Cruise operations must:

- Be profitable
- Help to grow the port business
- Be a value for ports and their customers
- Meet the test of time
- Be flexible and expandable
- Adjust to new technologies
- Be conscious of the irreplaceable land resources that ports have
• **BUDGET CONSCIOUS**

• **PORT TARIFFS ARE HEAVILY COMPETITIVELY NEGOTIATED**

• **PORT TERMINALS WITH LOW VOLUMES RESULTS IN POOR ECONOMICS**

• **UNLESS**
  • **HIGHER VOLUMES ARE ACHIEVED**
  • **SECONDARY USES ARE ACCOUNTED FOR**
  • **PASSENGER FACILITY CHARGES ARE INTRODUCED**

• **THE BUSINESS PLAN MUST SUPPORT THE DEVELOPMENT**

• **BUT...EVERYONE WANTS A BETTER EXPERIENCE**
Why has terminal development changed?

- **Old model**
  - Competition was minimal
  - Bottom line is king
  - Keeping port costs down was paramount
  - Moving people quickly was more important than comfortably
  - Technology was not deployed
Why has terminal development changed?

**Old model**
- Competition was minimal
- Bottom line is king
- Keeping port costs down was paramount
- Moving people quickly was more important than comfortably
- Technology was not deployed

**New model**
- Cruise lines are more competitive
- Cruise lines recognize the importance of the terminal as a “Gateway” for their passengers
- Customer satisfaction is paramount
- Technology is quickly being deployed (albeit not standardized)
PAST TREND

- **Most cruise terminals evolved from re-used cargo sheds**

- **New ones assumed the same relationship**
  - Ship
  - Apron
  - Terminal
  - Transport

- **Most terminals are disconnected from the City**

- **Surrounded by asphalt and other industrial uses**
CURRENT TREND

- CRUISE LINES WANT A TERMINAL THAT:
  - SUPPORTS THEIR BRAND
  - CREATES A ONE-OF-A-KIND EXPERIENCE FROM CURBSIDE TO SHIP
  - ACCOMMODATES THEIR STATE-OF-THE-ART TECHNOLOGY
  - GROWS THEIR BUSINESS
  - HAS FLEXIBILITY
  - MOVES HUGE AMOUNTS OF PASSENGERS & BAGGAGE EFFICIENTLY FOR +6,500 PASSENGERS
  - ARE “ICONIC”
  - SHOWS INNOVATION
## Level of Service

<table>
<thead>
<tr>
<th>Level of service</th>
<th>Total check-in</th>
<th>Total disembark</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>10 min</td>
<td>20 min</td>
</tr>
<tr>
<td>B</td>
<td>15 min</td>
<td>30 min</td>
</tr>
<tr>
<td>C</td>
<td>20 min</td>
<td>40 min</td>
</tr>
<tr>
<td>D</td>
<td>25 min</td>
<td>50 min</td>
</tr>
<tr>
<td>E</td>
<td>30 min</td>
<td>60 min</td>
</tr>
<tr>
<td>F</td>
<td>&gt;30 min</td>
<td>&gt;60 min</td>
</tr>
</tbody>
</table>

### Walking distances

<table>
<thead>
<tr>
<th>Level of service</th>
<th>Feet</th>
<th>Meters</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>&lt;500</td>
<td>&lt;150</td>
</tr>
<tr>
<td>B</td>
<td>1,500</td>
<td>500</td>
</tr>
<tr>
<td>C</td>
<td>2,500</td>
<td>800</td>
</tr>
<tr>
<td>D</td>
<td>3,000</td>
<td>1,000</td>
</tr>
<tr>
<td>E</td>
<td>4,000</td>
<td>1,300</td>
</tr>
<tr>
<td>F</td>
<td>&gt;5,000</td>
<td>1,600</td>
</tr>
</tbody>
</table>

### Terminal density

<table>
<thead>
<tr>
<th>Level of Service</th>
<th>Square feet per person in terminal</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>&gt;13</td>
</tr>
<tr>
<td>B</td>
<td>10 to 13</td>
</tr>
<tr>
<td>C</td>
<td>7 to 10</td>
</tr>
<tr>
<td>D</td>
<td>3 to 7</td>
</tr>
<tr>
<td>E</td>
<td>2 to 3</td>
</tr>
<tr>
<td>F</td>
<td>&lt;2</td>
</tr>
</tbody>
</table>

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Recent Terminal Projects
CARNIVAL - LONG BEACH
CARNIVAL - LONG BEACH

OWNED BY CARNIVAL CORP UNDER A LEASE FOR THE BUILDING AND PROPERTY
Terminal A, Port Miami

Built by RCCL under a land lease with Port Miami
Designed for Oasis class
Terminal A, Port Miami

170,000 s.f. 3-story terminal + garage
17-month Construction Schedule
Traditional design / bid / build
Transitioned to a Design-Build after contracting
Terminal A, Port Miami
Terminal B, Port Miami

Built under a preferential usage agreement with NCL
Designed for Joy Class
Terminal B, Port Miami

Built under a preferential usage agreement with NCL designed for +Joy Class.
188,000 sf terminal + garage + site + pier improvements
2 months to issue foundation package
15 month construction schedule
Fast track / multiple contracts / CM at Risk
Terminal B, Port Miami
Terminal B, Port Miami
Terminal B, Port Miami
Terminal B, Port Miami
Terminal B, Port Miami
Terminal B, Port Miami
Terminal 140,000 sf
+Baggage / X-ray 10,000 sf
Construction Schedule 10 months
LEED certified / CM@risk
BUILT UNDER A PREFERENTIAL USAGE AGREEMENT WITH RCCL
/ CELEBRITY
DESIGNED FOR EDGE
Terminal 25, Port Everglades
Terminal 25, Port Everglades
Terminal 25, Port Everglades
Terminal 25, Port Everglades
Terminal 25, Port Everglades
Terminal 25, Port Everglades
Cruise Terminal Trends

- Higher level of customer experience
- Better finishes, materials, lighting, furniture
- Branding, iconic and dramatic structures
- Better logistics
- Flexible platforms to introduce technologies
- Technology – technology - technology
- Terminals that can handle +7,000 passengers
- Segregating VIP from regular customers from curb-side to ship
- Luggage handling systems