



**Accommodations**

Suites: 120  
 Cabins with Balcony: 722  
 Ocean View Cabins: 240  
 Inside Cabins: 561  
 Inside Promenade View: 172

**Facilities**

Decks: 15  
 Passenger elevators: 14

**Nationality of Crew**

International

**Deployment**

Eastern and Western Caribbean



**Emerald Princess**

**Inaugural Cruise:** April 11, 2007  
**Shipyard:** Fincantieri Cantieri Navali Italiani  
**Shipyard Location:** Monfalcone, Italy  
**Country of Registry:** Bermuda  
**Cruising Speed:** 21.5 knots

**Size & Capacities**  
**Tons:** 113,000  
**Length:** 951 feet  
**Passengers:** 3,070  
**Crew:** 1,200



**Accommodations**

Suites: 26  
 Mini-suites: 178  
 Cabins with Balcony: 674  
 Ocean view Cabins: 218  
 Inside Cabins: 434

**Facilities**

Decks: 15  
 Pools: 4, Whirlpools Spas: 7

**Nationality of Crew**

British/Italian

**Deployment**

Mediterranean and Caribbean



# Around The Caribbean



*FCCA Security Operations Committee meets with Carrole A. M. Guntley, Director General, Jamaica (center) and Hon. Edmund C. Bartlett, Minister of Tourism, Jamaica (right).*



*FCCA Security Operations Committee presents a check to Lieutenant Colonel George Lovell (Ret.), National Emergency Coordinator, NEMO Secretariat. (2nd from left) and Hon. Godfrey Smith, Minister of Tourism, Belize (right).*



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