



CRUISE LINES  
INTERNATIONAL  
ASSOCIATION, INC.

# 2009 Cruise Industry

Terry L. Dale  
*President & CEO, CLIA*



# 23 Cruise Line Members



THE YACHTS OF  
**SEABOURN**  
INTIMATE. LUXURY.



NORWEGIAN CRUISE LINE  
FREESTYLE CRUISING



# 16,000 Travel Agencies



- World's largest travel agency association
- Agents produce 90% of all cruise sales
- Over 15,000 agents CLIA certified



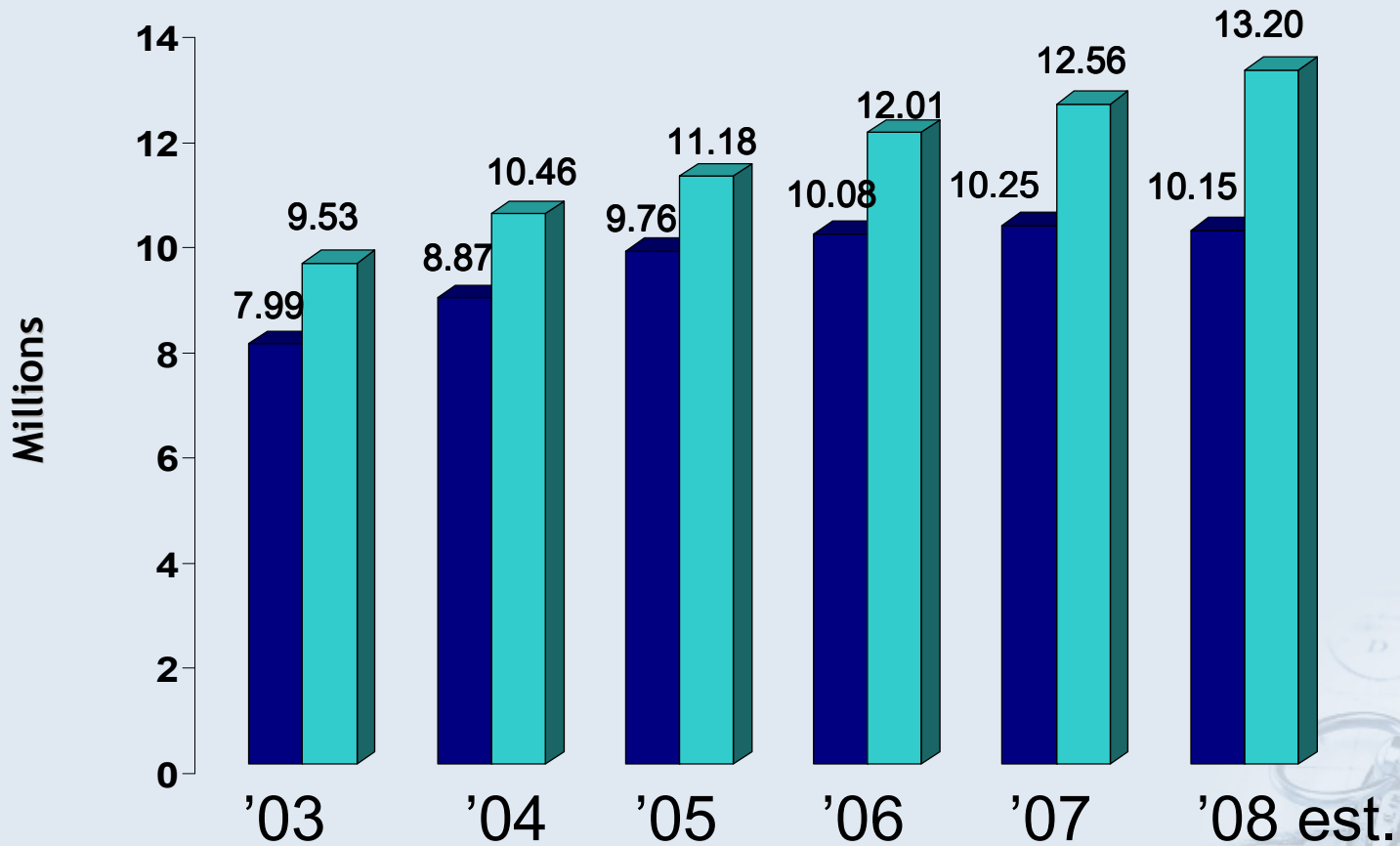


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# A Look at 2008

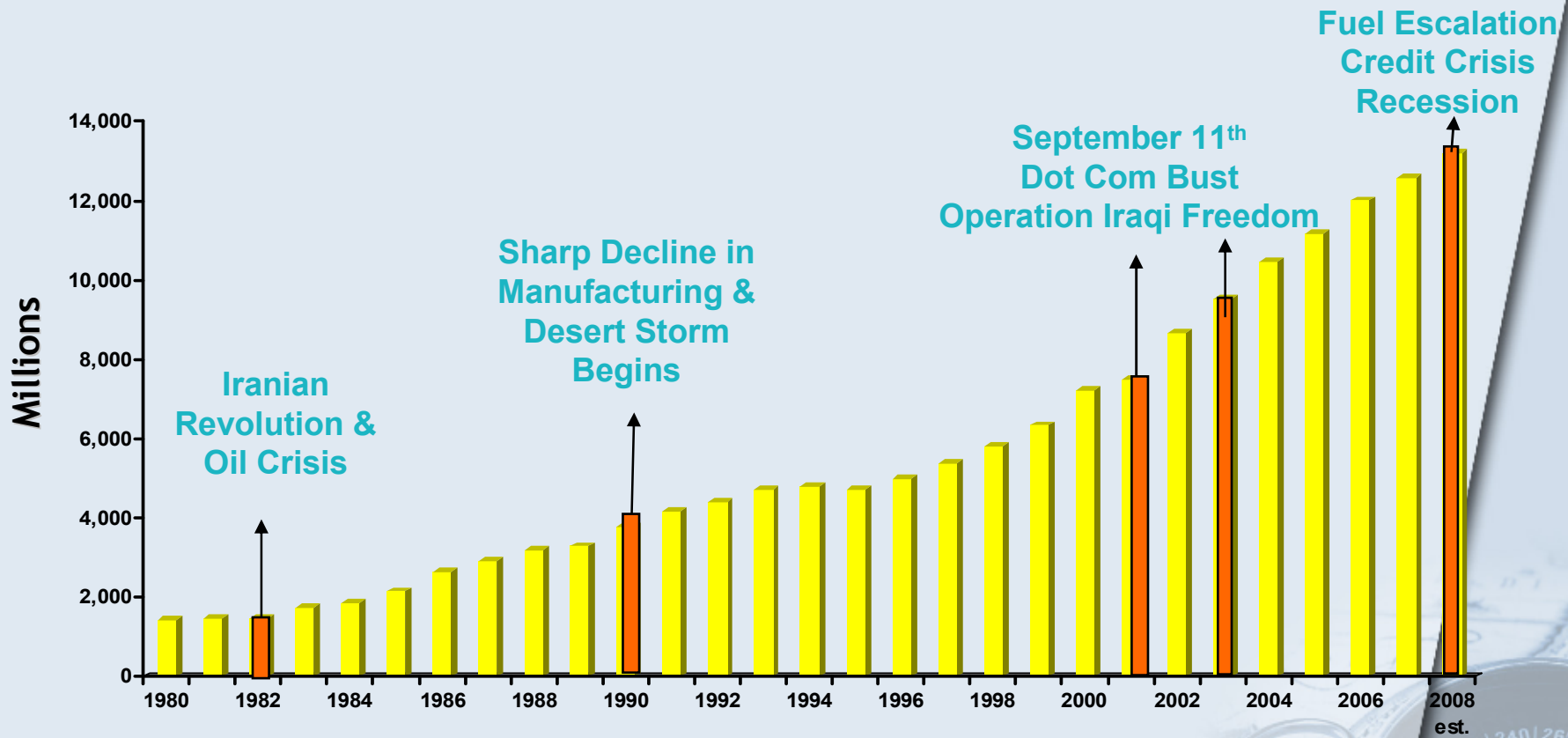


# Passenger Growth Continues



**13.2 million passengers in 2008 (est.)**

# Despite Obstacles... History of Growth

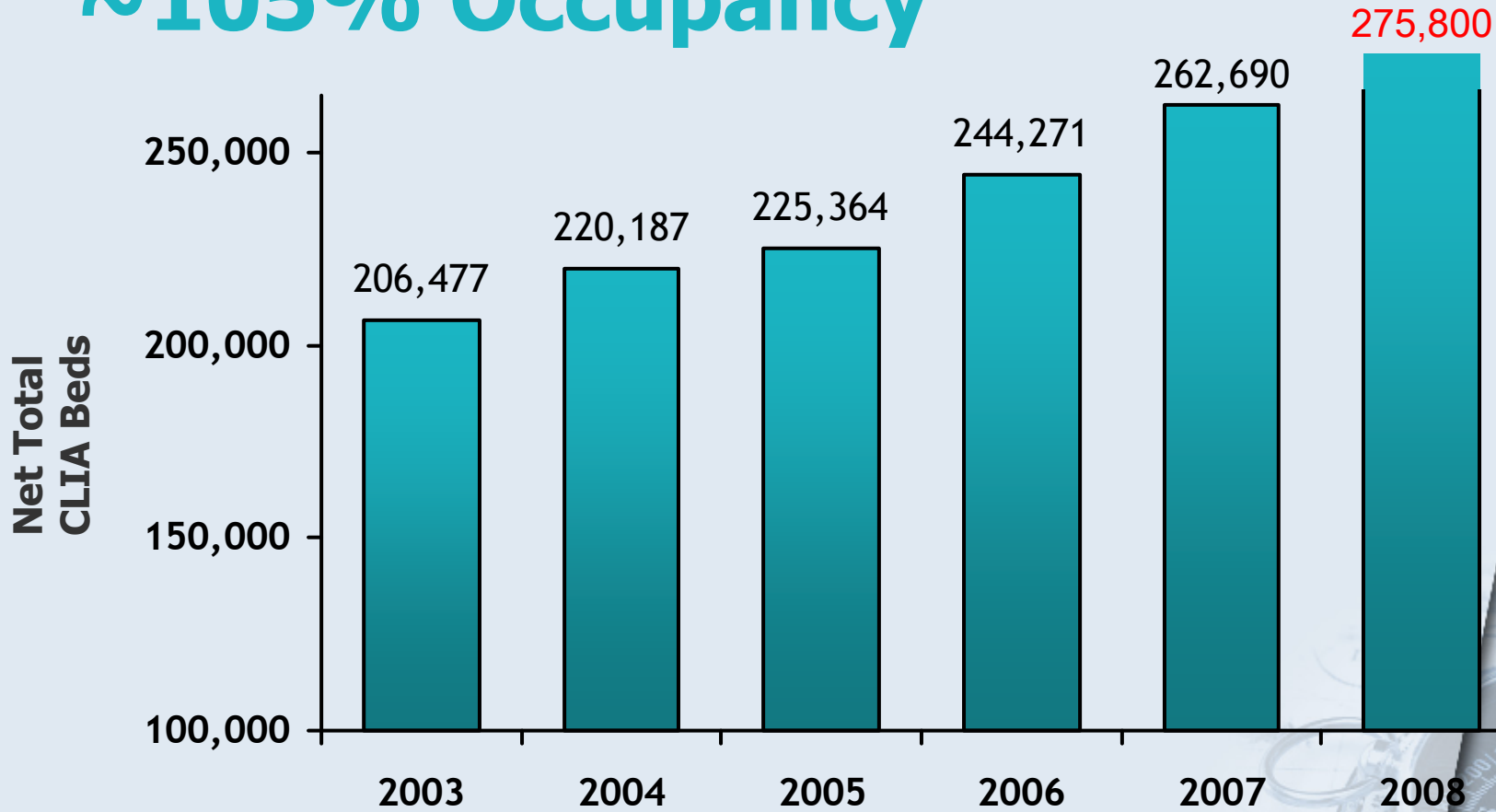


**Average Passenger Growth Rate  
1980 – 2007: +7.4%**

# 9 New Ships in 2008



# Steady Capacity Growth ~105% Occupancy

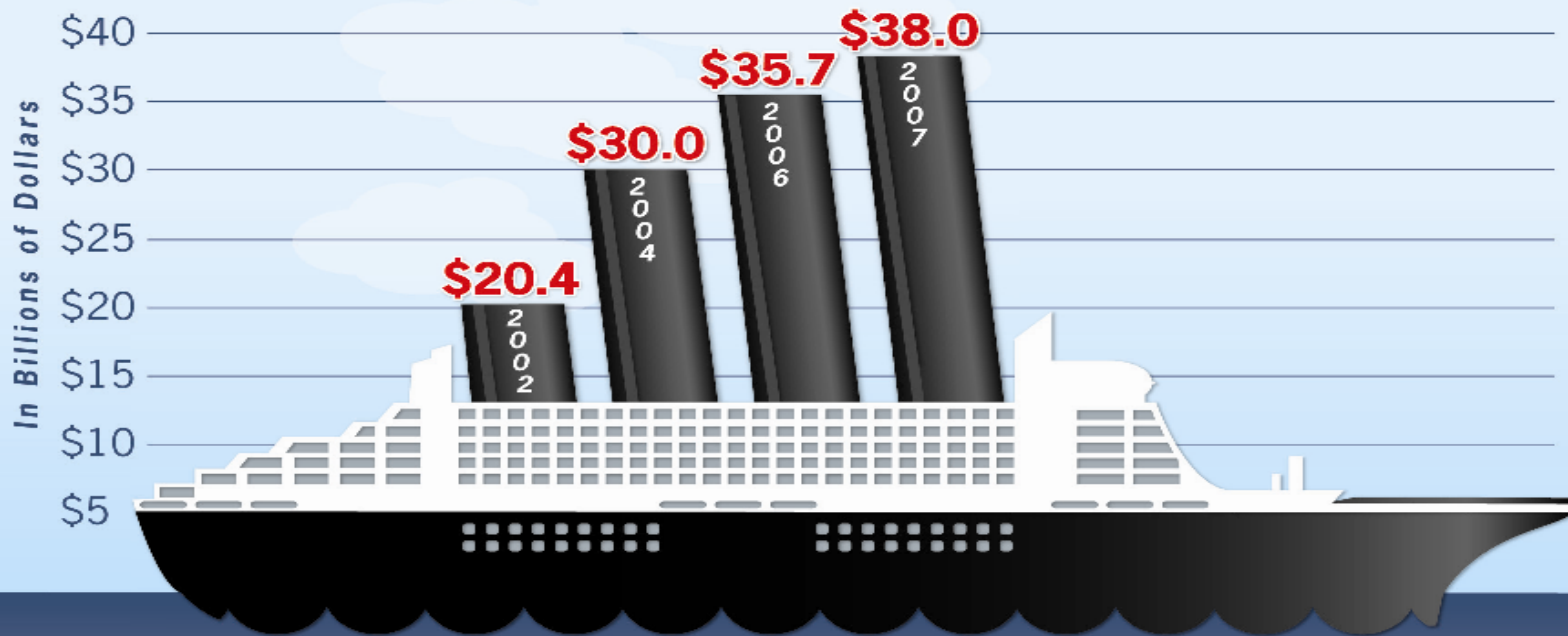




# Cruise Industry's U.S Economic Impact



## Cruise Industry's U.S. Economic Impact



Cruises generated a total of \$38.0 billion in economic output and created 354,700 jobs in 2007. Direct spending by cruise lines, their employees and passengers totaled \$18.6 billion. This research was conducted by BREA on behalf of the Cruise Lines International Association (CLIA).



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# Cruise Trends



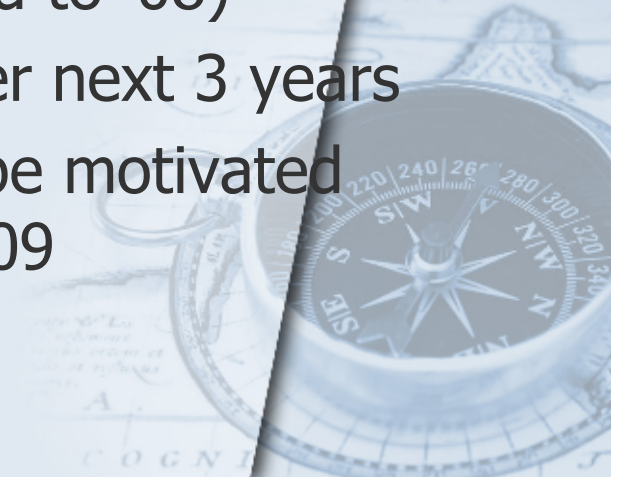
# Travel Agent Survey

\* 900 Agents Participated

\* CLIA Survey Conducted January 2009



- Cruises rank the highest in **consumer interest**, **perceived value** and **ease of sale**
- **Caribbean** (including Eastern Mexico) expected to receive most bookings in 2009
- “Hot” cruise destinations: **Alaska, Africa, South America, China/Japan**
- Half of all agents surveyed expect 2009 to be a “**very good**” or “**good year**” (compared to '08)
- 36% **very optimistic** looking ahead over next 3 years
- **Value** is the top reason consumers will be motivated to book a cruise during Wave Season 2009



# Cruise Line Trends Survey

*\* Survey conducted December 2008*



- **Meetings & Incentives, affinity travel and groups** increasing
- **Food and wine** - #1 for theme cruises
- Top international passenger source region: **Europe**
- Agents collectively represent **85-90%** of business booked
- Pax growth areas: **Families/multi-generational travel, Baby Boomers, first-time cruisers**
- **Sightseeing** and **historical/cultural activities** - most popular shore excursions
- **Shorter booking windows**
- "Hot" destinations for 2009: **The Mediterranean, Europe and South America**





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# What's New for 2009



# 2009 Industry Developments



- Value packages and promotions
- Fuel supplements dropped
- 14 new ships join the fleet
  - Continued evolution of shipboard facilities
- Diversification and global expansion
- New exotic, remote ports
- Continued growth of domestic home ports



# 2009 - 14 New Ships Net Bed Day Increase of 4.8%



- AMA's *ms Amadolce*, April, 148 pax
- AMA *ms Amalrya*, N/A, 148 pax
- American Cruise Lines *Independence*, August, 104 pax
- *Carnival Dream*, September, 3,646 pax
- *Celebrity Equinox*, Summer, 2,850 pax
- *Costa Luminosa*, June, 2,260 pax
- *Costa Pacifica*, June, 3,000 pax
- *MSC Splendida*, July, 3,300 pax
- Pearl Seas *Pearl Mist*, July, 210 pax
- RCI's *Oasis of the Seas*, Autumn, 5,400 pax
- *Seabourn Odyssey*, June, 450 pax
- Silversea's *Silver Spirit*, November, 540 pax
- Uniworld *River Beatrice*, March, 160 pax
- Uniworld *River Tosca*, April, 82 pax



# CLIA 2009 Passenger Forecast



- 13.5 million passengers (+300,000)
  - 10.4 million passengers – North America
  - 3.1 million passengers – International

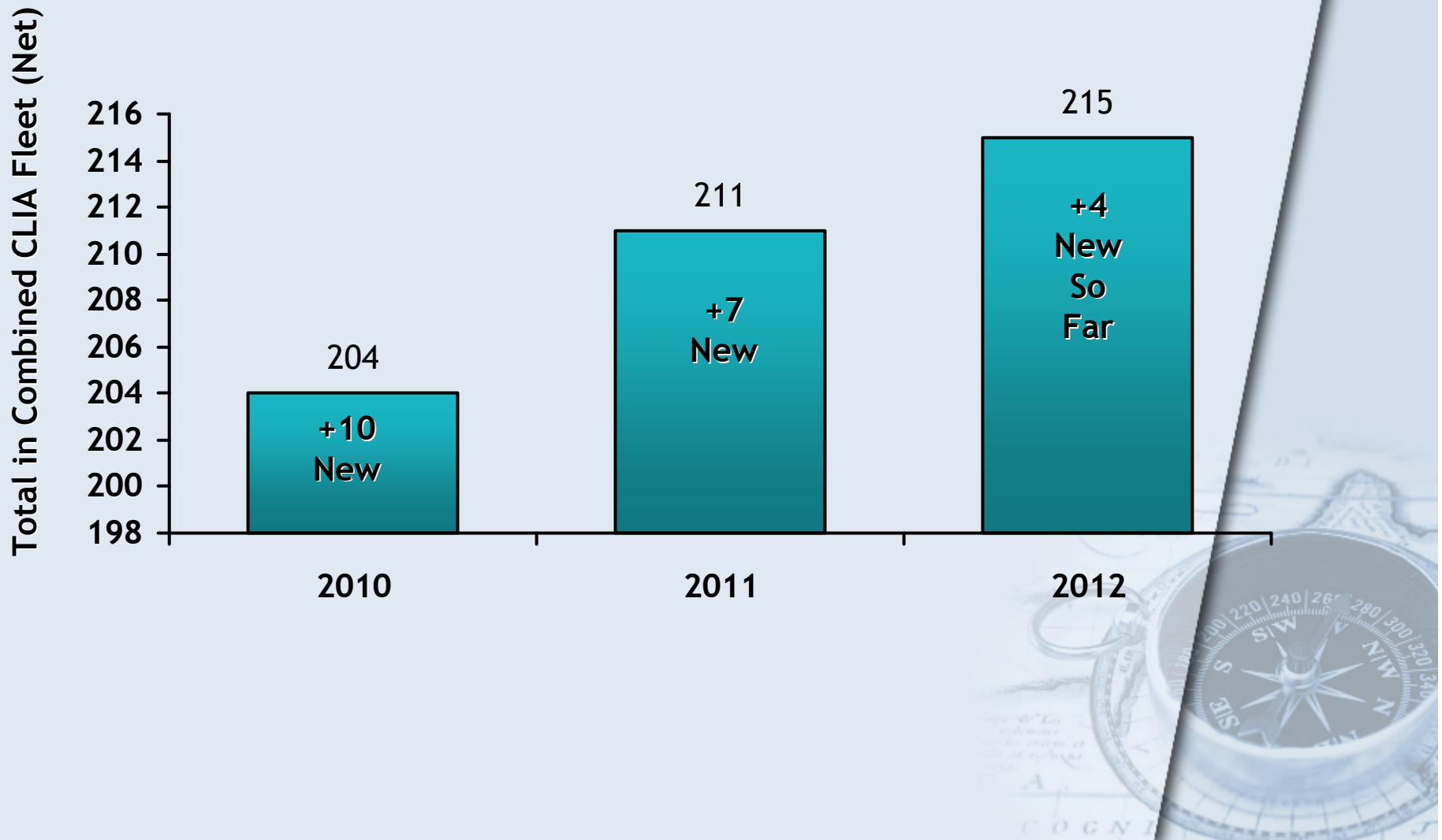




# 21 *New Ships on Order*: 2010 - 2012



Nearly \$14 billion investment in new ship building



# 2009 Calendar of Events



- Cruise Shipping Miami: March 16-19
- cruise3sixty: April 2-6 in Fort Lauderdale
- Congressional Cruise Caucus: June 15-18 in Washington, DC
- CLIA's Economic Impact Study: August
- World's Largest Cruise Night: Oct 15



# Partnership Opportunities



- Security Legislation
- California Environmental Legislation
- Guest Care Training





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