

Cruise Down Under 2012 Conference

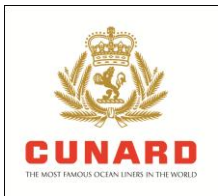
Connecting Experiences - from Ship to Shore



29 – 31 August 2012
Keynote Presentation
Shirley Henderson
Manager – Shore Excursions
Carnival UK

Carnival UK

- P&O Cruises
 - Roots go back to 1837
 - Celebrating 175th anniversary in 2012
 - 7 ships
- Cunard
 - Roots go back to 1839
 - Currently the only cruise line which does regular transatlantic crossings
 - 3 ships



CUK Ships Cruising Down Under

- P&O Cruises
 - Arcadia and Aurora in 2013 and 2014
- Cunard
 - QM2 and Queen Victoria in 2013
 - QM2, Queen Victoria and Queen Elizabeth in 2014
- QM2 Circumnavigation
 - Following success of 2012, QM2 to circumnavigate Australia again in 2014



Top Rated Ports

- Sydney is the main highlight of Australian ports, with Fremantle close second
- Adelaide and Melbourne consistently score high
- Auckland is the top NZ port, followed closely by Wellington
- Burnie featured in 2010. Despite a below average pre-cruise score, post score was high
- Tasmania on future itineraries?

Passengers on World Cruises

- Regular world cruisers
- Once-in-a-lifetime customers
- Repeat cruisers stepping up to a longer or more exotic experience
- International passengers – Europe; USA; Japan
- Average age is 67 – 70
- Sector passengers tend to be a bit younger
- Cunard very popular with Australians

Carnival UK Shore Excursions – my role

- Provide guests with the best possible experience ashore
- Connect the ship - shore experience
 - Quality; Service; Safety; Food; Value for Money
- Shore excursion product – something for everyone
- Promote and market the excursions
- Focus on product development
- Future strategies – what are the next generation of cruisers looking for?

Shore Excursions – Current Trends

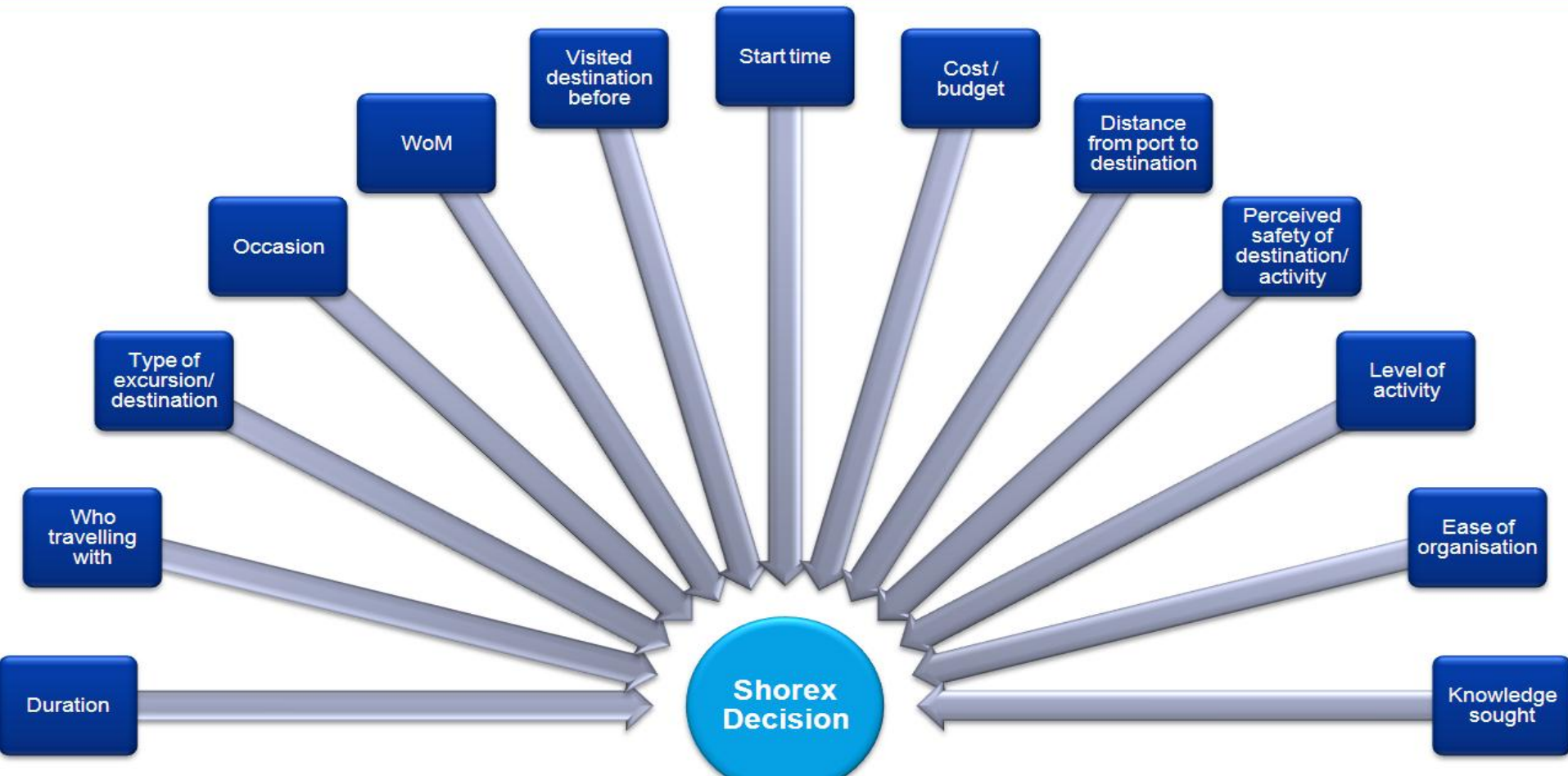
- Information provided by the cruise line is key in determining what passengers choose to do in port
- Top Considerations:
 - Seeing the main sights
 - Flexibility
 - Unique Experience
- Key Service Considerations:
 - Reputable Shore Excursion Operator
 - Getting back to the ship on time
 - Cost

Shore Excursions – Current Trends

- Participation on shore excursions in decline – passengers preferring to explore on their own; cost conscious; and increase in use of independent operators
- Majority of passengers stay close to the ship when exploring independently
- Increased interest in ‘independent excursion options’ – ‘on your own’ or small group tours for a more personal shore experience
- Interest in making last minute arrangements on the pier upon arrival

Purchasing Decisions

There are many factors impacting upon the shore excursion decision – a lot of the time it's a matter of “it depends on . . .”

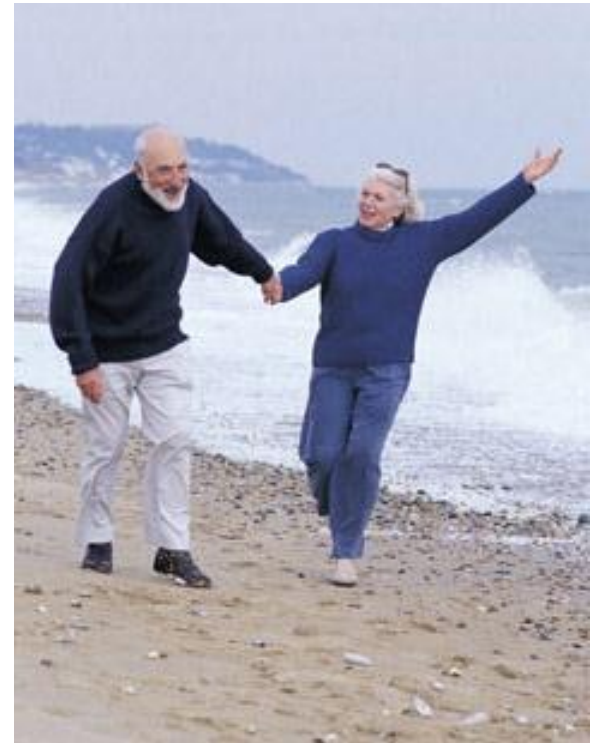


The 'Ideal' Shore Excursion

- 68% prefer half day
- Local delicacies/ produce are the more popular refreshment
 - trips with lunch low priority
- 47% prefer trips with up to an hour free time
- Morning departures 97% popular
 - even split between early (8-8.30) and late (10-10.30) start time
- 83% prefer groups of 8-20 passengers

Tailoring the Shore Excursion Product

- UK and International Passengers
 - Key attractions
 - Culture and wildlife
 - Cater for the independent explorer
 - Good value for money / value for time
 - Opportunity to interact with locals
 - Foreign language guides



Tailoring the Shore Excursion Product

- Australian Passengers
 - Low cost options
 - Independent exploration and flexibility
 - Unique experience - private events, privileged access, celebrities
 - Interactive experiences
 - Activity tours
 - Late starts



'Caribbean style' tours around the world



Connecting Ship – Shore Experience

Shore Excursions Safety

What is a Safety Management System?

- A documented reflection of the Ground Handler's operation
- An SMS is more than just a 'Statement of Intent' – show how you intend to deliver and manage the standards
- Demonstrates 'Due Diligence' not just minimum compliance with the Law
- It protects everyone on the supply chain – and means we can fight claims

Shore Excursions Safety

- Excursion Operator's Direct Activities – Areas to Consider
 - Guide Qualifications (if required)
 - First Aid Provision
 - Maintenance of Equipment
 - Safe System of Work/ Operating Procedures
 - Emergency Response

Shore Excursions Safety

- Subcontractors or Service Providers
 - Excursion Operator to have an oversight of their systems or processes
 - Reassurance that they have ‘the right things’ in place
 - Ensure Subcontractors / Service Providers have record keeping system in place
 - Don’t rely on the Truth – only what you can prove

Shore Excursions Safety

- Premises Used
 - Similar to service providers – ensure the right things are in place
 - Where this is impractical – Excursion Operator should inspect the premises and ensure it is safe
 - Slips, trips and falls make a up a disproportionate amount of claims - consider the small things

Shorex in more remote destinations

- Availability of transport
- Quality of guides
- Managing passenger expectation
- Pre-planning of excursion itineraries
- Communication
- Involvement of the local community
- Post cruise passenger evaluation

Connecting Ship – Shore Experience Support for Onboard Team

- Detailed tour specifications and descriptions
- Key Note Sheets – USP's / Features and Benefits
- Powerpoint Presentations
 - Ship's berth and quayside
 - Images of Venues, Access and Terrain
 - Information on comfort stops / frequency
- General Port Information and Maps
- Local Representative travel on board (where cabin available)
- Mobility

Challenges

- Lack of cruise berth capacity, particularly in the high season Feb to April
- Sydney berth constraints
- Port costs
- Fuel cost is a key cost and business driver
- Passenger expectations



If I could change one thing.....?

- Arrest the decline in shore excursion participation.

Thank you

- Thank you for your attention
- Look forward to further discussions on how we can work together in the future

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