

Cruise Industry News



Fleet Deployment 2019





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HOW TO USE THIS REPORT:

The 2019 Fleet Deployment Report 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 2016 to 2019. Some historical data may be available for relevant uses for subscribers, please contact research@cruiseindustrynews.com.

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 | 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% | | |

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

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.

Traditional sailing regions dominate the story heading into 2019. Capacity is up in Alaska, the Caribbean, and Europe is encouraging as well. Further east, the brakes have been put on in China, while Australia continues to perform well with a high market penetration rate.

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. |

▶ Carnival welcomes the Panorama late in 2019 and turns the Triumph into the Sunrise, adding 115 staterooms.

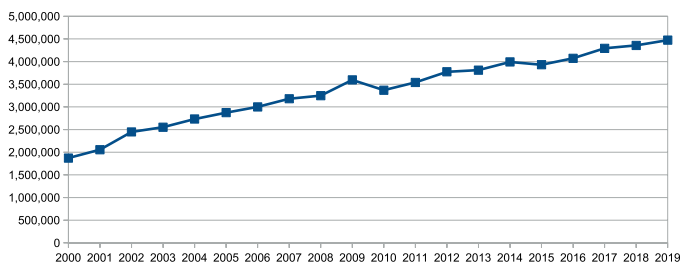
▶ The company maintains its leadership position in the Caribbean, while the Splendor moves to Australia late in the year on a full-time basis.



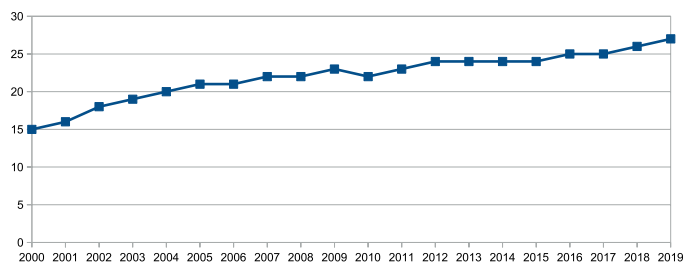
1. CARNIVAL CRUISE LINE



CAPACITY

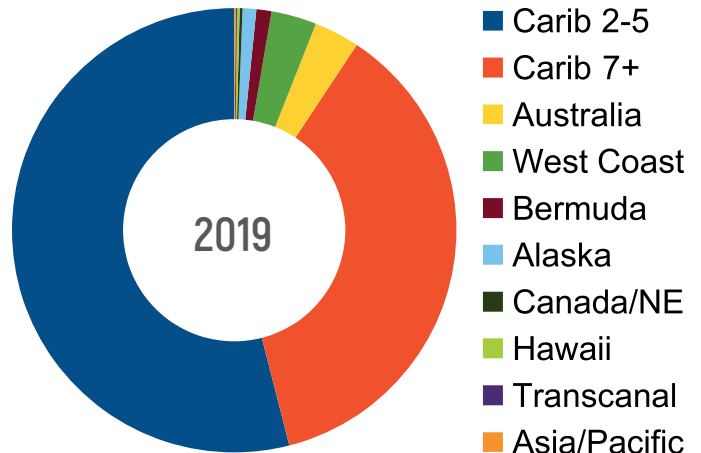


SHIPS



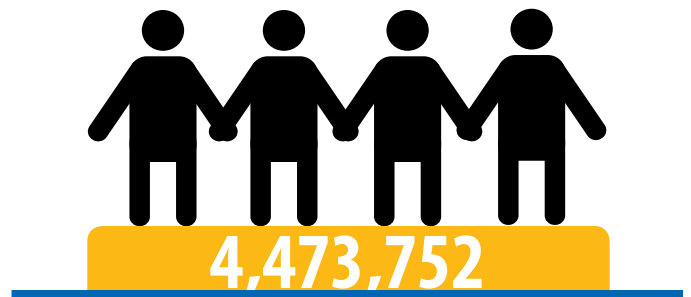
1. CARNIVAL CRUISE LINE - 2019

| Region | Ships | Capacity | Share | Change |
|----------------|--------------|------------------|-------------|---------|
| Carib 2-5 | 16 | 2,417,690 | 54.0% | +28.0% |
| Carib 7+ | 18 | 1,642,492 | 36.7% | -3.6% |
| Australia | 3 | 148,200 | 3.3% | +12.0% |
| West Coast | 3 | 146,116 | 3.3% | -73.5% |
| Bermuda | 4 | 51,016 | 1.1% | +917.5% |
| Alaska | 1 | 44,100 | 1.0% | +23.5% |
| Canada/NE | 1 | 8,490 | 0.2% | 0% |
| Hawaii | 2 | 8,424 | 0.2% | -41.5% |
| Transcanal | 2 | 4,224 | 0.1% | -17.6% |
| Asia/Pacific | 1 | 3,000 | 0.1% | 0% |
| Overall | 27 | 4,473,752 | 100% | |
| Change | +7.7% | +2.7% | | |



2018

| | | | | |
|----------------|------------|------------------|-------------|--------|
| Carib 2-5 | 13 | 1,889,268 | 43.4% | -1.3% |
| Carib 7+ | 15 | 1,703,362 | 39.1% | +4.3% |
| West Coast | 4 | 551,364 | 12.7% | +6.1% |
| Australia | 2 | 132,300 | 3.0% | -4.5% |
| Alaska | 1 | 35,700 | 0.8% | -15.0% |
| Med | 1 | 16,000 | 0.4% | 0% |
| Hawaii | 2 | 14,400 | 0.3% | -2.5% |
| Transcanal | 2 | 5,124 | 0.1% | 0% |
| Bermuda | 2 | 5,014 | 0.1% | -45.9% |
| Transatlantic | 1 | 4,000 | 0.1% | 0% |
| Overall | 26 | 4,356,532 | 100% | |
| Change | +4% | +1.5% | | |



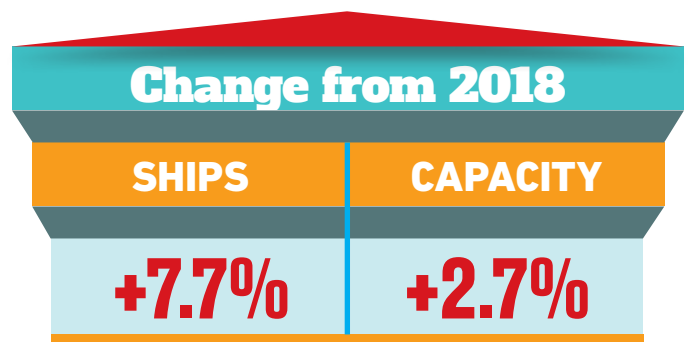
2017

| | | | | |
|----------------|-----------|------------------|-------------|--------|
| Carib 2-5 | 14 | 1,913,710 | 44.6% | +14.2% |
| Carib 7+ | 13 | 1,633,302 | 38.1% | +3.5% |
| 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 | 20,748 | 0.5% | -36.6% |
| Hawaii | 2 | 14,772 | 0.3% | +0.5% |
| Bermuda | 2 | 9,264 | 0.2% | -62.0% |
| Overall | 25 | 4,292,296 | 100% | |
| Change | 0% | +5.4% | | |



2016

| | | | | |
|----------------|------------|------------------|-------------|---------|
| Carib 2-5 | 17 | 1,676,368 | 41.2% | +8.2% |
| Carib 7+ | 17 | 1,577,836 | 38.7% | -4.8% |
| West Coast | 3 | 500,460 | 12.3% | -3.5% |
| Australia | 2 | 136,500 | 3.4% | +12.1% |
| Med | 1 | 70,848 | 1.7% | 0% |
| Alaska | 1 | 35,700 | 0.9% | 0% |
| Canada/NE | 1 | 32,714 | 0.8% | +20.9% |
| Bermuda | 5 | 24,408 | 0.6% | +378.0% |
| Hawaii | 2 | 14,700 | 0.3% | +40.0% |
| Transatlantic | 1 | 3,936 | 0.1% | 0% |
| Overall | 25 | 4,073,470 | 100% | |
| Change | +4% | +3.6% | | |



► *Disney offers up the best of the Caribbean with a strong short cruise program in 2019, as well as a seasonal offering on the West Coast and in Alaska with the Wonder sailing from Vancouver.*

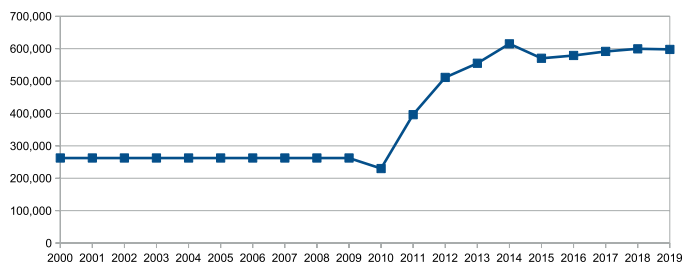
► *The Magic returns to Europe for another summer, where she splits the season with sailings in both Northern Europe and the Mediterranean.*



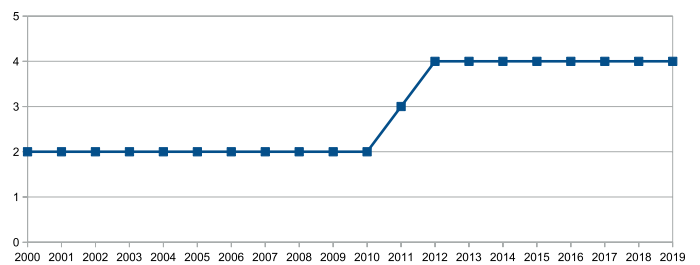
11. DISNEY



CAPACITY

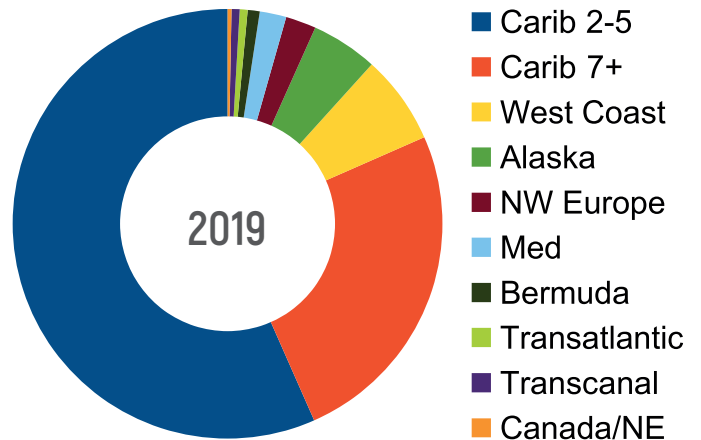


SHIPS



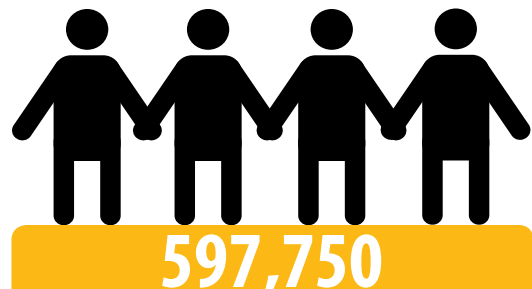
11. DISNEY - 2019

| Region | Ships | Capacity | Share | Change |
|----------------|-----------|----------------|-------------|--------|
| Carib 2-5 | 3 | 338,250 | 56.6% | +0.8% |
| Carib 7+ | 3 | 149,250 | 25.0% | -7.2% |
| West Coast | 1 | 40,250 | 6.7% | +35.3% |
| Alaska | 1 | 29,750 | 5.0% | +6.2% |
| NW Europe | 1 | 14,000 | 2.3% | +33.3% |
| Med | 1 | 12,250 | 2.0% | -12.5% |
| Bermuda | 1 | 5,250 | 0.9% | -40.0% |
| Transatlantic | 1 | 3,500 | 0.6% | 0% |
| Transcanal | 1 | 3,500 | 0.6% | 0% |
| Canada/NE | 1 | 1,750 | 0.3% | -66.7% |
| Overall | 4 | 597,750 | 100% | |
| Change | 0% | -0.3% | | |



2018

| | | | | |
|----------------|-----------|----------------|-------------|--------|
| Carib 2-5 | 4 | 335,500 | 56.0% | -2.1% |
| Carib 7+ | 3 | 160,750 | 26.8% | +1.9% |
| West Coast | 1 | 29,750 | 5.0% | +13.3% |
| Alaska | 1 | 28,000 | 4.7% | 0% |
| Med | 1 | 14,000 | 2.3% | +14.3% |
| NW Europe | 1 | 10,500 | 1.8% | -14.3% |
| Bermuda | 1 | 8,750 | 1.5% | 0% |
| Canada/NE | 1 | 5,250 | 0.9% | 0% |
| Transatlantic | 1 | 3,500 | 0.6% | 0% |
| Transcanal | 1 | 3,500 | 0.6% | 0% |
| Overall | 4 | 599,500 | 100% | |
| Change | 0% | +1.4% | | |



2017

| | | | | |
|----------------|-----------|----------------|-------------|--------|
| Carib 2-5 | 3 | 342,750 | 57.9% | +0.1% |
| Carib 7+ | 3 | 157,750 | 26.7% | -11.0% |
| Alaska | 1 | 28,000 | 4.7% | +23.1% |
| West Coast | 1 | 26,250 | 4.4% | +400% |
| NW Europe | 1 | 12,250 | 2.1% | 0% |
| Med | 1 | 12,250 | 2.1% | +16.7% |
| Canada/NE | 1 | 5,250 | 0.9% | +200% |
| Transatlantic | 1 | 3,500 | 0.6% | 0% |
| Transcanal | 1 | 3,500 | 0.6% | 0% |
| Overall | 4 | 591,500 | 100% | |
| Change | 0% | +2.2% | | |



2016

| | | | | |
|----------------|-----------|----------------|-------------|--------|
| Carib 2-5 | 3 | 342,250 | 59.1% | +7.6% |
| Carib 7+ | 3 | 177,250 | 30.6% | +1.0% |
| Alaska | 1 | 22,750 | 3.9% | -13.3% |
| NW Europe | 1 | 12,250 | 2.1% | -12.5% |
| Med | 1 | 10,500 | 1.8% | +20.0% |
| West Coast | 1 | 5,250 | 0.9% | -70.0% |
| Transcanal | 1 | 3,500 | 0.6% | 0% |
| Transatlantic | 1 | 3,500 | 0.6% | 0% |
| Canada/NE | 1 | 1,750 | 0.4% | 0% |
| Overall | 4 | 579,000 | 100% | |
| Change | 0% | +1.5% | | |

