

The Competitive Environment of Shore Excursions

Ellen Lynch
Director, Shore Excursions
Holland America Line
Seabourn

Cruising Australia – 1987!



ROYAL CRUISE LINE 

Royal Odyssey
Christmas in Paradise 1987



Through excellence, we create once-in-a-lifetime experiences every time.
- Holland America Line mission statement



- HAL/SBN brand overview
- Market changes
- What are we doing about the change
- How does it impact you?



Carnival Corporation - The Family



CUNARD





Holland America Line

A Signature of Excellence



#16 in 2016



Holland America Line
A Signature of Excellence

Holland America Line – Simply Premium





SEABOURN®



SEABOURN®

Seabourn Moments

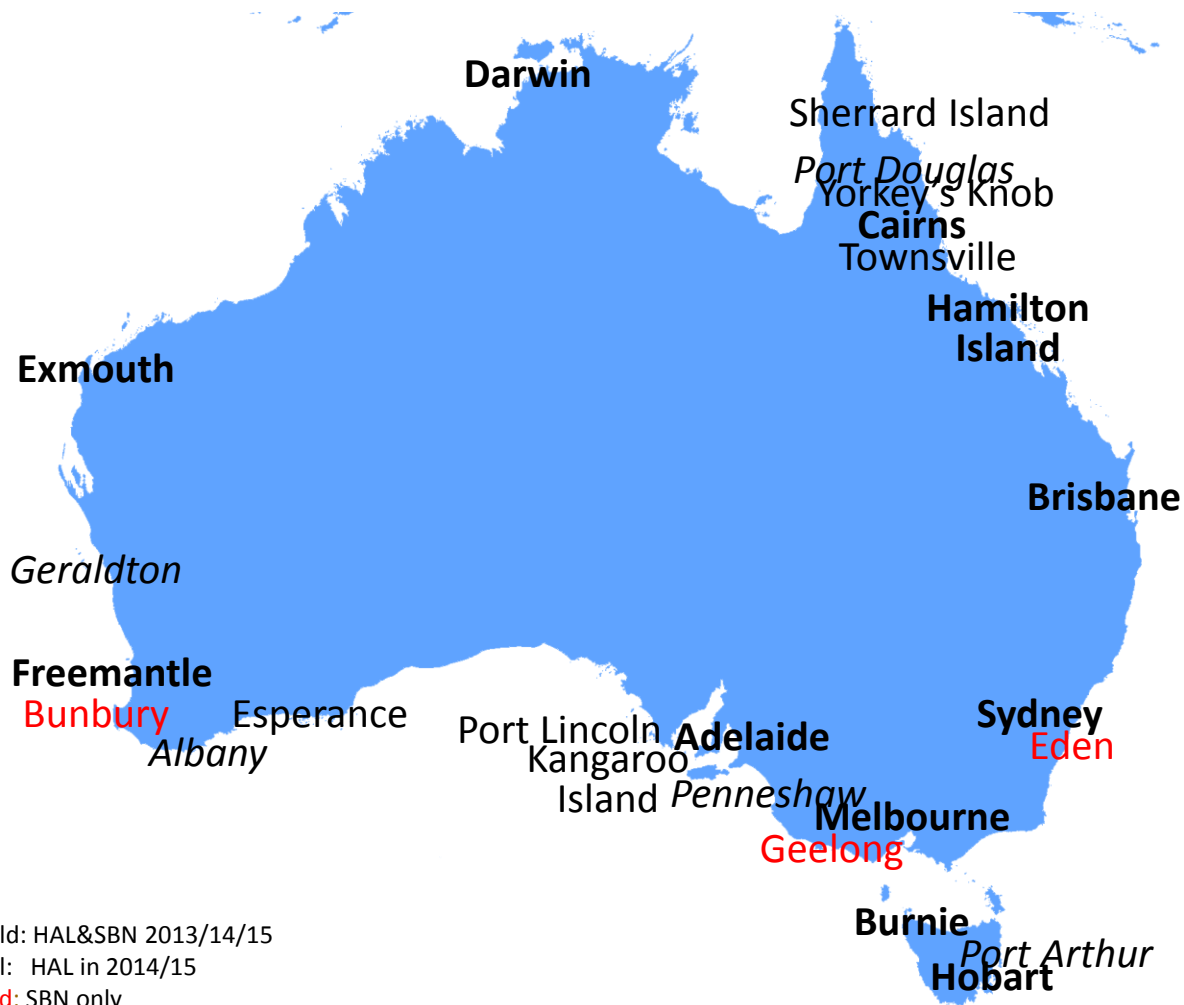


SEABOURN®

Itinerary Planning



Our Commitment to Cruising Australia



Bold: HAL&SBN 2013/14/15

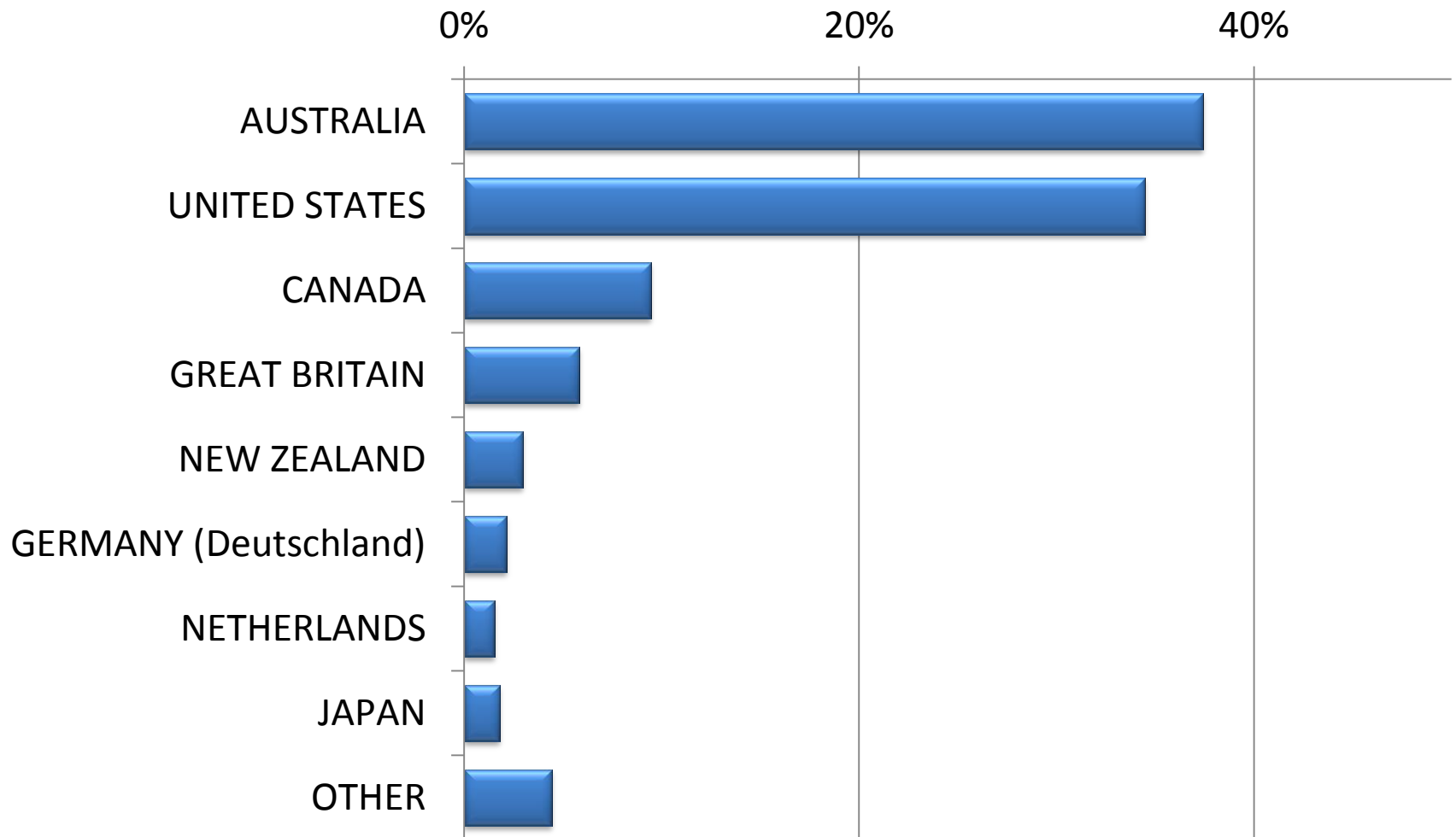
Ital: HAL in 2014/15

Red: SBN only

	2013/ 14	2014/ 15
HAL: Oosterdam, Volendam		
Ports	17	18
Calls	43	55
SBN: Sojourn, Odyssey		
Ports	17	"17"
Calls	31	TBA



Guest Mix for 2012 HAL Australia Voyages



HAL 2012 Australian Trade Overview



What do guests buy?

- Varies by...
 - Itinerary
 - Length of cruise
 - Ship class
 - Brand
 - Time of year
 - Nationality
 - Trends



Tour Development

Know the guest

- International/Domestic
- Independent groups
- Back to Back cruisers
- Cruise Price
- Physically Challenged
- Repeat guests

Itinerary

- Avoid redundancies
- Know competing port options

Tour Mix

- Classics, i.e. city tours
- Unique/exclusive
 - Local, i.e. food, family, customs - “insider information”
 - Soft adventure
 - Must do experiences
 - All price points

Price ceiling

- Not if the guest perceives value

Tour prices	\$27	→	\$11,499 pp
Duration	45 min.	→	8 days!
Tours per port	0	→	39
Longest 1 day tour	18 hours		

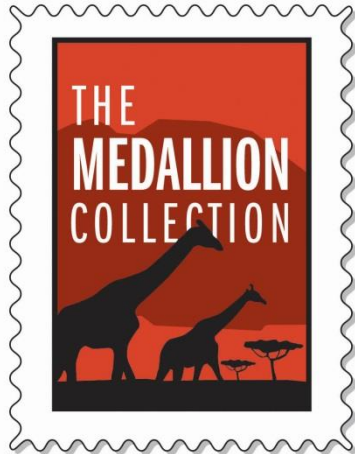


What are we looking for?

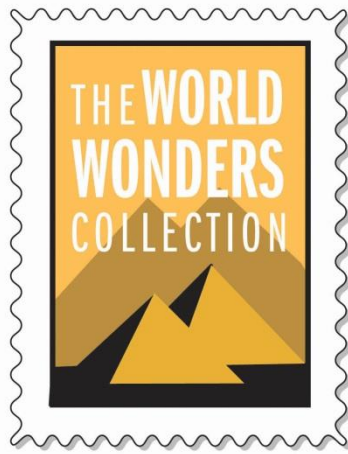
- Local and international appeal
- Guides, guides, guides
- It's all about the delivery –
- Quality transportation
- Brand specific/exclusivity
- Flexibility – we're not easy to work with!



The Collections of Holland America



- Exclusive
- First class style
- Smaller groups



- Seven Wonders of the World
- Other national treasures
- Tours that make you go "Wow"



- Been there done that?
- Designed for repeat guests
- Beyond the well known attractions



- Private transport
- Car, minivan, boat, floatplane, etc.
- Guest customizes their itinerary



- Socially & environmentally significant Excursions
- 'Feel good' or 'altruistic' experience
- Marine Protected Areas



Uniquely Seabourn

- Exclusive experiences
- Expectations are high
- Private Arrangements
 - Dedicated Private Arrangements Coordinator
 - Uncompromising service
 - Customized itineraries



Independent Attractions

- Package attractions
- Maximize time ashore
- We work hard to sell our tours!



Challenges

- Changing demographic
- Multi-language guests
- Independent travelers
- Safety
- Insurance
- Pricing
 - GST
 - Foreign exchange
 - Require net rates/volume
- External Competition



External Competition

Embedded Sales Automation Programs

Guests Booking Directly w/ Tour Operators

Internet Competitors

Guests Selling to Guests

Independent Tour Companies

Groups Going Direct



Guests Choosing Alternatives

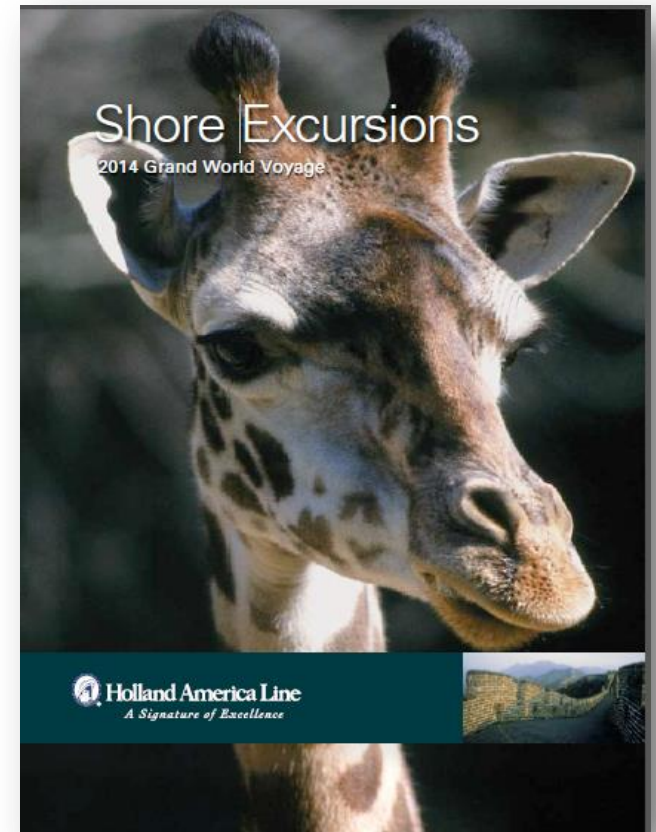
Travel Agents Booking Directly for Guests

Guests Booking Through Online Consolidators



Pre-cruise

- Emails/Blasts
- eBrochures
- Print brochures
- Shore Excursion Call Center
- Website
- Groups sales
- Social Media
- Sales Force
- Analytics team



Website

Destinations > Ports & Excursions

Tweet +1 Share Like 4.9k

Find Review Benefits of Booking Groups The Collections FAQs Terms and Conditions

Select Destination Australia/New Zealand & S. Pacific Brisbane, Australia GO Show All Ports

CRUISES VISITING BRISBANE, AUSTRALIA

Cruise to Brisbane

Once a harsh penal settlement, Brisbane is now Queensland's dynamic capital city. A blend of steel and glass defines the skyline, while riverside delights - botanical gardens, promenades, cafes and markets - mesmerize at eye level. Sample shore excursions: *Brisbane Sights & Lone Pine Koala Sanctuary.*

Shore Excursions Weather Departure Information

All Activities All Collections Tour Language Learn more about The Collections of Holland America Line and our icon categories

Australia Zoo and Mooloolaba On your Own

Experience the amazing Australia Zoo, once the home of the famous Crocodile Hunter, Steve Irwin. Here you will have entry to a facility housing more than 1,200 animals. Plenty of shows introduce you to the animals and the Croc Show at noon is not to be missed. See all the famous mammals, birds and reptiles that you would expect to find and much more. Continue to Mooloolaba for some free time at ...

Approximately 8 Hours

Be the first to write a review

Email Excursion Add to Favorites BOOK NOW VIEW DETAILS

Brisbane & Botanical Gardens

Tour historic Brisbane, passing Parliament House, the Treasury Building, City Hall and the Old Customs House. You will also pass the city's Cultural Centre which combines the Art Gallery, the Performing Arts Complex, the Museum and Public Library—all landmark properties. The gentle Brisbane River flows through green, inner-city parks, past an unusual blend of historic and modern architecture not ...

Approximately 4 Hours

Be the first to write a review

- Videos
 - Shorex
 - Port
- 32% more likely to book after viewing
- Website redesign
- Value message – why buy from us?



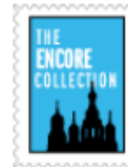
Shore Excursions – Online Reviews

Past guest reviews provide authenticity to the shore excursion program

High Country Explorer: Off the Beaten Track



This adventure tour explores one of New Zealand's least-visited areas—the rugged hill country of the Southern Alps, which offers a dramatic contrast to the flat Canterbury Plains surrounding Christchurch. This off-the-beaten-track excursion will take you into pristine high country that even New Zealanders seldom see. From Akaroa, drive across the fertile Canterbury Plains before crossing the ...



Email Excursion

Add to Favorites

BOOK NOW

VIEW DETAILS

★★★★★ 5 out of 5

Expensive, but worth every penny

Date: April 7, 2013

This tour was on the expensive side, but it was worth every penny from the time we were picked up at the port until we were dropped off over 9 hours later. If you enjoy a little adventure, the jet boat ride makes it all worthwhile. Most of us have not enjoyed this mode of travel in the past, so I found it really fun. The four-wheeling was done on vehicles which were enclosed and not scary at all. The scenery we saw was spectacular. The late lunch served at Flock Hill Lodge was very tasty. If you want to get out and see the New Zealand we all dream about, then take this tour.

[copperheadnaz](#)

Location: Surprise, AZ
Cruise Date Year: 2013
Cruise Date Month: March

Would you recommend this product to a friend? Yes

Approximately 9 Hours



\$\$\$\$



Enjoyed it?

4.7 out of 5

Value

4.7 out of 5

4 out of 4 (100%) reviewers would recommend this product to a friend.

[Write a review](#)



3 out of 3 found this review helpful.

Vote: 3 0

[Report inappropriate content](#)



Holland America Line
A Signature of Excellence

Shorex Promotional Emails

Holland America Shore Excursions%ignore%
Web version%ignore%

Like us on Facebook

Holland America Line
A Signature of Excellence

Find Shore Excursions | Onboard our Ships | Reserve Spa & Indulgences

See More & Save Up to \$125 on Select Shore Excursions*

Add one exceptional memory after another to your cruise experience, and let us take care of the rest.

- **Quality & Service:** Professional, local guides offer exceptional guidance ashore and Shore Excursions staff on board provide expert advice
- **Convenience & Peace of Mind:** Make the most of your time ashore with worry-free return to the ship
- **Uncompromised Value:** Superior quality and competitive pricing on award-winning shore excursions
- **Upgrade your Mariner Society status:** Earn one Cruise Day Credit for every US\$300 spent on shore excursions

Book shore excursions online or call 1-888-426-9376

Special Offer!
Promo code: HAKG01

Save up to \$125 on select Shore Excursions* when you enter the above promo code.

Book by Thursday, March 7.

explore ashore

1. Increase prebooked participation and demand
2. Mitigate erosion of our sales
3. Currently blasted in North America

Special Offer!
Promo code: HAKG01

Save up to \$125 on select Shore Excursions* when you enter the above promo code.

Book by Thursday, March 7.

“New promo code capability”



Shore Excursion Call Center

- 15 person shore excursion call center
- 100K+ calls annually
- Alternative to the website
- Agents can upsell
- North American/Australian/Dutch toll free lines - Australia since February 2013



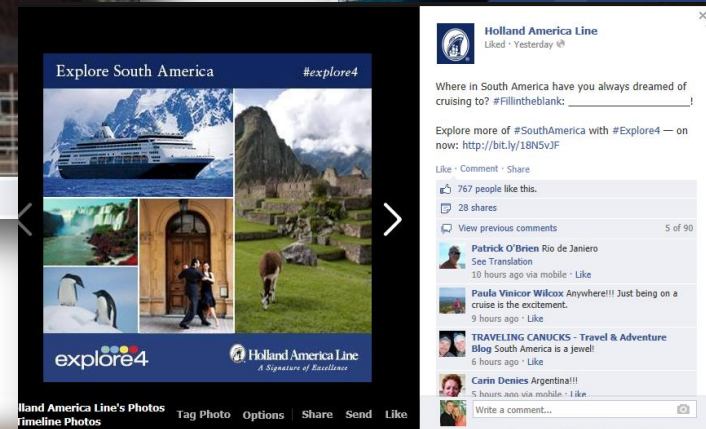
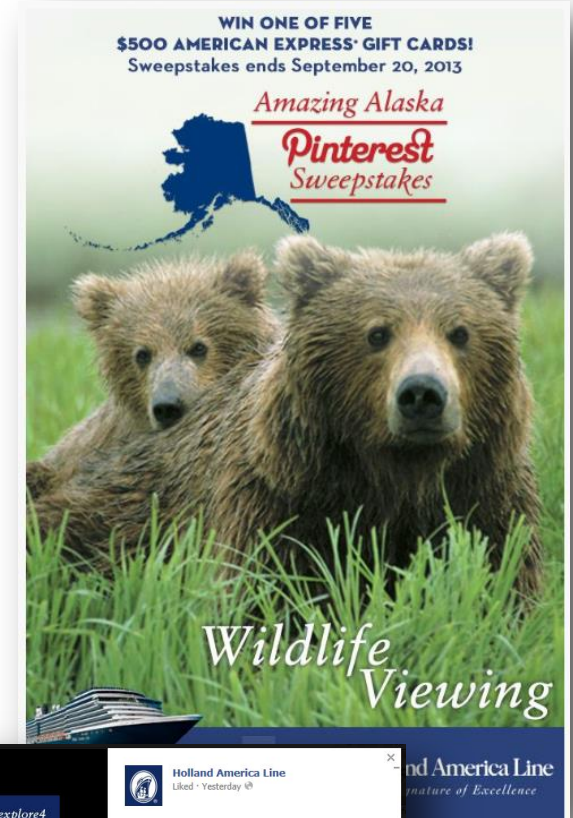
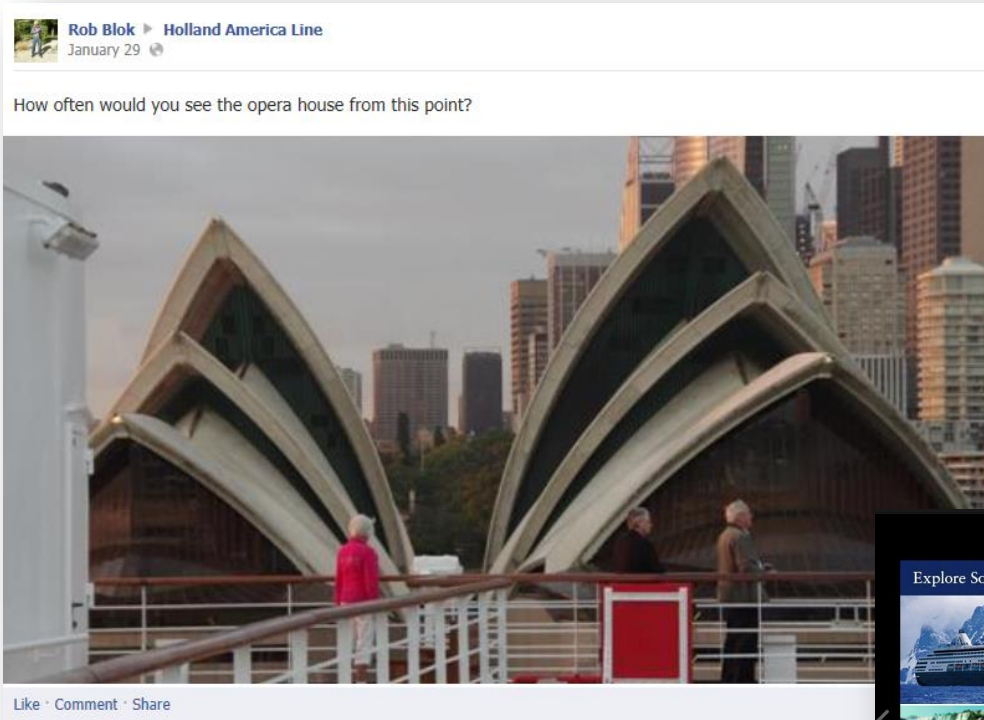
Group Shore Excursion Website

- Online requests
- Custom, exclusive transport
- Group tours visible only to the group



Social Media

Facebook, Twitter, YouTube & Pinterest



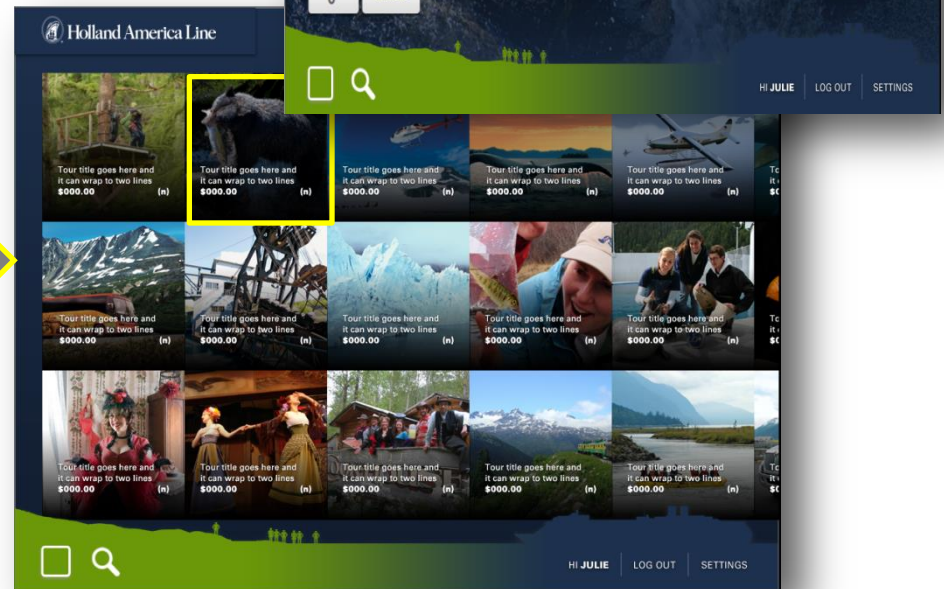
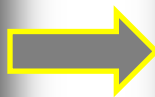
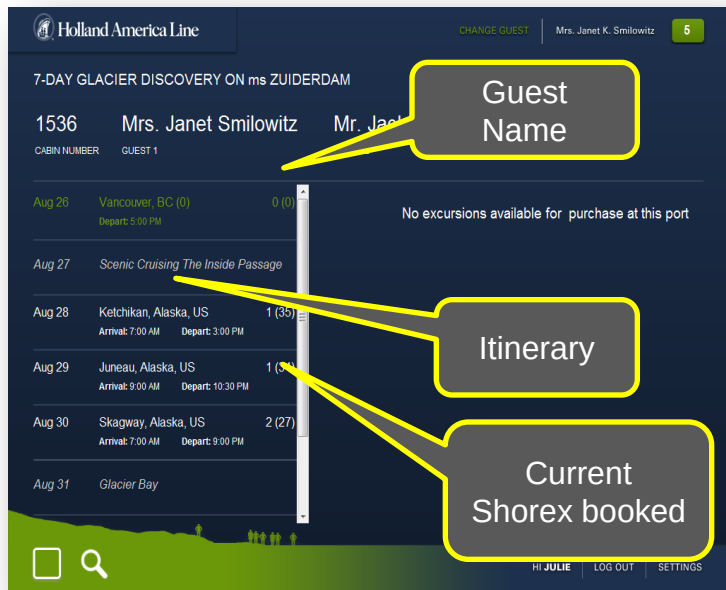
Onboard

- Tour Talks
- Tour videos
- Order Forms
- Vendor Rack Cards
- Flyers
- iPads
- Shore Excursion Desk
- Port Lecturer



iPads

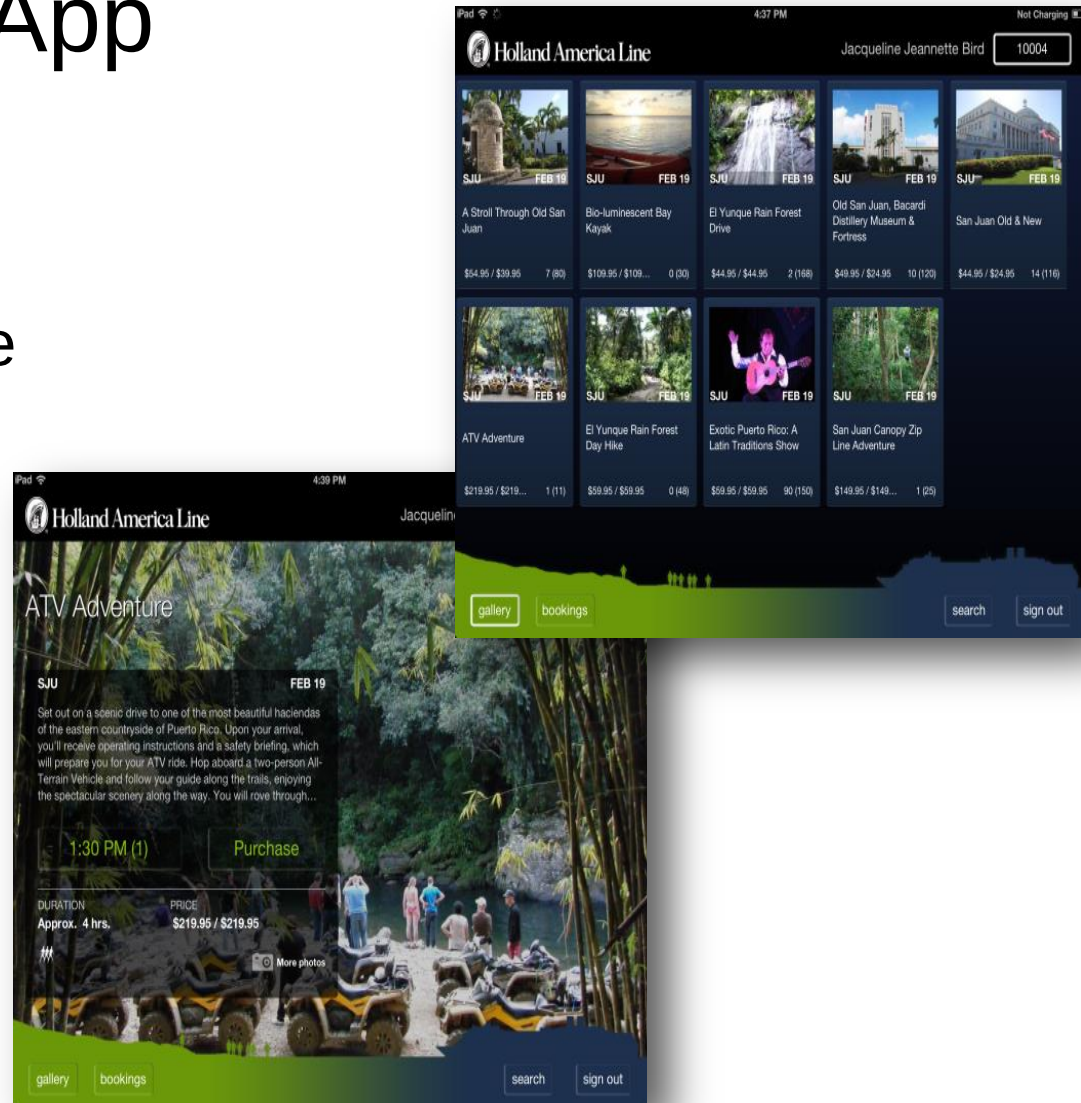
- Mobile Shorex POS System
- Photos sell tours!
- Flexible selling
 - We go to the guests



Onboard Guest App

– coming soon!

- Pre cruise/cruise
- Guests control schedule
- Purchasing



To summarize.....



- Flexibility
- Test new ideas
- Leverage technology
- Listen to our guests
- Know our guest
- Listen to our partners
- Communicate our message

