Mexico and South America Cruise Market

AAPA Cruise Seminar - Regional Cruising Part 2: Cruising to Mexico and South America – Challenges and Opportunities

April 24, 2013

Cruise Destination in Mexico



Cruise Destinations in South America



Overall Deployment

Top Markets: Deployment By Passenger Bed Days In Geographic Market (2011)

- 1. Caribbean: 36.2 million bed days
- 2. Mediterranean: 21.99 million bed days
- 3. Europe/Scandinavia: 8.47million bed days
- 4. Alaska: 6.65 million bed days
- **5. Bahamas:** 6.5 million bed days
- 6. Mexico (West): 3.51 million bed days
- 7. Transatlantic: 3.1 million bed days
- 8. Australia/New Zealand/S. Pacific: 2.9 million bed days
- 9. Trans Canal: 2.69 million bed days
- 10. South America: 2.6 million bed days
- 11. Hawaii: 2.19 million bed days

Overall Deployment Trends

5 Year Change In Geographic Deployment (2006-2011) Bed Day Percent Change /Share Shift

Caribbean + 13.5 percent / -5.5 points

Mediterranean +109.38 percent / +7.5 points

Europe/Scandinavia +24.61 percent / -.5 points

Alaska +4.66 percent / -1.62 points

Bahamas +7.2 percent / -1.4 points

Mexico (West): -32.6 percent / -3.1 points

Transatlantic: +111.2% / +1.08 points

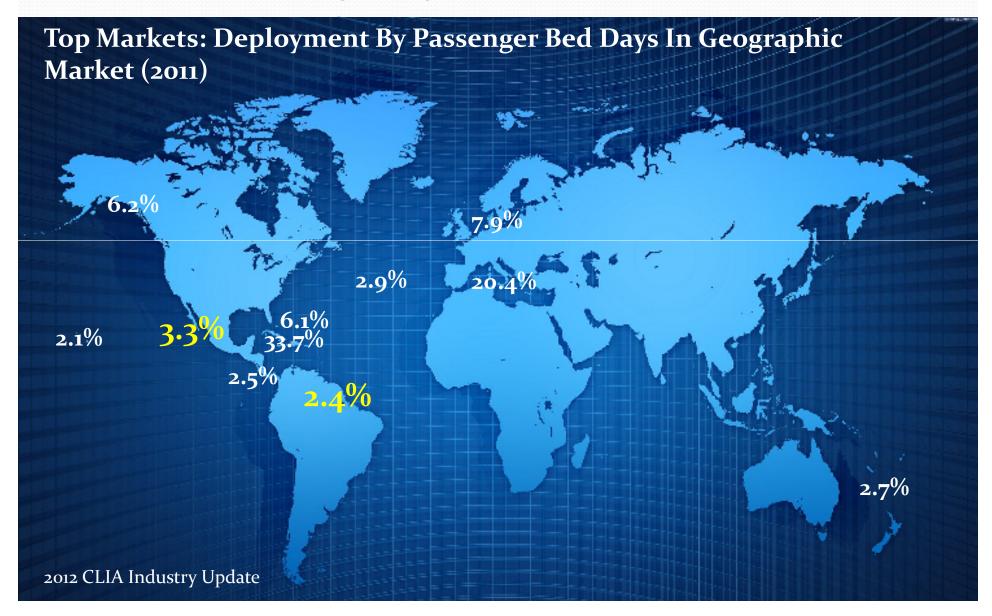
Australia/New Zealand/S. Pacific: 101.2 percent / +.93 points

Trans Canal: -3.91 percent/ -.94 points

South America: +81.7 percent / +.67 points

Hawaii: -23.9% percent / -1.5 points

Overall Deployment



Mexican Market

Cruise Traffic (passengers)

- Mexican Riviera down 41% from 2011 to 2012
 - Acapulco down 95%
 - Cabo San Lucas down 64% from 2010 to 2012
 - Ensenada up 7%
- Mexico (East) down 26% from 2011 to 2012
 - Costa Maya down 35%
 - Cozumel maintained traffic

South American Market

Cruise Traffic (passengers)

2011 – 2.3 million passengers¹

2000 - 50,000 passengers

• 2000 to 2011 = 4000%+ growth

Cruise Destination in Mexico



Cruise Destinations in South America

