James Stangroom

Chair, CruiseBritain

Commercial Manager, The Bristol Port Company

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A membership association that is a joint initiative between British cruise ports and service providers with an aim to...

- Raise the profile of Britain as a world-class cruise destination
- Increase the level of cruise calls at British ports
- Create an effective, consistent & visible cruise destination brand
- Respect regional identities
- Work with global destination associations
- Have a voice in relevant statutory and regulatory matters

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Our port and destination members

- ABP Cruise
- Bristol
- Capital Cruising
- Cruise Hull Yorkshire
- Cruise Wales
- Destination Plymouth
- Dover
- Fowey
- Guernsey
- Harwich
- Isle of Man
- Jersey
- Kirkwall, Orkney
- Liverpool
- London City Cruise Port
- Poole
- Portland
- Portsmouth
- Torquay
- Tyne
- Visit Hampshire

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Our service provider members

- Denholm Wilhelmsen
- Excursions
- GAC Shipping (UK)
- G.P. Wild (Int.)
- Intercruises Shoreside & Port Services
- International Friends
- IRN Research
- Kotug Harbour Towage UK
- Kuoni Destination Management UK
- MBNA Thames Clippers
- Multiport Ship Agencies Network
- Seatrade
- SCH Cruise & Passenger Services
- SMS International Shore Operations
- SMS Towage
- Solent Stevedores
- Svitzer Marine

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Snapshot of today's global industry

- Demand for cruising increased 62% 2005 - 2015
- Global market with four dominant source markets: US, Germany, Britain, Australia. But China is growing!!!

- 314 cruise ships worldwide
- Capacity of 537,000 passengers
- 26.0 million passengers taking a cruise in 2018

- Order book to 2027: 110 new ships, $63.5bn cost, equivalent to 250,000 lower berths

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Snapshot of today's global industry

The British picture…

- 120 cruise ships calling at 68 British ports
- Representing 56 different cruise lines

And the growth in passengers calling at British ports…

- 2007 365,000 passengers
- 2017 1,415,000 passengers
- An increase of 287% in a decade

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Economic benefit of cruise in Britain

2017	Passengers	YoY +/-%	Since 2007	Economic Impact
Day Call Passengers	1.415m*	+17%	X4 growth	€113/£99m**
Embark Passengers	1.1m*	+6%	X2 growth	€198/£173m**
Regional growth particularly strong				

- Excellent growth rates compare favourably with growth rate for overall inbound holiday market
- Each pax visit worth est. €80/£70 to any of 68 ports (2017) for whom tourism revenue can be vital
- Each crew member stepping ashore worth est. €35/£30
- Passenger and crew spend is only 15% of direct cruise line expenditures in UK.
- Total value to UK plc in 2017 was €3.85 billion / £3.38 billion

* source: IRN Research Feb 2018

**source: 2017 national economic value figures GP Wild/CLIA Europe

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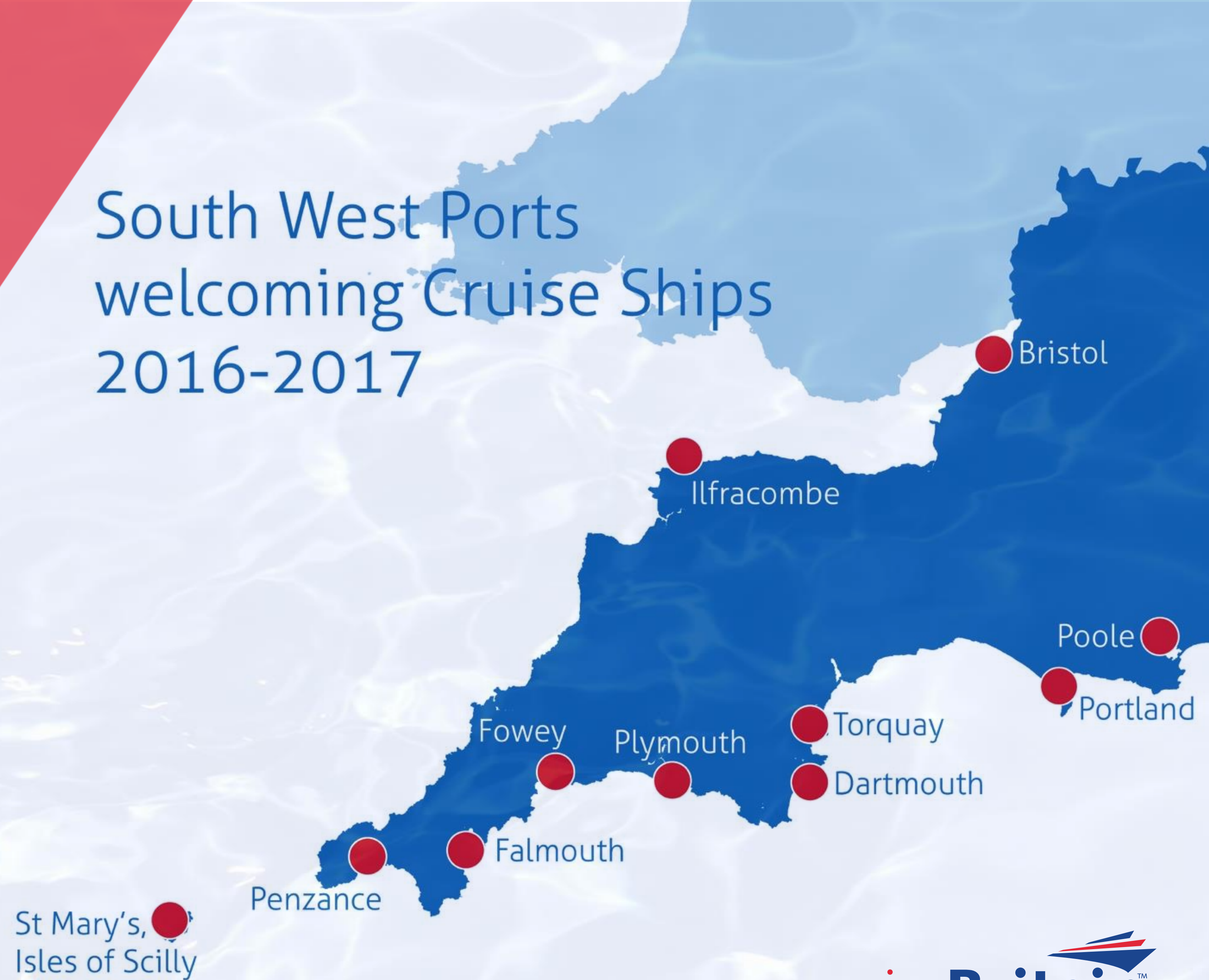
South West Ports welcoming Cruise Ships 2016-2017



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Ships for smaller / tender ports?

BRANDS INCLUDE:

- Cruise & Maritime Voyages
- Princess Cruises
- Hapag Lloyd
- Quark Expeditions
- Phoenix Riesen
- G Adventures
- Majestic International
- Viking

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Ships for smaller / tender ports?

BRANDS INCLUDE:

- Plantours
- Silverseas
- Regent
- Windstar
- Holland America
- Saga
- Hebridean
- Seabourn

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Key themes for cruise industry

- New generation / multi-generation takes to the water
- Travel agent use increases
- New cruisers will take to the ocean
- Also… river cruise demand rising

- AND need for innovative immersive product

Cruise lines see a need for investment in cruise infrastructure and appeal for guests and cruise lines

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Port infrastructure investment

Port	Infrastructure and investment
Liverpool	Planning granted for £55M new cruise terminal due to open 2020
Isle of Man	Plans approved for £11m deep-water berth open 2021
Dover	The Western Docks Revival (£250m) will improve cruise passenger facilities of two existing terminals
Poole	New £10m cruise berth for up to 220m ships
Tilbury	Renovation of 1930s floating landing stage and old Tilbury Riverside Rail station. Cruise car parking at Tilbury 2.
London Central	Dredging at Tower Bridge for deeper draught vessels into Pool of London. Extension of mooring for 230m ships.
Guernsey	New muster station and a covered waiting area
Portland	Main 340m cruise berth extension open Plans to dredge to 10.5m

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Importance of product

- Bespoke, immersive product is the ‘new black’
- Keys: *choice, quality, innovation & value*
- What do pax do on average?
  - 50% take official tour
  - 45% independent travel
  - 5% may not even leave the ship!
- What does this mean for cruise lines (2017 figures)?
  - Cunard £2.2m shore excursion spend
  - Princess £14m shore excursion spend
  - AidaPrima £8m shore excursion spend
  - P&O Cruises £3m shore excursion spend

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Cruise Line challenges

- High volume of passengers and the risk of overcrowding & infrastructure stress
- Internet & non-accredited shore excursion operators
- Lack of language skills especially German speaking guides

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Getting the attention of cruise lines

- Cruise lines cannot work with a myriad of suppliers of individual product
- Shore excursion agents are key – they are the tour operator for the line
  - Route to market
  - Reach multiple cruise lines (Country-wide contracts)
  - Influence decisions
  - Provide solutions
  - Book product
  - Deliver shore excursion that is appealing and fulfils the passenger expectations

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Working with the cruise industry

Excursions Ltd
A world of expertise

KUONI | Destination Management

INTERCRUISES
SHORESIDE & PORT SERVICES SM

International Friends

SMS
SMS INT SHORE OPERATIONS LTD
INTERNATIONAL SHORE OPERATIONS

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View of a transit port

- Destination is still the key influencer in cruise choice
- Local impact studies give the value to the local economy of £60 – 70 per passenger. This may be under-estimated.
- Passenger welcomes and enhancements often seen as key by cruise lines. All add to the rating which a passenger gives the port.
  - Musicians
  - Quayside taster sessions
  - Welcomes in appropriate languages
  - A smile!
- Between 20% (Norway study) - 30% (Liverpool study) may revisit for a land-based holiday .... so increased value to the destination!

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Destination Plymouth Mayflower 400

- Joined CruiseBritain in January 2018
- Promoting the Mayflower 400 destinations to the cruise industry – Cruise line itinerary planners and shore excursion companies.
- Working with other UK cruise ports such as Hull, Harwich, Southampton and Bristol to help build attractive itineraries.
- Building a legacy for beyond 2020! Cruise calls and passenger numbers into the UK continue to grow. It is up to the attractions in the South West to embrace this opportunity.

1620—2020 Mayflower 400™

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Thank you!

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