

AAPA



**American Association
of Port Authorities**

Alliance of the Ports of Canada, the Caribbean,
Latin America and the United States



Trends in the Cruise Industry



*AAPA Executive Management Conference
Napa, California — 2012*

*Peter Dailey
Deputy Director, Maritime*

26 Cruise Lines World-wide



✓ Approximately 200 Cruise Ships



Carnival Corporation & PLC



CARNIVAL
CORPORATION & PLC

- ✓ AIDA
- ✓ Carnival Cruise Lines
- ✓ Costa Cruises
- ✓ Cunard
- ✓ Holland America Line
- ✓ Ibero
- ✓ P&O Cruises
- ✓ Princess Cruises
- ✓ Seabourn

Fleet

2011 Revenues

99 Ships

\$15.7 Billion



Royal Caribbean Cruises, Ltd.



®

Fleet

2011 Revenues

- ✓ Azamara Cruises
- ✓ CDF Croisières de France
- ✓ Celebrity Cruises
- ✓ Pullmantur
- ✓ Royal Caribbean International

40 Ships

\$ 7.5 Billion



Cruise Line Market Shares



Other

Market Share

49.2 %

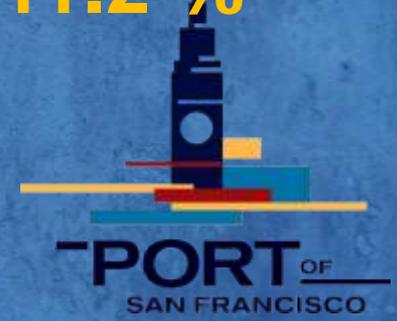
23.8 %

7.1 %

5.8 %

2.9 %

11.2 %



So You Want to Be a Cruise Port ?



Cruise Ships Are Cool



Economic Impact — \$37 Billion



Port Revenues — Miami : \$57 million

So You Want to Be a Cruise Port ?



X Expensive Infrastructure

**Port Everglades Terminal 18 —
Allure and Oasis of the Seas
240,000 sq.ft. / \$ 75 million**



**Houston Bayport Terminal —
96,000 sq.ft. / \$106 million
(No ships since 2009 Construction)**



**New Hong Kong
Mega Cruise Terminal —
538,000 sq.ft. / \$ 309 million**

So You Want to Be a Cruise Port ?



**Terminal Construction Costs —
Shore Power**



So You Want to Be a Cruise Port ?



X Dredging

X Gangways

X Traffic Crowds



So You Want to Be a Cruise Port ?



Ships Can Sail Away Easily

34th America's Cup

2013 • San Francisco



Eight Contenders



- ✓ Artemis Racing, Sweden
- ✓ Ben Ainslie Racing, (UK)
- ✓ China Team *中国之队*
- ✓ Emirates Team, New Zealand
- ✓ Energy Team, France
- ✓ Luna Rossa, Italy
- ✓ ORACLE RACING, USA
- ✓ Team Korea

The Timing

- **2012 World Series (San Francisco):
August 21 – 26 & October 4 – 7**
- **2013: July 4 – September 1
Louis Vuitton Challenger Selection Series**
- **2013: September 7 – 22
America's Cup Final Match · best 5 of 9**



Proposed Course Area

34 SAN FRANCISCO 2013 AMERICA'S CUP



START

FINISH

CRISSY FIELD

MARINA GREEN

AQUATIC PARK

PIER 27/29

Celebrating 150 Years
April 24, 2013





Thank You

