Cruise Tourism
From a broad perspective
to a focus on Zeeland
Cruise Tourism

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The cruise industry is the most important growth sector in the entire tourism market. The market is still growing, despite the global economic crisis. North America is the primary market for cruise activities. Although this market is the most mature one – with the United States traditionally accounting for the majority of all cruise passengers – it is showing signs of saturation. Nevertheless, there is still enormous potential to be found in the worldwide cruise market. The European cruise sector is number two and represents the fastest growing market. The biggest European player is Great Britain. The share of the Netherlands is still relatively small, although major cruise ports like Rotterdam and Amsterdam are gaining ever better positions strategically. The Dutch cruise passenger is not yet really convinced of this comfortable way of travelling, but here too, an upward trend can be seen. There are many prejudices against cruise holidays, but also against the people undertaking this kind of travel. Various interest groups are making efforts to increase familiarity with the cruise product, in order to eliminate these prejudices. The fact that the cruise market is displaying strong growth under difficult circumstances even (in times of crisis) brings confidence for the future. The cruise industry can make a huge positive contribution to tourism destinations and generate economic benefits, which makes it an interesting niche market for coastal regions. The Dutch province of Zeeland is no exception in this respect. Building a cruise port in Zeeland would allow the province to enter a promising market.
1 A Closer Look at Cruise Tourism

1.1 Definition of Cruise Tourism
In this chapter, we will take a closer look at cruise tourism. First of all, a definition of cruise tourism is presented.

“Cruise tourism is a luxurious form of travelling, involving an all-inclusive holiday on a cruise ship of at least 48 hours, according to specific itinerary, in which the cruise ship calls at several ports or cities.”

1.2 Types of Cruises
For cruises, a distinction is made between expedition cruises, river cruises, theme cruises and sea cruises. For all cruises, a subdivision can be made between transit cruises and turnaround cruises. Also decisive is the duration of the cruise. An average cruise takes slightly longer than a week, but a mini-cruise of a few days is also a possibility. The other extreme is possible as well: a year around the world cruise.

Expedition cruises
The goal of expedition cruises is to visit special locations which would normally be inaccessible, such as the polar regions. This type of cruise is perfectly suited to the curious and adventurous holiday-maker. It mostly involves small ships with a shallow depth and which are reasonably comfortable. Destinations include the Amazon, Australia, Papua New Guinea, Iceland, the Galapagos Islands, the Falklands, the Chilean Lake District, and the fjords of Patagonia.

River cruises
River cruises involve passengers spending several nights on board. River cruises are made with relatively small ships which are suitable for navigating close to the river banks. Most river cruise ships are fairly small, but they have every luxury you can think of. River cruises are especially popular with couples as well as singles. Cruises on the river Nile are the most famous river cruises. Furthermore, there are also many ships that cruise the European waters, treating passengers to spectacular scenery and cities.

Sea cruises
Sea cruises also involve passengers spending several nights on board. Sea cruises are entirely different than the above-mentioned types. Sea cruise ships sail the world’s seas and waterways, calling in at the most beautiful places on earth. These ships are the giants of the sea, often as tall as ten-floor buildings. They offer passengers all the services and facilities they need. If a
port wants to accommodate these giant vessels, it must have adequate facilities (e.g. a big enough cruise ship terminal).

**Theme cruises**
Throughout the year, various cruise companies organize a range of theme cruises. A few examples are golfing cruises, cookery cruises, music or celebrity cruises (with famous singers or bands), active bicycle cruises, and wine cruises.

**Mini cruises**
A mini cruise comprises all the ingredients of a cruise, the only difference being that it lasts considerably shorter. Usually, mini cruises start close to home, are less expensive, and the ships are slightly smaller, although they feature every comfort and luxury one might expect.

**World cruises**
A world cruise allows passengers to travel around the world in a very relaxed manner. Prices are generally quite high. Departure dates are usually in January and the tour lasts approximately sixty to one-hundred-and-ten days. During the trip, some thirty to sixty ports are visited.

**Transit cruises**
One speaks of a transit cruise, when a destination serves as a stopover. During a transit, the cruise ship moors early in the morning or afternoon, so as to give passengers enough time to explore the destination. The visit generally lasts one or several days, after which the cruise ship heads for another destination.

**Turnaround cruises**
If a cruise starts at and returns to the same destination, then this involves a turnaround cruise. The cruise ships moor at ports for the purpose of the embarking and disembarking of passengers. For the passengers, these ports may not be their desired destination, but they sometimes make use of the opportunity to make a tourist trip out of it. Turnaround cruises are only possible if a port is equipped with a terminal.

### 1.3 Cruise Ships of All Shapes and Sizes

Every day, some hundreds of ships are cruising the world’s oceans. The comparison of a cruise ship with a floating resort or city is easily made. There are small sea cruise ships with ‘merely’ a couple of hundred of passengers on board, but also giant vessels accommodating more than three thousand passengers. It is especially these large ships that offer scores of facilities to entertain passengers, including jacuzzi pools, swimming pools, casinos, nightclubs, fitness, sauna and wellness facilities, shops, (4D) cinemas, bars (including karaoke bars) and a variety of shows.
Over the past few years, the cruise market has seen enormous growth in both passenger numbers and destinations. This growth has given rise to a demand for very large cruise ships. Some shipping companies have eagerly capitalized on this situation and regard it as an opportunity to cope with the fierce competition. Today’s cruise ships have been designed for functionality (of the destination), taking into consideration the desired target market.

The most extravagant cruise ship of the world is the Oasis of the Seas, owned by Royal Caribbean International, an American shipping company. The total cost to build this ship ran to some 900 million euro. Royal Caribbean International’s most recent ships offer cruisers an exceptional experience, featuring cutting-edge innovations on board, including rock climbing walls, sports fields, jogging tracks, surf simulators, beach pools, ice-skating rinks and golf courts, and floating whirlpools. On top of its 2,115 crew members, the Oasis of the Seas can hold 7,300 passengers. It has 15 decks, and it measures 362 metres long and 47 metres wide, with a depth of 9.2 metres. It is impossible for a ship this size to make a turn on the Amsterdam IJ, for instance, which is ‘only’ 270 metres wide. The Oasis of the Seas was launched in November 2009 and it mainly cruises the Caribbean waters. The owners of this technical masterpiece claim that - apart from being the absolute biggest - the ship is also one of the most environmentally-friendly ones in the world.

1.4 Sector Organizations

Cruise Lines International Association

The Cruise Lines International Association (CLIA) is the largest cruise industry organization which promotes the interests of 26 leading cruise companies. The member lines of CLIA represent more than 97% of North America’s cruise market capacity.

The non-profit CLIA was founded in 1975 and the organization is involved in industry issues relating to safety, public health, responsibility for the environment, medical facilities, protection of passengers, and legislative activities. Its mission is to promote policies and practices that foster a safe, secure and healthy cruise ship environment (www.cruising.org).

The three key players in the international cruise industry are Carnival Cruise Lines, Royal Caribbean International, and Norwegian Cruise Lines.
European Cruise Council
Since its formation in 2004, the ECC represents the leading cruise companies operating in Europe and has 30 cruise members and 34 associate members. It looks after the interests of its members and collaborates closely with various EU institutions. They jointly consider policy issues related to cruise tourism. This involves issues relating to transport, environment, health, consumers, taxes, and tourism. Moreover, the ECC tries to promote cruising to a wider audience to encourage expansion of the European cruise market (www.europeancruisecouncil.com).

IG River Cruise
IG River Cruise is an organization consisting of 14 of the biggest river cruise companies. IG River Cruise was set up in 2000 by three Swiss cruise companies, by now it represents 85% of the European market (with more than 177 ships).

Organizations in the Netherlands
The Dutch Cruise Council (DCC) is the organization of cruise companies and their agents in the Dutch market. Since its establishment in May 2009, the most important aim of the DCC has been to expand the Dutch cruise market and to promote the cruise product as an attainable and wonderful holiday experience. In this way, the organization attempts to improve the public image of cruise tourism in the Netherlands. The activities of the Dutch Cruise Council are not only directed towards promotion, but also towards providing neutral / objective information on cruise holidays. This is in keeping with the educational aspect and the delivery of training courses or information sessions for travel agents, cruise specialists, and tourism schools. The DCC organizes a variety of membership meetings and road shows. At these events, people share knowledge and experiences to facilitate and improve collaboration. Furthermore, the DCC works together with travel journals and devotes efforts to building press contacts in order to increase the number of publications on cruise-related issues.

The Dutch river cruise sector is apparently unable to unite itself, and thus defend its own interests. In Amsterdam alone, there are four organizations involved in representing passenger shipping interests (VAR, VEVAG, VPAH and VKSR). Although quite a few cruise companies have joined the only national interest group for passenger shipping (CBRB), these companies still represent a minority. As a result, the CBRB is unable to provide optimal representation. Additionally, the CBRB cannot do everything that actually could be done, for the simple reason that there just is not enough time or money.
1.5 Main Cruise Line Routes

Over the past few years, cruise line routes have seen a further diversification as well as a global expansion. However, the Caribbean, Alaska and Europe (Mediterranean) continue to be the predominant destination areas. Due to the strong growth, there is now a greater choice of worldwide cruise destinations and the number of transatlantic routes is on the increase too. The most important region for cruises is North America (accounting for some 70% of all cruises), in which the Caribbean is the most popular destination. Europe follows at a distance with 13%. Most European routes are undertaken in the Mediterranean, but the fastest growing segment is made up of cruises in the Baltic Sea. As the demand increases, the regular cruise routes (North America) are becoming increasingly crowded, prompting cruise companies to look for new destinations.
In the early 1900s, cruise tourism was mostly an elite privilege. After World War II, commercial passenger aviation became more widespread, and more and more people came to prefer air travel. In the second half of the 20th century, cruise travel became popular, mostly with well-to-do senior holiday-makers. For this generation, a cruise holiday was the symbol of classiness and a luxurious lifestyle.

2.1 The Cruise Market Is Growing

Traditionally, cruise tourism concentrated on the American market. Meanwhile, the market has become saturated and cruise tourism is gradually conquering Europe, which includes the Netherlands. It is by far the fastest growing branch of tourism. Consumers are becoming increasingly familiar with cruise holidays, which makes them more inclined to try one for themselves. More and more people are discovering and acknowledging the advantages of cruise holidays over land-based holidays. The industry is responding to this situation with an ever-wider supply, ranging from trips along the Norwegian fjords to cruises in the Caribbean. An increasing number of new cruise destinations is emerging.

Initially, the growth and development of cruises was centred around the Caribbean, Alaska and Mexico, but has now come to comprise all four corners of the world. The North American cruise market is therefore mainly responsible for the total growth that was recorded from the 1970s to the 1990s.

Due to the emergence of more new cruise areas, people have the opportunity to explore the whole world on board of a cruise ship. There is a risk involved, however, that cruise tourism has a negative impact on the environment, but also on society. When big ships arrive to small ports, congestion will arise and will have an impact, not only on nature but also on the traditions and social behaviour of the local residents. Cruising also has the potential to reach even the most peripheral destinations and in doing so erase the last of ‘untouched’ places from the map. According to some, this will mean many ‘paradises lost’ and according to yet others, an instrument of development for even peripheral areas (Holloway 2002).

A worrisome phenomenon is that many cruise lines are operating under the flag of convenience. Passengers are offered the best services and the highest quality at the expense of the crew members. Many cruise companies have their home base in Bermuda, Saint Vincent, Mauritius, or Malta, where legislation is less stringent. This mostly means low salaries and little social security for personnel, as well as less tax on profit for the company.
2.2 Maritime Heritage

Cruising emerged gradually from a tradition of transatlantic crossings by ship in the early 1900s. In the battle for passengers, shipping companies added elements of luxury to their ships. The Titanic is the most famous example of this, with exquisite food and luxurious accommodation. The first ship that was built solely for this purpose, was the Prinzessin Victoria Luise, designed by Albert Ballin, general manager of the Hamburg-America Line. The ship was completed in 1900. The Prinzessin Victoria Luise is generally regarded as the first purpose-built cruise ship.

On 8 April 2012, Miles Morgan Travel organized a cruise to commemorate RMS Titanic, exactly 100 years after the world’s largest ship sank to the bottom of the ocean. At the Titanic’s wreck site, a special memorial ceremony was held, and the programme included a visit to the cemetery where the victims are buried.

2.3 Trends and Developments in the Cruise Market

The cruise industry, which is in ‘full-steam ahead’ mode, is currently characterized by a couple of noteworthy trends.

• Evolution of cruise ships

As we have discussed earlier, ships are getting bigger, more luxurious, and cruise routes are getting more crowded. A consequence of this is the globalization of routes. To beat the competition, and consequently attract more passengers, substantial investments are made in phenomenal facilities on board and in capacity. Technological advancements are not that much of an obstacle in this process, but the capacity of seaports to take these mega ships can indeed be a problem.

• Target group-oriented ships

Whereas people used to stay in double cabins, there is a current tendency towards spending the night in single cabins. And not surprisingly so, because an important socio-cultural trend is that of individualization. The number of single-person households in Western societies is increasing, and this is something that some cruise companies are responding to with special single concepts and deals. For instance, Norwegian Cruise Lines offers more than 100 single cabins on its ship the Norwegian Epic. In addition, there is a lounge for singles exclusively. Cruise company Fred Olsen Cruises also offers single cabins, in all classes, for prices around the ‘per person’ fare. Moreover, it is possible to pair up with another passenger to share a double cabin.
Singles are not the only group to whom personalized cruise experiences are offered. Practically every demographic category is served, from families with children, to singles, to seniors. For example, MSC Cruises offers child-friendly cruises with children’s menus, child-care facilities, teenage disco evenings, and entertainment programmes for children. And Costa Cruises offers cruise holidays especially for single parents with children. Some companies are even so child-friendly, that children can come along free of charge. This contrasts sharply with adults only cruises, where no children are allowed.

• The ship as a destination
A cruise ship takes passengers to a destination, but some cruise ships are a destination in themselves. These mega ships from companies like Disney, Royal Caribbean, Carnival Cruises, Norwegian Cruise Lines, and Aida Cruises are targeting a younger audience, boasting plenty of entertainment such as spectacular theatre shows complete with fireworks. On board you will find tropical swimming paradises, mega theatres, and ice-skating rinks, for instance.

• Creating experiences
Another important socio-cultural development of the past few years is that experiences are becoming increasingly important in choosing one’s holiday. The tourist expects more than a high-quality product, a reasonable price, and good service. He wants an experience, and is constantly looking for new events and stimuli. Cruise companies are doing their utmost to offer authentic experiences in order to capture the consumer’s heart.

• Strong degree of thematization
The cruise industry is also characterized by a strong degree of thematization. There is a lot of interest in theme cruises in the area of food and wine, music, culture and art. Additionally, consumer awareness of sustainability, authenticity, health and wellness is growing. More and more often, cruise lines offer their passengers active short trips and excursions on shore (e.g. mountain biking, snorkelling, and bicycling) and sports activities on board. Some cruise ships also offer impressive spa facilities, often sponsored by top-brand spa partners. The consumer’s growing health awareness can be explained to some degree by the ageing population – people today live longer, healthier and more vital lives.

• Culinary delights with a focus on health
On board you will find a wide range of catering facilities. The number of alternative or special restaurants is on the increase, serving world foods made from local ingredients. A healthy, balanced and varied menu is a key concern in this respect.

• Self-packaging
More and more cruise passengers extend their cruise holiday with a beach holiday, a city trip, or a tour of a certain destination area.

• Extra costs on board
Cruise lines traditionally have a policy of compulsory tipping. But nowadays one should also
take into account extra expenditure, because not all cruise holidays comprise an all-in package, a tendency which is only increasing. This makes cruise holidays more affordable to a wider audience. Since the capacity of cruise ships has increased, some companies can afford to lower their fares. Another development is the emergence of low-budget cruise companies, such as EasyCruise.

2.4 Future Prospects of the Cruise Sector

The cruise industry has been influenced by countless macroeconomic factors. Consumer confidence is strongly influenced by the financial crisis and especially the consequences of this crisis in the Unites States and in Europe. The political instability in North Africa is also a factor that plays a role. Moreover, there are the destructive natural disasters and the pirates in the Gulf of Aden and surrounding areas that keep posing threats. All these factors have a considerable influence on the demand for cruise holidays and tourism at local and international level.

More than half of the worldwide cruise market is in the hands of North America. The second largest cruise industry is that of Europe. It is expected that Europe will have the highest potential for growth over the years to come, and this potential is far from being fully exploited. This low market penetration rate offers plenty of opportunities for the future of cruise travel and the cruise industry is expected to continue to grow over the years to come.

The European market is well represented by, for instance, Great Britain, Germany, Italy, and France. With 5.5 million of passengers transported in 2010 (departure from a European port), Europe’s market share is about 30%. As a result, cruise tourism constitutes an important engine for the European economy and for the development of tourism in Europe. With 4% more jobs having been created, the total number of jobs in the cruise industry in 2010 added up to 300,000. The fact that the cruise market is displaying strong growth under difficult circumstances even, inspires confidence for the future. Expectations for the next couple of years are promising too.
2.5 Facts and Figures

Figure 2.1 European cruise market expressed in numbers of passengers transported per year.

The figures above demonstrate that growth was recorded every year. In ten years’ time, the European cruise market has more than doubled. Accurate statistics reveal that the European cruise market achieved a growth of 74% over a five-year period (2005-2010).

Figure 2.2 European cruise market per destination in 2010
The total volume of the European market in 2010 is 5,452,000 passengers, as opposed to 4,944,000 passengers in 2009. This means a 10.2% rise. Two out of three Dutch passengers opt for a European cruise destination. Especially the Western Mediterranean is popular. In 2009, 2,825,000 cruise passengers chose the Mediterranean as a destination, compared to 3,303,000 in 2012. An increase of 16.9%. In 2010, the destination of Northern Europe was also visited more often, by 2.6% more than in 2009 (884,000 pax). The other destinations recorded a slight increase of 0.6%. In 2009, they attracted 1,235,000 cruise passengers, compared to 1,242,000 in 2010.

The average cruise length is still increasing. In 2010, the average cruise length was 7.3 days. Nearly three-quarters of all river cruises last one week on average.

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<table>
<thead>
<tr>
<th>Year</th>
<th>Average cruise length in number of days</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>6,5</td>
</tr>
<tr>
<td>2001</td>
<td>6,4</td>
</tr>
<tr>
<td>2002</td>
<td>6,9</td>
</tr>
<tr>
<td>2003</td>
<td>6,9</td>
</tr>
<tr>
<td>2004</td>
<td>6,9</td>
</tr>
<tr>
<td>2005</td>
<td>6,9</td>
</tr>
<tr>
<td>2006</td>
<td>6,9</td>
</tr>
<tr>
<td>2007</td>
<td>7,1</td>
</tr>
<tr>
<td>2008</td>
<td>7,2</td>
</tr>
<tr>
<td>2009</td>
<td>7,2</td>
</tr>
<tr>
<td>2010</td>
<td>7,3</td>
</tr>
</tbody>
</table>

Figure 2.3 Average cruise length in 2010

<table>
<thead>
<tr>
<th>Year</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>Verandering 2010 t.o.v. 2009</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>4.290.000</td>
<td>4.690.000</td>
<td>4.840.000</td>
<td>5.280.000</td>
<td>9,1%</td>
</tr>
</tbody>
</table>

Figure 2.4 Number of cruise passengers departing from Europe

<table>
<thead>
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<th>Year</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>Verandering 2010 t.o.v. 2009</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>18.820.000</td>
<td>21.710.000</td>
<td>23.780.000</td>
<td>25.200.000</td>
<td>6%</td>
</tr>
</tbody>
</table>

Figure 2.5 European cruise ship passengers by nationality
The top 3 of European cruise countries are Great Britain, Germany and Italy. At the moment, Germany is recording the highest growth rates.

Worldwide, the cruise market accounted for almost 20 million passengers. Global growth is set at 7.6%. The European cruise market is growing steadily.
<table>
<thead>
<tr>
<th>Country</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Switzerland</td>
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</tr>
<tr>
<td>The Netherlands</td>
<td>42</td>
</tr>
<tr>
<td>Germany</td>
<td>39</td>
</tr>
<tr>
<td>Malta</td>
<td>34</td>
</tr>
<tr>
<td>France</td>
<td>28</td>
</tr>
<tr>
<td>Bulgaria</td>
<td>5</td>
</tr>
<tr>
<td>Portugal</td>
<td>4</td>
</tr>
<tr>
<td>Romania</td>
<td>3</td>
</tr>
<tr>
<td>Sweden</td>
<td>3</td>
</tr>
<tr>
<td>Austria</td>
<td>1</td>
</tr>
<tr>
<td>Belgium</td>
<td>1</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>1</td>
</tr>
<tr>
<td>Great Britain</td>
<td>1</td>
</tr>
<tr>
<td>Poland</td>
<td>1</td>
</tr>
<tr>
<td><strong>Total fleet</strong></td>
<td><strong>216</strong></td>
</tr>
</tbody>
</table>

42 river cruise ships are sailing under the Dutch flag. This is not the precise number that is sailing in the Netherlands, since they have an international character. Moreover, many ships are registered in Switzerland and Malta, because of the tax-friendly climate of these countries.
3 The Cruise Sector Has Discovered the Netherlands

3.1 Growing Interest

In the Netherlands too, the interest in cruise travel is growing. The Netherlands has a lot of ground to make up, because its share in the cruise market is still very small. Over the past few years, however, the Dutch cruise market has made huge strides and passenger numbers have risen sharply in a short period of time. In 2010, 65,511 passengers were booked to depart from the Netherlands on short and long cruise holidays, setting sail for destinations all over the world, which was 5.1% more than the year before. In the past year, the cruise market grew by another 31.7% to more than 86,000 passengers. Due to the steady growth rates, more and more shipping companies are targeting the Dutch market. This is also expressed in the increase in the number of departures from the Dutch ports of Amsterdam, Rotterdam and Ijmuiden. 2011, 168 ships called in at Dutch cruise ports, compared to 225 in 2012. Of these, 132 were ‘turnarounds’. Moreover, cruise companies are bringing more ships into European waters every year. Tour operators and cruise specialists have been quick to respond to this situation. The supply of cruises in the various travel brochures and travel portals has increased considerably, which also applies to the number of cruise brochures available at travel agencies. The increasing demand for river cruises has often been at the expense of the coach trip market. The DCC is positive about the future and is striving for 160,000 Dutch cruise passengers in the short term. In 2012, a further increase is expected. It is not only the Dutch cruise market that is making progress. In Belgium too, cruising is becoming increasingly popular. According to the Belgian cruise industry organization Cruise & Ferry World (CFW), 80,000 Belgians took a cruise in 2011, which is an impressive increase compared to the number of 65,000 in 2010. In the past few years, increases of 10% to 15% were recorded.

Developments in the Netherlands

Total number of Dutch passengers in 2007: 33,698
Total number of Dutch passengers in 2008: 48,642
Growth 2008 compared to 2007: + 44,3%

Total number of Dutch passengers in 2008: 48,642
Total number of Dutch passengers in 2009: 62,342
Growth 2009 compared to 2008: + 28,6%

Total number of Dutch passengers in 2009: 62,342
Total number of Dutch passengers in 2010: 65,511
Growth 2010 compared to 2009: + 5,1%

Source: Tourpress.nl, Dutch Cruise Council, De Standaard
3.2 Image

The Dutch cruise industry is still coping with an image problem, which was shown by a survey of a website called Cruises.nu. The website asked more than 1,000 people - who had never booked a cruise – about their ideas of cruise holidays. The results explain why the Dutch cruise market, comprising some 65,000 passengers annually, is one of the smaller ones in Europe. Cruises are readily associated with ‘boring’ and/or ‘monotonous’ (54%) and ‘older people’ (78%). Moreover, 23% are afraid of becoming seasick on board of a cruise ship. In addition, few people make the distinction between the various types of cruises.

River cruises, such as those on the river Rhine, are indeed booked by older people relatively more often. This is because these types of cruises are characterized by a low degree of product innovation. As a result, the sector does not appeal to all market segments. However, there is great variety in sea cruises, appealing to a wide audience, such as special youth cruises and family cruises. Furthermore, these ships are far from old-fashioned, and there are many more clichés that are simply not true. In other words, the cruise sector has been wrongly labelled as having a ‘grey image’, and fortunately, Dutch people are increasingly overcoming their reservations towards cruises.

The changing public image of cruises can largely be ascribed to the efforts of industry organizations such as the DCC. This organization is doing everything to promote cruises to an as wide as possible audience. Word-of-mouth advertising is also very important in this context.

Costa Concordia disaster

The tragic accident with the Costa Concordia that happened in January 2012 caused a public outrage. The vessel capsized off the Italian coast. As the ship tilted over and started sinking, it was complete and utter chaos and panic. There are indications that the captain made some serious mistakes. He was accused of deliberately steering the ship too close to the shore, allegedly to ‘salute’ an officer on the island, as a result of which the ship ran aground. He was also blamed for leaving the ship before it had been fully evacuated. The consequences of this accident are far-reaching. A search was set up immediately to look for missing passengers, but help came too late for 25 people. People also feared an environmental disaster because of a potential oil spill. Removing the wreck as safely and meticulously as possible is estimated to last one year. The salvage operation will cost dozens of millions of euro. Eerily enough, the disaster occurred on Friday the 13th. >>
It is of utmost importance for the sector to prevent that a disaster like that of the Costa Concordia does major damage to the image of cruise holidays. Erroneous media reports, only trying to stir things up, can do serious damage to the image. It also fuels the debate on ‘irresponsibly large cruise ships’ or ‘floating cities which are impossible to evacuate’. We must remember that the Costa Concordia accident was caused by ‘significant human error’, which means that even the strictest safety precautions could not have prevented the tragedy. Good communication is therefore of primary importance to the sector, because over the past few years, cruising has consistently proven to be a very safe form of travel. Accidents of this sort will only make cruise holidays safer, because it will lead to protocols and standards being tightened. Costa Cruises, for example, has imposed a prohibition to perform near-shore salutes. Nevertheless, it is expected that the Costa Concordia accident is going to affect the cruise industry.
4 Who Is the Cruise Tourist (or the Dutch Cruise Tourist)?

4.1 Cruise holidays for everyone

Who is the cruise tourist? The traditional image is that of an elderly couple, with a high standard of living, spending their time on board playing bridge and dining with the captain. On the other hand, there is the prejudice of middle-aged passengers looking for non-stop entertainment and shopping. Although passengers like this still exist, they are not representative of all passengers.

Initially, the majority of cruise travellers were well-to-do Americans, but in the current cruise market, Germans and Britons are also relatively frequent passengers. In the coming years, the variety of nationalities taking part in cruise travel is likely to increase (Trendrapport toerisme, recreatie en vrijetijd, 2011).

The average age of today’s cruise tourist has decreased considerably. The target group used to consist mainly of over-65s. Currently, the biggest group of cruise travellers (45%) falls into the age category of 45 to 65 years. The portion of over-65s is 35% of the total passengers. The number of cruise travellers aged between 25 and 45 is also on the up (13%). The average age on board is mainly determined by the type of cruise ship and the choice of cruise company.

Modern cruise tourists are not only younger, but also healthier / more vital and consider experience, customization and safety very important. Many cruise lines want to attract repeat visits by offering excellent service, quality and hospitality as an added value. Consequently, 40% of first-time cruisers book another cruise within two years of their last one. Furthermore, Dutch cruise tourists are known as late bookers and being very much price-driven. More experienced cruise passengers book early, sometimes as early as one year in advance. Additionally, cruisers are known for their relatively high spending pattern, as a result of which the cruise market contributes substantially to the general quality and image improvement of the region.

Two-thirds of Dutch cruise passengers take their cruise in Europe. Especially the Mediterranean is popular. Departure from the Netherlands is an absolute favourite and people would like to see a greater variety of routes departing from Dutch ports in the future. Furthermore, many Dutch cruisers do not mind spending a couple of days on sea before calling in at the first port.

Experienced elderly cruisers mostly remain loyal to one cruise line and travel frequently. They greatly enjoyed their cruises in the past, that is why it requires only minimal marketing efforts to reach out to this group. It does not matter to them that cruising is an experience they are already familiar with, they continue to enjoy it time and again.

Late baby boomers belong to the largest segment of cruise participants. They have more time and money to spend, and they are used to spending money while being on holiday. Issues that
baby boomers consider important include reliability, authenticity, health, comfort, convenience, and safety. They also need variety (different destinations) and this is a need that continues to exist until they reach higher age levels.

Despite the ageing population, young people are still an interesting target group. Today’s young tourists are the tomorrow’s more well-to-do tourists. By appealing to young people now, cruise liners try to get them to cruise again when they are older. Moreover, youngsters are highly internationally oriented.

4.2 Why Cruising?

All facilities are within easy reach
There is no need for anyone to get bored on board.

The DCC says, ‘100% satisfaction guaranteed’
Cruise voyages are known to deliver unparalleled customer satisfaction. This applies to frequent as well as first-time cruisers. Every time, the cruise experience exceeds expectations in a wide range of important holiday features. When compared to other types of holidays, cruise holidays receive consistent high scores.

Very favourable price/quality ratio
Cruise holidays are offered in a range of price categories.

‘Cruising fulfils important holiday needs to a high degree: service, quality, time for each other, and fun and entertainment’
Norbert van der Glas of Cruise Travel.

Cruise holidays are suited to a wide market range
Many ships offer facilities for all age categories.

Due to the increasing growth of supply, there is an ever-greater choice of countless destinations all over the world
Cruising is varied. You get to see a lot of different places in one holiday.

Booking a cruise is easy (as a package holiday), does not require any planning, and makes for a great experience without any inconvenience
A cruise is a tour which does not require its participants to pack and unpack every time. The accommodation remains the same, it is only the environment that changes.
Zeeland has so much to offer, not in the least because of its tourism potential. This is something that people in the Benelux countries and Germany are generally familiar with, but by marketing Zeeland as a cruise destination, a more internationally-oriented reputation can possibly be built for Zeeland. If a cruise terminal is built in Vlissingen, then this will make Zeeland a new cruise destination. As a new market entrant, it is important to find out about the activities and distinctiveness of competitors. In addition, it is very important to ascertain the competitiveness of the port and the destination itself.

5.1 The Potential of Zeeland as a Cruise Destination

The port of Zeeland is situated on the Westerschelde estuary, between Rotterdam and Antwerp, and is directly connected to the North Sea. The port itself is made up of the port of Vlissingen and the port of Terneuzen. Due to its strategic position, this port is one of the most ideally situated harbours in North West Europe. Hence, there are good connections with the European hinterland.

Tourists are attracted to Zeeland because of its tranquillity and natural beauty. This does not mean that the cities in Zeeland are uninteresting. On the contrary, they offer a wide variety of activities, events, and facilities that will please everyone’s tastes. Cities like Vlissingen, Middelburg, Veere and Zierikzee have many sights that are worth seeing. Moreover, Zeeland boasts the famous Deltawerken and Neeltje Jans. And for those tourists who don’t consider all this enough, there are the Flemish art cities to be visited nearby.

5.2 The Development of Zeeland Cruiseport (Cruise Terminal)

Six years ago, the company of Shipping, Trading & Transport B.V. (S.T.T.) conducted a feasibility study of industrial tourism in Zeeland, at the request of the Chamber of Commerce. The outcome of this study was negative: there simply are not enough production plants – either operational or disused - to consider branching out into the tourism field. During this process, however, the idea of developing Zeeland as a cruise destination emerged. The city of Vlissingen would be perfectly suited, due to its unique location, as a Northern European cruise destination. Zeeland Cruiseport, consisting of a private limited company and a foundation, was founded to lead the effort. The enterprise is part of the S.T.T. The work of the foundation consists of promoting tourism in the province of Zeeland, with the aim of attracting cruise tourists to Zeeland. The activities of the private limited company comprise the handling of cruise ships, the transportation of passengers and luggage, and the provision of logistics services. Zeeland Cruiseport is led by Mr Alex Nelis and is situated in Ritthem.

The idea of developing a cruise terminal with attendant visitor centre was fleshed out in the years after 2006. Should the cruise terminal be built, this may lead to a higher tourism intensi-
The initiative is supposed to ensure stronger support for the vision in terms of the market potential of sea cruise ships for Zeeland in general and the city of Vlissingen in particular. In order to not only serve incoming cruise tourists, but also the local residents of Zeeland, a centre for Education, Work, Experiences and Leisure may be considered. The concept developed is based on these themes and is in keeping with the objectives of the Structure Vision Vlissingen 2020 ‘een goede economische ontwikkeling van de gemeente Vlissingen’ (sound economic development of the city of Vlissingen) and ‘het realiseren van een aantrekkelijk werk-, woon- en leefklimaat’ (creating an attractive working and living environment). The target groups of the centre are inhabitants of Zeeland; inhabitants of Rotterdam, Antwerpen, Bergen op Zoom, Roosendaal, Breda, and Dordrecht/Zwijndrecht; tourists in the province of Zeeland; students (of Maritime Institute de Ruyter), and of course, international cruise tourists.

The pillars of the concept are as follows:

- A unique, attractive, international cruise terminal, a landmark feature for Zeeland.
- Tourism, cruise, and port-related educational facilities.
- A lively water-related centre for Leisure and Retail, in combination with a continuous supply of leisure activities.

Within the themes of Education, Work, Experiences and Leisure, the following services and facilities may be consistent with the above-mentioned pillars:

- **Education:** Students of, for instance, the Maritime Institute
- **Work:** Offices
  - Day nursery
  - Cruise conferences
- **Experiences:** Cruise terminal
  - Bowling
  - Hotels and restaurants
  - Go-karting
  - Shops
- **Leisure:** Climbing wall
  - Flow or body board course
  - Fitness & health club
  - Sports facilities

Together, these services may constitute a multifunctional venue that complies with the intended, future objectives of the Structure Vision Vlissingen 2020.
5.3 What Determines the Competitor’s Success?

At the moment, there are three competitors in the Netherlands in the area of cruise tourism, which are Rotterdam, Amsterdam and IJmuiden. In this section, we will take a look at the competitiveness of these ports. In addition, we will examine a number of well-known foreign cruise ports. What is the capacity of these ports (and how many cruise ships call in at them) and how do they set themselves apart from other ports?

**Zeebrugge**

Zeebrugge is Belgium’s most important ferry and cruise port. Every year, this port handles over 800,000 passengers. An important attraction near Zeebrugge is the historic city of Brugge. In 2012, Zeebrugge received 94 cruise ships. The port distinguishes itself as follows:

- The port of Zeebrugge is situated on the coast of the North Sea, which is crossed by some of the world’s busiest shipping routes.
- Zeebrugge is relatively close to the UK.
- It has good connections to all the countries of continental Europe.

Apart from being a competitor (should a cruise terminal be built in Vlissingen), Zeebrugge also represents the biggest opportunities for Vlissingen. Vlissingen has a couple of advantages over Zeebrugge. Vlissingen has a better infrastructure than Zeebrugge, a more attractive hinterland, and well-organized services/facilities. Enough arguments to move shipping companies to trade their docking place in Zeebrugge for a visit to Vlissingen.

**Rotterdam**

The port of Rotterdam is one of the biggest in Europe and the fourth biggest in the world. From 1962 to 2004, the port of Rotterdam was even the biggest of the world. It certainly has name recognition. In 2012, Rotterdam expects to welcome 28 cruise ships. Distinguishing features of the port of Rotterdam are:

- It is directly connected to the North Sea through the Nieuwe Waterweg and the Eurogeul.
- The port is favourably situated on the mouth of the river Rhine.
- The port is favourably situated in relation to major population concentrations, such as the Randstad and the Ruhr area in Germany, and therefore has a wide choice in hinterland transport as well as a wide trade catchment area.
- There is a direct connection between Rotterdam and South-East Europe.
Amsterdam
In 2012, 157 cruise ships will dock at Amsterdam port, which makes Amsterdam the leader in the Netherlands where it concerns cruise holidays. What distinguishes the port of Amsterdam, is:

- The port is located near Centraal Station Amsterdam, providing frequent links with Schiphol Airport and more than 50 international railway destinations.
- Schiphol Airport has direct links to 240 cities all over the world, providing great accessibility for foreigners to embark in Amsterdam.
- Amsterdam-stad alone has nearly 800,000 inhabitants, so the port has a very wide trade catchment area.
- Amsterdam attracts many tourists.

IJmuiden
IJmuiden comes second in the Netherlands as far as the docking of cruise ships is concerned. IJmuiden’s success is largely based on the fact that the cruise terminal of Amsterdam does not have any capacity left for extra arrivals. In 2012, 45 cruise ships are expected in IJmuiden.
A downside of the port of IJmuiden is that it is more difficult to get to than the ports of Rotterdam and Amsterdam. IJmuiden does not have its own train station, for instance. There are a couple of distinguishing features though:

- In May, the brand-new cruise terminal will be opened.
- The port is directly connected to the North Sea and does not have any navigation locks, which saves travelling time for passengers.
- IJmuiden is creating a distinct profile for itself as a fishing port. As a result, there are considerable numbers of day-trippers that visit the port.

Antwerpen
The port of Antwerpen is expecting 26 cruise ships in 2012. The cruise market of Antwerpen was in a depression for a couple of years, but over the past few years, the number of cruise liners calling at Antwerpen has been increasing. The distinguishing capacity of the port of Antwerpen can be found in the following:

- The port is situated 60 kilometres inland. There are 100 million people living there within a 350 kilometre radius.
- Antwerpen is a major transport hub in Europe.
- In international surveys of labour productivity, Belgian dock workers often top the list. Moreover, most of the port staff speak several languages. As a result, the port has a good reputation.
**Kiel**
Kiel is the most important German departure and arrival port in terms of cruise travel in Northern Europe. Kiel is still developing, taking on an increasingly sumptuous style. This is confirmed by the ever greater number of luxurious cruise ships that dock in Kiel. A total of 50 cruise ships will call in at Kiel in 2012. The port’s distinguishing features are:

- As of 2013, the port will be able to accommodate ships with a length of 300 metres and more.
- In 2011, an old warehouse was acquired, which will be converted into a new passenger terminal.
- Kiel is one of the most popular shopping destinations in the Baltic Sea area.

**Le Havre**
Le Havre is a port for both river cruises and big sea cruise ships. The port is the second biggest ferry port of France. In 2012, this French port will accommodate 42 cruise liners. The port distinguishes itself from other ports by means of the following characteristics:

- The port is situated by one of the busiest shipping lanes in the world.
- The distance between Le Havre and Paris is 200 kilometres.
- With its first-class technical facilities complying with ISPS safety and security standards, Le Havre is one of the safest ports in the world.

**Southampton**
The port of Southampton is mainly known for the high number of cruise ships that dock there. Every day, cruise ships from all over the world arrive at and depart from Southampton. It is not clear how many cruise ships will be calling in at this British port in 2012, but the number is in the hundreds. The port’s distinguishing features are:

- The port is situated near a good motorway network and railway lines.
- Southampton is located in the county of Hampshire (South England) and is the gateway to the county’s beautiful landscape and historical sights.
- Southampton is the ‘Cruise Capital’ of the United Kingdom.

**Göteborg**
Göteborg is the biggest port of Sweden. Göteborg is a real event city, where there is always something happening. It is not yet clear how many cruise ships will visit Göteborg in 2012. Distinguishing features of this port are:

- The natural beauty of Scandinavia is a tourism magnet.
- The port of Göteborg is the biggest in Sweden.
- The city of Göteborg has about 450,000 inhabitants. That alone gives the port a wide trade catchment area.
5.4 Competitiveness of Cruise Terminal Vlissingen

This section specifically examines the competitiveness of Cruise Terminal Vlissingen. What are the factors that make Vlissingen an ideal cruise destination and what are the threats?

Zeeland’s position in the cruise market
In terms of cruise tourism, Zeeland’s location is ideal. The province is situated by the North Sea and has good connections with the hinterland of Europe. Zeeland also boasts plenty of tourism resources.

It is important for Zeeland Cruiseport to incorporate all the disciplines that are key to a port authority and that are critical to accommodating cruise ships. Vlissingen also has advantages over the two nearest ports, Antwerpen and Zeebrugge. It will take a cruise ship about twelve hours to go to Antwerpen and back again, whereas by car, you can get from Vlissingen to Antwerpen within two hours’ time. In other words, when a cruise ship docks in Vlissingen, it will give its passengers more time for excursions. This is important, because cruise companies make most of their money from excursions. Additionally, the port of Zeebrugge focuses mainly on container transport, as a result of which the number of docking places for cruise ships is decreasing. That is why some of the cruise companies are dissatisfied and want to move out of Belgium.

"It will not just be rich Americans stepping onto Zeeland’s shores. There is a transformation going on. There are also more and more Europeans who take a sea cruise. It has become affordable. Six out of ten passengers take a cruise regularly and have seen Antwerpen and Amsterdam by now. Shipping companies and cruise line operators are looking for new destinations. That is what makes Zeeland attractive.”

(Mr Maes in the PZC of 9 November 2007)

Another aspect that plays a role in this respect is that the cruise market is displaying a strong shift in focus towards North West Europe. The reason for this is that cruise companies want to avoid risk areas. Just think of the war situations in the Middle East and the Northern part of Africa and the nuclear disaster in Japan. This shift increases Vlissingen’s chance of becoming a new cruise destination. Antwerpen is its biggest competitor. Antwerpen does not charge cruise ships any port dues, which reduces costs for cruise line operators.

However, just like with any initiative, there aren’t just positive aspects. There are weaknesses and threats too. An example of this is that, to welcome the guests of these large vessels, it takes more than just a standard docking place. At the moment, Zeeland does not have a cruise terminal. Furthermore, the growth of Zeeland Cruiseport will be dependent on the number of cruise ships and passengers arriving. It is impossible to achieve an increase in the number of cruise ship arrivals without a cruise terminal.
The threat of new market entrants is very small, fortunately. The Dutch coast does not have much to offer in terms of cruise potential. Besides, neighbouring countries Belgium, the UK, Germany and France already have existing cruise quays which have been part of the cruise itineraries of shipping companies for many years.

**Cruise ships in Zeeland**

In 2009, a cruise ship called in at Vlissingen for the first time. Additionally, there were 250 river cruise bookings. The objective is to accommodate 20 sea cruise ships and 450 river cruise ships before 2020. To achieve this objective, two factors are essential: sufficient docking space and a passenger terminal. What’s more, there must be interest from shipping companies. To raise awareness among shipping companies of Zeeland as a cruise destination, a delegation of Zeeland Cruiseport went to the Seatrade Cruise Shipping Convention in Miami in 2011 and 2012. At the moment, the following companies have ‘booked’ Zeeland: Holland America Line, Phoenix Reisen, Grand Circle Travel, and Peter Deilmann Cruises. Interested cruise line operators are: Fred Olsen Cruises, Sea Cloud Cruises, Seabourn, Feenstra rhine line, and Azamara cruises.

**5.5 Effects of Zeeland Cruiseport**

The arrival of Zeeland Cruiseport could trigger important events in Zeeland in general, and in the Walcheren region in particular. After all, the cruise terminal would bring substantial groups of financially strong tourists to the region, looking for fun and entertainment during their stay there. Day trips to interesting cities and attractions would certainly be a serious and lucrative option. The cruise sector is already generating handsome profits elsewhere in the Netherlands. Figures like 1.4 billion euro per year – divided among just a few cities and provinces – are mentioned. There is also talk of 300,000 euro in income per day for small and medium-sized businesses (just think of businesses that offer day trips, passenger transport, hotels and restaurants, and interesting tourist attractions). The tourism and leisure sector in Zeeland and far beyond stands to gain from the arrival of cruise ships.

**Economy and image**

A cruise terminal would be of economic value. Various feasibility studies have shown that an initiative of this sort has the potential to generate employment for 350 full-timers. A precondition in this respect is that the number of cruise ships docking in Vlissingen should increase. Only then will economic value and employment opportunities be ensured. Furthermore, cruise passenger spending is known to be relatively high, so the cruise market can contribute considerably to the general improvement of the region’s quality and image. Cruise passenger spending is also conducive to maintaining and expanding the level of services and facilities in the region. In addition, the image, the entertainment, the hustle and bustle, the economic effects, and the commercial potential of a cruise terminal will have a positive influence on business location policy. Moreover, cruise tourism will bring the port closer to the people and the city. This too will improve the image.
Tourism
Another effect of the arrival of a cruise terminal would be: an increase in day-trip tourism in Vlissingen and surrounding area. The district around the railway station of Vlissingen will become more attractive because of the new functions and stimuli in the area. As a result, the motivation to travel – for both domestic and international tourists – will increase considerably. Research has shown that 40% of the cruise passengers come back for a repeat visit and about 80% use the cruise trip to acquire ideas for future holidays.

Internationalization
The presence of large numbers of cruise ships will give the city and the region a strong international dimension. There will be a greater diversity in products and services offered, a new cultural meeting place, and the number of visitors will be distributed more equally over the year. In addition, the visitors may be either local, regional or international. In short, Zeeland in general and Vlissingen in particular will be put on the international map. This is something that will not only attract cruise travel, but other activities as well.
I have read this report with interest and I can assure you that it is a truthful representation of the facts with regard to cruises and the interests of cities and regions in cruises. Based on ample experience in the field of marketing and acquisition, I know that it isn’t easy to promote a region on a global scale.

Zeeland, however, has so much to offer and due to the unique location of the city of Vlissingen on the mouth of the Westerschelde river, the city as well as the region are especially attractive to cruise line companies.

With a view to the growth of the cruise market and the need for new destinations for cruise passengers, Vlissingen will have to make the most of its opportunities over the years to come. By means of a network of representatives in the cruise market and by means of active, targeted marketing, Zeeland Cruiseport will strive to address these opportunities.

The fact that our region is attractive to cruise ships is shown by the large number of bookings from surrounding ports, such as the 94 calls in Zeebrugge in 2012. Now that the local council of Vlissingen has decided to prepare the Finsa Terminal on the outer port of Vlissingen for receiving cruise ships, Vlissingen has enough to offer in terms of facilities.

In conjunction with Zeeland Delta, the city of Vlissingen, and the province of Zeeland, programmes have been developed which will present the very best of our region to cruise tourists. As described earlier in the report, the primary goal for visiting cruise ships is to boost tourism in Zeeland. There is, however, a lot more going on, a region and city that is able to position itself as a cruise port will not only attract many international visitors, but will also generate more publicity.

Zeeland Cruiseport has joined Cruise Europe, a European cruise organization in which the name of Vlissingen as a city is named in one breath with cities like Barcelona, Amsterdam, Antwerpen, and so on.

Our goal is to refer to Vlissingen and Zeeland in our presentations, time and again, as an excellent region to visit, but also to live, work, and for recreation. As mentioned earlier, Vlissingen and Zeeland are going to have to embrace the golden opportunities that await them, and our organization certainly intends to contribute to that process.

Alex Nelis, Board of Directors Zeeland Cruiseport
Appendix I: Cruise Terminology

Some knowledge of cruise terms may be useful during a cruise holiday. Here is a list of the most frequently used cruise terminology.

**Aft /Stern**
Near, towards or in the rear (stern) of the ship.

**Atrium**
An interior, multi-deck, open-area of a ship. Typically, atriums are located near lifts, shops, cafes and guest services. Shipboard atriums can extend anywhere from two to ten decks or more.

**Bow**
Toward or in front (fore) of the ship.

**Bridge**
The navigation and command centre of the ship, usually found high up and forward.

**Cabin**
The passenger’s personal accommodation on board of a ship.

**Cabin Guarantee**
The cruise line’s promise that the passenger will sail on a stated voyage in a specified price category or type of cabin, at an agreed rate no higher than would ordinarily apply for that voyage, which may result in an improvement of accommodation at no additional cost.

**Cruise Card**
Credit card-size personal ID document, given to each cruise passenger to charge shipboard purchases, use as their cabin key-card, and boarding pass to embark and disembark the ship.

**Day programme**
Passengers are informed via a day programme that is provided every preceding evening. The day programme contains details on arrival and departure times of the cruise ship, information, information about the upcoming destination and shore excursions, contact details of port agents, but also opening hours and locations of restaurants, bars, and events.

**Deck Plan**
An overhead diagram illustrating cabin and public room locations in relation to each other.

**Debarkation / Disembarkation**
Exiting the ship.
**Double Occupancy**
A cabin for two passengers.

**Dry dock**
A docking facility for maintenance, refurbishment and upgrading of ships.

**Embarkation**
Entering or boarding a ship.

**Gratuities / Tips**
The passenger’s personal expression of thanks (tips) for the service received on board, sometimes automatically added to their account.

**Leeward**
The leeward side of a ship is the side that is sheltered from the wind.

**Muster station**
The location where groups of passengers are asked to report in the event of an emergency at sea or during a muster drill. The specific muster location depends on the location of the passenger’s cabin.

**Pier**
The area where the ship docks, also known as quay.

**Port of Call**
The places visited by a ship.

**Port Side**
The left side of the ship as you face forward.

**Shore excursions**
Activities that passengers can engage in at a port of call. Booking in advance is often required to avoid disappointment.

**Starboard**
The right side of a ship as you face forward.

**Stateroom**
The passenger’s personal accommodation on board of a ship.

**Tender**
A small vessel used to move passengers between the ship and shore when the ship is at anchor.
**Triple/quad cabin**
Refers to a cabin for 3 or 4 persons.

**Windward**
The windward side of a ship is the side that is exposed to the wind.

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The cruise industry is the most important growth sector in the entire tourism market. The market is still growing, despite the global economic crisis. North America is the primary market for cruise activities. Although this market is the most mature one – with the United States traditionally accounting for the majority of all cruise passengers – it is showing signs of saturation. Nevertheless, there is still enormous potential to be found in the worldwide cruise market. The European cruise sector is number two and represents the fastest growing market. The biggest European player is Great Britain. The share of the Netherlands is still relatively small, although major cruise ports like Rotterdam and Amsterdam are gaining ever better positions strategically. The Dutch cruise passenger is not yet really convinced of this comfortable way of travelling, but here too, an upward trend can be seen. There are many prejudices against cruise holidays, but also against the people undertaking this kind of travel. Various interest groups are making efforts to increase familiarity with the cruise product, in order to eliminate these prejudices. The fact that the cruise market is displaying strong growth under difficult circumstances even (in times of crisis) brings confidence for the future. The cruise industry can make a huge positive contribution to tourism destinations and generate economic benefits, which makes it an interesting niche market for coastal regions. The Dutch province of Zeeland is no exception in this respect. Building a cruise port in Zeeland would allow the province to enter a promising market.