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**

<table>
<thead>
<tr>
<th></th>
<th>December 2019</th>
<th>December 2020</th>
<th>September 2021</th>
<th>November 2021</th>
<th>March 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very Likely</td>
<td>7%</td>
<td>10%</td>
<td>10%</td>
<td>11%</td>
<td>8%</td>
</tr>
<tr>
<td>Likely</td>
<td>24%</td>
<td>24%</td>
<td>28%</td>
<td>27%</td>
<td>27%</td>
</tr>
<tr>
<td>Not sure</td>
<td>37%</td>
<td>38%</td>
<td>38%</td>
<td>37%</td>
<td>40%</td>
</tr>
<tr>
<td>Not Likely</td>
<td>28%</td>
<td>24%</td>
<td>21%</td>
<td>22%</td>
<td>23%</td>
</tr>
<tr>
<td>Not Likely At All</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

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

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

- 60+ (14%)
- 40-59 (32%)
- 20-39 (20%)
- 0-19 (33%)

% of Cruise Passengers Who Plan to Cruise Again

- Traditionalists: 73%
- Baby Boomers: 77%
- Gen-X: 82%
- Millennials: 85%
- Gen-Z: 79%

Source: CLIA Global Market Report, 2020
Lots of interest and bookings for Alaska—and we expect many more. This is a huge segment for us.

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

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

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:

- **26** LNG-powered CLIA ocean-going cruise ships, representing **16%** of global capacity.
- **231** CLIA ocean-going cruise ships equipped with advanced wastewater systems, representing **81%** of global capacity.
- **176** CLIA ocean-going cruise ships equipped with exhaust gas cleaning systems, representing **81%** of non-LNG global capacity.
- **174** CLIA ocean-going cruise ships equipped with shore-side power connectivity, representing **66%** of global capacity.


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.
### Figure 1. Visitor Industry Economic Impact Model

<table>
<thead>
<tr>
<th>Direct impacts</th>
<th>Goods</th>
<th>Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visitors spend money in Alaska</td>
<td>Food/beverages, Souvenirs, Fuel for rental cars</td>
<td>Tours, Recreation, Lodging</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Indirect impacts</th>
<th>Goods</th>
<th>Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>Companies that directly serve visitors spend money</td>
<td>Restaurant supply, Inventory, Fuel for transportation</td>
<td>Utilities, Maintenance, Accountants</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Induced impacts</th>
<th>Goods</th>
<th>Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employees of tourism and related companies spend money</td>
<td>Groceries, Clothing, Restaurants</td>
<td>Medical care, Housing, Recreation</td>
</tr>
</tbody>
</table>
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 Dunleavay and our entire congressional delegation.
THANK YOU