



# Florida-Caribbean Cruise Association

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## Cruise Industry Overview - 2014

### State of the Cruise Industry

#### 2013

The 2013 year-end passenger forecast is that a record 21.3 million passengers cruised globally during the year, including 11.7 million North Americans. Coupled with an annual occupancy percentage that exceeded 100%, this passenger growth shows sustained consumer interest in cruising and an industry where demand continues to outstrip supply.

In 2013 alone, 13 new ships—totaling a \$3.23 billion investment and 14,887 new beds—debuted globally from CLIA Member Lines, presenting new options for guest capacities ranging from 60 to 3,969 to sail the world's waters for the first time.

#### 2014

In 2014, the cruise industry's growth continues as we enter an era distinguished by an additional 15 innovative, feature-rich ships, international ports-of-call and convenient departures from proximal embarkation cities. The current cruise ship order book from 2014-2016 includes 34 new ships (22 ocean-going vessels and 12 river-boats/coastal vessels) from FCCA and/or CLIA Member Lines, with over 60,000 berths and a capital investment value over \$14 billion.

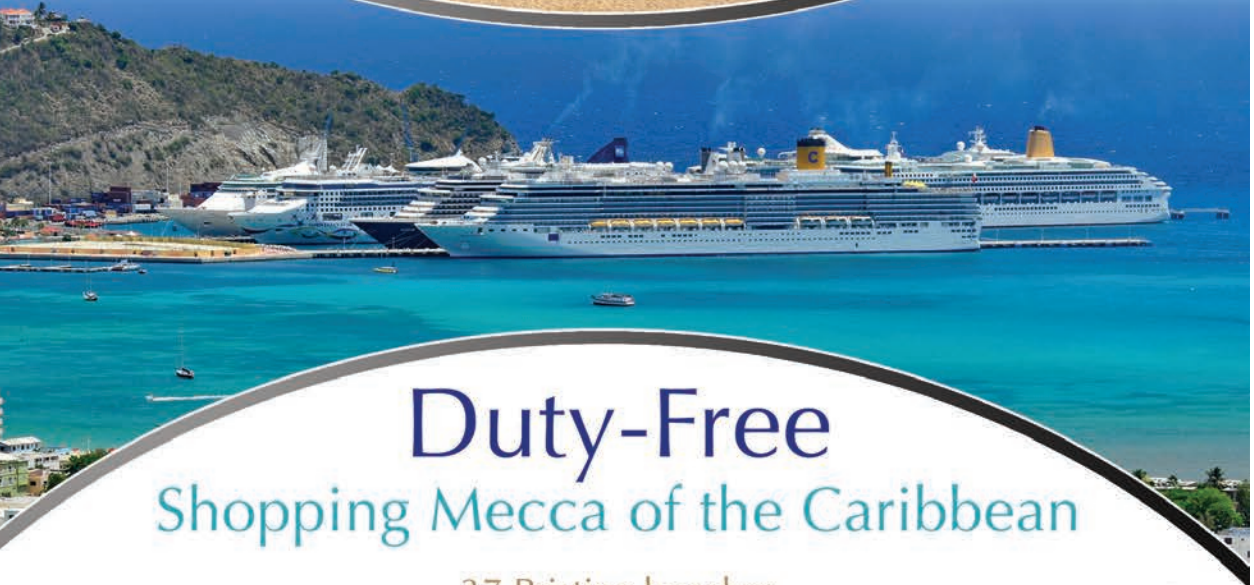
Based on known ship additions and deletions, the industry forecasts 21.7 million passengers to cruise globally in 2014, with 11.9 million sourced from North America and 9.8 comprised of international passengers. This represents an approximate 2% increase over 2013's figures and is commensurate with the added capacity.

There has been growth in all global cruise regions, but the industry's success is headlined by the Caribbean. It continues to rank as the dominant cruise destination, accounting for 34.4% of all global itineraries in 2013 and a projected 2014 capacity share of 37.3% due to deployments of new and exciting ships.

Note: Cruise passenger and capacity statistics as of March 2014 and include some estimates. New ship announcements, vessel retirements and quarterly passenger reporting will provide updates to these statistics that are subject to revision.

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Region	2014 Deployed Capacity Share
Caribbean/Bahamas	37.3%
Mediterranean	18.9%
Europe w/o Med	11.1%
Asia	4.4%
Australia/New Zealand/S. Pac	5.9%
Alaska	4.5%
South America	3.3%
Other Programs	14.5%

Today's ships offer a new generation of onboard features and a world of innovation, including water parks, surf pools, planetariums, golf and sky-diving simulators, ice-skating rinks, rock-climbing walls, bungee-trampolines, self-leveling billiard tables, demonstration kitchens, multi-room villas with private pools, and much more. Today's new ships also offer facilities to accommodate family members of all generations traveling together or even passengers cruising solo.

From a product standpoint, cruise ships offer an array of feature-rich innovative facilities, amenities and services that exceed the expectations of a growing population of travelers. Today's cruisers can easily find a cruise line, ship, stateroom and itinerary to perfectly suit them.

## Cruise Industry Overview

- In 2013, a record 21.3 million passengers are estimated to have cruised globally.
- The industry estimates 21.7 million to cruise globally in 2014.
- The cruise industry is the fastest-growing category in the leisure travel market. Since 1980, the industry has experienced an average annual passenger growth rate of approximately 7.2% per annum.
- Since 1990, over 200 million passengers have cruised the CLIA North America brands. Of this number, over 70% of the total passengers have been generated in the past 10 years and nearly 40% in the past 5 years.
- The average length of cruises is over 7 days (7.2 days).

- The cruise product is diversified. Throughout its history, the industry has responded to vacation desires of its guests and embraced innovation to develop new destinations, new ship designs, new and diverse onboard amenities, facilities and services, plus wide-ranging shore side activities. Cruise lines have also offered their guests new cruise themes and voyage lengths to meet the changing vacation patterns of today's travelers.
- The cruise industry's establishment of over 30 North American embarkation ports provides consumers with unprecedented convenience, cost savings and value by placing cruise ships within driving distance of 75% of North American vacationers. By providing significant cost savings through the convenience of avoiding air travel, the new homeports have introduced leisure cruising to a wider customer base.
- From a capacity standpoint, utilization is consistently over 100%.
- The Caribbean and Bahamas is the number one destination, with 37.3% of capacity in 2014.
- The current cruise ship order book from 2014-2016 includes 34 new ships (22 ocean-going vessels and 12 riverboats/coastal vessels) from FCCA, CLIA Member and global lines, with over 60,000 berths and a capital investment of value of over \$14 billion.

*Note: Cruise passenger and capacity statistics as of March 2014 and include some estimates. New ship announcements, vessel retirements and quarterly passenger reporting will provide updates to these statistics that are subject to revision.*

## Economic Impact of Cruise Industry on Destinations

Highlights of the Business Research & Economic Advisors (BREA) 2012 study *Economic Contribution of Cruise Tourism to the Destination Economies\** include:

- Cruise tourism contributed \$1.99 billion of direct expenditures in the participating 21 destinations for the 2011-2012 cruise year.
- Cruise ship calls brought 15.44 million passenger visits and 2.7 million crew to the participating destinations during the 2011-2012 cruise year, which generated \$1.48 billion and \$261.9 million in onshore spending, respectively.
- Average expenditure per passenger across all destinations was \$95.92, and average expenditure per crewmember was \$96.98.
- Cruise-related expenditures generated 45,225 jobs throughout the studied destinations, which paid \$728.1 million in wage income to the residents.

- The typical cruise ship carrying 2,550 passengers and 480 crew members conservatively generates \$225,596 in passenger and crew expenditures during a single port-of-call visit.  
*(Amount based on 85% of passenger visits and 38% of crew visits using average expenditures.)*
- Cruise passengers were, in general, very satisfied with their Caribbean cruise vacation, with a mean score of 7.6 for “overall visit” (using a 10-point scale with 10 being the highest and 1 being the lowest).

It is, therefore, clear that the cruise industry’s economic impact in the Caribbean and Latin American regions is significant and continues to grow. The Member Lines of the FCCA urge you to carefully analyze all this information and see for yourself how the cruise industry is positively impacting your country’s economy.

2012 participants included: Antigua & Barbuda; Aruba; The Bahamas; Barbados; Belize; British Virgin Islands; Cayman Islands; Colombia; Costa Rica; Curaçao; Dominica; Dominican Republic; Grenada; Honduras; Nicaragua; Puerto Rico (San Juan); St. Kitts and Nevis; St. Maarten; St. Vincent and the Grenadines; Turks and Caicos; U.S. Virgin Islands

*\*This study is coordinated between the FCCA and BREA every three years, and participation is available for any interested Caribbean/Latin American destination.*

# What is the FCCA?

The Florida-Caribbean Cruise Association (FCCA) is a not-for-profit trade organization composed of 15 Member Lines operating more than 100 vessels in Floridian, Caribbean and Latin American waters. Created in 1972, the FCCA's mandate is to provide a forum for discussion on cruise operations, tourism development, ports, tour operations, safety, security and other cruise industry issues. By fostering an understanding of the cruise industry and its operating practices, the FCCA seeks to build cooperative relationships with its partner destinations and to develop productive bilateral partnerships with every sector. The FCCA works with governments, ports and all private/public sector representatives to maximize cruise passenger, cruise line and cruise line employee spending, as well as enhance the destination experience and the amount of cruise passengers returning as stay-over visitors.

## Member Lines:

AIDA Cruises, Azamara Club Cruises, Carnival Cruise Lines, Celebrity Cruises, Costa Cruise Lines, Cunard Line Ltd, Disney Cruise Line, Holland America Line, MSC Cruises (USA) Inc., Norwegian Cruise Line, P&O Cruises, Princess Cruises, Royal Caribbean International, Seabourn, TUI Cruises.

## Partnerships:

Some of the ways the FCCA works with the cruise-oriented destinations include:

- **Port Improvements** – The FCCA provides technical assistance on port expansion, including input on port and pier design, improvements and planned new services.
- **Research** – Research is conducted and provided to destination partners in an effort to create a better understanding of cruise passengers; improve the landside product delivery; and maximize cruise tourism's benefits.
- **FCCA Outreach Program** – FCCA training seminars provide destination partners with valuable information regarding cruise passengers—their wants, needs and habits—enabling the destinations' private and public sectors to optimize the impact of cruise tourists in their country. The FCCA has four core training programs:
  - *Service Excellence: "Cruise Passengers Equal Profits:"* Workshop on the importance of excellent customer service and the economic impact of the cruise industry. A happy guest not only spends more money, but also will return again and again, thereby producing greater profits and converting cruise passengers into return stay-over guests.
  - *Taxi Pride:* Entertaining and informative workshop geared toward taxi drivers, tour operators and vendors providing ground transportation. It focuses on five main areas: courtesy, professionalism, marketing, rules and safety.

In addition, the FCCA will design outreach programs based on destination requests, including, but not limited to, the following areas: hurricane/beach/road cleanups; painting schools, hospitals and orphanages; visiting the elderly; community projects; and volunteering at hospitals.

- **FCCA Training Partner** – Aquila’s Center for Cruise Excellence offers training for Tour Guides, Tour Operators and workshops for member Destinations aimed at raising the level of Excellence in the cruise industry. Aquila’s signature programs include:
  - *Tour Guide Excellence International Certification*: an Online Training and Certification Program that teaches Tour Guides what makes an excellent tour guide and the skills to turn that knowledge into a practical reality when guiding cruise shore excursions. The program involves six interactive sessions on cruise-specific topics, including: hospitality, service, research, presentation, preparation and risk management. Successful completion of an exam and video assessment earns participants their International Certification.
  - *New! ACE Tour Operator Designation*: an Aquila Cruise Excellence designation awarded to Tour Operators who meet the requirements for service excellence in the cruise industry. Exclusive to FCCA Member Tour Operators, this program allows Tour Operators to demonstrate that they have the policies and procedures in place to meet or exceed the established standards of quality that are recognized and respected throughout the cruise industry.

## **FCCA Membership:**

The FCCA has designed a two-tier membership program for destination partners and private organizations impacted by cruise tourism to cultivate an even closer, direct working relationship with FCCA Member Lines.

### ***Associate Membership***

The FCCA Associate Membership Program is designed as a partnership to help promote a business to the cruise industry at a great value. For only \$500 per year (about \$42 a month), it includes the following benefits:

- Exclusive Associate Member reception at the FCCA Conference and Trade Show
- Exclusive VIP tour during the FCCA Conference and Trade Show
- Upgraded FCCA membership badge at the FCCA Cruise Conference & Trade Show
- Savings on registration fees for the annual FCCA Cruise Conference & Trade Show
- \$500 discount on advertising for first year of membership
- Discount on Tour Guide Excellence training and exclusivity on ACE Tour Operator Designation from Aquila’s Center for Cruise Excellence
- Discount on insurance program for tour operators through AON Risk Services
- Discount on the FCCA Emergency Card Program through Trinity Air Ambulance
- Access to up-to-date research and statistical studies (customized to your destination if requested)
- Promotional updates on the cruise industry (current e-mail required)
- Listing/profile in the FCCA Membership Directory
- Listing in the Conference issue of FCCA’s Cruising Magazine
- Associate Member FCCA pin
- Membership certificate
- Use of Associate Member FCCA logo on printed materials and cruise line proposals

## **Platinum Associate Membership**

Platinum Membership cultivates close relationships with FCCA Member Line CEOs, presidents and executives that decide what products are sold onboard and where ships call. For the price of some publications' advertising, Platinum Members gain direct access to the cruise industry. In addition to the benefits above, Platinum Membership includes:

- One complimentary cabin for the annual FCCA PAMAC Cruise Summit
- One complimentary cabin for inaugural cruise events
- One complimentary hotel room for the annual PAMAC Conference
- One complimentary registration for the FCCA Gala
- One complimentary registration for the FCCA Conference and Trade Show
- Exclusive one-on-one meetings during the FCCA Conference and Trade Show
- Exclusive receptions during the FCCA Conference and Trade Show
- Private lunch meeting at the FCCA Conference and Trade Show
- Preferred VIP seating at the FCCA Conference Opening
- Exclusive VIP receptions at the FCCA booth during Cruise Shipping Miami
- Exclusive VIP events during Cruise Shipping Miami
- Access to FCCA Operations Committee meetings
- Chance to speak/present at FCCA panels and workshops
- Assistance setting meetings
- Company profile and updates in the FCCA's Cruising Magazine
- Platinum listing in the FCCA Membership Directory
- Advertising and marketing discounts
- Membership in the FCCA Urgent Care Program through Trinity Air Ambulance
- Seat on FCCA's Platinum Associate Membership Advisory Council (PAMAC)
- Platinum Membership plaque/clock

## **FCCA Foundation:**

The FCCA Foundation provides a tangible mechanism for the cruise industry to fund a range of humanitarian causes in the Caribbean and Central American regions, along with Mexico and Colombia. In its 19 years of existence, the Foundation has impacted thousands of citizens by providing millions of dollars in support and countless hours to causes and charities throughout the region. Programs include:

- *Holiday Gift Project* – The FCCA reaches out to many Caribbean and Latin American destinations by providing gifts and holiday cheer to children in foster homes or institutions. The presents are delivered to partner destinations on Member Lines' vessels, and the crew and FCCA associates then give the gifts at a festive party. In 2013, 33 destinations participated in the program, and about 7,000 children received presents and smiles because of the efforts.
- *Children's Essay and Poster Competitions* – The FCCA orchestrates these competitions to further educate FCCA destination partners' youth by learning and thinking about the cruise industry's impact, along with their destinations' and citizens' roles in it, while also prompting practical problem solving. There are two divisions—junior (12 years and under) and senior (13-16)—that each receive 1st-3rd-



place prizes of 3,000, 1,500 and 1,000, respectively, for themselves and their schools, along with a \$200 award for every finalist submitted by the participating destinations. The first place recipients also receive functions in their honor.

### **Foundation Events** *(All Proceeds Support the Foundation):*

- **FCCA Online Auction** – Taking place every December and open to anyone with a valid e-mail address, this auction features items ranging from vacation packages, artwork, jewelry and sports memorabilia—all graciously donated by FCCA Member Lines and partners throughout the Caribbean and Latin America.
- **FCCA Gala** – Created by the Member Lines 20 years ago, the Gala gathers cruise executives and industry stakeholders on a social level to establish new relationships or enhance existing ones. It features a cocktail reception, silent art auction with works from Park West Gallery, and dinner with a selected table host—each a Member Line executive, president and/or CEO.

### **FCCA Magazines and Publications**

- **Cruising Magazine** – Published quarterly, Cruising is the official magazine of the FCCA and cruise industry, serving to educate and enlighten about the industry’s inner-workings. With a distribution list of over 18,000 via the Internet and direct mailings, Cruising offers advertisers access to over 13,000 travel agents, along with partner destinations’ private and public sectors and Member Line decision makers in marine operations, marketing, strategic planning and more.
- **The Highlight Issue** – Features a cruise industry who’s who, with cruise executive profiles and information on FCCA Member Lines. The Highlight Issue is an essential tool when dealing with the cruise industry.
- **Membership Directory** – The FCCA Directory contains a complete listing of all FCCA Associate and Platinum Members, as well as partner destinations’ ministers of tourism.
- **Conference Program and Gala Program** – Delegates attending these functions receive comprehensive programs packed with useful FCCA schedules, information and accomplishments.

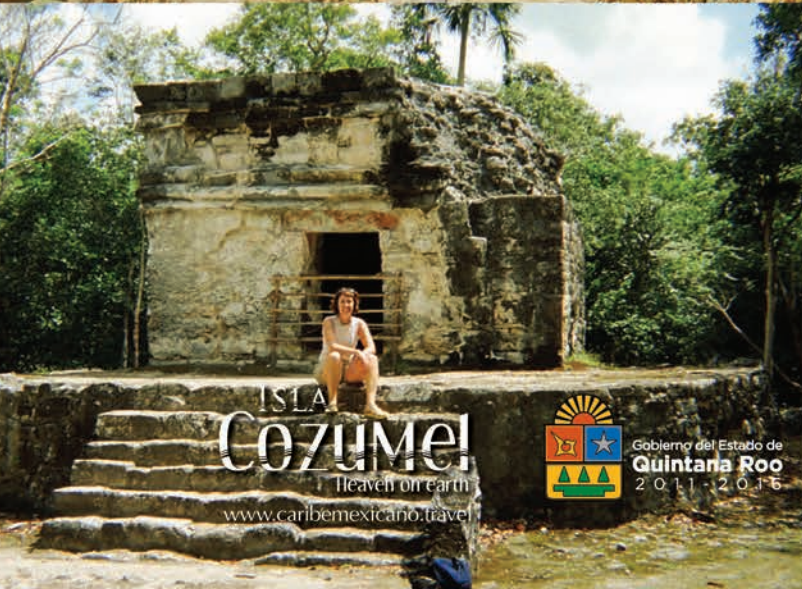
### **FCCA Cruise Conference & Trade Show**

For many cruise executives, destinations, suppliers and tour operators, this is the premier industry event of the year—an opportunity to meet in a roundtable format with key players to analyze industry trends and discuss current issues. The FCCA Conference brings together over 100 cruise executives and 1,000 industry stakeholders. For 2014, the Conference will be held in St. Maarten from October 6 – 10.

***As the FCCA sails into the future, it remains steadfast in its mission to create mutually beneficial relationships between cruise lines and partner destinations’ private and public sectors.***

# COZUMEL

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SECRET ”



patricia y, New York

#### Flamenco Beach, Culebra

If you only stay in San Juan during your time in PR, you are missing out, my friend! Take the ferry to Culebra, a small island off the eastern coast of Puerto Rico. When you get there, go to the #2 ranked most beautiful beach IN THE WORLD, Flamenco. Its super fine white sand and crystal clear calm waters await you. It's TOTALLY worth it if you're looking to unwind. It's my favorite part of PR. I GO EVERY YEAR.

*Flamenco is not only one of the most award-winning beaches in the Caribbean. It's a five star world class attraction. Live your own five star vacation story.*



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# Expertise.



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Florida-Caribbean  
Cruise Association.**

Aon focuses on delivering value and impact to all our clients, and as a result, Aon is the world's leading broker of insurance services.

Just ask the Florida-Caribbean Cruise Association. As the FCCA's endorsed broker for the Global Tour Operator Liability Insurance Program, Aon delivers value in a variety of areas, including Claims Consulting, Loss Control Services, and Disaster Recovery Planning.

With more than 40 Aon and Aon Affiliate offices located throughout the Caribbean and Latin America, we stand ready to serve the needs of the FCCA membership.

#### **Key features of the Global Tour Operator Liability Program:**

- Foreign Commercial Liability and Third-Party Liability Coverage
- Contingent Commercial Auto and Contingent Commercial Watercraft Liability Coverage
- Crisis Response and Crisis Management Coverage
- Meets Cruise Line coverage and limit requirements
- Provides worldwide jurisdiction covering claims brought by claimants anywhere in the world, including USA
- Underwritten by Chartis Insurance Company (Insurance Company of State of PA), A.M. Best Rated A (Excellent)
- An FCCA dedicated 24-Hour Catastrophe-Go Team available to respond in the event of incidents involving serious injuries or major accidents requiring immediate attention

#### **Additional Product Solutions offered:**

Tour Operators Professional Liability  
Property and non-tour operations Casualty Programs involving Marine and Aircraft Liability  
Directors and Officers Liability

To inquire about Aon solutions for FCCA Members contact:

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