

THE GLOBAL INDUSTRY AND AUSTRALIAN DEPLOYMENT

CHAD BERKSHIRE, NORWEGIAN CRUISE LINE HOLDINGS



NCLH

NORWEGIAN CRUISE LINE
HOLDINGS LTD.

An aerial, high-angle photograph of a cruise ship's deck. In the foreground, a large, octagonal hot tub is filled with clear blue water. Two women are relaxing in the hot tub; one is wearing a red swimsuit and the other a dark blue one. The deck is made of light-colored wood. The ship is moving through deep blue ocean water, with white wake visible at the bottom of the frame.

CRUISE INDUSTRY DEPLOYMENT STRATEGY

WINNING FORMULA

GROW OUR SHARE OF THE HOLIDAY MARKET

CRUISE IS STILL LESS THAN 2% OF TOTAL
LAND-ONLY VACATIONS DOMINATE



NORWEGIAN CRUISE LINE
HOLDINGS LTD.

An aerial view of a cruise ship deck. In the foreground, there is a large, octagonal hot tub with white jets and a wooden deck. Two women are relaxing in the hot tub; one is wearing a red swimsuit and the other a blue one. The ship is moving through blue water, leaving a white wake. The background is a vast expanse of blue ocean.

CRUISE INDUSTRY DEPLOYMENT STRATEGY

TARGET SPECIFIC DEMOGRAPHICS

TOP DESTINATIONS

PEAK SEASONS

CURATED ITINERARIES

IDEAL SHIP SIZE, DESIGN, & AMENITIES

DELIVER THE BEST VALUE PROPOSITION



NORWEGIAN CRUISE LINE
HOLDINGS LTD.



WE MEASURE SUCCESS WITH ROEx & ROI

MAXIMIZE RETURN ON EXPERIENCE
GUEST SATISFACTION & REPEAT RATES

MAXIMIZE RETURN ON INVESTMENT
DRIVE REVENUE, CONTROL COST, &
REDUCE RISK



NORWEGIAN CRUISE LINE
HOLDINGS LTD.



WE MEASURE SUCCESS WITH ROEx & ROI

UTILIZE HISTORICAL PERFORMANCE
PLUS FUTURE FORECASTS TO PLACE
LONG TERM INVESTMENTS IN
DEPLOYMENT

SUPPLY & DEMAND
PRICE SETTERS & PRICE TAKERS



NORWEGIAN CRUISE LINE
HOLDINGS LTD.

A photograph of a man and a woman in clear, shallow blue water. The woman is on the left, smiling and looking towards the man. The man is on the right, wearing a swim cap and goggles, and is looking back at the woman. The water is bright and clear, suggesting a tropical or coastal setting.

AUSTRALIAN MARKET FITS THE FORMULA IN 3 WAYS

AUSTRALIANS LOVE TAKING
CRUISE HOLIDAYS VISITING THE
REST OF THE WORLD



NORWEGIAN CRUISE LINE
HOLDINGS LTD.

A photograph of a man and a woman in clear, shallow water. The woman is on the left, smiling and looking towards the man. The man is on the right, wearing a swim cap and goggles, and is looking back at the woman. The water is a vibrant blue-green color, and the background is a bright blue sky.

AUSTRALIAN MARKET FITS THE FORMULA IN 3 WAYS

AUSTRALIANS LOVE TAKING
CRUISE HOLIDAYS FROM
AUSTRALIA



NORWEGIAN CRUISE LINE
HOLDINGS LTD.

A photograph of a man and a woman in clear, shallow blue water. The woman is on the left, smiling and looking towards the man. The man is on the right, wearing a swim cap and goggles, and is looking back at the woman. The water is bright and clear, suggesting a tropical or coastal setting.

AUSTRALIAN MARKET FITS THE FORMULA IN 3 WAYS

AUSTRALIA IS A TRULY ICONIC
DESTINATION ATTRACTING GUESTS
FROM AROUND THE WORLD



NORWEGIAN CRUISE LINE
HOLDINGS LTD.

A photograph of a man and a woman in the water, smiling and looking at each other. The man is wearing a snorkel mask on his head. The water is clear and blue.

AUSTRALIAN MARKET PRIMARY ITINERARIES

SHORT CRUISE TO NOWHERE

TASMANIA

SOUTH PACIFIC

PAPUA NEW GUINEA

GREAT BARRIER REEF

NEW ZEALAND

COASTAL AUSTRALIA CRUISES

PARTIAL & FULL CIRCUMNAVIGATION

POSITIONINGS

WORLD CRUISES



NORWEGIAN CRUISE LINE
HOLDINGS LTD.



KEY CONSIDERATIONS FOR NCLH EXPANSION

STRENGTHS – WHAT IS WORKING

TOURISM ORGANIZATIONS
THAT PROVIDE A PASSIONATE
CONNECTION BETWEEN
LOCAL INSTITUTIONS AND
THE CRUISE INDUSTRY



NORWEGIAN CRUISE LINE
HOLDINGS LTD.

KEY CONSIDERATIONS FOR NCLH EXPANSION

STRENGTHS – WHAT IS WORKING

DEMOGRAPHIC THAT EMBRACES
TRAVEL & CRUISING

SIGNIFICANT VACATION TIME

SPEND IS AMONG THE BEST

LIFETIME VALUE OF GUESTS

TRADE RELATIONS



NORWEGIAN CRUISE LINE
HOLDINGS LTD.

KEY CONSIDERATIONS FOR NCLH EXPANSION

STRENGTHS – WHAT IS WORKING

HIGHLY DESIRED & RESPECTED
TOURISM BRAND

WIDELY RECOGNIZABLE TOP
DESTINATIONS

STABILITY AND SECURITY

CULTURE OF HOSPITALITY

LANGUAGE



NORWEGIAN CRUISE LINE
HOLDINGS LTD.

A koala is the central focus of the image, sitting on a tree branch and looking directly at the camera. The background is a soft-focus green forest. The text is overlaid on the right side of the image.

KEY CONSIDERATIONS FOR NCLH EXPANSION

STRENGTHS – WHAT IS WORKING

INCREDIBLE DIVERSITY OF
EXPERIENCES:

NATURE, WILDLIFE, HISTORY,
CULTURE, ARTS, MUSIC,
CULINARY, WINE, SPORT,
ARCHITECTURE, BEACHES



NORWEGIAN CRUISE LINE
HOLDINGS LTD.

A koala is the central focus of the image, sitting on a tree branch and looking directly at the camera. The background is a soft-focus green forest. The text is overlaid on the right side of the image.

KEY CONSIDERATIONS FOR NCLH EXPANSION

STRENGTHS – WHAT IS WORKING

INCREDIBLE DIVERSITY OF
EXPERIENCES:

MOST ARE EASILY ACCESSED
BY SEA

PACKAGEABLE INTERIOR
LAND OPTIONS



NORWEGIAN CRUISE LINE
HOLDINGS LTD.



KEY CONSIDERATIONS FOR NCLH EXPANSION CHALLENGES

WHAT CAN WE BRING THAT IS
UNIQUE TO THE LOCAL MARKET



NORWEGIAN CRUISE LINE
HOLDINGS LTD.

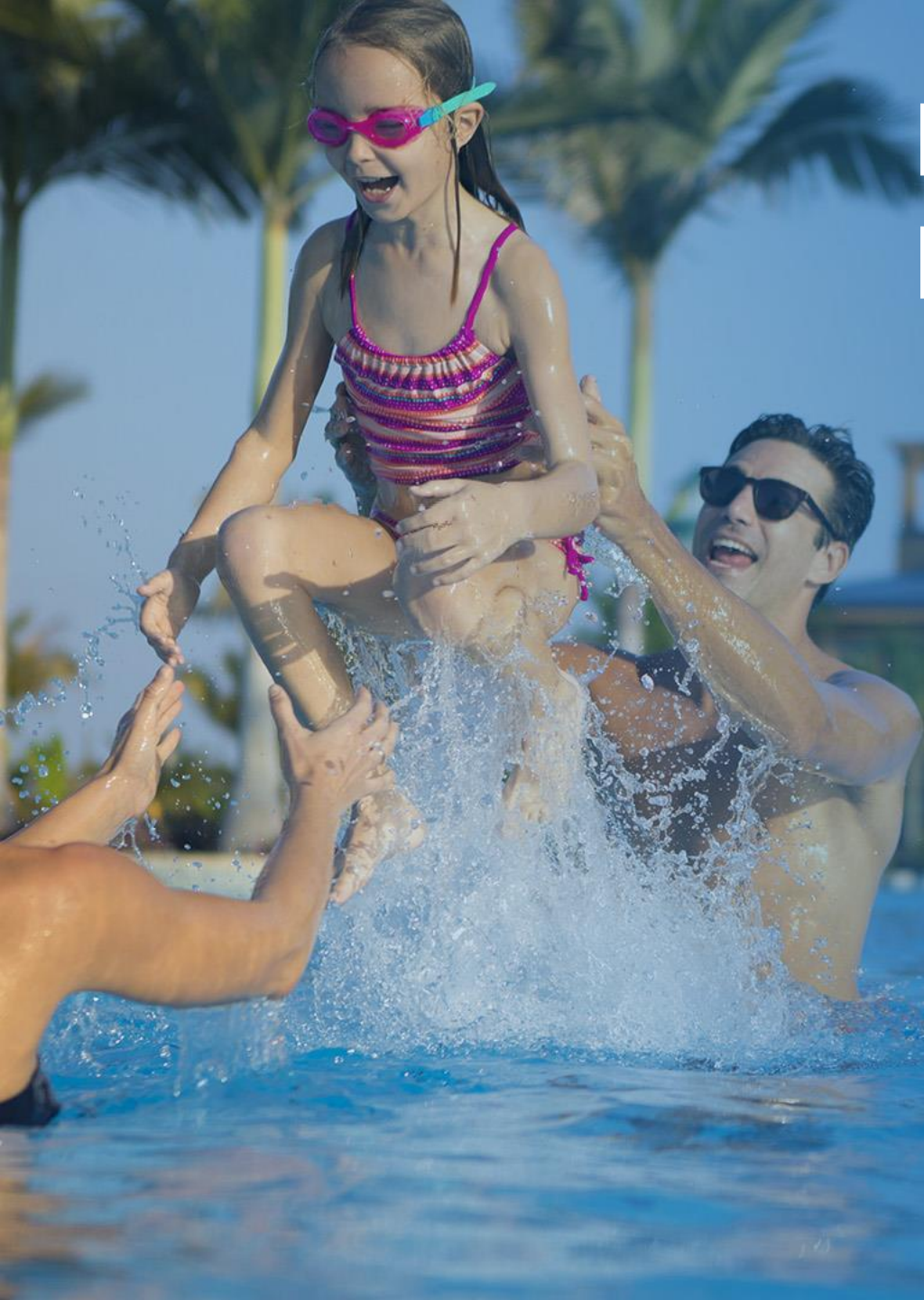
A woman with long blonde hair, wearing a light blue top, a straw hat with a dark band, and sunglasses, is sitting on a boat. She is looking out at the ocean with her hand resting on her chin. The background shows a blue sea and a rocky coastline under a clear sky.

KEY CONSIDERATIONS FOR NCLH EXPANSION CHALLENGES

LONGER THAN AVERAGE VACATION
HIGHER TOTAL COST WITH AIR
NOT A FIRST CRUISE FOR FLY MARKET
LOWER MARKETING EFFICIENCY
TELL THE STORY BEYOND THE BIG 4
TESTIMONIAL / INFLUENCER ECONOMY



NORWEGIAN CRUISE LINE
HOLDINGS LTD.



KEY CONSIDERATIONS FOR NCLH EXPANSION

CHALLENGES

COMPETITION FROM BAHAMIAN
PRIVATE ISLANDS

POSITIONING TIME FROM OTHER
CRUISE DESTINATIONS

FOREIGN PORTS WITHIN ITINERARIES

AIR CONNECTIVITY

SUPPLY CHAIN



NORWEGIAN CRUISE LINE
HOLDINGS LTD.



KEY CONSIDERATIONS FOR NCLH EXPANSION CHALLENGES

CAPACITY CONSTRAINTS & LOGISTICS

CERTAIN HOME PORTS

PORT SCHEDULE VISABILITY

INFRASTRUCTURE FOR GROWTH

CAPITAL INVESTMENT & RECOVERY
MODELS



NORWEGIAN CRUISE LINE
HOLDINGS LTD.



KEY CONSIDERATIONS FOR NCLH EXPANSION CHALLENGES

TOUR CAPACITY AS SHIPS GET BIGGER
& MULTIPLE SHIP CALL DAYS

MANAGING THE FLOW OF CRUISE
GUESTS AS THEY SEEK MORE TOUR
EXPERIENCES



NORWEGIAN CRUISE LINE
HOLDINGS LTD.



KEY CONSIDERATIONS FOR NCLH EXPANSION CHALLENGES

LEGAL & REGULATORY

PORT OF ENTRY & EXIT RESTRICTIONS

INCENTIVES & DISINCENTIVES

PROTECTING THE ENVIRONMENT



NORWEGIAN CRUISE LINE
HOLDINGS LTD.



KEY CONSIDERATIONS FOR NCLH EXPANSION

COLLABORATION IS KEY

TOURISM AUTHORITIES

CRUISE LINES

PORTS

GOVERNMENTS / REGULATORS

TOUR OPERATORS & ATTRACTIONS

AIR & HOTEL

MEDIA

FINANCIAL CAPITAL



NORWEGIAN CRUISE LINE
HOLDINGS LTD.

NOW...LET'S TALK!



NORWEGIAN CRUISE LINE
HOLDINGS LTD.