

* The Vanilla Islands *

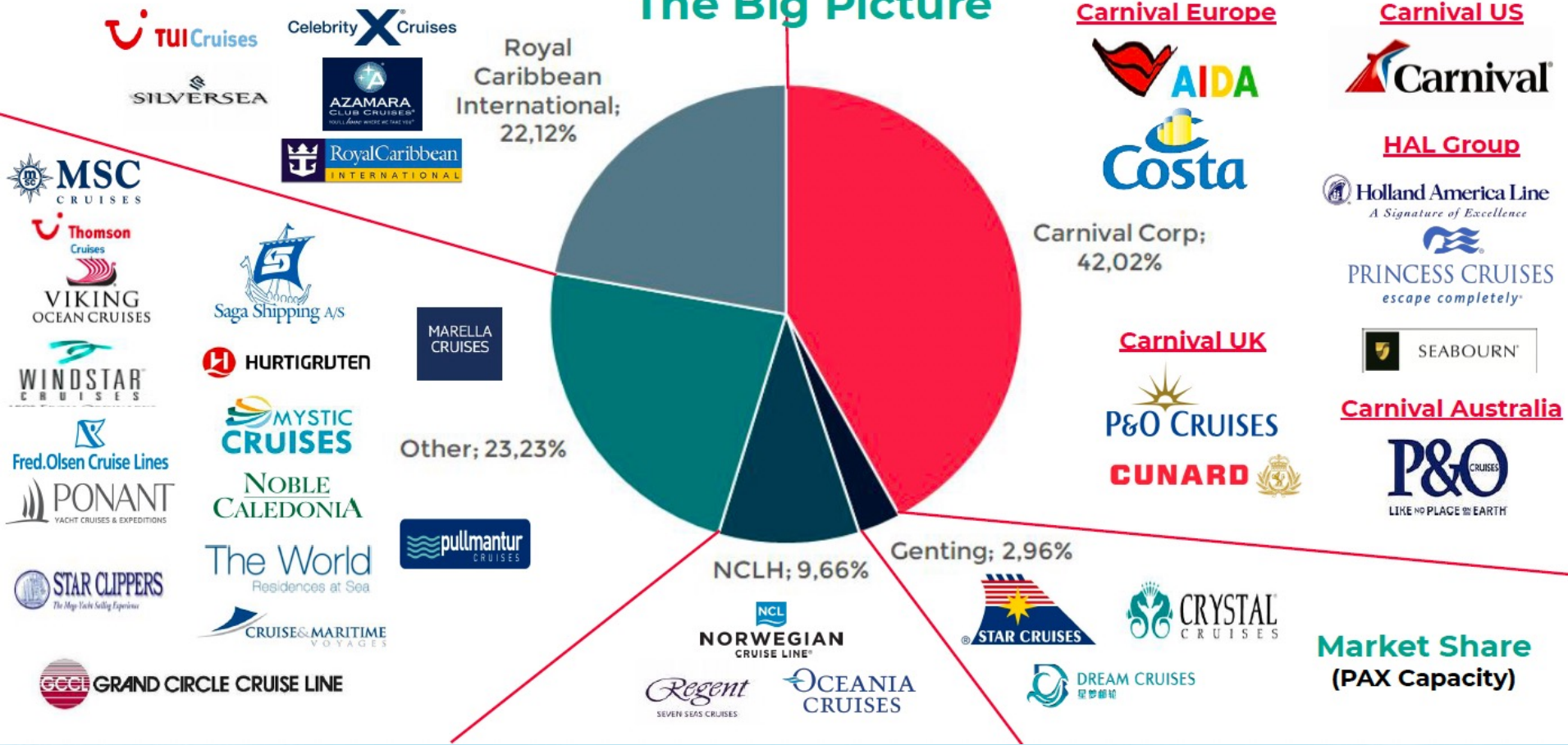
STRATEGIE CROISIERE



Les Îles Vanille

OCEAN INDIEN

The Big Picture



Market Share
(PAX Capacity)

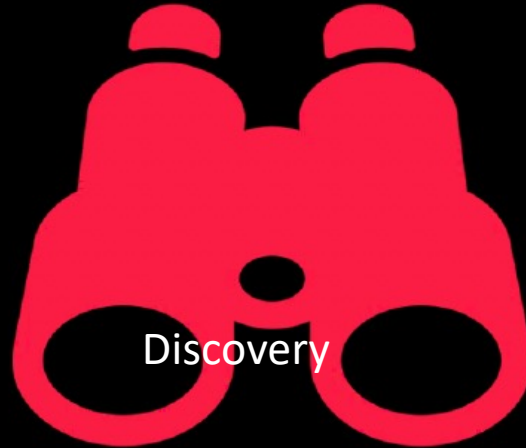


Les îles Vanille
OCEAN INDIEN

Cruise Operating Sectors



MEGA



Discovery



Luxury

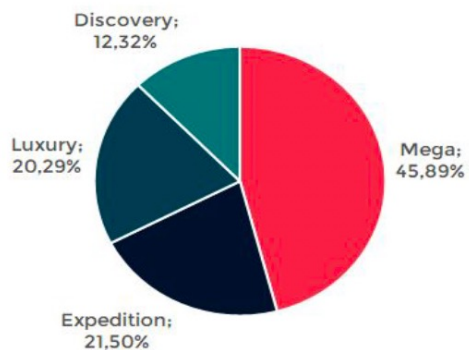


Expedition



Les Îles Vanille
OCEAN INDIEN

Sector Market Share by Vessels



414 ships in total



190 ships



84 ships



51 ships



89 ships

Cruise Line	Number of Ships	Total Capacity
Royal Caribbean	26	112,993
Carnival	24	75,384
MSC Cruises	21	85,452
Norwegian Cruise Line	18	53,634
Princess Cruises	15	47,950
Celebrity Cruises	15	32,377
Hurtigruten	14	9395
Ponant / Paul Gauguin	13	2625
AIDA	12	38,572
Costa Cruises	12	37,019



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Quelques chiffres

Arrivées Océan Indien									
2014	2015	2016	2017	2018	2019	2020	2021	2022	2023 prev
14094	29059	34533	43276	49342	67 724	38 397	0	6 391	35 000
	106%	19%	25%	14%	37%	-43%			



PRINCIPES

- **Sustainability:** Destination, Ship and Passenger capacity and responsibility management.
- **Attractions:** Focus marketing efforts on the 5 pillars of attraction (see below) with priority to “Nature & Culture”.
- **Premium:** Attention to “Quality over Quantity” to ensure a premium experience and ensure a lasting legacy.
- **Sectors:** Place appeal priority to Luxury and Expedition over Mega (volume - mass production).
- **QHSSE:** Manage and mitigate the risks of Quality, Health, Safety, Security and Environmental factors.



LES PRIORITES

1st PRIORITY

Ship Size	500 pax or less PAX (max 1,000) - All suite ships
USP's	Attention to detail, exotic & high spend power \$1,000 / day
Focus	High quality, luxurious experience, Wealthy Guest profile
Summary	Elite cruising to exotic destinations with a truly 5 star service
Lines E.G.	Silversea, Crystal, Regent, Seabourn, Ponant & Windstar

2nd PRIORITY

Ship Size	Under 300 pax; small & cozy, but sometimes a little rudimentary
USP's	All about Experience, Science, Fascination, Awe-Inspiring Scenery
Focus	Destination, Nature, Science, Adventure, Well Informed Guests
Summary	Elite cruising to exotic destinations with a truly 5 star service
Lines E.G.	Hurtigruten, Quark, Hapag-Lloyd, National Geographic & Lindblad

LUXURY SECTOR



EXPEDITION SECTOR



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LES PRIORITES

3rd PRIORITY

Ship Size	Typically 500-2500 Passengers - Generally smaller & older ships
USP's	Friendly, familiar, traditional, value for money, destination & cost effective
Focus	Small ship cruising, destination is king, culture & history, mature guests
Summary	Traditional small ship cruising to discover new lands & cultures
Lines E.G.	Fred Olsen, Celestyal Cruises, Marella Cruises, Majestic Cruises

4th PRIORITY

Ship Size	Typically 2500 up to 6,500 Passengers – State of the Art vessels
USP's	Quality mass operation, facilities, entertainment, service, value for money
Focus	The ship itself, F & B, pricing, need cater for all markets, location secondary
Summary	Quality multi-optional product delivery on a cost effective mass scale
Lines E.G.	RCCL, Celebrity, Carnival, Princess, Costa, AIDA, HAL, NCL, MSC & TUI

DISCOVERY SECTOR



MEGA SECTOR



Les îles Vanille
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MARKETING

Salons

Visites directes

Eductours

Autres + incentives



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enjoy the
side of

**Vanilla
Life...**



Thank you!



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