

THE MARIPORT GROUP LTD.

REPRESENTATIVE PROJECTS RELATING TO THE CRUISE INDUSTRY

Cruising the Great Lakes

In 1992, undertook detailed market analysis relative to re-introducing overnight cruising to the Great Lakes. Work included extensive analysis of relevant legislation, pilotage, insurance, customs and immigration, and related matters. Work continued from 1993 to 2004, through Cruising the Great Lakes Inc., creating the cruise image for the Great Lakes region and undertaking promotion and marketing efforts. This work was funded in part by sponsors from around the Great Lakes and in part by the Mariport Group.

Promotional materials included high quality guides to the region and sponsoring ports. A comprehensive web site was maintained and updated every year. Cruising the Great Lakes took a proactive role in rebuilding the cruise industry on the Great Lakes and from two ships, four cruises and 360 passengers in 1993, to six ships and over 7,000 passengers ten years later. Assistance was provided to most of the cruise companies, including help with chartering one vessel. A substantial database was built up to over 19,000 entries.

Great Northern Navigation

In recognition of the diminishing number of good, small, intermediate quality cruise ships, Mariport developed a 300 passenger vessel for remote cruise destinations in conjunction with Elliott Bay Design Group and Bauer Interiors. Prepared a comprehensive concept book to demonstrate the vessel.

Cruise Charter

Mariport chartered the *c Columbus* for an overnight cruise on Lake Erie to reposition the ship from Canada to the USA. Mariport marketed the cruise, and developed a booking system to handle reservations. In conjunction with a Toledo company, handled all ground transportation.

Cruise Shore Excursions

Handled all shore excursion and ground transport for North American passengers on the 1998 & 1999 cruises by ms *c Columbus*. Provided an on-board cruise director to provide liaison for four bilingual cruises over two seasons, and provided specialized lectures about the Great Lakes to passengers on two cruises.

Bellingham Cruise Terminal Economic Impact and Development Plan

Undertook a comprehensive survey to determine the economic impact of the cruise terminal on the city and its hinterland. Recommended a range of short and long term initiatives by which the economic benefit could be enhanced. A major component of the overall study was a detailed analysis of the North West Cruise shipping industry and the prospects for a U.S. port attracting vessels to a new facility. Assessed the likely regional economic impact if the port was successful in attracting vessels. Identified specific market areas where the port could develop a unique cruise product.

Turks and Caicos Ports Master Plan

As part of the Master Plan, reviewed the prospects for attracting small cruise ships, given extreme draft constraints. Assessed the relative importance to tourism and the potential environmental impact. Reviewed opportunities for eco-tourism relative to the emerging market for this product.

Port of Toronto Impact Study

Undertook a preliminary review of the overnight cruise trade as a new business area for the port. Researched the international cruise fleet to determine the availability of suitable vessels that could access the region. Assessed the economic impact of such business if the port could achieve home port status.

St. Lucia Port Market and Traffic Analysis

Reviewed likely future cruise traffic as part of a broader study of port development at Castries and Vieux Fort.

Newfoundland and Labrador Ports Master Plan

As part of the Master Plan, projected probable cruise traffic calling at regional ports as part of broader eastern North America and specialized itineraries.

Arctic and Antarctic Cruises

As part of work related to the Polar Code, researched cruise activity in Arctic and Antarctic waters over the past several years. Also estimated the financial impact on cruise ships of implementing the draft provisions in the Code. This information was used in an overall cost/benefit analysis of the proposed Code.

Cruise Itineraries and Costing

Prepared a comprehensive proforma for the delivery voyage of a small cruise ship to the Great Lakes as well as a season's operational budget. Developed shore excursion opportunities for the transatlantic voyage and retained agents on behalf of the charterer.

Strategic Development Plan

On behalf of the Basques Port Authority Inc., undertook a comprehensive evaluation of development opportunities. A component of this was an evaluation of cruise prospects. A subsequent contract created a cruise marketing strategy for the port community, a package of shore excursions and signature artwork. A cruise dock security plan was prepared and approved by Transport Canada on 9th June, 2004.

Cruise Opportunity Analysis

Working with Summerside Economic Development, undertook a comprehensive review of existing material targeted at the cruise industry, developed a full range of tour options based out of Summerside that could be used for cruise and conference promotion. Undertook a targeted marketing campaign the following year that brought the community a cruise call in 2007.

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EXPERTISE RELATING TO THE CRUISE INDUSTRY

The Mariport Group maintains an extensive, active database on the cruise shipping industry. This database covers well over 200 ships currently in cruise operation, plus known new buildings, conversions and upgrades. Cruise ferries are identified separately, as are sail assisted vessels. Ships are classified according to criteria on passenger/GRT and passenger/crew ratios into four main categories. These are then cross-referenced against market information and fare levels for each vessel. Ships are tracked relative to summer and winter cruise activities as well as swing season positioning voyages.

From the information available through Mariport's database we can identify those ships and class of service relative to vessel routes that can be accessed. This permits promotional material to be specifically tailored, and a very focused marketing effort to be mounted.

Mariport can also provide outline requirements for berth and facility requirements, and likely economic impact in terms of passenger, ship and operator expenditures in the region. We have undertaken direct surveys of passengers to determine spending and interests within a port and the surrounding region. We also have a library of material on economic impact for North America and the Caribbean. As a consequence of our information on spending by type of cruise passenger, we can review those local and regional attractions that would permit increased sales to cruise passengers to be achieved.

We are also very familiar with the key legislative issues in the U.S.A. and Canada including the Passenger Services Act of 1886 and Canada's Coasting Trade Law, security, environmental and health regulations.

The spring 1997 issue of Seascope addressed cruise opportunities:

- *A Cruise Too Far – the Rise and Rise of the International Cruise Industry.*

NASTO: Quebec City, June 1997

- *The Great Lakes, an Old/New Cruise Destination*

Second Annual Cruise Conference & Exhibition, Dearborn, April 2001

- *State of the Cruise Industry 2001*

Wisconsin Harbor Towns Association

- *State of the Industry 2002, 2003*

SNAME: Eastern Canadian Section, April 2002

- *Design Process for a Great Lakes Cruise Ship*