

UK AND IRELAND CRUISE MARKET - 2008

06/03/09

In 2008, the UK cruise market grew by 11% to reach almost 1.5 million passengers. Ex-UK port passengers (including line voyages) increased by 23% to 577,000 passengers while the number of fly cruise passengers increased 4% to 900,000 passengers.

Open Sea Cruise Passengers (000s) by main area, 1999-2008

| Area | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | Change 07-08 |
|---------------------------------------|------------|------------|------------|------------|------------|-------------|-------------|-------------|-------------|-------------|-----------------|
| UK-Port Cruises | | | | | | | | | | | |
| - Mediterranean | 38 | 45 | 52 | 71 | 75 | 100 | 107 | 130 | 154 | 168 | 9 |
| - UK - Western Europe | 13 | 25 | 27 | 29 | 53 | 56 | 67 | 88 | 70 | 86 | 24 |
| - Norway | 22 | 27 | 31 | 30 | 38 | 37 | 57 | 59 | 65 | 90 | 37 |
| - Baltic | 23 | 19 | 25 | 26 | 36 | 48 | 51 | 54 | 59 | 70 | 20 |
| - Atlantic Islands | 28 | 37 | 43 | 36 | 44 | 45 | 50 | 51 | 57 | 70 | 24 |
| - Caribbean | 6 | 9 | 7 | 9 | 9 | 7 | 14 | 15 | 11 | 13 | 20 |
| - Other areas (Greenland, USA, etc.) | 3 | 4 | 1 | 3 | 3 | 9 | 28 | 26 | 23 | 34 | 47 |
| - Line Voyages | 13 | 16 | 15 | 19 | 9 | 9 | 18 | 18 | 23 | 43 | 82 |
| - Charter | 10 | 11 | 16 | 9 | 14 | 5 | 9 | 10 | 5 | 3 | -43 |
| UK-Port Cruises | 156 | 193 | 217 | 232 | 281 | 316 | 403 | 451 | 467 | 577 | 23 |
| Fly Cruises | | | | | | | | | | | |
| - Mediterranean/Black Sea | 241 | 187 | 218 | 230 | 305 | 288 | 247 | 308 | 371 | 452 | 22 |
| - Mediterranean/Ex-Cyprus | 91 | 102 | 64 | 53 | 31 | 23 | 16 | 14 | 17 | 15 | -15 |
| - Caribbean/Bahamas/Bermuda | 143 | 141 | 139 | 162 | 179 | 228 | 202 | 195 | 217 | 194 | -10 |
| - Indian Ocean/Red Sea/Persian Gulf | < | < | < | < | < | < | < | 40 | 40 | 18 | -56 |
| - Atlantic Islands | 39 | 26 | 34 | 37 | 41 | 44 | 46 | 35 | 36 | 38 | 6 |
| - W.Coast/Mex/Hawaii/Canal | 12 | 10 | 11 | 19 | 23 | 24 | 34 | 35 | 33 | 34 | 0 |
| - Transatlantic - repositioning | < | 8 | 9 | 10 | 15 | 16 | 19 | 25 | 34 | 41 | 20 |
| - Alaska | 15 | 18 | 16 | 17 | 13 | 22 | 26 | 29 | 32 | 31 | -1 |
| - Scandinavia/Baltic | 9 | 14 | 15 | 14 | 16 | 20 | 14 | 15 | 19 | 19 | -1 |
| - Far East/Australia | 14 | 15 | 17 | 15 | 18 | 7 | 15 | 15 | 21 | 26 | 22 |
| - East Coast | < | < | < | < | < | < | < | < | < | 8 | |
| - Round the World and sectors | 8 | 10 | 12 | 9 | 9 | 13 | 10 | 13 | 14 | 11 | -20 |
| - South America | < | 5 | 6 | 6 | 15 | 12 | 7 | 14 | 12 | 8 | -37 |
| - Other areas (Red Sea, Pacific, etc) | 12 | 13 | 13 | 13 | 17 | 13 | 29 | 12 | 18 | 4 | -76 |
| - Charter | 4 | 12 | 6 | 4 | 2 | 4 | 3 | 3 | 2 | 1 | -21 |
| Total Fly Cruises | 590 | 561 | 559 | 590 | 683 | 713 | 669 | 753 | 867 | 900 | 4 |
| Total | 746 | 754 | 776 | 822 | 964 | 1029 | 1071 | 1204 | 1335 | 1477 | 11 |

< Included in other areas

Produce for the Passenger Shipping Association by IRN Research (www.irn-research.com)

Open Sea Cruise Passengers (000s) by main destination area, 1999-2008

| Area | 99 | 00 | 01 | 02 | 03 | 04 | 05 | 06 | 07 | '08 | Change 07-08 |
|--------------------|------------|------------|------------|------------|------------|--------------|--------------|--------------|--------------|--------------|-----------------|
| - Mediterranean | 370 | 334 | 334 | 354 | 411 | 411 | 371 | 452 | 543 | 634 | 17 |
| - Caribbean | 149 | 150 | 146 | 171 | 188 | 235 | 215 | 210 | 228 | 208 | -9 |
| - Northern Europe | 67 | 85 | 98 | 99 | 143 | 161 | 190 | 216 | 213 | 265 | 24 |
| - Atlantic Islands | 67 | 63 | 77 | 73 | 85 | 89 | 96 | 86 | 93 | 108 | 17 |
| - Other areas | 93 | 122 | 121 | 125 | 137 | 133 | 199 | 240 | 258 | 261 | 1 |
| Total | 746 | 754 | 776 | 822 | 964 | 1,029 | 1,071 | 1,204 | 1,335 | 1,477 | 11 |

- ✓ UK Market up 11% in 2008 to 1.5 million passengers
- ✓ Mediterranean up from 41% to 43% share of the market.
- ✓ Caribbean down from 17% to 14% of the market
- ✓ Northern Europe including the UK up 2% to 18%
- ✓ Atlantic Islands down from 8% to 7%

