Special Report

Cruise Industry News

Fleet Deployment 2018





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HOW TO USE THIS GUIDE:

The Fleet Deployment Guide breaks down cruise line fleet deployment by market for the major operators.

The columns show sailing regions, ships, capacity and percentage share of that cruise line's capacity in each region, and the percentage change compared to the previous year with data provided from 2014 through 2017.

Trends are obvious with percentage changes year-over-year by region.

The overall number of ships is the number of vessels in the fleet of a particular cruise line, while ships per region show how many ships are in a particular region for that operator.

REGION GUIDE

NUMBER OF SHIPS FOR THAT CRUISE LINE IN A PARTICULAR REGION. OVERALL SHIP TOTAL IS NUMBER OF SHIPS SAILING FOR THAT BRAND FOR THE CALENDAR YEAR

PASSENGER CAPACITY IN GIVEN REGION

Region	Ships	Capacity	Share	Change
Carib 2-5	14	1,936,148	44.9%	+15.5%
Carib 7+	13	1,630,564	37.8%	+3.3%
West Coast	3	519,900	12.1%	+3.9%
Australia	2	138,600	3.2%	+1.5%
Alaska	1	42,000	1.0%	+17.6%
Canada/NE	1	20,818	0.5%	-36.4%
Hawaii	2	14,772	0.3%	+0.5%
Bermuda	2	9,274	0.2%	-62.0%
Overall	**25**	**4,312,076**	**100%**	
Change	**0%**	**+5.9%**		

CHANGE FROM PREVIOUS YEAR

MARKET SHARE OF THAT CRUISE LINE'S CAPACITY

What Drives Deployment?

The complex matrix of cost and revenue analysis that is itinerary planning really comes down to where passengers want to go.

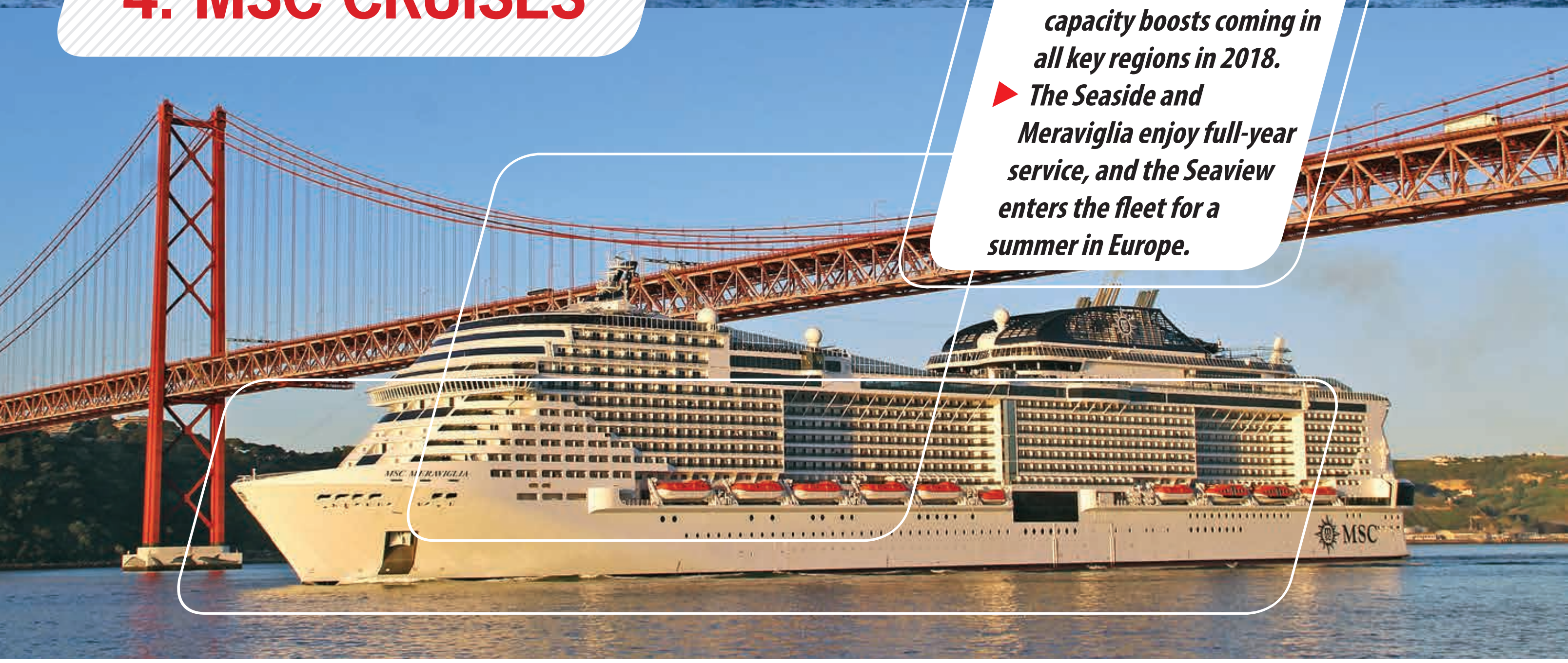
As the fleet grows, the planet generally continues to deliver the same options in terms of viable markets and sailing regions.

Emerging markets are key, and Asia (China) is starting to pick up steam, an ongoing downturn in Europe has stopped its run-away growth, and South America may have found its ceiling – leaving the bread and butter of the cruise industry in North America, Alaska, the Caribbean, the Mediterranean and Northern Europe, with Australia and Asia slowly creeping in.

Cruise lines will move the ships to where revenue is highest, but that matrix is based on a complex set of numbers, including fuel costs, geopolitical issues, ticket prices, onboard spend, environmental regulations, local fees and more, making ship deployment and itinerary planning the key to success.

Here's how we define our regions:	
Alaska	Cruises featuring Alaskan ports.
Antarctica	Voyages sold around a visit to Antarctica, often leaving from Ushuaia.
Asia	Cruises sailing in Asia.
Australia	Capacity positioned out of Australian homeports.
Bermuda	Cruises sailing to and typically staying overnight in Bermuda.
Canada/NE	Cruises featuring Canada/New England ports as the main draw.
Canaries	Voyages sailing primarily to the Canary Islands.
Carib 2-5	Short Caribbean cruises, no more than five days.
Carib 7+	Longer Caribbean cruises, one week or more.
Hawaii	Cruises with a focus on the Hawaii islands.
Ind/Red Sea	Trips featuring ports or extended time in the Indian Ocean or Red Sea.
Med	Sailings in the Mediterranean.
NW Europe	Cruises visiting the Baltic, Norwegian fjords, Greenland/Iceland, the UK, Scotland, etc.
South America	Visits or sailings from South America; also includes Galapagos.
Transatlantic	Atlantic crossings.
Transcanal	Cruises transiting the Panama Canal fully or partially.
West Coast	Sailings on the West Coast, often to the Mexican Riviera, that do not feature Alaska.

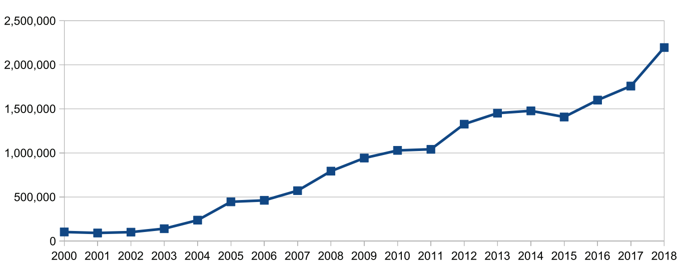
4. MSC CRUISES



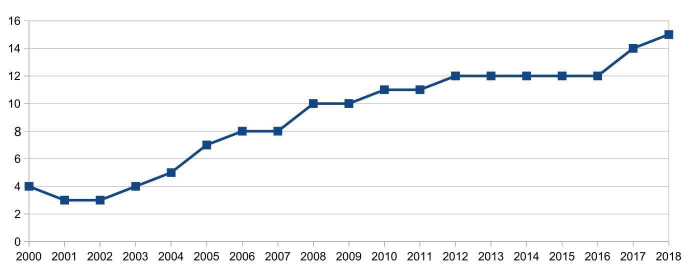
▶ *MSC is a company that continues to grow aggressively, with major capacity boosts coming in all key regions in 2018.*

▶ *The Seaside and Meraviglia enjoy full-year service, and the Seaview enters the fleet for a summer in Europe.*

CAPACITY

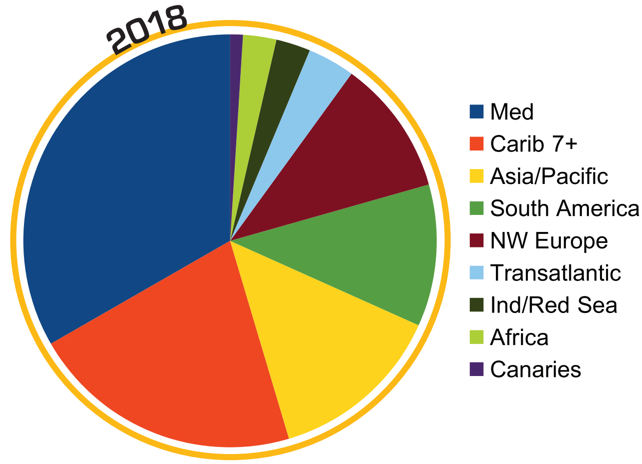


SHIPS



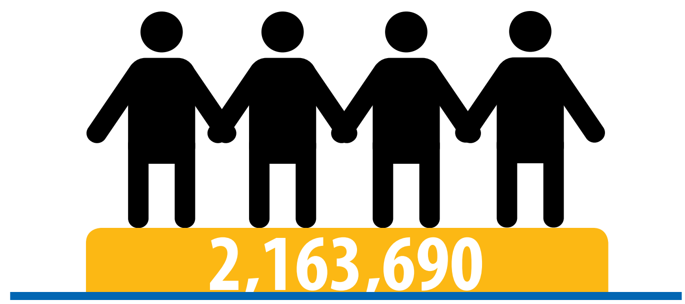
4. MSC CRUISES – 2018

Region	Ships	Capacity	Share	Change
Med	12	808,820	37.4%	+20.2%
Carib 7+	6	467,820	21.6%	+32.0%
South America	7	243,760	11.3%	+38.4%
NW Europe	4	231,850	10.7%	+15.7%
Asia/Pacific	2	187,100	8.6%	+28.2%
Transatlantic	9	82,290	3.8%	+149.4%
Ind/Red Sea	2	63,400	2.9%	+37.2%
Africa	2	57,650	2.7%	-41.6%
Canaries	2	21,000	1.0%	-24.3%
Overall	**15**	**2,163,690**	**100%**	
Change	**+7.1%**	**+23.0%**		



2017

Med	10	673,100	38.3%	-4.7%
Carib 7+	6	354,350	20.1%	+27.8%
NW Europe	4	200,350	11.4%	+46.1%
South America	5	176,100	10.0%	-2.7%
Asia/Pacific	1	146,000	8.3%	+52.0%
Africa	1	98,800	5.6%	+3.3%
Ind/Red Sea	2	46,200	2.6%	-11.5%
Transatlantic	7	32,990	1.9%	+17.9%
Canaries	2	27,750	1.6%	+6.9%
Carib 2-5	1	3,500	0.2%	0%
Overall	**14**	**1,759,140**	**100%**	
Change	**+16.7%**	**+10.0%**		



2016

Med	10	706,352	44.2%	-6.8%
Carib 7+	5	277,256	17.3%	+117.7%
South America	5	180,954	11.3%	-16.7%
NW Europe	3	137,120	8.6%	+4.2%
Asia/Pacific	1	96,040	6.0%	0%
Africa	1	95,648	6.0%	+144.8%
Ind/Red Sea	2	52,200	3.3%	+155.9%
Transatlantic	8	27,972	1.7%	-14.2%
Canaries	3	25,950	1.6%	-69.8%
Overall	**12**	**1,599,492**	**100%**	
Change	**0%**	**+13.6%**		

2015

Med	12	747,656	53.4%	+11.9%
South America	5	217,246	15.3%	-5.6%
NW Europe	3	131,586	9.3%	-29.0%
Carib 7+	4	127,350	9.0%	-24.1%
Canaries	5	85,876	6.1%	+50.7%
Africa	2	39,072	2.8%	-62.5%
Transatlantic	9	32,612	2.3%	+23.5%
Ind/Red Sea	1	20,400	1.4%	-30.8%
Asia/Pacific	1	2,550	0.2%	0%
Bermuda	1	3,500	0.2%	0%
Overall	**12**	**1,397,848**	**100%**	
Change	**0%**	**-4%**		

Change from 2017

SHIPS	CAPACITY
+7.1%	+10.0%

Note: South America is a seasonal market, the number of ships reported includes two seasons.