

Cruise Tourism in Alaska 2022



Resource Development Council for Alaska
May 5, 2022

ONE INDUSTRY. ONE VOICE.



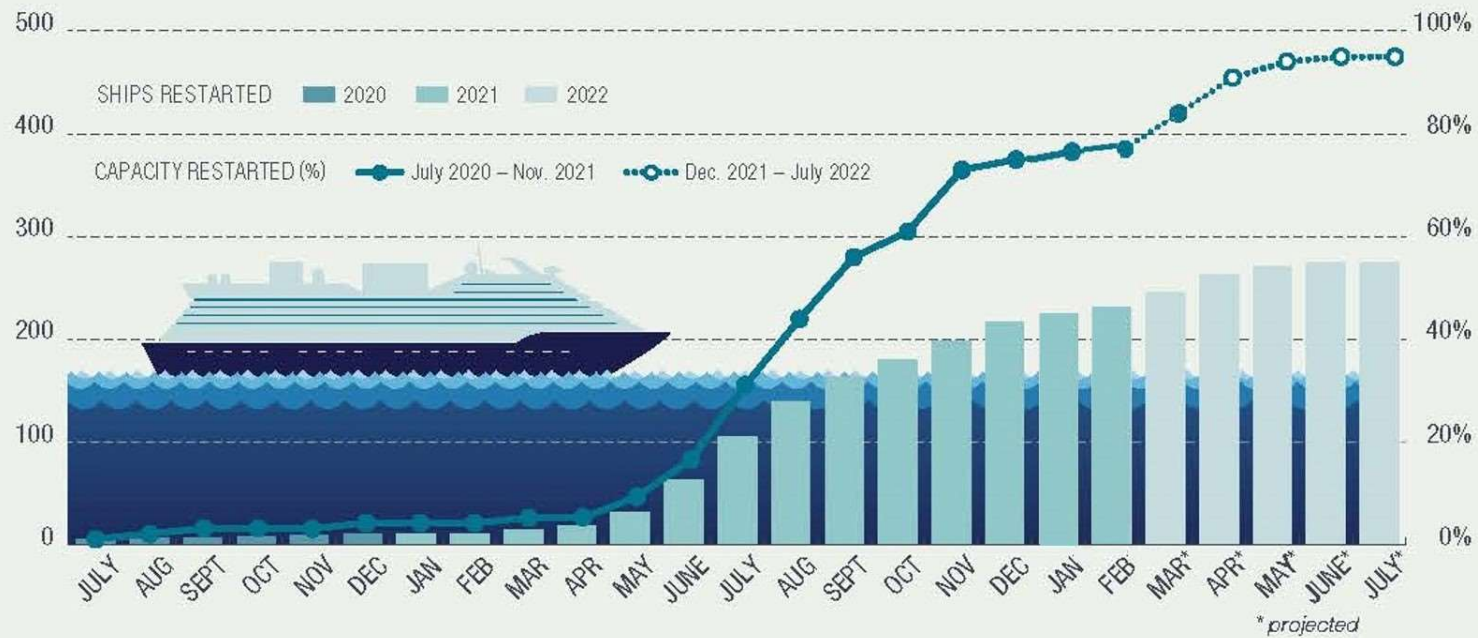
From 250 passengers to 4600, CLIA member lines visit ports all across Alaska.

The Responsible Resumption of Cruise is a Model for Others



Nearly 100% of CLIA ocean-going capacity projected to be in operation by the end of July 2022

Since restart began in July 2020



Leading the Way with Proven Public Health Protocols



Cruise line protocols represent some of the strongest of any industry

In sharp contrast to land-based venues and experiences, on CLIA ocean-going cruise lines:

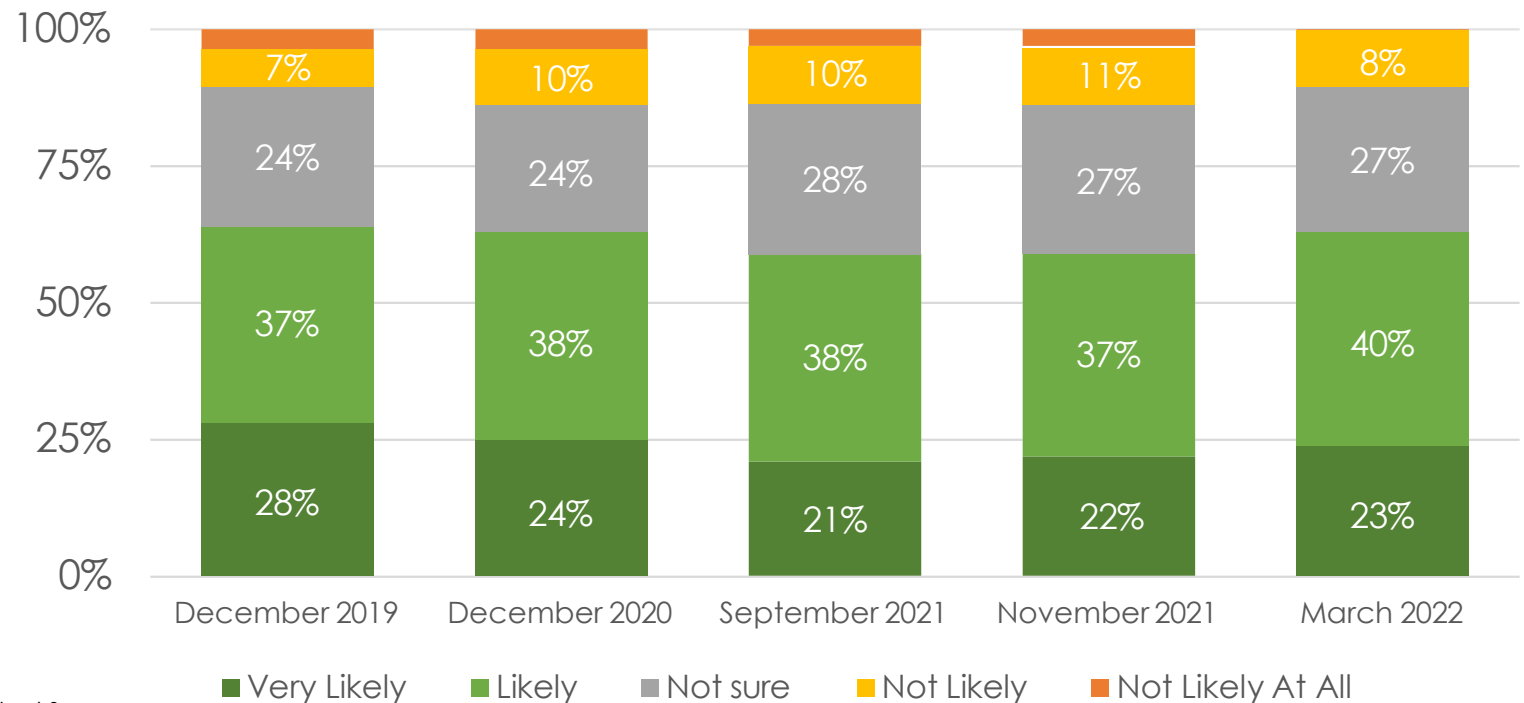
- Nearly everybody who is eligible (guests and crew) must be vaccinated.
- Testing occurs 21 times more frequently than on land.
- The vast majority of cases that do occur are mild or asymptomatic—with most identified as a result of the high-frequency of testing.
- An extraordinarily low number of hospitalizations. And, onboard medical facilities mean no burden on ports and local communities.

Total "Intent to Cruise" (Cruisers and Potential Cruisers) is Rebounding

63% of Cruisers and Potential Cruisers are **Very Likely** or **Likely** to Cruise in the Next Two Years (up 7% from November 2021, but 2 percentage points below pre-pandemic levels)

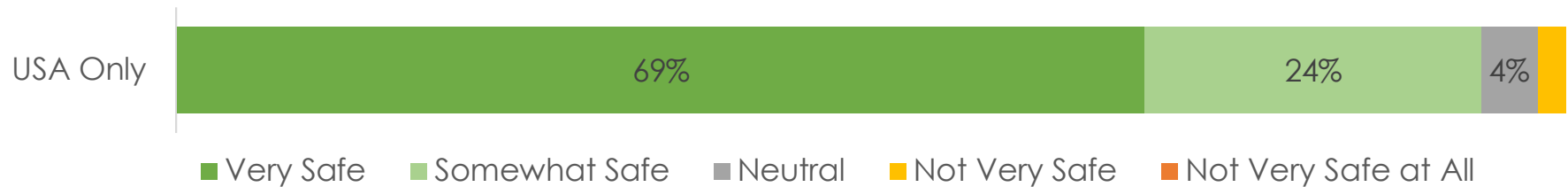
How likely are you to go on a cruise as a vacation in the next 2 years?

Cruisers and Potential Cruisers Only



Source: CLIA Research / Sentiment, Perception, Intent Survey

For USA Respondents that Have Cruised January to March 2022; 93% Reported Feeling Very Safe or Somewhat Safe Aboard their Cruise



How safe did you feel aboard your cruise in the last 90 days?
Answers from USA only

94% of USA respondents that took a cruise in the last 90 days said they would cruise again **under the exact same circumstances**

*Based on the cruise you took in the last 90 days;
would you cruise again under the same
circumstances?*

Answers from USA only

Source:
CLIA Research / Sentiment, Perception, Intent Survey

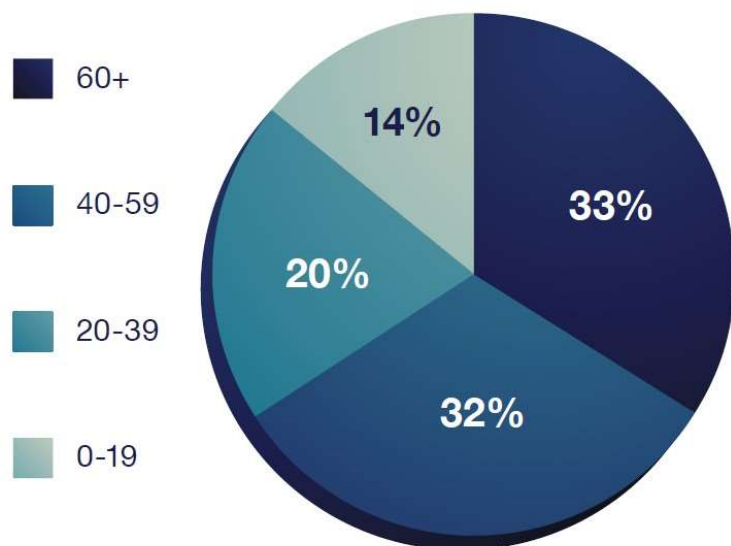
The Future of Cruise is Getting Younger



47.6 Average age of cruise tourist

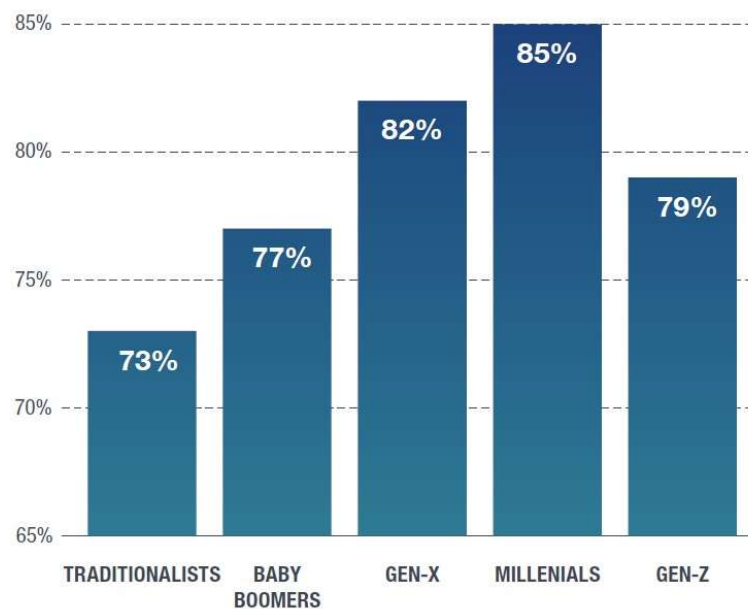
Millennials are the most enthusiastic cruisers of the future

Cruise Tourist Age Averages from 2018-2020



Source: CLIA Global Market Report, 2020

% of Cruise Passengers Who Plan to Cruise Again



Source: CLIA Global Market Report, 2020

CLIA Travel Advisors See Alaska as a Top Destination



Lots of interest and bookings for Alaska—and we expect many more. This is a huge segment for us.

Travelers are looking to upgrade their on-board experiences with better staterooms, more luxurious lines.

Alaska cruisers are more likely to select extended cruise tour choices.

Alaska is huge for us this season and next. Lots of interest.

There is a lot of interest in smaller ships.

Travelers to Alaska are ok paying higher fares for land/sea cruise tours.

Travelers are booking longer cruises in Alaska (many from SFO round trip).

Excursion spending is on the rise. Cruise travelers are seeking out higher-priced “bucket list” experiences—and not just “walk around town” for free.

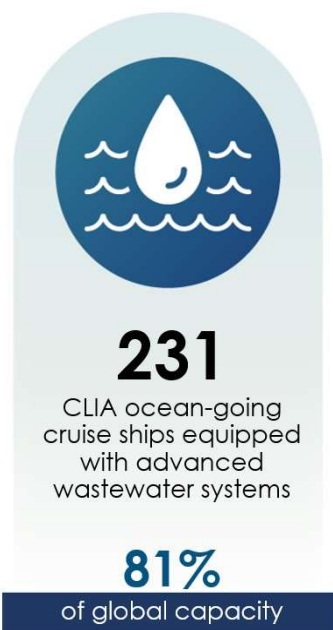
As long as Canada keeps the border open people will go. The only possible downside to this is the cost of fuel which rising flight prices may curtail.

Cruise travelers are looking for more “off-the-beaten-track” experiences.

Driving Innovation for a More Efficient Future



BY 2027,
THE CLIA OCEAN-GOING MEMBER FLEET WILL INCLUDE



Source: CLIA Environmental Technologies and Practices and Oxford Economics Report 2021

Projections do not account for retirement of vessels between now and 2027; vessels without these technologies, and/or unable to be retrofitted with these technologies are more likely to be retired first.

\$4.5 Billion Impact



Figure 1. Visitor Industry Economic Impact Model

A graphic on the left side of the table consists of three concentric, semi-circular shapes. The outermost shape is the largest and darkest, the middle one is smaller and lighter, and the innermost one is the smallest and lightest. They are all aligned to the right, creating a layered effect.

Direct impacts Visitors spend money in Alaska	Goods Food/beverages Souvenirs Fuel for rental cars	Services Tours Recreation Lodging
Indirect impacts Companies that directly serve visitors spend money	Goods Restaurant supply Inventory Fuel for transportation	Services Utilities Maintenance Accountants
Induced impacts Employees of tourism and related companies spend money	Goods Groceries Clothing Restaurants	Services Medical care Housing Recreation

Telling our story



- We make a **significant economic impact** on state and local levels
- Polling shows the tourism industry has **wide support** in port communities
- We have a positive story about **sustainability**
- The cruise industry is committed to being **good partners in the communities** we visit
- The cruise industry is proud to have the **steadfast support** of Governor Dunleavy and our entire congressional delegation



CLIA
CRUISE LINES INTERNATIONAL ASSOCIATION
ALASKA

THANK YOU