

# 2013 Cruise Industry

Christine Duffy | President & CEO

Jim Berra | CMO, Carnival Cruise Lines

*January 30, New York City*



# Christine Duffy

President & CEO, Cruise Lines International Association



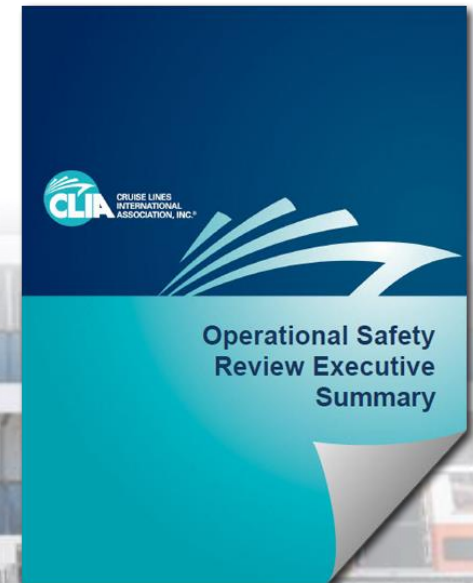
# Highlights

- CLIA goes global
- Global CLIA branding
- CLIA's Specialty Cruise Collection
- 2013 & beyond
  - New ships
  - Revitalizations & rebuilds
  - Itineraries & deployment
- Trends
- Q&A

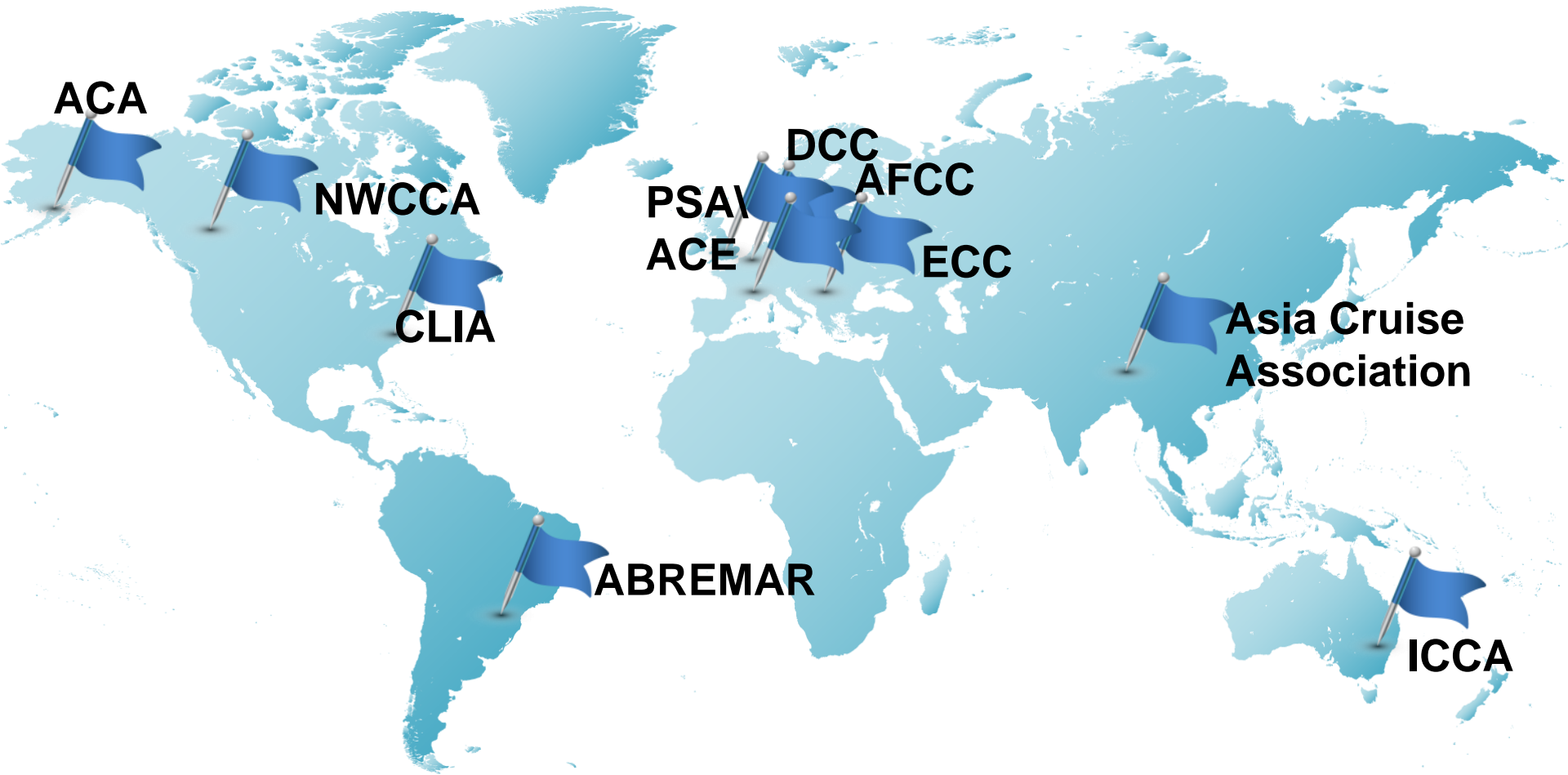


# Safety is our #1 priority

- One year on
- CLIA Operational Safety Review



# Global CLIA



**ACA**

**NWCCA**

**CLIA**

**ABREMAR**

**PSAV**

**ACE**

**DCC**

**AFCC**

**ECC**

**Asia Cruise  
Association**

**ICCA**



# One industry, one voice



# 2013 ship growth

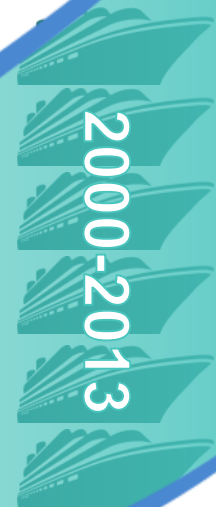
**40**  
new ships



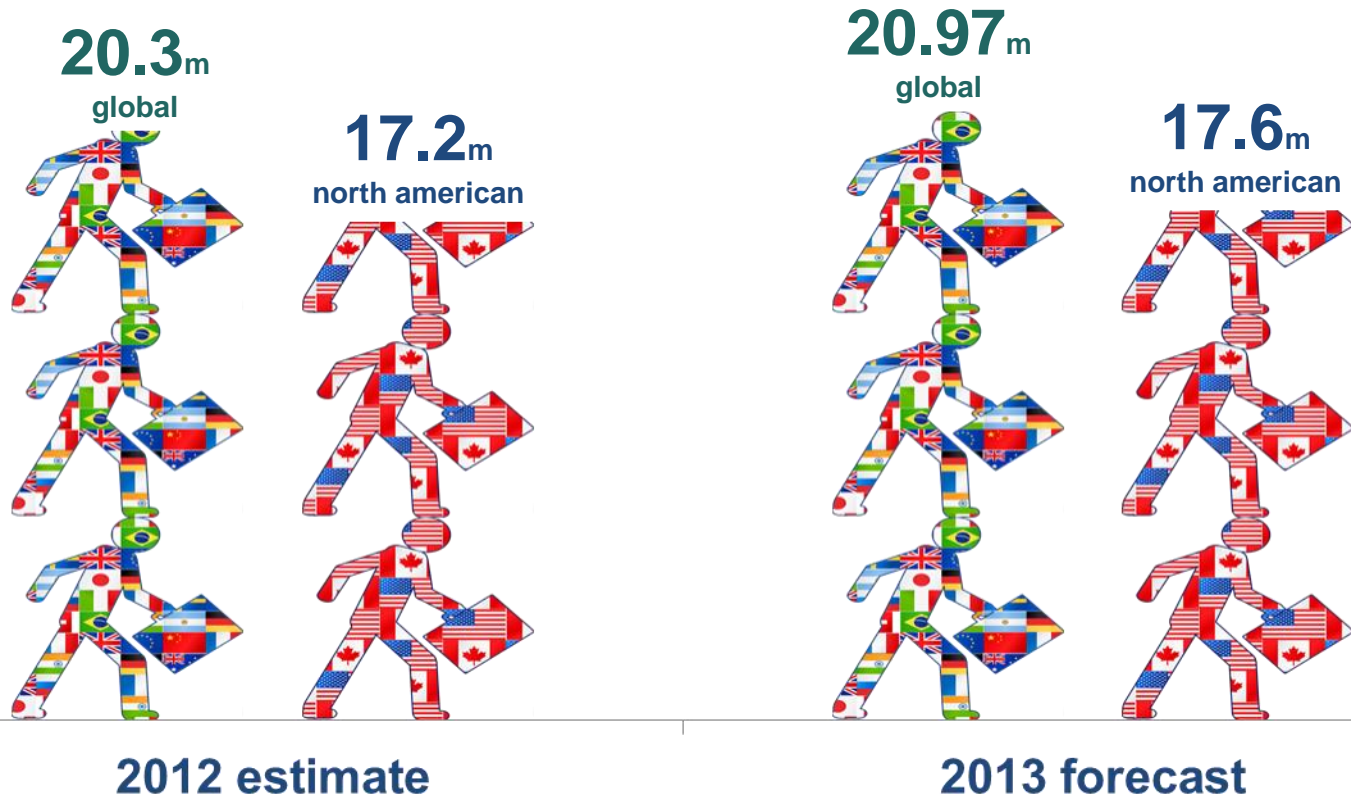
**80**  
new ships



**167**  
new ships



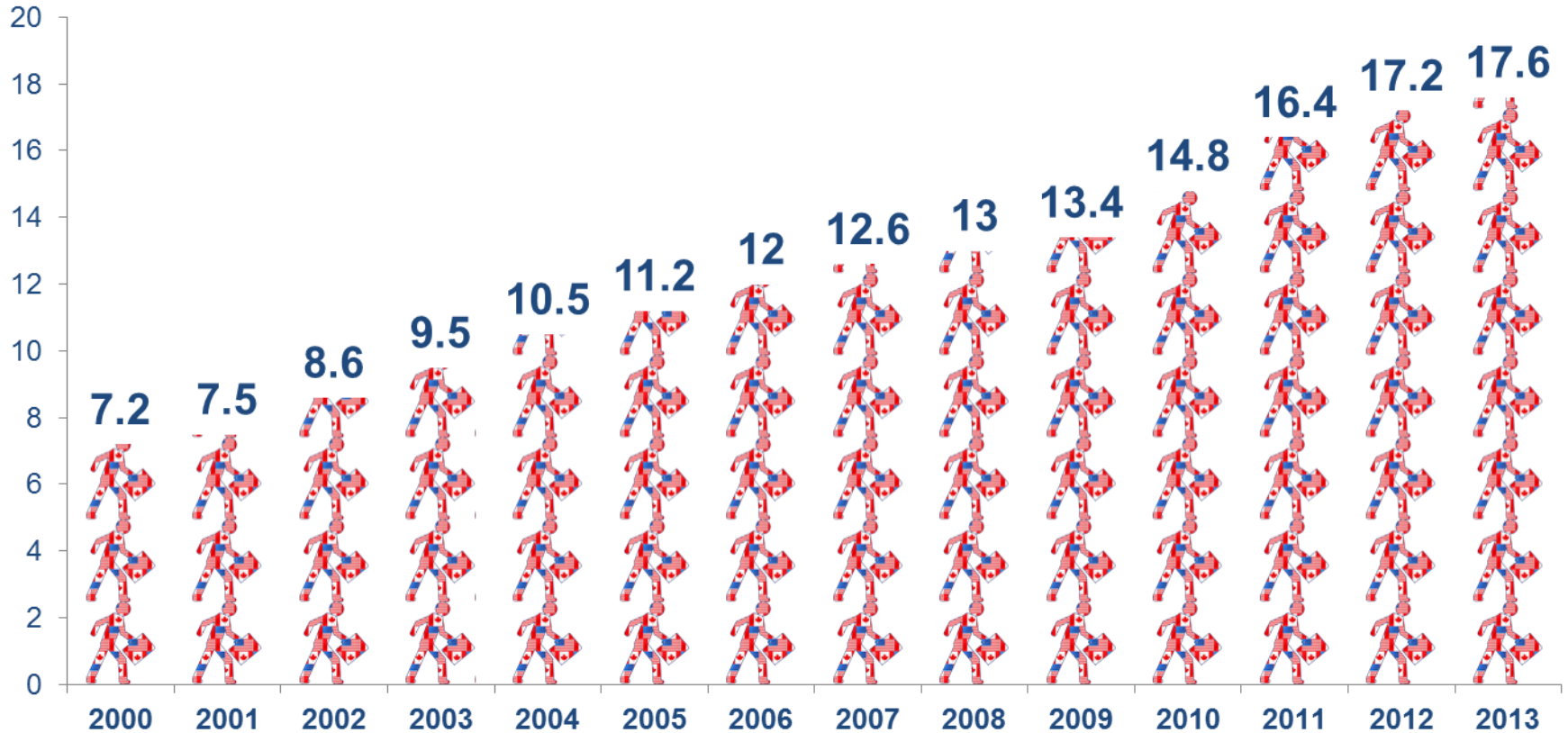
# Global passengers





# North America growth

Total Passengers (millions)



# 55 member lines



# 55 member lines



# New member | TAUCK



- 88 years of river cruising
  - Rhine, Danube, Main, Rhone, Moselle
- Experts in family river cruises
- Themed cruises
- Four vessels
  - ms Swiss Emerald
  - ms Swiss Sapphire
  - ms Swiss Jewel
  - ms Swiss Treasures
- Distinguishing characteristics:
  - Intimate (118 passengers)
  - Inclusive
  - Insider access shore excursions



# Specialty Cruise Collection

*“experience the world in a different way”*



# Specialty Cruise Collection

## The collection

- Select group of 13 companies with unique differences sharing one philosophy: ***the world is best explored up close and in depth***

## The SCC experience

- Great rivers of Europe, North America, Asia, Africa
- Coastal waters of North America and Scandinavia
- Arctic & Antarctica adventures
- Ports in the Mediterranean, Greek Isles, Caribbean and South Pacific
- Yacht-sized luxury ships



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# Travel agents

- An enduring CLIA commitment
- Training events in-person and online
- Conferences
- Communications and support





# Travel agents

- Critical to the cruise industry
- Positioning travel agents for the future
- Defining the next generation of “Travel Advisors”

From Travel Agent to “Travel Advisor”  
Defining, Elevating and Promoting the Role of  
Travel Agents for the Next Generation

FROM TRAVEL AGENT TO “TRAVEL ADVISOR”  
Creating and Promoting the Role of Travel Agents for the Next Generation

...in, in large part, been based on the fact  
...had access to the “world” and were seen as  
...providing general information and educa-  
...travelers who were “inventing” it a travel  
...could really access on their own. Relation-  
...were conducted in communities of common  
...conducted face-to-face, by telephone or  
...correspondence.

...here impacted the travel industry, but the  
...technology, which has changed the rules and  
...societal transformations, largely brought  
...expressions and attitudes about travel,  
...to information about airlines, destina-  
...tions lines that were previously unavailable  
...access outside the travel agent relation-  
...the complexity and some of the fear out of

...al agencies are already proving, travel  
...the way are perceived by the public and  
...can ensure that there is a next genera-  
...tion generation of consumers who will  
...of working with an agent. The good  
...technological change that has brought  
...represent the tools that will ensure

...n Today’s Tourism Industry  
...a premise that the interest and new

...ent agencies who did not have the internal capabilities  
...or resources to sell and serve consumers directly. This  
...“open” model (similar to insurance and real estate agents or  
...financial services advisors) provides consumers with “free”  
...professional services. For many years, the consumer would  
...pay the same rates or airfare whether they were through an  
...agent or booked directly with the supplier. The provision

CLIA CRUISE LINES INTERNATIONAL ASSOCIATION, INC.

# Cruise Forward

ABOUT US | CONTACT US | GET INVOLVED: [LinkedIn](#) [facebook](#) [YouTube](#)

**cruise FORWARD**  
vacations that make a difference

ECONOMIC BENEFIT | COMMUNITY PARTNERSHIP | ENVIRONMENTAL STEWARDSHIP | INDUSTRY PRACTICES

### Welcome to Cruise Forward

Cruise lines are moving full speed ahead to turn the vacations of more than 20 million passengers each year into meaningful change around the globe. Across oceans, rivers and waterways, cruise lines offer travelers a safe, healthy and enjoyable experience that also delivers significant economic benefits, supports community organizations and causes, and safeguards the oceans and environment.

Click the dots to read stories from across the industry on how we are making a positive impact in every corner of the globe...

Browse Stories by Region  
Select Region

#### On Board for Children

Over the past two years, MSC Cruises has been the principal supporter of an innovative UNICEF project to combat poverty and inequality in Brazil.

[READ MORE](#)

### CONVERSATIONS

[f](#)

What [#cruises](#) and [#cruise](#) innovations are you most looking forward to in 2013? [#HappyNewYear! 2 Jan](#)

[t](#)

### STAY INFORMED

Keep apprised of how the cruise industry is benefitting global communities. Sign up here to get updates as new content is added.

Name  Email

[SUBMIT](#)

ABOUT US | CONTACT US | GET INVOLVED: [LinkedIn](#) [facebook](#) [YouTube](#)

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## Community Partnership

We take pride in our rich relationships with the communities where our employees live and work and the profits around the world that we visit with our passengers. Explore the stories below to see the charities, nonprofit organizations, non-governmental organizations, businesses, public sector bodies, and cultural preservation and volunteerism programs with which the industry is proud to partner and support.

### Helping Residents Wake Up on the Right Side of the Bed

Getting a good night's rest is the key to starting the day off right, but for those who are less fortunate, a comfortable warm bed is a luxury beyond their reach. The Single Homeless Accommodation Project (SHAP) works with vulnerable people in Dublin, England to help them start a new life. Often struggling to find mattresses to distribute, the organization was thrilled with P&O Line's donation of 100 mattresses straight from their ships.

Learn more from community members or find out how you can get involved in the mattress program [here](#).

#### Giving World Online helps homeless people: Ghd's Riley Banehoary

#### Schools, Teachers and Tourists

Cruise travelers in meeting the locals in the ports they visit have that opportunity in Cambodia.

[FULL STORY](#)

#### Taking the Unbeaten Path

Azamara Club Cruises' Land Discovery shore excursion program takes guests to culturally rich sites lead by local expert guides.

[FULL STORY](#)

#### From Ship to Shelter in Florida

Holland America's "Ship to Shelter" program gathers items that might have been discarded and shares it with those in need.

[FULL STORY](#)

Cruise Industry Charitable

KEYWORDS: [P.O. CRUISES](#) | [COMMUNITY PARTNERSHIP](#) | [ENGLAND](#)

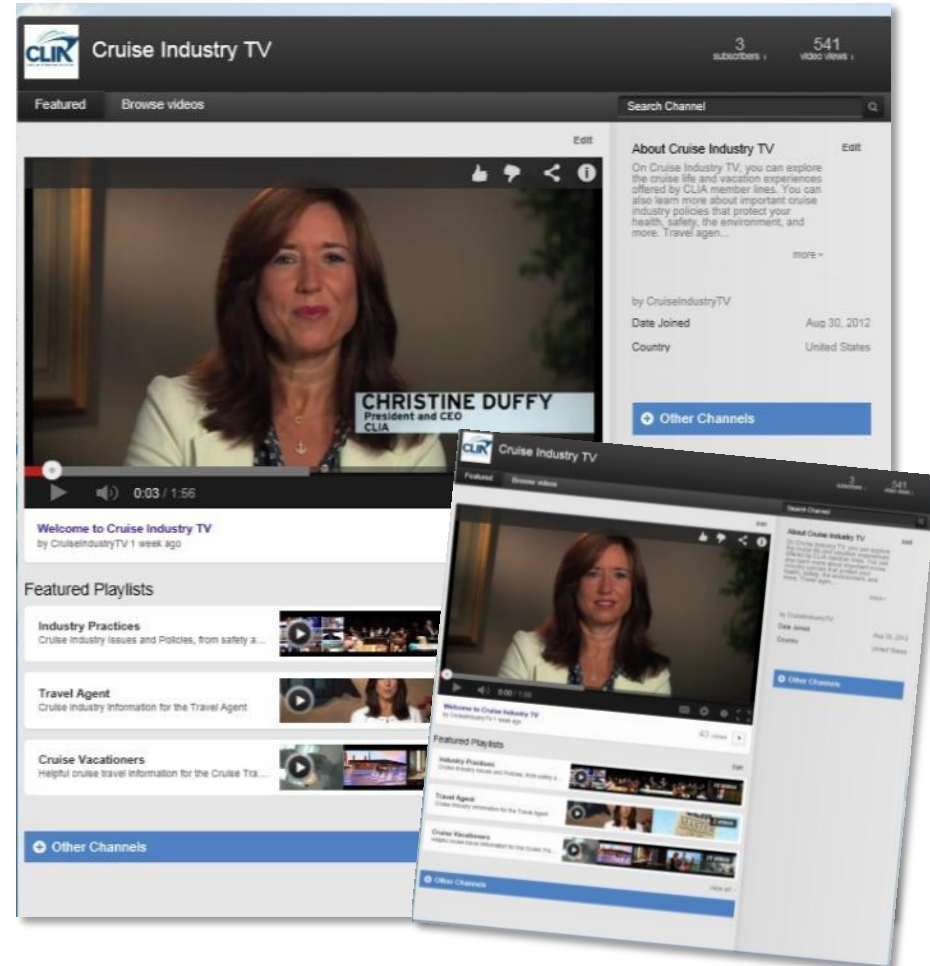
### CONVERSATIONS

### STAY INFORMED



# Cruise TV

- Something for everyone
- Highlighting diverse experiences & destinations
- Tips & features for consumers
- Industry operational practices



# Jim Berra

Chief Marketing Officer, Carnival Cruise Lines



# 2013 outlook



# New member line ships

## 2013 (\$2.3 billion)

- AmaPrima (164)
- AmaVida (106)
- Avalon Artistry II (128)
- Avalon Expression (166)
- Royal Princess (3,600)
- MSC Preziosa (3,502)
- Norwegian Breakaway (4,000)
- Pearl Mist (214)
- Silver Galapagos (100)
- Uniworld Queen Isabel (118)
- Uniworld River Orchid (60)

## 2014 (\$5.7 billion)

- AmaSonata (164)
- AmaReina (164)
- Costa Diadema (4,947)
- Norwegian Getaway (4,000)
- Regal Princess (3,600)
- Royal Caribbean "Project Sunshine" (4,100)
- Uniworld S.S Catherine (160)



# Global itineraries & deployment

**Alaska**  
**4.8%\***

**Europe (no Med)**  
**10.9%**

**Mediterranean**  
**21.7%**

**Caribbean**  
**34.4%**

**Asia**  
**3.4%**

**South America**  
**3.9%**

**Australasia**  
**5%**

**Other Markets**  
**15.8%**

# Ship revitalizations





# Firsts at sea



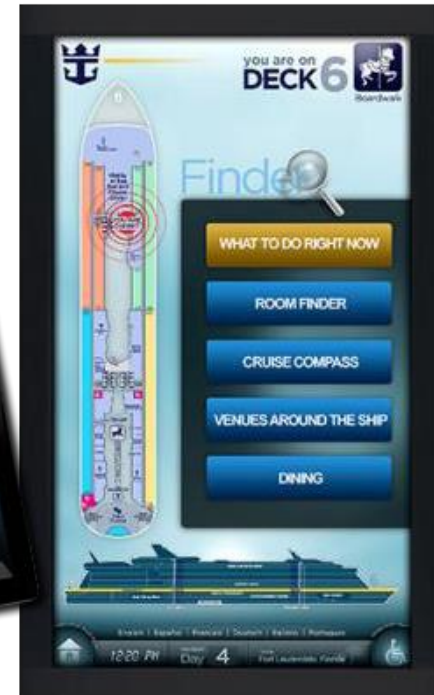
# Cruise line trends survey

- Global destinations
- **Exploring the unknown**
- **Big brand entertainment**
- Specialty dining
- Romance reigns
- Importance of outdoor spaces
- The more the merrier (groups)



# Cruise line trends survey

- Rapid innovation across all areas of the guest experience
- **River Cruising fastest growing segment**
- Lingering longer
- Families and generations
- **Leveraging technology wherever possible**



# Travel agent trends survey

- 68% believe bookings will be comparable or better than 2012
- Booking window is getting shorter
- Customers are and remain, brand loyal
- **Home port, price and onboard facilities** are the top 3 decision making factors
- Ethnic groups, weddings and honeymooners represent the top 3 growth potential target groups



# Q & A

