CRUISE BALTIC
Northern Europe

OPEN HAGEN
Open for cruise guests

SAS
Scandinavian Airlines

Scandic
Stay smarter

www.cruisebaltic.com

CRUISE BALTIC
Northern Europe

Cruise industry
- and how it affects you

2007

Director - Bo Nylandsted Larsen - bnl@woco.dk

Global cruise market

- Massive industry growth rates

Year	Berths	% Increase	Passengers	% Growth
2009	470,000	6.4	17,840,000	4.3
2010	500,000	6.4	18,760,000	5.2
2011	518,000	3.6	19,416,000	3.5
2012	540,000	4.3	20,193,000	4.0
2013	560,000	3.7	20,900,000	3.5
2014	580,000	3.6	21,628,000	3.5
2015	605,000	4.3	22,709,000	5.0
2016	630,000	4.1	23,844,000	5.0
2017	660,000	4.8	24,917,000	4.5
2018	685,000	3.8	25,913,000	4.0
2019	710,000	3.6	26,690,000	3.0
2020	730,000	2.8	27,304,000	2.3
2021	750,000	2.7	28,123,000	3.0
2022	770,000	2.7	28,967,000	3.2
2023	795,000	3.2	30,038,000	3.7
2024	820,000	3.1	30,789,000	2.5
2025	845,000	3.0	31,559,000	2.8

Global cruise market

- 9 new ships in 2011

Cruise Line	Ship	Pax	Due	Cost (m)
AIDA	AIDAsol	2,644	April	€ 380
Ponant Cruises	L'Austral	268	May	€ 100
Disney Cruise	Disney Dream	4,000	May	$750
Carnival	Carnival Magic	4,631	May	€ 565
Oceania	Riviera	1,260	June	$ 500
Seabourn	Seabourn Quest	450	June	€ 200
Celebrity	Celebrity Silhouette	3,145	October	€ 698
Costa	Costa Favolosa	3,780	TBA	€ 510
Pearl Sea Cruises	TBA	210	TBA	$ 60

Global cruise market

- Massive potential due low penetration in all key markets

Country	Population (m)	Passengers (,000)	% of Population
USA	308	10,459	3.4
Japan	127	200	0.2
Germany	82	1,027	1.3
France	62	347	0.6
UK	61	1,533	2.5
Italy	58	799	1.4
Spain	40	587	1.5
Canada	33	775	2.4
Australia	22	331	1.5
Scandinavia	19	173	0.9

The cruise industry

trends
Perceptions
New and larger ships
New markets
New segments and a younger auidence
Traditional distribution
Fuel cost
Environmental focus and challenges
Seasonality
New infrastucture

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PRINCESS CRUISES
escape completely

NCL
NORWEGIAN CRUISE LINE
FREESTYLE CRUISING

Celebrity X Cruises

THE YACHTS OF SEABOURN

Transocean Tours

CRYSTAL CRUISES
The difference is Crystal clear.

MSC CRUISES
The most modern fleet in the world.

Costa
Cruising Italian Style...That's Amore

SWAN HELLENIC
DISCOVERY CRUISING

PHOENIX
REISEN GMBH BONN

Peter Deilmann Cruises

PLEIN CAP CROISIÈRES

TUI Cruises

OCEANIA CRUISES

pullmantur

Hapag-Lloyd
Cruises

SILVERSEA

Holland America Line
A Signature of Excellence

Lindblad Expeditions

NATIONAL GEOGRAPHIC

Voyages of Discovery

Thomson

Fred. Olsen Cruise Lines
It's all about the people

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Regent
SEVEN SEAS CRUISES

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Plantours & Partner
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CUNARD
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43

3.5 24 79

11,4

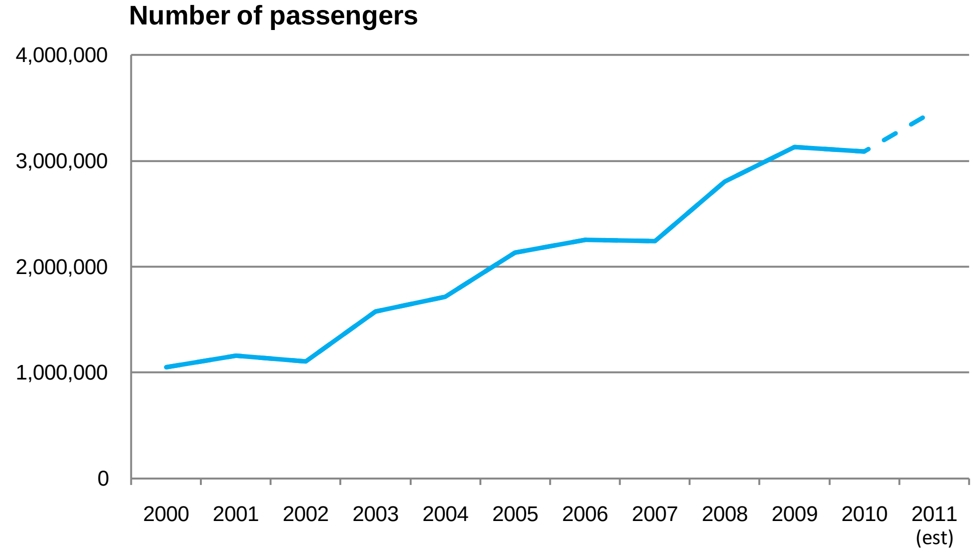
Passengers
2001 - 2011

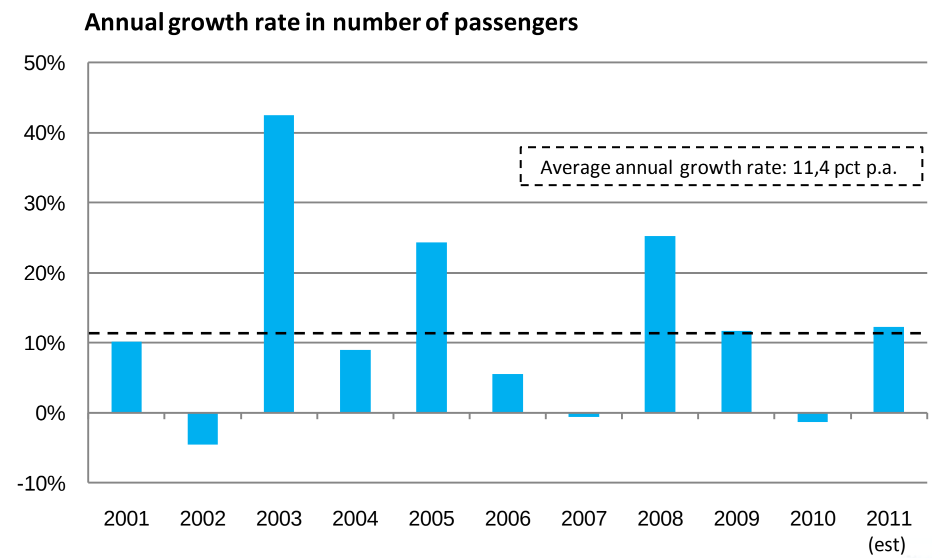
From 2000-2010 the number of passengers increased by an average annual rate of 11.4%

From 1.1 mill. to 3.1 mill.

The number of passengers is expected to grow substantially in 2011 as in 2009 with a growth rate around 12%.

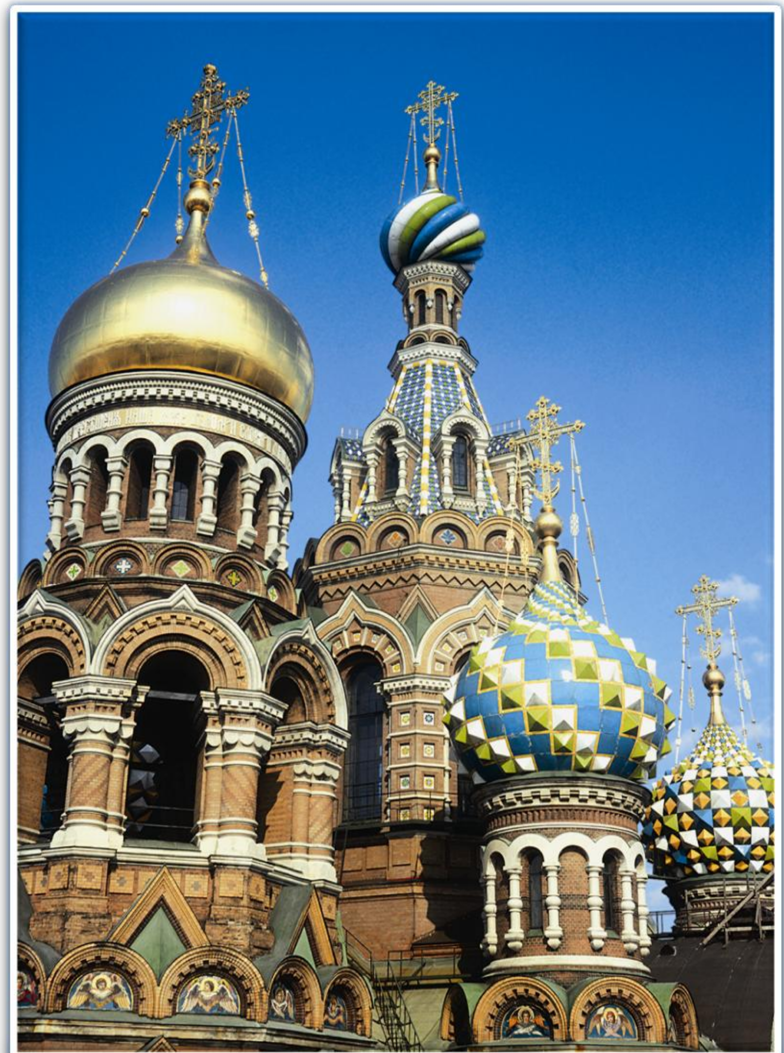
3.5 mill. Expected in 2011

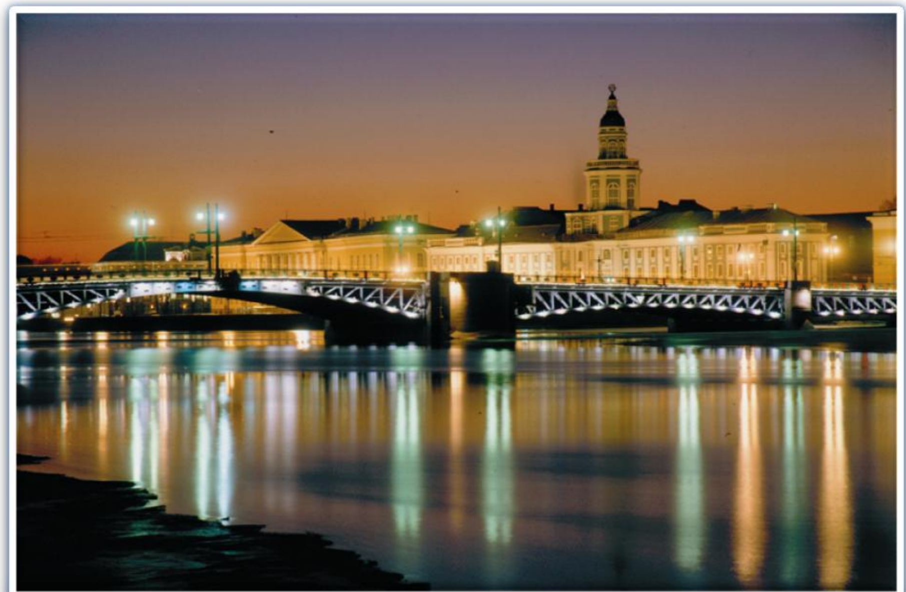




Increase of 380.000 guests since last year

St. Petersburg



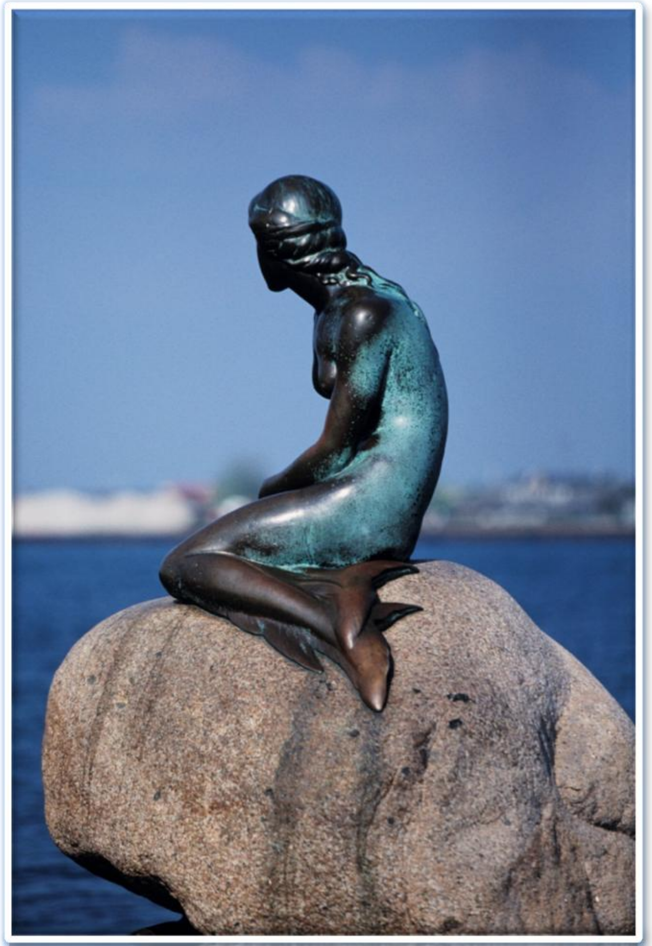


Tallinn

Stockholm

Aarhus & Elsinore

Copenhagen



CRUISE BALTIC
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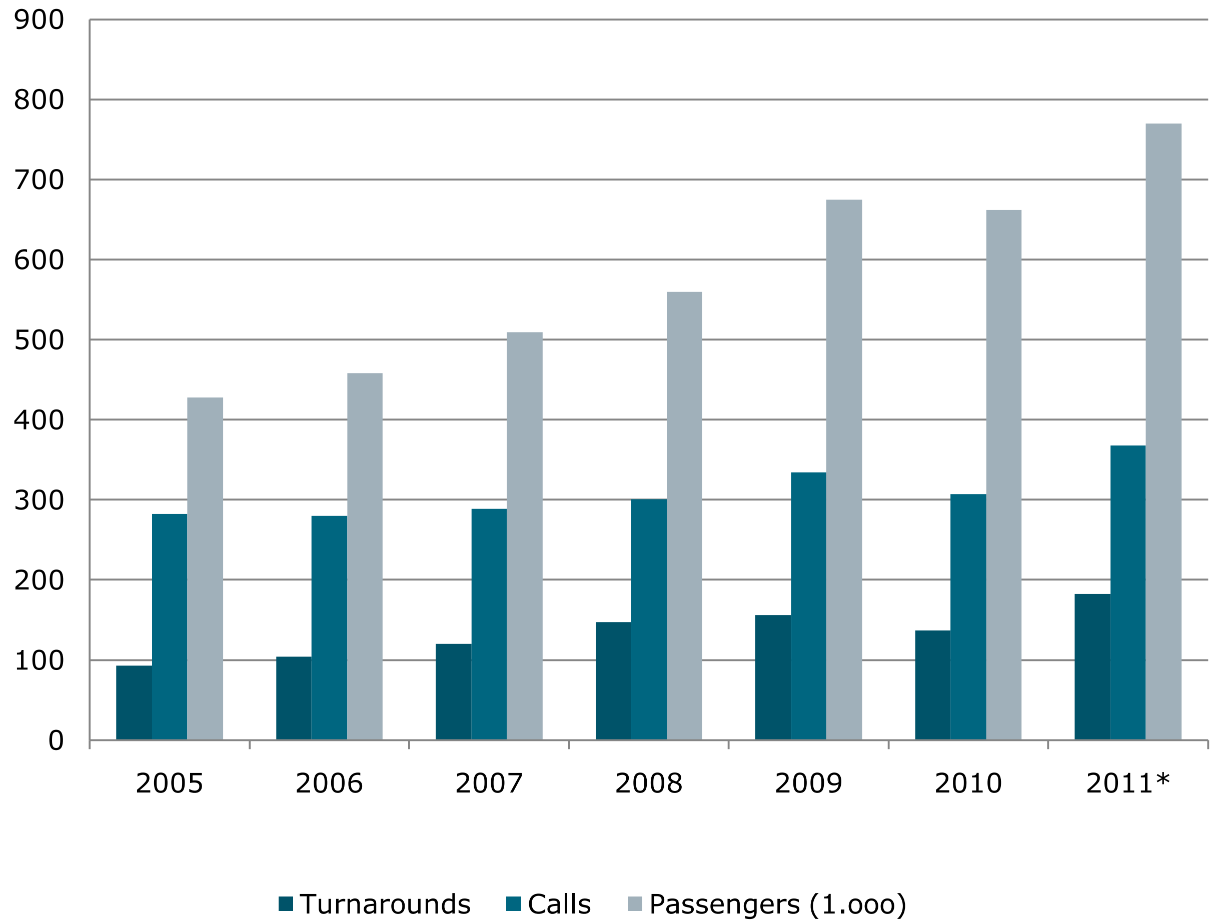
COPENHAGEN
Open for cruise guests

Strong and consistent growth 2001 - 2011

Year	Calls	Guests
2005	282	428.000
2006	280	458.000
2007	289	509.000
2008	301	560.000
2009	334	675.000
2010	307	662.000
2011	368	770.000



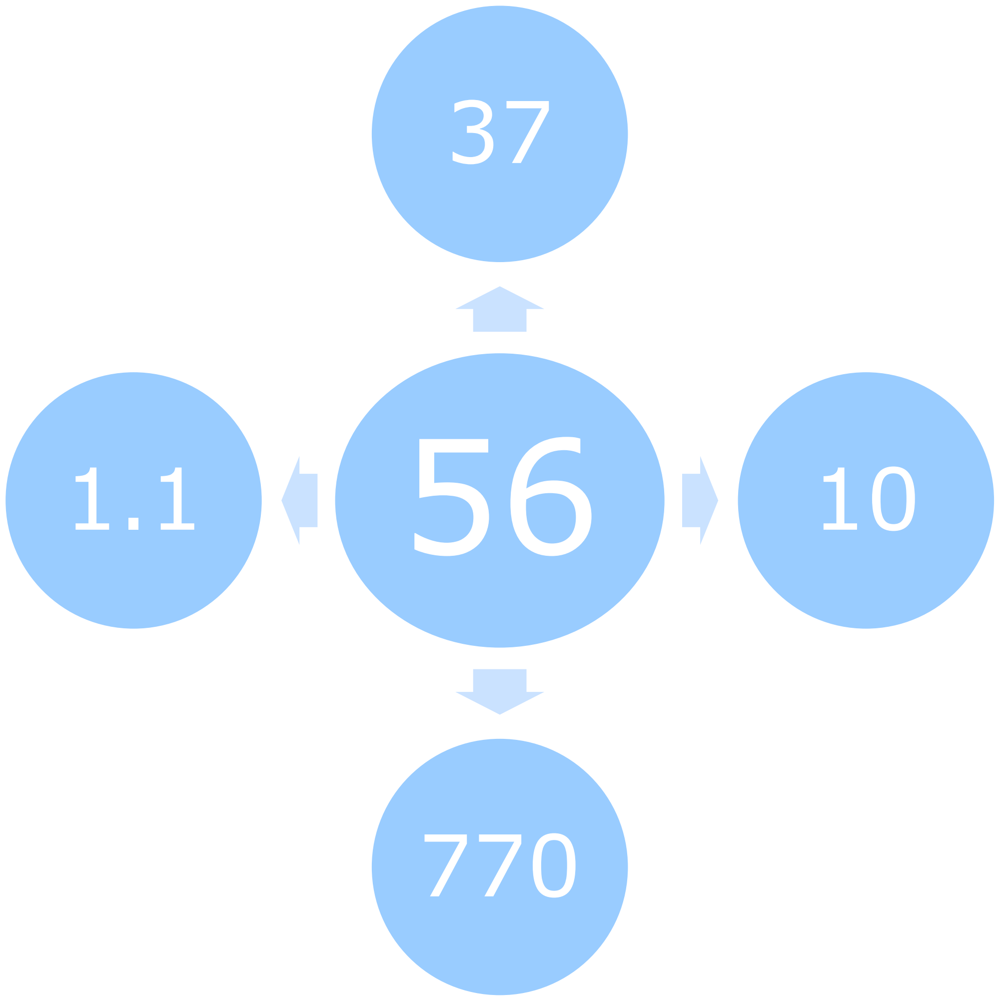
WONDERFUL COPENHAGEN CruiseNetwork

COPENHAGEN Open for cruise guests

Guest satisfaction

Attribute	Europe Average	Mean Score	Extremely Satisfied	Very Satisfied	Somewhat Satisfied	Not Too Satisfied	Not At All Satisfied	Satisfied	Not Satisfied
Guided Tour	4.12	4.11	44%	33%	15%	4%	4%	92%	8%
Historic Sites/Museums	3.97	4.15	36%	47%	13%	4%	0%	96%	4%
Variety of things to see and do	3.69	4.08	36%	40%	21%	2%	1%	97%	3%
Friendliness of Residents	4.03	4.20	41%	42%	16%	1%	0%	99%	1%
Overall Shopping Experience	3.60	3.82	27%	41%	23%	6%	3%	91%	9%
Overall Visit	3.98	4.00	28%	49%	18%	2%	3%	95%	5%
Visit Met Expectations	3.71	3.93	27%	47%	20%	4%	2%	94%	6%
			Greatly Exceeded	Exceeded	Met	Fell Short	Fell Far Short	Met/ Exceeded	Fell Short

Key figures




2013

2013

BY&HAVN

2013

BY&HAVN

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Northern Europe

Destination of the year 2009 & 07

Seatrade Insider

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