

# NELSON MANDELA BAY CRUISE LINE STRATEGY 2019-2024



## **NELSON MANDELA BAY CRUISE LINE STRATEGY.**

### **STRATEGIC PLAN**

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## 1. INTRODUCTION

Nelson Mandela Bay – Port Elizabeth is seen as the top cruise destination for cruise ships visiting Southern Africa due to its proximity to the Eastern Cape Safari Options.

Visiting cruise ships play an important role in Nelson Mandela Bay's tourism industry, bringing many passengers and crew to our shores. These passengers undertake tours and travel to our beautiful regions, spending valuable tourism Rands and ultimately contributing to growing our economy.

With the recent growth of the number of cruise ships to the city, it has become vital that we plan and strategize around the development of this industry in order to achieve higher economic returns for the city and to position the city as a destination of choice for visiting cruise lines.

EDTA in partnership with Transnet, the private sector and other role players plans to implement an effective business strategy for Nelson Mandela Bay in order to grow and develop cruise tourism to the city, contributing to job growth and economic development of the city. The strategy will focus on maximizing the local economic opportunities this industry can provide for the city through encouraging investment in infrastructure, enhancing our visitor experiences and increasing regional dispersal.

The strategy will also focus on how the city can leverage on marketing partnerships with the tourism trade and other destination marketing organisations / cities that operate in this market, with South African Tourism as a key role player.

This strategy will provide the NMBM, key industry stakeholders and regional partners with clear direction by identifying priority action areas that will assist us in reaching our growth potential in the cruise industry.

Five key priority action areas will support the city to reach its expenditure and growth potential in tourism with cruise tourism playing an important part of this:

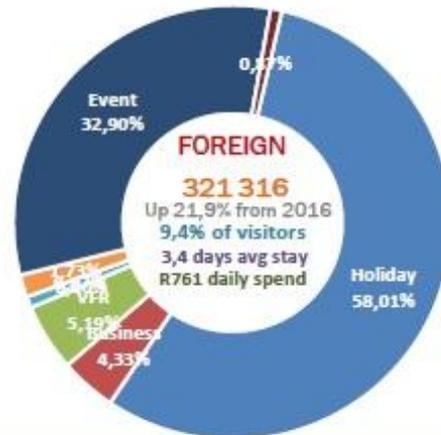
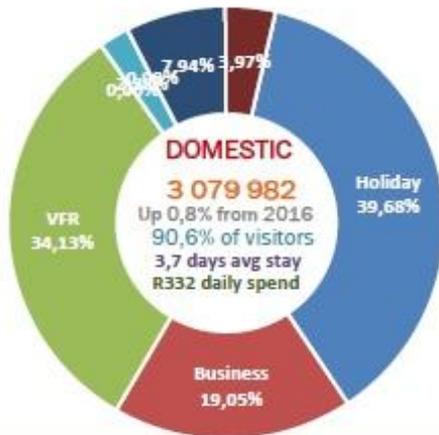
1. Driving demand
2. Working better together
3. Supporting what we have
4. Increasing the recognition of the value of tourism
5. Using events to grow visitation

Through considering these key drivers, the Nelson Mandela Bay Municipality will plan and implement key action items to continue to grow not only tourism as a whole but also cruise ship visits and passenger expenditure for the city.

## 2. CURRENT STATE OF TOURISM IN NELSON MANDELA BAY



TOTAL VISITORS  
**3,4 MILLION**  
Up 2,5% from 2016



### TOTAL VISITOR SPENDING



**R3,8 billion**  
DIRECT SPEND

**22%**

is international



### CONTRIBUTION TO GDP



**R7,0 billion**  
TOTAL CONTRIBUTED

**44 227**

local jobs supported



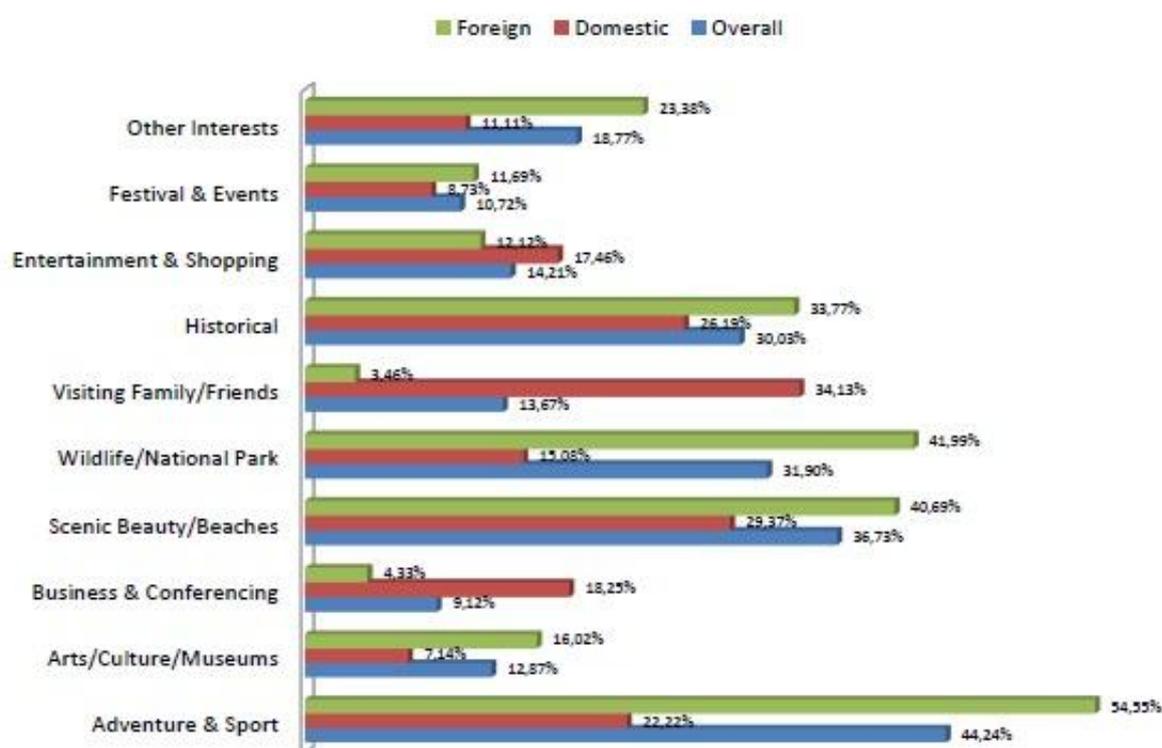
### FOREIGN ARRIVALS TO PORT ELIZABETH



## TOP 10 FOREIGN MARKETS

COUNTRY	SHARE	GROWTH	COUNTRY	SHARE	GROWTH
1 Germany	20,7%	9,6% ↑	6 Switzerland	4,0%	39,6% ↑
2 UK	16,8%	37,9% ↑	7 Australia	3,8%	21,5% ↑
3 USA	9,1%	-10,3% ↓	8 Canada	2,6%	11,9% ↑
4 Netherlands	7,8%	10,1% ↑	9 Brazil	2,1%	131,9% ↑
5 France	4,9%	36,2% ↑	10 Sweden	2,0%	9,3% ↑

## ACTIVITIES UNDERTAKEN



## ACCOMMODATION OCCUPANCY

	Facilities in NMB	Beds Available	Beds sold p.a	Average Occupancy	Average bed Rate	Total Income	Foreign %	Domestic %
Hotel	39	5075	1 096 191	59,2%	R 564,76	R 619 080 969	21,9%	78,1%
Self-Catering	102	5186	1 079 963	57,1%	R 300,08	R 324 080 655	5,8%	94,2%
B&B	96	1415	232 947	45,1%	R 633,30	R 147 524 840	23,8%	76,2%
Guest House	136	2158	338 119	42,9%	R 617,29	R 208 717 764	15,6%	84,4%
Camping & Caravanning	5	1448	359 176	68,0%	R 199,54	R 71 669 635	1,9%	98,1%
Backpackers	14	764	161 910	58,1%	R 192,54	R 31 173 363	82,4%	17,6%
<b>TOTAL</b>	<b>392</b>	<b>16046</b>	<b>3 268 306</b>	<b>55,8%</b>	<b>R 429,04</b>	<b>R 1 402 247 225</b>	<b>16,9%</b>	<b>83,1%</b>

	Booked Properties	Guests	Nights booked	Avg Occupancy	ADR	Market Revenue	Foreign Share %	Domestic Share %
AirBnB	425	11481	28 620	34,5%	R 754,17	R 37 201 353	48,2%	51,8%

Disclaimer: The information represented in this infographic is based on Nelson Mandela Bay Tourism's Research Methodology and has been sourced from SA Tourism; Stats SA; Formal Accommodation as supplied by them; WTTC, NMBT Surveys and other sources. Full details available on request from [research@nmbt.co.za](mailto:research@nmbt.co.za).

The Nelson Mandela Bay Cruise Ship Strategy has been developed by an industry task team to ensure Nelson Mandela Bay becomes a national leader and destination of choice for cruise lines visiting South Africa. For the city to reach growth in the cruise line industry, the focus must be on the following objectives amongst others:

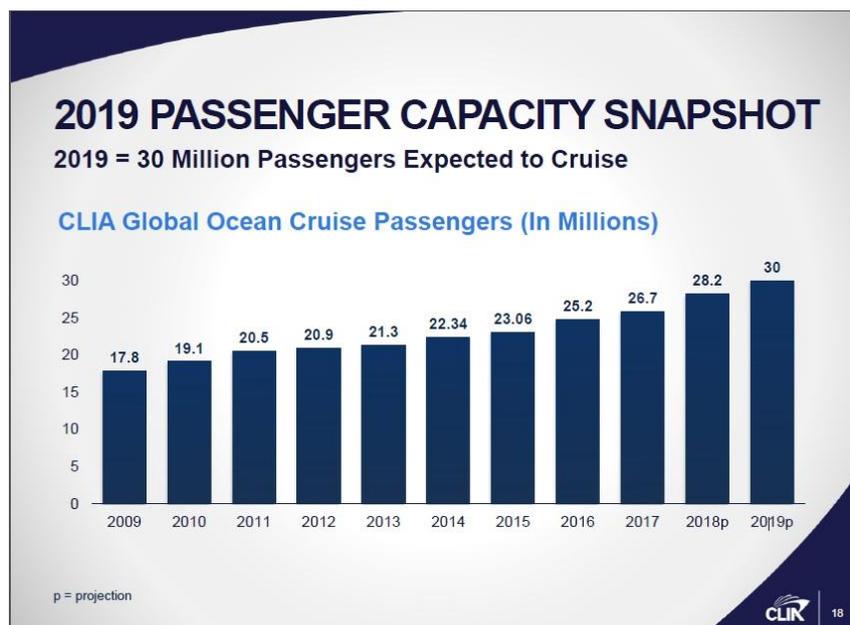
1. Continue to attract more cruise lines to the city;
2. Educate the industry on the importance of the cruise industry as well as how it operates;
3. Ensure quality services, products and experiences are provided to visiting cruise lines and passengers;
4. Encourage investment in new products, experiences and destination infrastructure;
5. Maximise opportunities for cruise liners and passengers to spend money in the city and reduce leakage;
6. Increase regional dispersal from cruise passengers when they visit.
7. Promote business tourism opportunities and incentivise cruise ships to support the development of SMME opportunities.

This strategy provides the City, key industry stakeholders and regional partners with clear direction by identifying priority action areas that will assist us in reaching our growth potential in the cruise industry.

#### 4. THE GLOBAL CRUISE INDUSTRY

The outlook for the global cruise industry continues to be strong. Natural disasters, environmental factors and international relations continue to provide challenges for deployment of cruise ships around the world; however, the industry remains innovative and reactive to these events, with over a decade of double-digit percentage growth in passenger numbers projected to continue over the next five years.

30 million passengers around the world are expected to undertake a cruise in 2019. Projections indicate year-on-year for the next decade, another 1 million passengers will take a cruise.



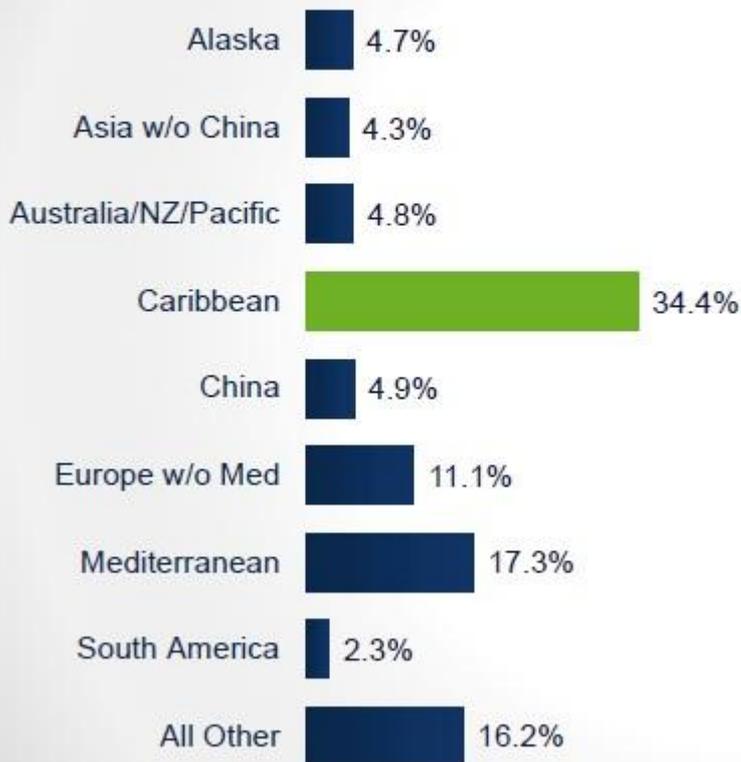
448 Ocean cruise ships were operating in 2016, with 26 new ships commencing operations in 2017. Another 17 ships are due to be built by 2018, 22 more in 2019 and 32 between 2020 and 2026.

The global target for 2027 is to have 74 new ships enter the industry, with over 60% of them being between 100,000 – 200,000 Gross Tonnage. This will enable a total of 38 million passengers to travel on 522 ships around the world.

**NEW SHIPS DEBUTING IN 2019 - CLIA Ocean Member Cruise Lines Represented**

<b>CRUISE LINE</b>	<b>SHIP NAME</b>
Aurora Expeditions	Greg Mortimer
Carnival Cruise Line	CarnivalPanorama
Celebrity Cruises	Celebrity Flora
Costa Cruises	Venezia   Smeralda
Coral Expeditions	Coral Adventurer
Hapag-Lloyd	Hanseatic Nature   Hanseatic Inspiration
MSC Cruises	MSC Grandiosa   MSC Bellissima
Norwegian Cruise Line	Norwegian Encore
PONANT Yacht Cruises and Expeditions	Le Dumont-d’Urville   Le Bougainville
Princess Cruises	Sky Princess
Royal Caribbean International	Spectrum of the Seas
Scenic Luxury Cruises and Tours	Scenic Eclipse
Saga Cruises	Spirit of Discovery
TUI Cruises	Mein Schiff 2

# DEPLOYMENT



Percent of Share

Consumer demand for cruising has increased 62% over the past decade (2005-2015). The Caribbean/Bahamas continues to be the world's most popular cruising destination with 34.4% market share, followed by the Mediterranean 17.3%.

There is a greater deployment of new ships in Asia, influenced by the growth in China. It is predicted that over 2 million Chinese passengers will be cruising by the end of 2018. Asia is the fastest emerging cruise destination and now has over 200 ports across 17 countries.

Source: Cruise Line Industry Association

## 5. GLOBAL TRENDS

Instagram photos are driving interest in travel around the world. With on-board connectivity, cruise passengers are filling Instagram feeds with diverse travel experiences both on-board and on land from several cruise destinations.

Stressed out from fast-paced lives, travellers are seeking ways to check out from daily responsibilities and rejuvenate more than ever before. Cruise lines are responding by offering total wellness in the form of restorative spa experiences, on-board oxygen bars, healthy menu choices for a wide variety of diets, and the latest in fitness innovations.

Experiential travel has evolved into achievement travel as vacationers are looking for experiences beyond sightseeing. Bucket lists have become goal-oriented and cruise lines are meeting these demands. Passengers can conquer Machu Picchu or complete culinary workshops hosted by Le Cordon Bleu chefs.

Travelers use tech in daily lives and are expecting smart tech when vacationing as well. Cruise lines have adopted technology for cruise travellers—including keychains, necklaces, bracelets, apps and more—in order to provide a highly personalized travel experience while on and off the ship.

Travelers want to see the world in a conscious, mindful way. The cruise industry is more conscientious than ever, working to local destinations to local cultures, landmarks and minimize environmental footprints.

Travelers are setting sights on destinations that were previously out of reach –some only accessible now by cruise ship –from the Galapagos Islands to Antarctica.

Generation Z is set to become the largest consumer generation by the year 2020—outpacing even Millennials. This generation like the one before, prefers experiences over material items and is seeking out travel. The appeal of multiple destinations and unique experiences, such as music festivals at sea, is attracting this new category of cruisers.

The off-peak season is rising in popularity whether travellers want to escape the cold in a tropical locale or embrace the chill in a new destination. Cruising offers some once in a lifetime experiences during colder months including excursions to see the Northern Lights, visiting a penguin colony and touring European Christmas markets.

Combining work with leisure time is on the rise. Straying far from the notion of device-free travel, many modern travellers or “digital nomads” are opting for trips where they can work remotely which cuts down on time off and lost wages. With Wi-Fi, desks and work-friendly cafes, travellers can keep up with work while enjoying a cruise vacation.

With the number of female travellers growing, many tourism and travel companies are creating female-centred itineraries based on interests and connecting women with other women. Female-centred cruises can create a female empowerment community at sea while allowing travellers to experience the world around them, as well as famous feminist landmarks.

With more Google searches for “solo travel” and “traveling alone” than ever before, solo traveling is rising in popularity. Cruising allows for solo travel without the worry of arranging a ton of details while visiting even the most far-reaching destinations and connecting with other travellers, forming community bonds and once-in-a-lifetime experiences.

Source: Cruise Line Industry Association

## **6. THE SOUTH AFRICAN CRUISE INDUSTRY**

The National Department of Tourism has advised that the coastal and marine sector will contribute about R21.4 billion to the GDP and create about 116 000 direct jobs by 2026, thus reducing poverty, inequality and unemployment, while contributing to sustainable livelihoods and development.

Cruise travel is one of the fastest growing sectors of the global tourism industry. Once small and localized, the cruise industry has grown into a sophisticated, multi-billion-dollar enterprise with a wide assortment of products to offer vacation consumers. The cruise lines fuelling industry growth have not been the sole recipients of the economic benefits generated by their efforts; for strategically located destinations with port and tourism infrastructure capable of accommodating cruise ship activities, the economic benefits derived from cruise ship homeport and port-of-call operations are sizable.

These favourable economic benefits, coupled with other intangible contributions, are the central reasons why many communities are actively marketing and enhancing their destinations and welcoming cruise ship operators and passengers.

In 2008, Mitchell Du Plessis Projects (PTY), Ltd., (MDA) and supporting consultants were retained to prepare an analysis of market trends and outline a strategy for the City of Cape Town to increase its stature as a leading regional cruise destination. Conclusions associated with the study pointed towards opportunities over the long term for Cape Town and South Africa to welcome increased levels of cruise port-of-call and homeport traffic. These opportunities were linked to a number of performance factors—most notably, redoubled efforts by the City of Cape Town and regional partners to make gains in marketing and coordination activities.

- Following a series of local and regional discussions, growing cruise travel and leisure activities was elevated to a national discussion and initiative, with the Department of Tourism (DOT) seeking to advance the basic research and conclusions of the 2008 study in five areas:
  - Update market analysis and considerations to reflect notable changes in global and regional market fundamentals
  - Broadly address the strengths and weaknesses of regional actors capable of directly and indirectly welcoming cruise and other maritime tourism activities;
- Assess the economic impacts associated with current and projected cruise passenger levels;
- Broadly weigh environmental and other impacts associated with current and projected cruise passenger levels; and,
- Building from the foundation of work under the 2008 study and expanded 2009 assessment, update the overall strategic approach to growing of South Africa’s cruise and maritime tourism business.

A full report was prepared for the South African Department of Tourism in November 2010 and highlights the key findings of the 2009 study effort.

Since the report Transnet built reception facilities in Cape Town and elsewhere and the report is currently still being used as a reference for catalysing new cruise infrastructure.

### **South African Ports:**

Active ports in South Africa include Durban, Cape Town, Richards Bay, Port Elizabeth, Mossel Bay, East London and Saldanha. Only Durban and Cape Town are formally used by cruise ship operators as homeports. The remaining ports have become port-of-calls as part of past/current cruise line itineraries.

## **7. CRUISE LINE INDUSTRY ASSOCIATIONS**

Cruise associations can be highly useful in marketing to cruise lines. Possibly more importantly, however, is that when these associations are run and organized well, they can be a clearinghouse for information, statistics, creative marketing and new ideas. Furthermore, these associations can help encourage development of minimum standards for member port destination delivery. South Africa, as possibly the most strategic player in the region, should take a strong leadership role in this group, helping to steer it to realize its ultimate potential and utilize this group as a mechanism for achievement of the country's goals for growing the cruise business.

### **Cruise Line International Association:**

Established in 1975, Cruise Lines International Association (CLIA) is the world's largest cruise industry trade association, providing a unified voice and leading authority of the global cruise community. CLIA supports policies and practices that foster a safe, secure, healthy and sustainable cruise ship environment and is dedicated to promoting the cruise travel experience. <https://cruising.org/>

### **Cruise Indian Ocean Association:**

The Cruise Indian Ocean Association has as its mission to promote Eastern and Southern Africa and the Indian Ocean islands as a cruise destination. [www.cruiseindianocean.org](http://www.cruiseindianocean.org).

### **South African Association of Ship Operators and Agents:**

The South African Association of Ship Operators and Agents ("SAASOA") is a section 21 company which represents Ship Operators and Vessel Agents. Its members are also members of various international shipping and ship's agency organizations. <http://www.saaso.co.za/>

## **8. NELSON MANDELA BAY CRUISE INDUSTRY**

In the 2016/2017 season, there were 18 passenger liners who visited our shores and 20 passenger liners visited to Nelson Mandela Bay for the cruise liner season of 2017/18 with last docking being MS Queen Elizabeth who brought in 2 547 passengers on the 21 April 2017. The 2018/19 season saw similar number of dockings, with the addition of the Japan Grace – Peace Boat. The Peace Boat had the longest stay on the whole itinerary with a total of 3 nights in port. The Estimated total spend in Nelson Mandela Bay for the season was estimated in excess of R30 million.

The Nelson Mandela Bay Municipality offers a hospitality desk on-board allowing passengers access to destination information upon arrival and offering last minute bookings should passengers not have pre-booked excursions. Popular excursion includes Addo Elephant National Park, private game reserves, Route 67 as well as craft and heritage routes.

**CRUISE DOCKINGS 2018/ 2019 SEASON INCLUDED:**

Date	Name of Cruise Liner	Max Pax. On-Board	Max Crew	Number of days
6/11/2018	Europa II	516	370	2
18/11/2018	MS Amadea	624	292	1
1/12/2018	Europa 1	516	370	2
12/29/2018	Regent Seven Seas 'Explorer'	700	447	1
1/9/2019	AIDA Aura	1300	418	1
1/13/2019	Nautica	824	386	1
1/19/2019	Artania	1260	537	1
1/21/2019	Queen Elizabeth	2547	1000	1
25/01/2019	Peace Boat – Japan Grace	1500	550	2
2/18/2019	Seabourn Sojourn	430	335	1
1/23/2019	Nautica	824	386	1
2/18/2019	Seabourn Sojourn	430	335	1
2/24/2019	Seabourn Sojourn	430	335	1
7/3/2019	Aegean Odyssey	380	180	2
3/9/2019	Seabourn Sojourn	430	335	1
3/10/2019	Crystal Serenity	1070	655	1
3/13/2019	Saga Pearl II	449	220	1
3/28/2019	Ponant's Le Lyrial Cruise Ship	264	139	1
4/10/2019	Queen Victoria	2081	900	1
16/04/2019	Viking Sun	930	480	1

Date	Name of Cruise Liner	Pax. On-Board	Cr
06-07/11/2018	Europa II	516	
18. Nov. 2018	MS Amadea	624	
01-02/12/2018	Europa 1	516	
29-12-2018	Regent Seven Seas 'Explorer'	700	
09-01-2019	AIDA Aura	1300	
13-01-2019	Nautica	824	
19-01-2019	Artania	1260	
21-01-2019	Queen Elizabeth	2547	
23- 25/01/2019	Peace Boat – Japan Grace	1500	
18-02-2019	Seabourn Sojourn	430	
23-01-2019	Nautica	824	
18-02-2019	Seabourn Sojourn	430	
24-02-2019	Seabourn Sojourn	430	
07-08/03/2019	Aegean Odyssey	380	
09-03-2019	Seabourn Sojourn	430	

10-03-2019	Crystal Serenity	1070
13-03-2019	Saga Pearl II	449
16/03 OR 16/04/2019????	Viking Sun	930
28-03-2019	Ponant's Le Lyrial Cruise Ship	264
10-04-2019	Queen Victoria	2081

**The biggest challenges facing the industry in Nelson Mandela Bay:**

- Crime and safety of passengers.
- State of tourist attractions, lack of facilities in certain areas of the city and operating hours.
- Condition of harbour, access roads and surrounding areas/ Urban deterioration
- Lack of dedicated terminal and passenger friendly facilities, including access to transportation.
- Lack of awareness of alternative cruise excursion offers and uptake of these by cruise liners.
- Lack of sufficient tour guides in the city especially language specific guides.
- Lack of capacity to host the tourists, resulting in high leakage.

**9. NELSON MANDELA BAY CRUISE STAKEHOLDERS**

**Nelson Mandela Bay Municipality (NMBM)**

Nelson Mandela Bay Municipality is one of eight metropolitan municipalities in South Africa. It is located on the shores of Algoa Bay in the Eastern Cape Province and comprises the city of Port Elizabeth, the nearby towns of Uitenhage and Despatch, and the surrounding rural area.

As a municipality the city is responsible for the following cruise activities:

- Managing the passenger 'Meet and Greet Welcome Program' – a visitor information service provided by the city for passengers when a ship berths at the Harbour.
- Attracting cruise lines through the development of itineraries / excursions.
- Representing NMBM at national and international industry trade events.
- Facilitating elements of itinerary planning, product relationships and operational management for cruise lines, inbound tour operators and shipping agents.
- Providing guidance and leadership to industry to ensure the delivery of services and experiences to maximise economic returns for the city.
- Leveraging national marketing campaigns and national leadership for growth in the cruise industry.
- Educating industry partners and tourism operators, allowing them to engage with and work in the cruise industry.
- Contributing to collaborative initiatives at a national level.

**Shipping Agents**

There are a number of different shipping agents that assist with managing the operational needs for a cruise line when they berth or anchor at a port or destination.

Shipping agents coordinate all shoreside support that a cruise line may require, including rubbish removal, fresh water, clearance with local authorities and any necessary welfare appointments for crew. They are the liaison between the cruise line, the ship staff and all other stakeholders when a ship is in port.

### **Inbound Tour Operators (ITO's)**

These companies book products and experiences on behalf of the cruise line. The nature of cruise tour bookings means that they can be booked as late as 12-hours in advance on board cruise ships. ITO's need a variety of products to offer, as they often work with many different cruise lines and a wide array of target markets.

### **TRANSNET**

Transnet national ports authority is one of five operating divisions of Transnet SOC Ltd. The national ports authority is responsible for the safe, effective and efficient economic functioning of the national port system, which it manages in a landlord capacity.

The national ports authority provides port infrastructure and marine services at the eight commercial seaports in South Africa. It operates within a legislative and regulatory environment created by the National Ports Act 2005 (Act No. 12 of 2005).

In line with the provisions of the National Ports Act, the core functions of the national port's authority are as follows:

1. To plan, provide, maintain and improve port infrastructure;
2. To provide or arrange marine-related services;
3. To ensure the provision of port services, including the management of port activities and the port regulatory function at all south African ports; and
4. To provide aids to navigation and assistance to the manoeuvring of vessels within port limits and along the coast.

The National Ports Act creates a dual role for the National Ports Authority whereby it is responsible for the port regulatory function at the ports - i.e. controlling the provision of port services through licensing or entering into agreements with port operators to ensure that efficient port services are provided.

The national ports authority's service offering is targeted at mainly port users (which include terminal operators, shipping lines, ship agents, cargo owners and clearing & forwarding agents). As such, it manages the eight commercial seaports along South Africa's 2 954-km coastline. These ports are Richards Bay, Durban, East London, Ngqura, Port Elizabeth, Mossel Bay, Cape Town and Saldanha.

Its service offering is divided mainly in two categories: (1) the provision of port infrastructure; and (2) the provision of maritime services. Maritime services include dredging, aids to navigation, ship repairs and marine operations.

Port infrastructure is provided in five commodity sectors:

1. Containers / TEUs
2. Dry bulk [such as coal, iron ore, manganese, sugar, chrome ore, copper, lead, woodchips]

3. Liquid bulk [such as petroleum products, chemicals, vegetable oils]
4. Break-bulk [such as fruit, steel, scrap steel, Ferro alloys, pig iron, fish & fish products]; and
5. The automotive sector.

In view of evolving developments in the maritime industry, the National Ports Authority seeks to continue to enhance its role in facilitating trade, influencing growth through the provision of port infrastructure capacity ahead of demand; and aligning its core activities to changing market dynamics.

The National Ports Authority has developed a three-tier strategy aligned with TRANSNET's Four-point Growth Strategy, with an emphasis on providing port infrastructure capacity; efficient port and port operations management; and enhancing the ports' geographical positioning as a leading gateway for trade emanating from the eastern and western seaboard.

The strategy aims to meet the growth demands of the South African port system and focus on delivery in three main areas:

1. Timely delivery of capital investment projects to sustain and increase existing port infrastructure and marine capacity;
2. Improved efficiency in port services to promote productivity; and
3. Revenue growth and cost-effectiveness.

TRANSNET has developed a Standard Operational Plan (SOP) for the handling of passenger liner vessel processing to Port Elizabeth.

#### **NELSON MANDELA BAY – PORT OF PORT ELIZABETH**

The Port of Port Elizabeth is a geographically well-positioned, customer-centric, multi-cargo port that prides itself on flexibility and service excellence. It is the gateway for expanding markets and is not only linked with the rest of the world, but it also has direct transport links into the heart of the African continent.

Situated in Algoa Bay, on the south-eastern coast of Africa. The port has a container terminal, one of only five (Durban, East London, Ngqura, Port Elizabeth and Cape Town) in South Africa.

Being a congestion free port allows it to maintain high cargo handling rates, fast and efficient ship turnaround and unparalleled service levels. The port is equipped to handle dry bulk, bulk liquid, general cargo and container cargo. Passenger ships usually make use of one of the fruit terminal berths when calling at Port Elizabeth.

The port's container terminal has three berths totalling 925m in length and a storage area of 22 hectares with 5400 ground slots for stacking purposes. The container terminal is equipped with the latest generation gantry container cranes and straddle carriers.

The break-bulk terminal has six berths totalling 1170m, two bulk berths totalling 360m and a tanker berth of 242m. The tug, fishery and trawler jetties measure 120m, 165m and 136m respectively.

#### **PORT INFORMATION & SERVICES:**

##### **ADVISING ETA**

To VTS/Port Control, 72 hours prior to arrival at the Fairway Buoy.

##### **AIRPORT**

Port Elizabeth Airport is served by world airlines with scheduled flights to all parts of the globe, either direct or via Johannesburg.

### **ANCHORAGES**

Good holding ground in Algoa Bay. Recommended anchorage is 1,5 nautical miles to north or south of fairway buoy but clear of channel. There are 3 anchorages in Algoa Bay.

- Anchorage No 3: Hazardous Cargo
- Anchorage No 2: General
- Anchorage No 1: (Small Craft)

### **APPROACHES**

Via VTS lanes.

### **BALLAST**

Vessels should be sufficiently ballasted to navigate safely within the harbour.

### **BERTHS**

There are 12 berths ranging up to 318.5m length.

### **CARGO HANDLING**

The port deploys a wide range of modern, standard and specialised equipment as appropriate to terminal operations.

### **CONSULAR**

All leading maritime nations are represented.

### **CRUISE SHIPS**

There are no dedicated areas within the Port for cruise liners. They are berthed at 8 and 9 berths depending on space availability and vessel size.

### **DEPTH**

The depth at the entrance channel is 14.5m,

### **EMERGENCIES**

Contact Port Control on Channel 11 or

Tel.: +27 41 507 1911.

### **FISHING INDUSTRY**

Cape Town is the major base for the fishing industry of the region with sophisticated facilities for processing catches and the maintenance of the international fleets.

### **FRESH WATER**

Available at all berths on request.

## **HAZARDOUS CARGO**

Arrangements for the handling of hazardous cargo must be made through the Harbour Master. Vessels carrying explosives or dangerous goods are restricted to arrival and movement within the port during daylight hours.

## **INFORMATION**

Weather bulletins and reports available from Cape Town Radio/ZSC. Coastal weather bulletins via Navtex at 12:20 and 16:20 hours.

## **PASSENGER TERMINAL**

Facilities for cruise ships are provided Berth at 8 & 9.

## **PILOTAGE**

For all vessels requesting pilotage services, one hour of advance notice is required to VTS/Port Control on channel 14. Pilot ladders must comply with SOLAS regulations.

## **PILOT BOARDING POSITION**

Off the Fairway buoy

## **PORT LIMITS**

Cape Recife East (True) to a point in the Indian Ocean, distant 1609 m line drawn from the extreme point to the East Bank of the Zwartkops River, east (True) distant 1609 m metres on the eastward by a line drawn between these two points.

## **RADIO**

The calling frequency for VTS/Port Control Cape Town (call sign ZSC) is VHF Channel 14. Cape Town Radio also uses HF channels: 421, 821, 1221 and 1621 and monitors Morse code transmissions on 500 kHz, R/T on channel 2182 and digital selective calling channels on: 4207.5, 6312.0, 8414.5, 12577.0 and 16804.5 kHz. Distress and safety traffic is conducted on 4125, 6215, 8291, 12290 and 16420 kHz.

## **SHIP'S AGENTS**

Leading South African and world ship's agents are represented at Port Elizabeth.

## **STEVEDORING**

Port Elizabeth stevedoring companies offer services including cargo stowage, lashing and securing, cargo breakout, stowage planning, and operation of ship's equipment, hatch and tank cleaning.

## **10. PROMOTION OF NELSON MANDELA BAY AS A CRUISE DESTINATION**

### **WHAT ATTRACTS CRUISE LINERS TO A DESTINATION?**

- Port infrastructure e.g. cruise terminal
- Competitive port charges and taxes
- Interesting excursions in and around the destination
- Building relationships with ground operators

- Collaboration with South African ports
- Developing regional itineraries and package tours with port cities and small island developing states in the Western Indian Ocean (WIO)

## **DESTINATION SELECTION: WHAT'S IMPORTANT TO CRUISE LINES?**

### **Marketing and Sales**

- Consumer awareness and marketability of a cruise destination
- Access to consumers
- Fit with cruise brand philosophy
- Fit with consumer vacation patterns

### **Marine Operations**

- Marine navigation and access
- Berth, apron and terminal features
- GTA and parking
- Provisioning and Security
- History of operations from the port / destination

### **Logistics, Air-Sea and Shore Excursions**

- Landside access
- Airlift
- Lodging
- Shore excursions and destination
- venues

### **Finance and Legal**

- Terminal charges
- Labour, fuel and other operating costs
- Regulatory issues
- Maritime law

## **11. SITUATIONAL ANALYSIS**

### **Strengths**

- Destination appeal – Named after Nelson Mandela and great product packaged – Route 67, exceptional land-based safari options in close vicinity of the harbour, Great Marine Life Experiences, Historical, Cultural and Heritage Attractions available.
- Air Access, Road access and Rail access – Close Proximity of harbour to all
- Language – Most South Africans can speak English fluently, Some German speaking guides available.
- Geographic location – The Port of Port Elizabeth is ideally located between Durban and Cape Town.
- Trade promotions – The City has a good existing working relationship with the Tourism Trade that promote travel to South Africa including the cruise ground handlers and destination management companies that deal with Cruise Liners.

### **Weaknesses**

- Group shore excursion options are limited with Townships being seen as unsafe and inaccessible.
- Crime and safety and the perception thereof to South Africa is a concern to the cruise industry, and especially outside of the port of Port Elizabeth.
- State of tourist attractions and operating hours is seen as a weakness. Museums and other attractions are closed over certain days, parking isn't available and there is a lack of toilet facilities in certain areas.
- Condition and cleanliness of harbour, access roads and surrounding areas/ Urban deterioration is seen as a big weakness.
- Lack of dedicated terminal and passenger friendly facilities, including access to transportation without having to walk through an operational harbour.
- Multi-use berths – competing with car terminals etc. is not ideal and switching between berths complicates planning.
- Dedicated multi use facilities such as Meet and greet area, terminal facilities, dedicated ground handler area and local operator / SMME area, Taxi / Uber / transfer pick up point is lacking and required.
- Costing – Perception that Port Taxes are high in the city
- Alternative Languages and Guides are required i.e. French, Spanish, Mandarin
- Availability of guides is a problem for ground handlers with local operators and guides opting to do higher paying tours directly with passengers not opting for the cruise excursions sold onboard.
- There is a perceived lack of understanding with regards to how the cruise line industry works and how business is obtained within the local tourism industry.
- International awareness of Africa, South Africa and PE as a cruise destination.
- There is a need for dedicated cruise industry coordination
- Destination marketing – lack of dedicated cruise promotional material, joint marketing initiatives on a national level.
- Awareness of alternative cruise excursion offers and uptake of these by cruise liners.
- Lack of coordination with regards to security services.

## Opportunities

- Air Access, Road access and Rail access development and route expansions can boost Cruise line dockings and visitor numbers.
- New and existing excursion options can be developed especially in partnership with SMME's to grow the number of beneficiaries in the city.
- Incentives and costing can be looked at and incentive schemes can be developed to lure more cruise line visits.
- Guides can be trained to cater for language requirements, to increase availability of guides.
- Safety and Tourism ambassadors can be employed to assist with improving condition of attractions and opening hours. This will also address the concerns of cleanliness and safety.
- International awareness of SA and PE as a cruise destination to be worked on through participation on a national level.
- Meet and Greet Program development
- Destination marketing – cruise tourism promotional material, joint marketing initiatives and stakeholder engagements to be developed.
- Grow and expand business using existing markets, attract visits from cruise liners using other routes internationally.

## Threats

- Lack of tourism product development, maintenance of tourism facility's and increase in crime
- Increased travel restrictions – visa's, customs, and port entry requirements
- Unnecessary delays in gaining access to the port due to congestion,
- Health issues relating to infrastructure and facilities in the harbour i.e. Manganese ore dumps, environmental degradation, pollution and their effects on tourist attractions.
- Growing regional competition in other cruise destinations with similar or better product offerings that the city.

## 12. STRATEGIC OBJECTIVES

To ensure that cruise tourism's benefits are maximized, and its impacts minimized effectively, the Nelson Mandela Bay Cruise Line Strategy presents strategies for the Nelson Mandela Bay tourism authority and local stakeholders to undertake an introspective and participative assessment that considers all stakeholders and not solely the cruise lines or immediate revenues projected. Seven strategies are presented for sustainable cruise tourism development and responsible tourism in Nelson Mandela Bay.

The following strategies have been developed to achieve this purpose.

### **STRATEGY 1: Cruise Line Strategy Regional Context**

- Evaluate regional trajectory for cruise tourism
- Evaluate optimal levels of cruise passenger visitation
- Benchmark other cruise line destinations and
- Develop organic growth plans for receiving cruise tourism

### **STRATEGY 2: Assess the sustainable development needs across the entire value chain and visitor experience**

- Map the cruise tourism value chain
- Assess visitor flow impacts beyond port reception
- Assess sustainable destination management capacity, and
- Conduct destination waste assessments

### **STRATEGY 3: Quantify the value of natural and cultural heritage conservation to cruise tourism**

- Identify and assess shore excursion possibilities
- Conduct visitor carrying capacity studies at heritage sites
- Increase scientific study and monitoring of coral reefs and ocean environment, and
- Identify dispersal and containment opportunities for attractions

### **STRATEGY 4: Position responsible tourism as an innovative pillar of the region's cruise tourism promotion**

- Build awareness of responsible tourism for cruise passengers
- Develop concepts of experience fees and heritage crowdfunding
- Embed conservation initiatives into itinerary promotion
- Provide access to local communities for passengers to experience their heritage, and
- Seek inclusive linkages for cruise ship crew

(Crowdfunding is the use of small amounts of capital from a large number of individuals to finance a new business venture.)

**STRATEGY 5: Stimulate innovation and regional interest in improving sustainable tourism**

- Spread best practice guides across value chain
- Create awareness campaigns for local stakeholder's role
- Illustrate examples to spread innovation and innovative spirit
- Increase sustainable tourism training mechanisms, and
- Create cross-functional teams for cruise tourism management

**STRATEGY 6: Integrate sustainable cruise tourism components into data collection, monitoring and performance measurement**

- Improve cruise tourism statistical data collection
- Monitor visitation levels at key sites
- Conduct routine visitor expenditure and motivation studies, and
- Establish environmental data monitoring systems

**STRATEGY 7: Create a regional network for data-driven collaboration in sustainable cruise tourism:**

- Initiate cross-border collaboration for benchmarking e.g. IORA and WIO
- Create knowledge-sharing environments
- Evaluate comparative offering of destination experiences
- Engage multiple cruise line players, and
- Increase involvement in industry initiatives and dialogue

**13. TASK ORIENTED ACTION PLAN**

The purpose of the task-oriented action plan is to determine what actions are required to attract cruise liners to destination Port Elizabeth based on benchmark studies, research findings and strategies that were developed.

The key tasks include:

- The development of Port infrastructure e.g. cruise terminal
- Benchmark study of port charges and taxes levied in other ports
- Developing interesting excursions in and around the destination Port Elizabeth
- Building relationships with ground operators, tour operators and agents who specialize in cruise tourism
- Collaboration with South African ports
- Developing regional itineraries and package tours with port cities and small island developing states in the Western Indian Ocean (WIO)

**TASK 1: SHORT TERM BERTHING AND ARRANGEMENT**

NMBM in partnership with Transnet will use the existing multipurpose cruise terminals to retain the existing cruises and attract new ones. This will be implemented creatively through a local organising committee that put an action plan in preparation for every passenger cruise prior arrival. The short-term strategy will ensure coordination of different activities, temporary beautification of terminals, organising of cultural performances, branding, mobile arts and craft kiosk, deployment of trained

tourism ambassadors to assist and any other creative activity that would create a positive image and enhance visitor's experience.

The short-term will also involve ongoing management of the terminals to ensure compliance with international standards and passenger expectations, as well as the surrounding areas around the port. Draw up recommendations with estimated cost implications for short-term beautification of harbour dockings area

## **TASK 2: LONG TERM CRUISE LINE TERMINAL DEVELOPMENT**

Engage Transnet on current existing plans regarding development of harbour. This to include review by all stakeholders of TRANSNET Standard Operational Plan (SOP) for the handling of passenger liner vessel processing to Port Elizabeth. Thereafter make recommendations on how the facilities and services at the terminal could be upgraded and improved in short and long term.

### **Factors to consider:**

A Cruise Terminal is the starting point of a cruise vacation. A cruise terminal and its operational activities are vital to the success of a cruise liner and to the satisfaction of the cruise vacationer. A functional terminal must not only be the ideal starting or ending point for the cruise itinerary, but also a perfect port of call.

- Must be located in the city centre;
- Must provide everything needed to host not only the smaller but also the extra-large cruise vessels;
- Must be conveniently reached by train, by coach or by car;
- Must provide car and bus drivers with spacious car parks, with easy and safe terminal access;
- Must have a Terminal Help Desk;
- Must have a comfortable Terminal Lounge and shopping area;
- Must have a security and passenger screening area, and check-in area;
- Must have a luggage pick-up area
- Multi-functional venue to cater for non-cruise season.

Facilities in the terminal should include:

- Speaker system for announcements, music, etc.
- Indoor check-in and check-out, Agriculture Department and Customs area for control of passengers and crew;
- Check-in counters for passenger registration;
- Luggage carts/wagons for luggage portage;
- Hand trucks for individual's luggage;
- Luggage porters free of charge;
- Private office and telephone for agent's and line's use;
- Pay telephones, inside the building;
- Internet stations, inside the building;
- A help desk is provided in the terminal building to assist passengers and crew for port-of-call vessels with bilingual staff;
- Foreign Exchange services / ATM

- Covered drop-off area for passengers and luggage at the terminal building;
- Visitor parking is available directly in front of the terminal;
- Complimentary reserved parking is available for cruise line staff, ship's agent, tour operators, cruise support staff and special guests;
- Port Police and private Security service provided while the ship is in port;
- First Aid station;
- Several shops with a variety of services and product for guests and crew such as souvenirs, local handcrafts, wine, newspapers and magazines as well as a cafeteria.

### **TASK 3: STAKEHOLDER IDENTIFICATION AND ENGAGEMENT**

Identify the key players in the cruise line industry and companies that have established sales offices in South Africa. This should include compiling a list of ground operators, tour operators and agents who specialize in cruise tourism.

#### **These to include:**

##### Carnival Corporation & PLC

- Carnival Cruise Lines
- Holland America Line,
- Princess Cruises,
- Seabourn Cruise Line,
- Windstar Cruises,
- AIDA Costa Cruises,
- Cunard Line,
- P&O Cruises.

##### Royal Caribbean International

- Royal Caribbean International and Celebrity Cruises,
- Pullmantur,
- Azamara Cruises

##### Star Cruises

- Now operates Norwegian Cruise Line and Cruise Ferries

##### Mediterranean Shipping Company (MSC)

Following the purchase of the Monterey, MSC took over the Lauro cruise line structures. When two more ships, Rhapsody and Melody, were added to the fleet, MSC Cruises was formally established as a subsidiary of the larger MSC Group.

MSC Cruises boasts one of the most modern and dynamic fleets in the world. In just over a decade the company has built 4 beautiful 'Lirica' class liners, followed by 4 majestic 'Musica' class vessels and the 4 stunning flagships of the 'Fantasia' class. All of them feature MSC Cruises' trademark blend of traditional elegance and innovative design.

This task should also include determine supply from Nelson Mandela Bay and evaluate it based on the minimum and maximum cruise line passengers

### **TASK 4: MARKET IDENTIFICATION AND PRODUCT DEVELOPMENT**

Identify the demographics, types of markets, and profiles of cruise passengers who could be interested in visiting the Port of Port Elizabeth. Identify Cruise promotion opportunities and work with regional and national partners in attracting cruise liners through an integrated marketing and promotions plan. This to include a shore excursion and Meet and Greet Welcome Program review and implementation for the city. Task team to look at destination management issues surrounding the excursion offers, safety of passengers and facility management.

**Cruise markets include a wide variety of demographics e.g.**

Typical traveler:

- 50+ years old
- Married
- No children in household
- Income of \$79K
- Cruise for less than 7 days
- Brand loyalty is common- Frequent Guest Programs

Types of Cruise Markets:

- Mass market: Consists of people with incomes in the \$30,000 to \$60,000 range. Average cost per person is \$100 to \$300 per day.
- Middle market: Consists of people with incomes in the \$60,000 to \$80,000 range. Average cost per person is \$250 to \$500 per day.
- Luxury market: Consists of people with incomes higher than \$80,000. Average cost per person of more than \$500 per day.

Meet and Greet Welcome Program can include:

- Traditional Dance Welcome
- Hospitality Desk
- Captains Dinner and function
- Meet and greet by city volunteers / officials
- Gift from city to passengers (souvenir / badge etc)

**TASK 5: DEVELOPMENT OF INCENTIVES**

Conduct a benchmark study to investigate if port charges and taxes paid to the authorities in the Port of Port Elizabeth are competitive and develop incentives to attract new cruise visits.

**Port charges**

Whenever a cruise ship docks at a port of call, the local authorities require a fee. Before a cruise starts, the cruise line will add up the port charges from the different ports of call on the cruise itinerary and will pass the cost of these port charges on to the passengers. Different places charge cruise lines different amounts and the total of your port charges will depend on what ports of call the cruise is visiting and how many stops are included in the itinerary. The more places you're visiting, the higher the port charges should be.

**Taxes**

Not only do cruise lines pay a fee to the local authorities for docking at a port of call, they also have to pay taxes to the government. As with port charges, the amount charged varies greatly and it's passed on to the cruise passengers. Sometimes you'll find that taxes are grouped together with port charges.

### **TASK 6 – DESTINATION MARKETING**

As a task team develop a cruise line-marketing plan by using the differential advantages of Nelson Mandela Bay as a region in order to expand existing markets and penetrating new markets using new strategic marketing tools that appeal to the cruise line industry. This to be done to attract new market segments by using existing products, developing a well trained work force, using product differentiation and introducing new products via appealing promotional strategies.

Platforms to consider:

- Digital marketing and promotional platforms
- Trade promotions
- Trade & media educational tours
- International trade and consumer shows and roadshows including specialised Cruise Industry Trade events
- Trade sales calls to cruise liners, ground handlers and other relevant stakeholders such as industry trade associations
- Joint marketing agreements (JMA)
- PR and communication
- Dedicated Cruise industry promotional material development and distribution.

### **TASK 7 – DESTINATION MANAGEMENT**

Destination management tasks will include the following:

- Maintenance of existing tourism attractions
- Ensure effective management and operationalisation of tourism facilities, i.e. provision of trained and knowledge personnel.
- Ensure safety and security of attractions.
- Intervention and provision of auxiliary services
- Implementation of action planning emanating from local cruise line task team.
- Facilitate accreditation of tour operators and tour guides in partnership with ECPTA.

## **14. GLOSSARY OF CRUISE INDUSTRY TERMS**

### **Brand**

A promise of what you are going to deliver. It is an identifiable trademark, characteristic or association that becomes the primary recognition of a product or service.

### **Channels of distribution**

How travel is sold. Products or services can be sold directly to the consumer (direct distribution) or through the travel trade (indirect distribution).

**Commission**

A fee paid to an agent for transacting a piece of business or service. In the travel business, commissions are paid to travel agents, and tour operators or wholesalers as compensation for marketing and selling products or services to their markets.

**Component**

A single travel or tour service; when grouped together, components form a package.

**Contemporary product segment**

Includes cruises in medium-size to very large and/or modern ships with daily rates of less than \$300. The contemporary cruise product appeals to passengers of all ages and income categories, and most often to first-time cruisers.

**Concessionaire**

Those firms under special contract rights to provide food, beverage, retails, spa services, etc. on the cruise ships.

**Cruise Association**

A non-profit or not-for-profit organization of cruise homeports and ports-of-call joined together for the promotion of their destinations to the cruise lines and the cruising public. An example of this is Cruise BC.

A cruise association can also be a non-profit or not-for profit organization of cruise lines and related organizations and businesses. An example of this is Cruise Lines International Association (CLIA).

**Cruise Theatre**

In cruise tourism, a theatre is the geographic area and waters where cruise itineraries occur. The theater includes the entirety of the air, land and sea space that is, or that may potentially become, involved in supporting both the water based activities of the cruise ship, marine excursion activities or shore based tour operations.

**Cruise Tourism**

Means the arrival of large and small cruise line vessels and “mega yachts” that are chartered. The term used here does not include private boats and their owner passengers although they are a great addition to community tourism and can use many of the same facilities.

**Deployment**

The distribution of cruise ships by cruise itinerary and ports of call, generally based on seasonality and consumer demand.

**DMC (Destination Management Company)**

A DMC is a professional management company specializing in the design and delivery of events, activities, tours, staffing and transportation, possessing and utilizing extensive local knowledge, expertise and resources.

**DMO (Destination Marketing Organization)**

An organization whose primary function is to attract visitors to its locale for the purpose of enhancing the local economy through purchase of room nights, food and beverage, retail items, transportation, visitor services, etc.

### **Economic Impact**

The cumulative economic stimulus of visitor spending from direct, indirect and induced spending as visitor dollars work their way through the local economy.

### **Escort (Escort & Driver)**

The representative of a tour company who leads a group; driver is often sub-contracted with the coach, but works with the tour company escort to ensure the success of a tour; drivers are responsible for the safety and comfort of the group while onboard the coach; escorts are responsible for all aspects of the tour, and represent the tour operator, dealing with all of the suppliers during the trip.

### **Experiential Product**

A tourism product that provides personal development opportunities, recreation activity training or simply an enhanced interactive involvement.

### **Exploration / Soft Adventure product segment**

Cruise products that are generally found on smaller ships with widely varying daily rates, fewer frills, but an emphasis on earning/education.

### **Familiarization ("FAM") trips**

Free or reduced-priced trips given to travel agencies, tour wholesalers and operators, travel writers, and others by destination marketing organizations and travel suppliers. "FAM Tours" help stimulate sales and cultivate positive media coverage of an area or product.

### **FIT (Fully independent tour)**

Custom designed travel itineraries designed by travel agents or tour operators for travelers who prefer to have a fully planned vacation but do not want to be part of a group tour.

### **Guest Lecturer**

An individual, not usually on permanent employment with the cruise line, who speaks on a particular hobby, skill or activity that he or she is considered expert.

### **Guides**

Guides work for tour companies or ground operators may be called land operators or receptive operators. A ground operator is a type of inbound tour operator who specializes in servicing other tour companies' arriving groups. These guides meet their clients and conduct tours for the various groups.

### **Ground Operator**

A company that contracts services and/or a selection of products to a tour operator; its role is to ensure all components contracted for in a region are fulfilled; often looks after meet & greet services and airport to lodging transfers.

### **Homeport**

Port from which a cruise ship loads passengers and begins its itinerary, and to which it returns to disembark passengers upon conclusion of voyage. Sometimes referred to as embarkation port and turn around port. It is also where the cruise ship's supplies are loaded for the cruise, which includes everything from fresh water and fuel to fruits, vegetable, champagne, and any other supplies needed for the cruise.

### **Host**

A representative who provides information, meet & greet services, or who assists at a destination with ground arrangements. Does not actually accompany the tour.

### **Infrastructure**

The assembled buildings, machines, tools and other hardware gathered for the purpose of conducting business. Port infrastructure means the physical facilities used for cruise ships such as docks, aprons, gangways, roadways, parking, etc.

### **Itinerary**

The travel schedule provided by a cruise line, travel agent or tours operator for their clients. A final itinerary, however, provides all details such as flight numbers, departure port and times, ports-of-call and describes any prepaid planned activities.

### **Large cruise lines**

Based on the size of ships rather than the size of the company. Large Cruise Lines deploy ships that carry upwards of 1,800 passengers.

### **Lower-berths**

The unit of measurement used to describe how many passengers a ship will hold. It refers to the number of people that can sleep in the beds available in a cabin that are at floor level. Thus it is possible to have more than 100% occupancy on a cruise ship.

### **Luxury product segment**

Usually includes medium-sized to smaller ships, and daily rates of \$300 to \$600 or more, longer cruises and worldwide service.

### **Market share**

The percentage relationship of an organization's sales (or number of visitors) to total industry sales.

### **Net Rate or Price**

The rate to be marked up by a wholesaler or a cruise line for resale to the traveller.

### **Packaging**

The combination of related and complementary travel and hospitality services into a single-price offering.

### **Partnership Cooperative**

Promotions/marketing efforts and other cooperative offerings made by travel and hospitality organizations. Partnerships can also play an important role in packaging shore excursions – where two businesses work together to deliver to tour experience. An example of this is a motor coach operator providing transportation to an attraction.

### **Passenger capacity**

The number of revenue-paying passengers that can be accommodated on a cruise ship. Calculated at an occupancy of two persons per cabin.

### **Premium product segment**

Includes daily rates from \$200 to \$400. It attracts older, more affluent passengers, and experienced travelers/cruisers. Typically this segment features large, frequently newer ships.

### **Port-of-call**

A destination that is visited as part of the cruise's itinerary. Calls may range from five to 24 hours. Sometimes referred to as transit port and destination port.

### **Pre / post tours**

Optional extension or side-trip package before or after a package tour or cruise.

### **Rates**

Prices to be given to an RTO, tour operator or cruise line. Rates are to be net, non-commissionable, which allow the operator to add a required profit margin to reach a competitive retail price.

### **Receptive Tour Operator (RTO)**

Also known as inbound tour operators or ground operators, provide and specialize in ground services within a destination and sell these services to tour operators, wholesale tour operators and in some cases travel agencies.

### **Repositioning**

Typically, when a vessel moves from one seasonal cruise area to another i.e. from Alaska in the summer to the Caribbean in the winter. The movement (or segments of the movement) from the Alaska cruise theatre to the Caribbean may be termed a "repositioning cruise."

### **Retail price**

The published price. Retail prices are often discounted.

### **Round-trip or circle itinerary**

When a cruise vessel leaves from and returns to the same port. Also called a closed-jaw itinerary.

### **Small Cruise Lines**

Based on the size of ships rather than the size of the company. Small Cruise Lines deploy ships that carry fewer than 500 passengers.

### **Shore Excursions**

Shore side tours operated by independent tour companies specifically for cruise passengers. An extra charge is usually applied to your shipboard account.

### **Shore Excursion Manager**

His or her primary responsibilities are the promotion, arrangement, and supervision of all shore excursion programs arranged on behalf of the cruise line by the independent organizations that provide the various tours.

### **Shore Excursion Staff/ Assistant Shore Excursion Manager**

The responsibilities of shore excursion staff are to assist with shore excursions and land tours. The position is comparable to that of a Junior Assistant Purser and, on some cruise lines; the actual title is Junior Assistant Purser, Shore Excursions. Office and administrative skills are required, but no previous experience in tourism is necessary. The Shore Excursion staff sometimes are referred to as Assistant Shore Excursion Managers and are responsible for staffing the shore excursion desk that includes guest services and tour sales. They also must politely deal with complaints from passengers

### **Time in port**

The length of time a cruise vessel is at a port-of-call location. It can range from 4 hours to up to 24 hours.

### **Turnaround time**

The length of time a cruise vessel is at a home or turn around port location. The length of time is determined by the size of ship and the need for passengers to disembark and embark.

### **Trans-Atlantic**

A cruise that crosses the Atlantic Ocean. Today, port-of-call visits to Newfoundland and Labrador, Atlantic Canada and the Saint Lawrence River are often scheduled into Trans-Atlantic crossings.

### **Wholesale price**

The price assigned to a product or service that covers all variable and fixed costs and a profit to the producer. The difference between wholesale and retail price includes mark ups and commissions by distributors, retailers, and others.

## **DOCUMENTS AVAILABLE ON REQUEST**

1. TRANSNET – SOP
2. SOUTH AFRICAN CRUISE TOURISM REPORT 2010 – DEPARTMENT OF TOURISM

## **CONTACT**

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