



Cruise Industry and South America

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Lets define what is South America:

For the U. S., South America used to be “South of the Border”.

For the rest , South America is only from Colombia to Tierra del Fuego.

Central America is from Panama to Guatemala.

Mexico is in the North America Region, as U.S. and Canada.

Complicate?

Let's take a look at some of the Cruise routes and their trend in this part of the world:

Offer increase from 2000 to 2008 (Bed days '000)

Caribbean: 43% (from 21,510 to 30,786), 33% market share

Mexico West: 141% (from 2,681 to 6,451) 7% market share

South America: 224% (from 826 to 2,129) 3% market share

In 2000, the Caribbean had a market share of 39%-

SOME FIGURES

1970

500,000 pax

2008

12 million plus pax.

ALMOST 25 TIMES IN EIGHTEEN YEARS

SOME FIGURES

NEW SHIPS

1980 - 1999

80 NEW SHIPS

2000 - 2008

100 + NEW SHIPS

SOURCE OF PASSENGERS (ORIGIN)

NATIONAL:

Florida, California, Texas, Massachusetts, New York
Pennsylvania, New Jersey, Illinois, Arizona
And Georgia.

INTERNATIONAL:

Europe

HOW DID THE PASSENGERS GOT ON A CRUISE SHIP?

THROUGH TRAVEL AGENTS (90%)

WHERE TO PROMOTE OUR PORT?

JUST FOR THE RECORD

CRUISE SALES ACCOUNT FOR MORE THAN HALF
OF VACATION SALES

Ports of call:

Santiago, Easter Island, Santiago, Valparaiso, Coquimbo,
Callao, Manta, Puntarenas, Buenos Aires, Iguazu Falls, Buenos Aires,
Montevideo, Punta del Este, Puerto Madryn, Cape Horn, Ushuaia,
Punta Arenas, Magellan Strait, Chilean Fjords, Puerto Montt,
Valparaiso, San Juan/Puerto Rico, Cartagena, Panama Canal,
Puntarenas, Aruba, Cartagena, Panama Canal, Cristobal, Puerto Limon

Cruise business requirements:

For the ship:

Safe maneuvering, docking.

For the passenger:

Safety, amusement, Transport.

DESTINATIONS AND PASSENGERS

DESTINATION	2000	2008		
	TOTAL	TOTAL		
	BED	BED		
	DAYS	DAYS	INCREASE	MARKET SHARE
CARIBBEAN	21,510	30,786	43%	33%
MEDITERRANEAN	6,277	16,271	159%	18%
ALASKA	4,197	6,968	66%	8%
EUROPE	3,745	7,592	103%	8%
MEXICO WEST	2,681	6,451	141%	7%
ANTARCTICA	49	285	482%	0%
SOUTH AMERICA	826	2,676	224%	3%
BERMUDA	988	1,266	28%	1%
TRANSATLANTIC	1,016	2,830	179%	3%

SOURCE: CLIA

DESTINATION	2000	2008		
	TOTAL	TOTAL		
	BED	BED		
	DAYS	DAYS	INCREASE	MARKET SHARE
HAWAII	857	3,031	254%	3%
SOUTH PACIFIC	1,155	1,986	72%	2%
SOUTH EAST ASIA	245	527	115%	1%
TRANS PACIFIC	52	389	648%	0%
CANADA/NEW ENGLAND	1,108	1,911	72%	2%
FAR EAST (ORIENT)	202	527	161%	1%
MISSISSIPPI	347	137	-61%	0%
WORLD	414	1,063	157%	1%
U.S. COASTAL WEST	218	225	3%	0%
INDIAN OCEAN	121	229	89%	0%

* SOURCE: CLIA

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