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A MESSAGE FROM CLIA

Dear Executive Partners,

Since my last message, CLIA's Technical & Regulatory team has continued to work hard to advocate for our industry. We've been representing CLIA's Members in a number of different forums, including the International Maritime Organization (IMO) and the International Labour Organization (ILO), as well as organizing, and participating in, a number of meetings regarding some notable industry topics, such as gastrointestinal illness, cybersecurity, man overboard detection technology, fire protection, greenhouse gases and pool safety. We have had the pleasure to memorialize these efforts throughout the year in the Technical and Regulatory Update within previous Executive Partner Newsletters. Additionally, CLIA's oceangoing Cruise Line Members are in the process of implementing two new fire protection policies: One on [water mist fire suppression systems](#) and one on [fire protection measures for covered mooring decks](#).

I am thrilled to share with you some of the new and exciting Executive Partner events that CLIA will be coordinating in the coming months. As mentioned by Bo Larsen in the June newsletter, the CLIA Port & Destination Summit will take place on Tuesday, September 20, in Santa Cruz de Tenerife, Spain. I look forward to seeing and meeting many of our Executive Partners there. During that week, I will also be moderating a session at Seatrade Cruise Med entitled "Environmental sustainability and regulatory impact on Med operations."

The Executive Partner Summit takes place November 13-15, in Miami, FL. My team is currently working on finalizing the session content for the Technical and Regulatory Forum within that event on Tuesday, November 15. We plan to have the following sessions: *Regulatory Update*, *Advancements in Carbon Reduction and Energy Efficiency*, *Infectious Diseases – Prevention and Response*, and a unique *Design and Innovation* session. One item that is especially exciting for us is that we are offering an opportunity exclusively for our Executive Partners to participate as speakers in the *Design and Innovation* session. Please read the Technical and Regulatory Update section to learn more.

Best Regards,

Bud Darr
Senior Vice President, Technical & Regulatory Affairs



NEWS YOU CAN USE

STATE OF THE ASIA CRUISE INDUSTRY: NO SIGNS OF SLOWING DOWN

CLIA released the findings of the new, comprehensive *2016 Asia Cruise Trends* study. Once again, the data reveals the cruise industry in Asia is growing at a record pace and shows no signs of slowing down.

The project reveals many essential facts and trends on the current State of the Asia Cruise Industry:

- 1. More Cruises Offered** – The number of ocean cruises and voyages offered in the region continues to grow to meet demand with 1,560 sailings scheduled for 2016 alone, a sharp increase of 43 percent when compared to last year.
- 2. Increase in Cruise Ships** – This year, 60 ocean cruise ships will sail in Asia versus 43 ships in 2013, 15 percent more ships than the 52 operating in 2015. Of the ships sailing this year, 14 operate year-round while another 12 have extended deployment in Asia.
- 3. Capacity Boost** – The capacity to carry passengers continues to grow, surging by 51 percent in 2016. As a result, the overall passenger capacity on ocean cruise ships will reach 3.2 million in 2016.
- 4. Demand for Destinations** – Cruising in the region includes more than 204 destinations across 17 countries, making traveling by cruise ship one of the easiest ways to see multiple destinations throughout Asia.
- 5. Asia Passenger Growth** – Asian travelers are cruising more than ever before. Asia experienced the most growth year over year in ocean cruise passengers with an impressive 24 percent increase from 2014 to 2015 and a total of 2.08 million ocean cruise passengers in 2015.
- 6. Increase in Chinese Cruisers** – From 2012 to 2015, the number of Chinese passengers grew at an annual compounded rate of 66 percent. Growth in 2015 alone was 40 percent. In both 2014 and 2015, China has been the world's fastest growing major source market.
- 7. Preference for Shorter Cruises** – Asian passengers continue to prefer shorter ocean cruise lengths. In 2015, almost three out of ten (30 percent) Asian passengers continued to choose cruises two to three nights in length and half (50 percent) chose four to six night cruises.
- 8. Asian Exploration** – While Asian outbound tourism is exploding around the world, the study found that Asian cruisers are primarily exploring Asian destinations. More than eight out of ten Asian passengers (84 percent) cruised within Asia.
- 9. Under 40 Cruisers** – In China, the average age of cruisers is below 43 with about 42 percent of cruise travelers below 40 years old. For the region, the same segment represents 38 percent of all cruisers.
- 10. Attracting the Asian Traveler** – Cruise lines have recognized the need to bring their best ships and amenities to the region. New onboard offerings tailored to the Asian guests include inclusive onboard activities aimed at multi-generational families, high-end shopping, languages, adapted menus to include familiar favorites and regional cuisine, cabin amenities and high-tech features.

[Click here to read the full report.](#)

NEWS YOU CAN USE

CLIA CRUISE LINE MEMBERS INVEST IN LIQUEFIED NATURAL GAS (LNG) TECHNOLOGY

In an industry first, three CLIA Cruise Line Members announced plans to invest \$8 billion to build up to eight new cruise ships that can principally run on LNG or diesel fuel. More lines may follow suit.

These next-generation ships, the first of which is set to be delivered in 2019, are expected to use LNG to generate 100 percent of the ship's power in port as well as on the open seas. LNG presents an intriguing alternative to traditional fuels that can potentially greatly reduce air emissions to help protect the environment.

CLIA Cruise Line Members continue to invest in substantial resources to explore fuel alternatives and other options that present the safest and most effective environmental solutions. Over the past decade, cruise lines have committed \$1 billion to develop new environmental technologies and cleaner fuels.

Whether pioneering exhaust gas cleaning systems or exploring new applications for alternative fuels, the cruise industry continues to be at the forefront of technologies to meet or exceed regulatory requirements and responsibly reduce air emissions.

CLIA outlines the industry's innovations and investments in its newly released sustainability report. [Click here to read the report.](#)



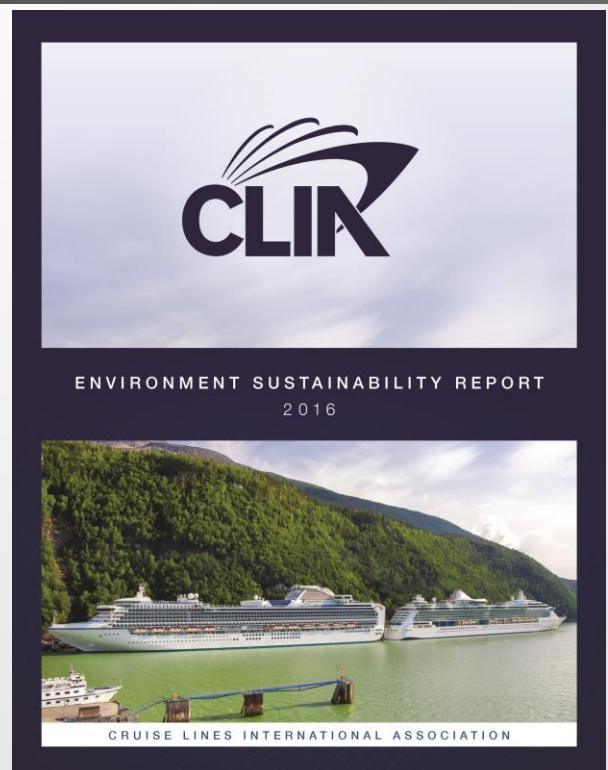
PUBLIC AFFAIRS UPDATE

CLIA RELEASES 2016 ENVIRONMENT SUSTAINABILITY REPORT

This month, CLIA released its 2016 Environment Sustainability Report on the state of the industry's environmental initiatives in 2016 and its ongoing commitment to responsible, sustainable cruising. In cooperation with its Cruise Line Members, the report describes cruise lines' continual efforts to collaborate with environmental stakeholders, invest in innovative technologies and lead the maritime sector.

Cruise lines take their responsibility as environmental stewards seriously. CLIA Cruise Line Members recognize that protecting and preserving the environment is fundamental to the industry and critical to the cruise vacation experience for the 24.2 million passengers expected to cruise this year. The industry looks forward to continued investments and innovations to reduce its environmental impact.

In releasing this report, CLIA hopes to inform the public about the cruise industry's efforts to protect and preserve the environment. [Read the full report here.](#)





A MEMBER PERSPECTIVE

LUIS DE CARVALHO

CEO
Bermello Ajamil & Partners Europe



Bermello Ajamil & Partners Europe

1

Please describe your position and role in the cruise industry.

I am responsible for B&A Europe operations overseeing cruise-related projects in Europe, Africa and the Middle East. B&A's primary office is located in Miami with offices in Fort Lauderdale and New York, as well as my office in Copenhagen. Our staff works worldwide.

B&A is the leading International Group, servicing the Cruise Tourism & Maritime Sectors specializing in Architecture, Engineering, Planning and Destination Development.

We work with governments, ports, destinations, cruise lines and private entities, providing cruise market assessment, cruise facilities planning, development, design and implementation, port & waterfront master planning and cruise destination development services, such as strategic cruise tourism marketing plans, amongst others.

As a group, B&A is currently responsible for some 75 percent of all cruise and maritime-related cruise facilities projects at the global level.

2

How long have you been in the cruise industry and what other roles/positions have you held?

I started my career in the cruise industry in Miami in 1986 after leaving a career in the Portuguese Army as a lieutenant at age 21.

Throughout the past 30 years I have served with Premier Cruise Lines, Royal Caribbean International, Crystal Cruises, TUI, Tumlare and Kuoni. I started Consult DC in 2009, and in 2013, B&A Europe was born after a merger of Consult DC and B&A's desire for a European office.

Positions included: F&B, Front Office, Clearance Officer, Global Port Coordinator, Director Cruise Operations, Managing Partner and CEO.

I attribute my success in the industry to the opportunities that each position gave me to learn as much as I could about cruise operations and customer service, and developing a "problem solving" attitude. In my opinion, understanding passenger's needs and expectations is the key driver for success in this industry.

3

Please describe a contribution you or your company has made to the cruise industry that you are proud of.

I am proud of the fact that B&A has been at the forefront of port & destination development since its inception. We are the link between governments, ports, destinations, private entities and cruise lines when it comes to the delivery of outstanding cruise facilities and strategic long-term planning that improves the guest experience and propels the industry forward.

Notable projects include Hong Kong; Singapore; Sydney; Mumbai; New York City; San Diego; Port of Miami; Port of Everglades; Tampa Bay; St. Petersburg, Russia; San Francisco; Dublin, Dubai (the World); Tarragona; Hamburg; Gibraltar; Visby; Balearic Islands, Canary Islands and the Cape Verde Islands amongst others.

4

What is the biggest challenge in the cruise industry as it relates to your sector and how would you address it?

While cruise lines continue to invest in new vessels with amazing new features and sizes to match, that is not immediately the case when it comes to ports and destinations. This is affecting the long term development of the majority of the cruise regions.

In Europe, we have identified that financing, politics, excessive regulations and bureaucracy issues are affecting the development of soft (destination) and hard (port) infrastructure to service the cruise industry. We have therefore assumed the role of “educators” and facilitators regarding cruise matters in many cases.

Examples include two to three day workshops where we spend time with governments, ports and destinations to identify immediate solutions to remove some basic blocks and clear the way to implement larger projects, while assisting in defining a long-term vision and strategy.

We are also capable of regional and local economic impact analyses, as well as passenger satisfaction survey work, which assist in the decision-making process.

5

What do you believe is the key to growth in your sector of the cruise industry?

Many destinations still believe that anything to do with cruise falls under the jurisdiction of the ports, which is not entirely the case as ports provide the “entry door,” but passengers ultimately want to experience the destinations themselves.

Very often tourism boards do not have a clear strategy for cruise and believe that they should focus on the larger land-based tourism sector. Indeed, in general the annual number of cruise passengers might be smaller as compared to the land-based tourism sectors, but it is best to plan to develop both through common tourism opportunities.

Once the destination partners understand the full potential that cruise can bring to their region by ways of direct and indirect spending and return tourism visitation, they become more active in promotional and marketing campaigns targeting specific consumer markets, cooperating with cruise lines to increase cruise ticket sales and shoreside revenue opportunities and supporting the much needed investments at a port and destination level.

I see this involvement as key, not only for the growth for port and destination development, but for the growth of the cruise industry in general. The passenger is the key!

6

Looking forward, what are some predictions for the future in your sector of the cruise industry?

We are living in very exciting times. In the 19th century, we had the industrial revolution, which impacted the way we lived up to recent times, but now we are going through an information revolution. The rules of the “game” are being written as we go along.

All of us are potential buyers of some sort. These days, people do not look and buy what is available, they look for what they want and buy it! Companies and professionals who understand the endless opportunities on how to apply this to cruising will lead the pack.

Everyone is a potential cruiser. I believe that each of us has an opportunity to work together to create that “want,” but also to contribute in each of our areas of expertise to deliver the best possible passenger experience!

TECHNICAL AND REGULATORY UPDATE

VESSEL SANITATION PROGRAM'S ANNUAL GENERAL MEETING AND MANUAL REVISIONS

CLIA Cruise Line Members recently participated in the Vessel Sanitation Program's (VSP) Annual General Meeting and three-day manual revision session. The VSP was established as a voluntary, cooperative program under the Centers for Disease Control and Prevention (CDC) to develop and implement comprehensive sanitation programs to minimize the risk for acute gastroenteritis on cruise ships. VSP requirements are memorialized in the VSP Operations Manual and the Construction Guidelines, which are revised and updated every five years by the VSP, cruise lines, ship yards and other members of the public.

The current revision has been underway for the last 18 months and the most recent revision meeting covered topics such as recreational water facilities, food safety and child activity centers. CLIA anticipates new versions of the Operations Manual and the Construction Guidelines to be published in early 2017.

The revision session was followed by the VSP's Annual General Meeting at which CLIA provided a brief update on the progress of CLIA's Gastrointestinal Illness Task Force including the publication of a Sample Outbreak Prevention & Response Plan (OPRP) and pursuit of a harmonized testing protocol to determine the efficacy of products against human norovirus, as well as updates on ongoing partnership efforts with NoroCORE and Takeda Vaccines.



CALL FOR PARTICIPANTS - DESIGN AND INNOVATION SESSION AT 2016 EP SUMMIT

Planning is underway for the 2016 Executive Partner Summit! We are excited to announce the Summit will again include a Design and Innovation session. As a valued CLIA Executive Partner Member, we'd like to hear from you!

During the Design and Innovation session, a select number of Executive Partners will have the opportunity to present some of their latest technologies, design concepts and interesting experiences to members of the cruise industry community attending the CLIA Executive Partner Summit. There are two methods to present during this session. A spot is guaranteed if your organization sponsors a portion of the EP Summit by September 2, 2016. A second method is to apply for the remaining spots.

Should you decide to do the latter, interested Executive Partners should email Kierstin Del Valle at kdelvalle@cruising.org with a summary of what

they wish to present, by September 2, 2016 in order to be considered for the presentation opportunity.



Johannes Pinl, Managing Director and Founder of MARSS, presenting on the Design and Innovation Panel during the 2015 EP Summit.

CLIA EVENT OVERVIEW

CLIA OFFERS AN EXCITING LINE UP OF EVENTS IN THE REMAINDER OF 2016

One of the many benefits of being a CLIA Executive Partner are the numerous CLIA events which provide an array of education and networking opportunities with industry experts. There are many upcoming events for the remainder of 2016 – see below to find the perfect networking opportunity and make the most of your membership.



Port & Destination Summit

20 September 2016
Santa Cruz, Tenerife

CLIA's third annual Port & Destination Summit will build on the productive, unique, audience-generated content it's renowned for, and is a key event for anyone in, or seeking greater engagement with, the global cruise port and destination community.

[Registration is open now.](#) [Click here](#) for an overview of CLIA events during the week of Seatrade Cruise Med.

CLIA Europe Cocktail Reception

20 September 2016
Santa Cruz, Tenerife

This year's annual CLIA Europe Cocktail Reception brings together cruise line executives and Executive Partners for an evening of cocktails, canapes and networking. [Click here](#) for more information and to register.

CLIA Diamond Partner Dinner

20 September 2016
Santa Cruz, Tenerife

Taking place at the stunning Royal Casino of Santa Cruz, Tenerife, this dinner brings together Diamond and Diamond Elite Executive Partners, cruise line executives and VIP's for an exclusive evening.

CLIA Italy Annual Gala Dinner

29 September 2016
La Spezia, Italy

This year, CLIA Italy is proud to host the Annual Gala Dinner at the stunning Grand Hotel Portovenere in La Spezia, with views over the Ligurian coast. Registration is open now. Please [click here](#) for more information or contact Claudia Marmorato at cmarmorato@cruising.org.

CLIA Diamond Partner Dinner

13 November 2016
Miami, Florida

Beginning late afternoon, Sunday, November 13 this year's CLIA Diamond Partner Dinner will bring together Diamond Elite, Diamond Executive Partners and cruise line executives for an exclusive evening of networking under the stars.

Executive Partner Summit

14-15 November 2016
Miami, Florida

CLIA's Executive Partner Summit includes the Technical & Regulatory Forum and Port & Destination Forum. The event features educational content specific to each of the forums and includes a joint day that focuses on strategic business issues facing the global cruise industry. For sponsorship opportunities, contact Marla Phaneuf: mphaneuf@cruising.org.



CLIA Europe Annual Dinner

21 November 2016
Madrid, Spain

The CLIA Europe Annual Dinner takes place in Madrid in 2016! Having previously taken place in the UK, Germany and Italy, Spain hosts the dinner this year. Registration is opening soon.

We hope to see you at one of our upcoming events! For more information regarding an upcoming European event enquiries, please contact Natalie Hall-Gearing at nhallgearing@cruising.org.

For North America event enquiries, please contact Lane West at lwest@cruising.org.

CALENDAR OF EVENTS

UPCOMING GLOBAL EVENTS



Cruise360 Australasia

16 September, 2016

Pyrmont, Australia

[Click Here](#)



Plan a Cruise Month

1-31 October, 2016

[Click Here](#)



CLIA UK & Ireland Annual Dinner

13 December 2016

Berkshire, England

[Click Here](#)



Cruise360

18-24 April, 2017

Fort Lauderdale, FL

[Click Here](#)

WHAT'S NEW AT CLIA

CLIA Welcomes Gale Collins

Gale Collins joined CLIA as manager, sponsorship relations. Having worked with Cruise360 exhibitors and sponsors for many years as a consultant, Gale now joins CLIA full time, with responsibility for sales and sponsorships of Cruise360, as well as other CLIA events and media/advertising opportunities. Gale has tremendous knowledge of trade shows and conferences to travel suppliers worldwide. Most recently, she worked at Michael J Pierson Associates.



New National Representative for CLIA Netherlands

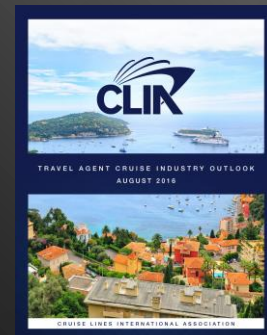
CLIA appointed Daniële Felix as CLIA Netherlands National Representative. Felix has extensive experience within the cruise industry having been Sales & Marketing Director Benelux for Costa Cruises where she was instrumental in significantly increasing the number of cruise passengers. She has also undertaken roles with Nespresso and Festival Cruises.

Felix will promote the interests of cruise line members, travel agents and Executive Partners while creating greater awareness of cruise holidays.



CLIA Releases Third Quarterly Travel Agent Cruise Industry Outlook Report

CLIA released the third Travel Agent Cruise Industry Outlook Report of 2016, revealing that as the demand for cruising continues to grow, travel agents are playing an increasingly important role in the consumer travel process. The report is the third installment in an ongoing quarterly research study from CLIA, designed to forecast trends in the cruise industry among the travel agent community. [To view the full report, please click here.](#)



MEMBER SPOTLIGHT

Port Canaveral

Port Canaveral serves as the premier cargo and cruise seaport for Florida's central coast. Port Canaveral offers efficient and convenient services for cargo operations, featuring quick access to the Southeast United States and markets in Central and South America, the Caribbean, Africa and Europe. The port continually focuses on improving their cargo logistics, investing in their cargo infrastructure and 10 deepwater berths. Port Canaveral also offers convenient cruise passenger services, being located just 45 miles from Orlando. The port has recently invested in modernizing their current cruise terminals as well as investing for future development as the cruise industry continues its rapid growth. Port Canaveral's unique location presents great opportunity for Florida's central coast.



Port Everglades

Located on the southeast coast of Florida, Port Everglades is one of Florida's leading seaports for both cargo and cruise operations. Located near Fort Lauderdale, Port Everglades sees millions of tons of cargo each year thanks to recent investments in new marine cargo terminals, gantry cranes, convenient access to Atlantic shipping lanes and easy transfer opportunities with an onsite Florida East Coast Railways Intermodal Container Transfer Facility. Port Everglades also serves as a Florida powerhouse for cruise operations, handling more than 3.7 million cruise passengers in the 2015 fiscal year. The port, which continually invests in the redevelopment of its terminals, is currently home to 9 cruise lines and 34 homeport cruise ships.



QATAR AIRWAYS

Qatar Airways, serving over 150 global destinations from their hub in Doha, Qatar, has quickly grown to be one of the world's premier airlines. Founded in 1994, the then regional carrier served only a few routes, but quickly began to grow into a leading international carrier in 1997. Since then, the airline has expanded rapidly across the globe, adding new destinations near and far, introducing cutting edge aircraft from Boeing and Airbus, and continually investing in the passenger experience on the ground and in the sky. Now, it reaches all corners of the globe with one of the youngest fleets, award winning service and top quality passenger products, flying the spirit of Qatar to every city they serve.



Sojern

Sojern is travel's leading data-driven performance marketing engine. Through its Sojern Traveler Platform and billions of traveler intent signals across online and mobile channels, Sojern puts more heads in beds and travelers in towns for its clients worldwide. Currently one of the fastest growing travel tech companies, Sojern works with top travel brands and independent hotels in North America, Latin America, Europe, Middle East & Africa and Asia-Pacific. Sojern receives real-time search and booking data on over 350 million unique travelers looking for flights, hotels, car rentals, cruises and vacation packages.



PARTNER NEWS

Bahrain Economic Development Board

[Bahrain Ranked Top Among Gcc Countries In Wef Human Capital Index](#)

Intercruises Shoreside & Port Services

[Mark Robinson Makes Waves at MedCruise General Assembly](#)

Lloyd's Register

[Lloyd's Register secures two contracts from the Oil & Gas Authority](#)

Maine Port Authority

[Rockland, Maine prepares for its first cruise ship home porting operation](#)

Massport

[Port of Boston Welcomes Largest Cargo Ship to Date](#)

Port of Kirkwall

[Award-winning Orkney Welcomes Milestone Cruise Visitor](#)

Port Metro Vancouver

[Vancouver Fraser Port Authority Chief Financial Officer to retire](#)

Port of Skagen

[Largest cruise day in Skagen ever](#)

Singapore Tourism Board

[Changi's first flip-dot walls and engaging photo spots delight travellers](#)

Starwood Resorts & Hotels

[Starwood Hotels & Resorts Makes Historic Debut With The Opening Of Four Points Havana](#)

Tampa Port Authority

[Port Tampa Bay and Ports America sign container agreement and new breakbulk concession](#)