

***JAMES PRESCOTT***  
*CEO, Harding+*



Founded  
**1930**



**17+**  
Cruise line partnerships



**7**  
Continents



**1250+**  
Headcount at land/sea

**100+**

**SHIPS**

**300+**

**SHOPS**

**32%**

**MARKET SHARE**

**4.4M**

**TRANSACTIONS**

**>\$600M**

**FULLY OPERATIONAL**

# PRODUCT MIX & HEADLINE KPI'S

**1/3<sup>RD</sup>**

**LTC & BEAUTY**

**1/3<sup>RD</sup>**

**FINE JEWELLERY  
& WATCHES**

**1/3<sup>RD</sup>**

**FASHION  
GIFTING, LOGO**

**50%**

**PENETRATION**

**2x**

**FREQUENCY**

**7**

**DAYS**



***A BOOMING INDUSTRY  
RESHAPED BY COVID  
CREATING OPPORTUNITIES***



MSC World Europa

MSC CRUISES | CRUISE NEWS

## MSC Cruises reports record bookings in October

Nearly 400,000 passenger bookings were taken for winter 2022/23 and the line's fleet

By Cruise Adviser — On Nov 10, 2022

**Cruise Industry News**  
Number 1 in Industry Reporting

2023 USA RIVERBOAT REPORT  
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IT HAS TO BE **Quantum** MARINE STABILIZERS

**Oceania World Cruise Sells Out in 30 Minutes**  
March 8, 2022

TRAVEL

## Luxury round-the-world cruise to New Zealand sells out in 30 minutes



By [Thomas Bywater](#)

8 Mar, 2022 09:21 PM · 2 mins to read

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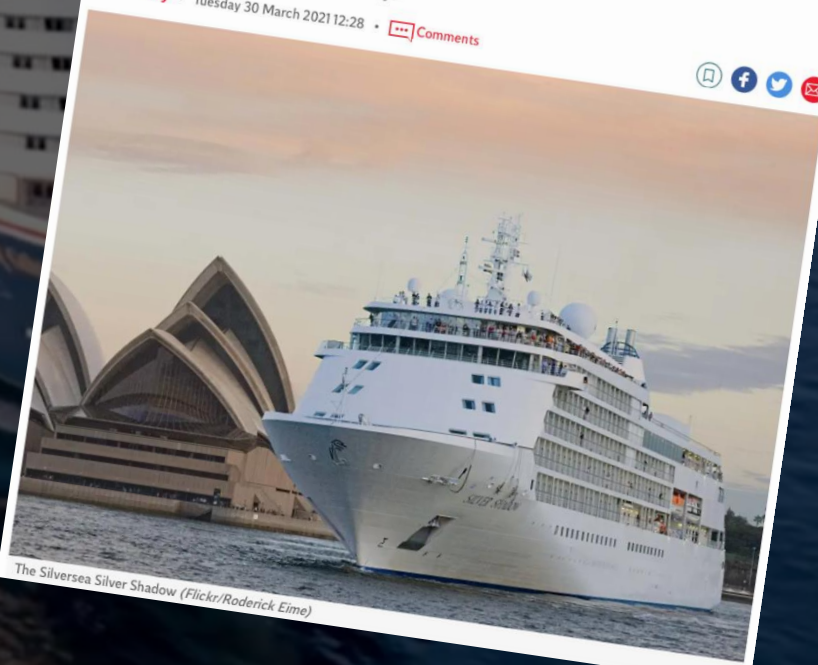


The Insignia will be the home for 684 lucky passengers on a six-month trip around the world. Photo / Supplied

## World cruise costing £58,000 sells out in under a day

Voyage calls at 34 countries over 139 days

Helen Coffey · Tuesday 30 March 2021 12:28 · Comments



The Silversea Silver Shadow (Flickr/Roderick Eime)

# With new ships in 2022, cruise industry shows recovery after pandemic

## Norwegian Cruise Line Beats Earnings Estimates and Signals Record 2023. The Stock Is Rising.

By Callum Keown [Follow](#) Nov. 8, 2022 8:44 am ET

### Cruise Bookings Up: Lines and Travel Agencies Break Passenger Records



Fran Golden  
Contributor

In a post-pandemic trend that has been a long time coming, cruise lines and travel agencies are reporting that bookings are up, with record numbers of passenger

### CDFG anchors position in cruise market with Costa Mediterranea contract

By CHARLOTTE TURNER | Wednesday, 9 February 2022 12:00

CDF Cruise Services Co Ltd, a wholly-owned subsidiary of China Duty Free Group (CDFG), has won a contract to manage duty free operations onboard CCSC Carnival Cruises' Costa Mediterranea vessel exclusively for a period of three years.

CDF Cruise Services Co Ltd already operates retail onboard the Costa Atlantica, also owned by CSSC Carnival Cruises.

CSSC Carnival Cruises is a joint venture company, first established in 2018 by the China State Shipbuilding Corporation and Carnival Group. As part of the JV, CSSC announced an agreement to purchase two ships from Carnival Corporation's Costa Group, the leading cruise operator in Europe and Asia; the Costa Atlantica and the Costa Mediterranea.



## Cruise Industry Sees 'Encouraging Momentum'

by [Dori Saltzman](#) / November 22, 2022

### MSC OPERA TO OFFER ACCOMODATION AS A CRUISE SHIP HOTEL FOR FOOTBALL FANS IN DOHA, QATAR

10/10/2022

• **High-end MSC Cruises ship to offer 1,075 passenger cabins for visitors to Doha from 19 November to 19 December**

A large cruise ship is shown sailing on the ocean. The ship is white with a red and blue stripe along the hull. It has multiple decks with balconies and a funnel. The text is overlaid on the image.

***TOTAL CRUISE INDUSTRY \$41BN***

***\$154BN INDIRECT BENEFIT***

***1.8M JOBS***

***TOTAL CRUISE RETAIL REVENUE \$2BN***

# CRUISELINE GROUPS MARKET SHARE

ESTIMATE 2027

**40%**

**CARNIVAL CORP**

**22%**

**RCCI**

**12%**

**NORWEGIAN CL  
HOLDINGS**

**10%**

**MSC**

**16%**

**OTHERS**





# CAPACITY GROWING >50% BY 2024

**28m**  
guests

**560K**  
berths

**42m**  
guests

**850K**  
berths

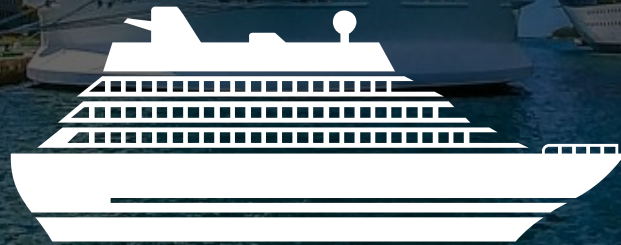


# OVER 100 SHIPS UNDER CONSTRUCTION



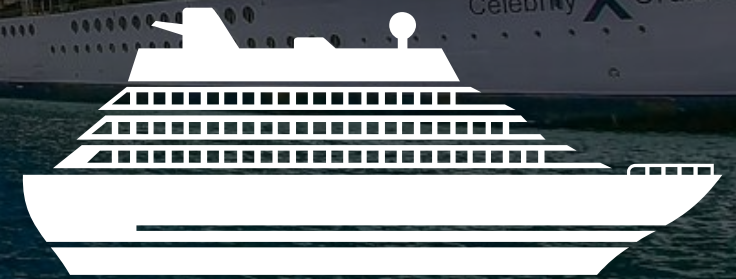
**1,500**

*average size of all ships today*



**2,300**

*average size launched in the last 10 years*



**3,200**

*average size of ships on order*

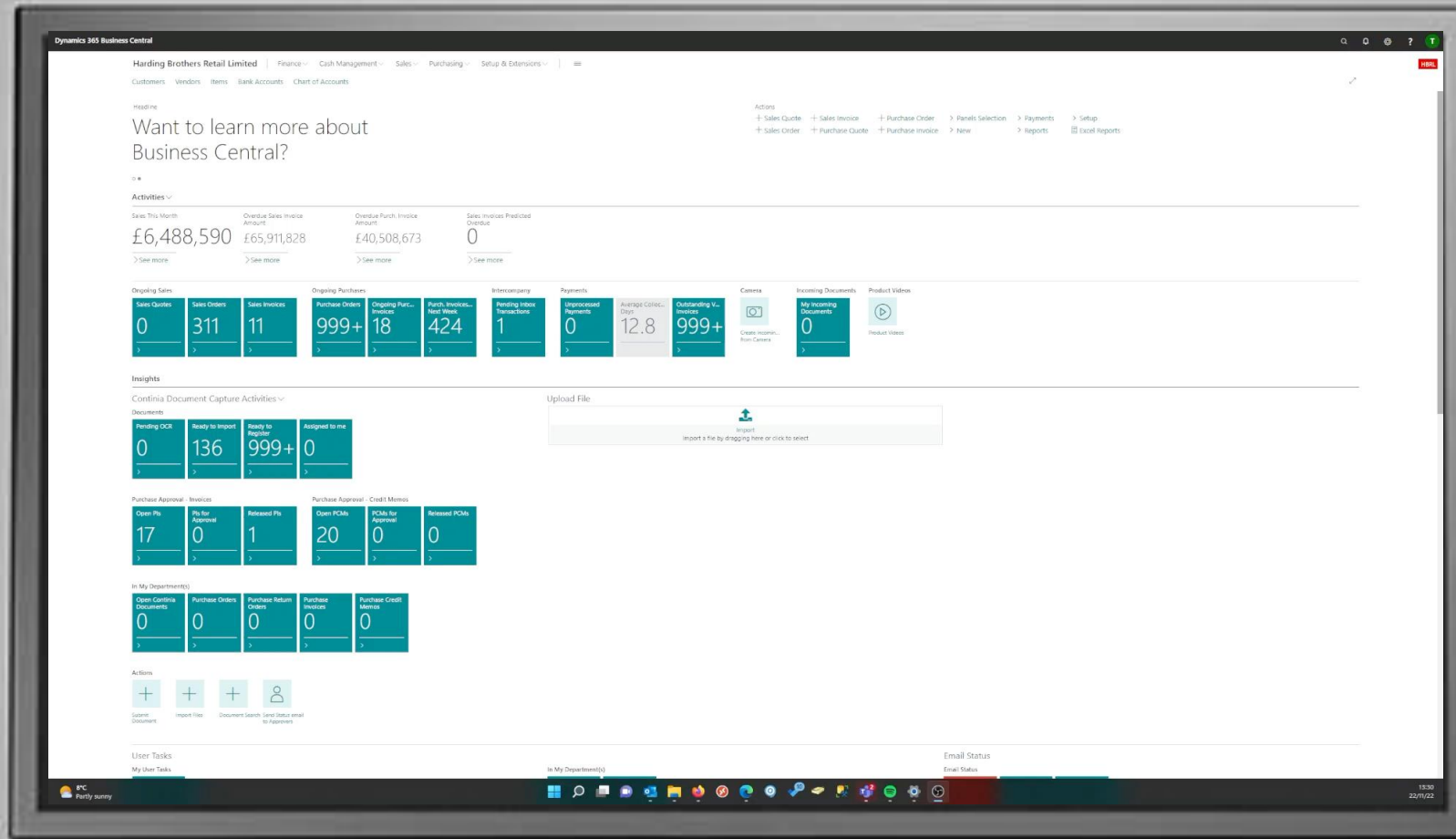
# ***SUSTAINABILITY***



Certified



Corporation



**DATA – THE DIFFERENTIATOR**

# ***SO IT'S EASY?***



***WE KNOW WHO THE  
GUESTS ARE***

***WE KNOW THEIR  
PURCHASE HISTORY  
OR HAVE MONTHS TO  
PLAN***

***WE ASK THEM  
(RESEARCH) WHAT  
THEY WANT***

***WE ADD SURPRISE  
AND EXCITEMENT  
WITH IMMERSIVE  
EXPERIENCES***

***THE COMMERCIAL  
MODEL ALLOWS US TO  
SELL ANYTHING***

***ALL STAKEHOLDERS  
OBJECTIVES ARE  
ALIGNED***

# ***THE 'BASICS' ARE HARD***



***LAST MILE LOGISTICS***

***CUSTOMS***

***MOVING SHIPS***

***FORWARD PLANNING***

***SMALL LOADING WINDOWS***

***TAX STATUS CHANGES***

***LIMITED SPACE***

***HIGH STOCKHOLDING***

***ESSENTIALS VS LUXURY***

***TEAM LIVE ONBOARD***

***SERVICE IS NO.1 PRIORITY***

***EXPECTATIONS***

# ***A HIGHLY COMPLEX BUSINESS NOT MANY CRUISE RETAILERS***



IN HOUSE INC.



**THE CHALLENGE IS EXECUTING IT  
BRILLIANTLY**

**SALES FORECAST  
ACCURACY**

**LOGISTICS**

**SHIP  
LOCATION**

**THE ONBOARD  
TEAM**







**CUSTOMER BASE  
IS CHANGING  
AND DIVERSIFYING**



Aisle  
Allée  
2

DWELL

TIME

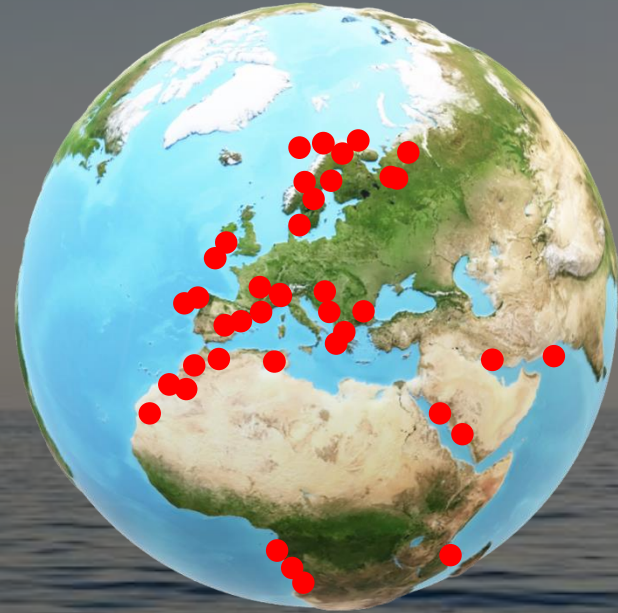
AIRPORT

CRUISE

# CRUISE GEOGRAPHY



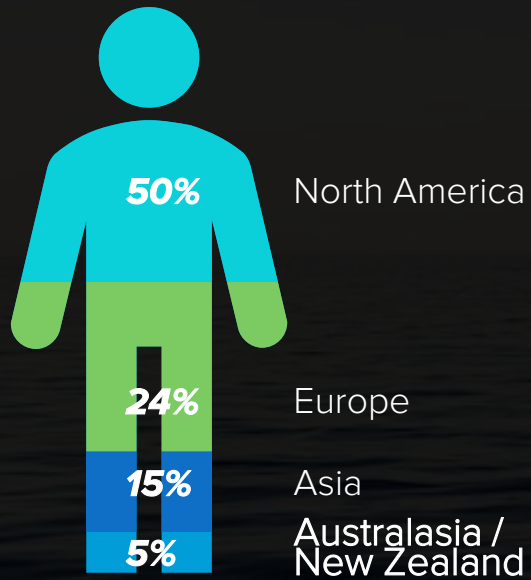
**IT'S ABOUT *THE JOURNEY***



**NOT *ALL* REGIONS ARE  
CURRENTLY EQUAL**

# THIS REGION ISN'T YET GETTING ITS FAIR SHARE?

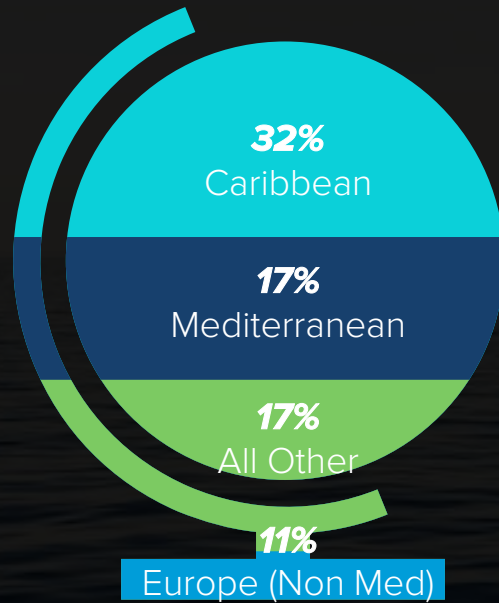
Global Passenger Origin



94% Big 4 Total

6% Other

Regions Visited



77% Big 4 Total

23% Other

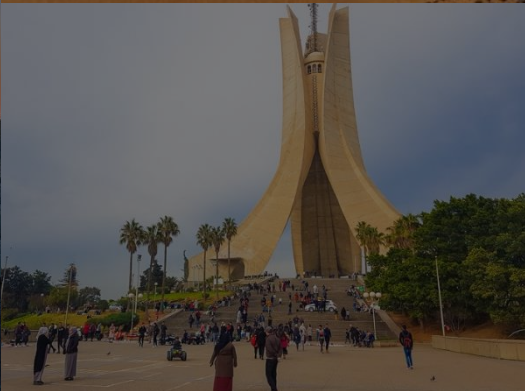


A nighttime photograph of a city skyline reflected in water. The sky is a deep blue, and the city lights are visible. The most prominent feature is a tall, illuminated skyscraper with a unique, pointed, sail-like structure. Other buildings of varying heights and designs are scattered across the horizon. The water in the foreground is dark, with bright reflections of the city lights and the illuminated skyscraper.

***THIS REGION HAS  
ALWAYS SET THE  
BENCHMARK***



*THE POTENTIAL FOR  
CRUISE IN THIS  
REGION IS  
SIGNIFICANT*



**OPPORTUNITY TO  
SHOWCASE THE REGION**





OPPORTUNITIES



FOR LOCAL BRANDS

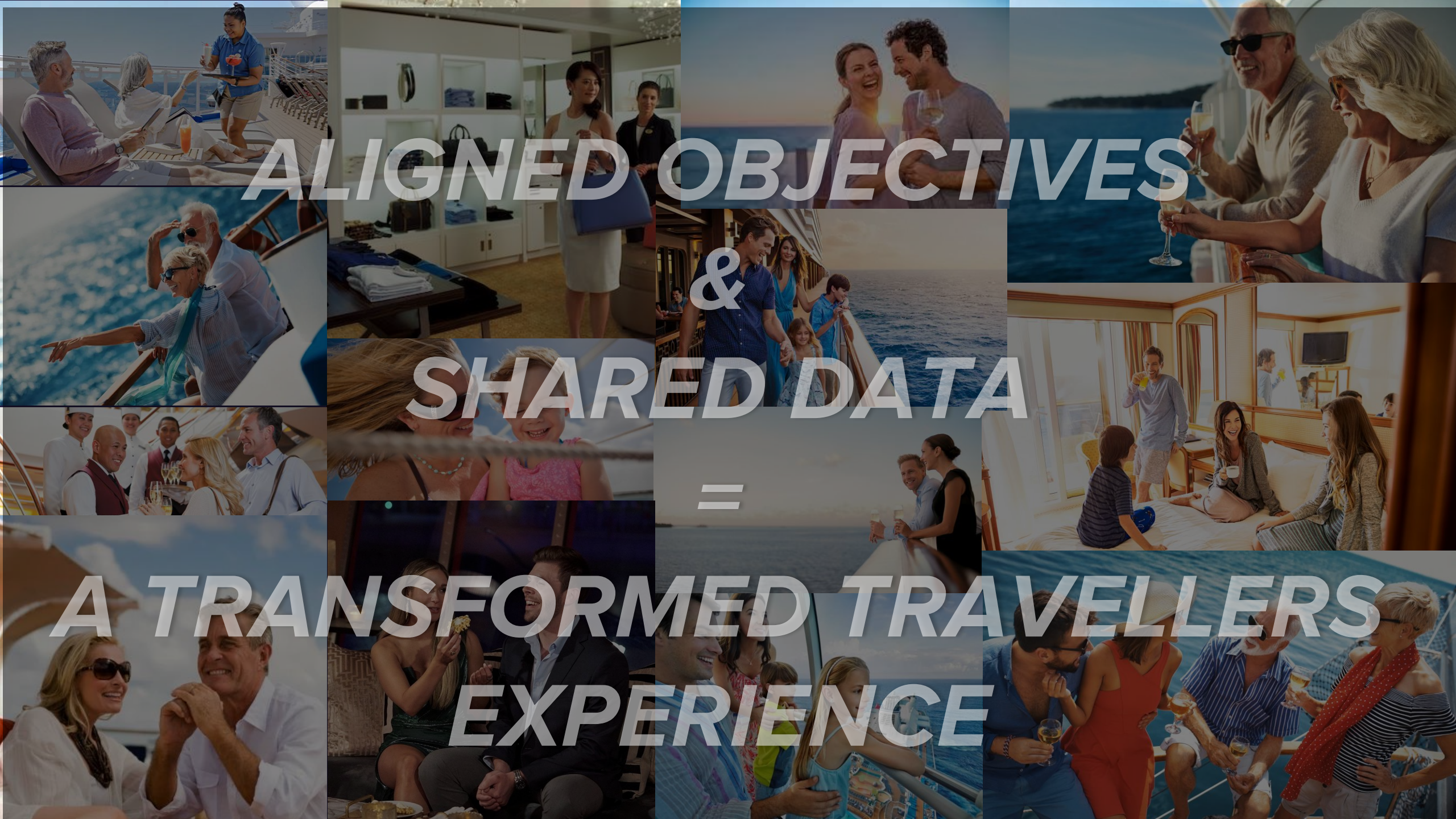




# OPPORTUNITIES TO TRIAL NEW EXPERIENCES AND ACTIVATIONS



**OPPORTUNITIES  
FOR CRUISE & AIRPORTS  
TO COLLABORATE ON THE  
GUEST JOURNEY**



**ALIGNED OBJECTIVES**

**&**

**SHARED DATA**

**=**

**A TRANSFORMED TRAVELLERS**

**EXPERIENCE**



***GUEST***

***BRANDS***

***PEOPLE***

***CRUISELINE***

***RETAILER***



**THE AIM – DOUBLE CRUISE  
RETAIL REVENUE BY 2025**

**\$2BN**

**TODAY**

**> \$4BN**

**2025**



**THANK YOU**

