



Delivering Sustainable Cruising

Marie-Caroline LAURENT
Director General Europe





Our Mission and Vision



Our Mission:

Our mission is to foster our members' success and protect the industry's license to operate responsibly through maritime best practices.

Our Vision

Our vision is for the cruise industry to be recognized as a leader in responsible travel and the best way to experience the world.

"Confidential, Privileged and Prepared by or with Advice of Counsel. Do Not Disseminate"

The CLIA Cruise community



57
CRUISE
LINES



Includes 42 ocean cruise line members (278 vessels and 539,000 lower berths) and 15 river cruise marketing affiliates representing 95% of global capacity

400
EXECUTIVE
PARTNERS



Includes members of the port, destination, and travel community; maritime and technical services providers; and product and service suppliers supporting cruise line food, beverage, and hotel operations.

15,000
TRAVEL
AGENCIES



Includes the largest travel agencies, hosts, franchises, and consortia throughout the world

54,000
TRAVEL
AGENTS



Includes travel agent members in North America, Europe, the United Kingdom, and Australasia

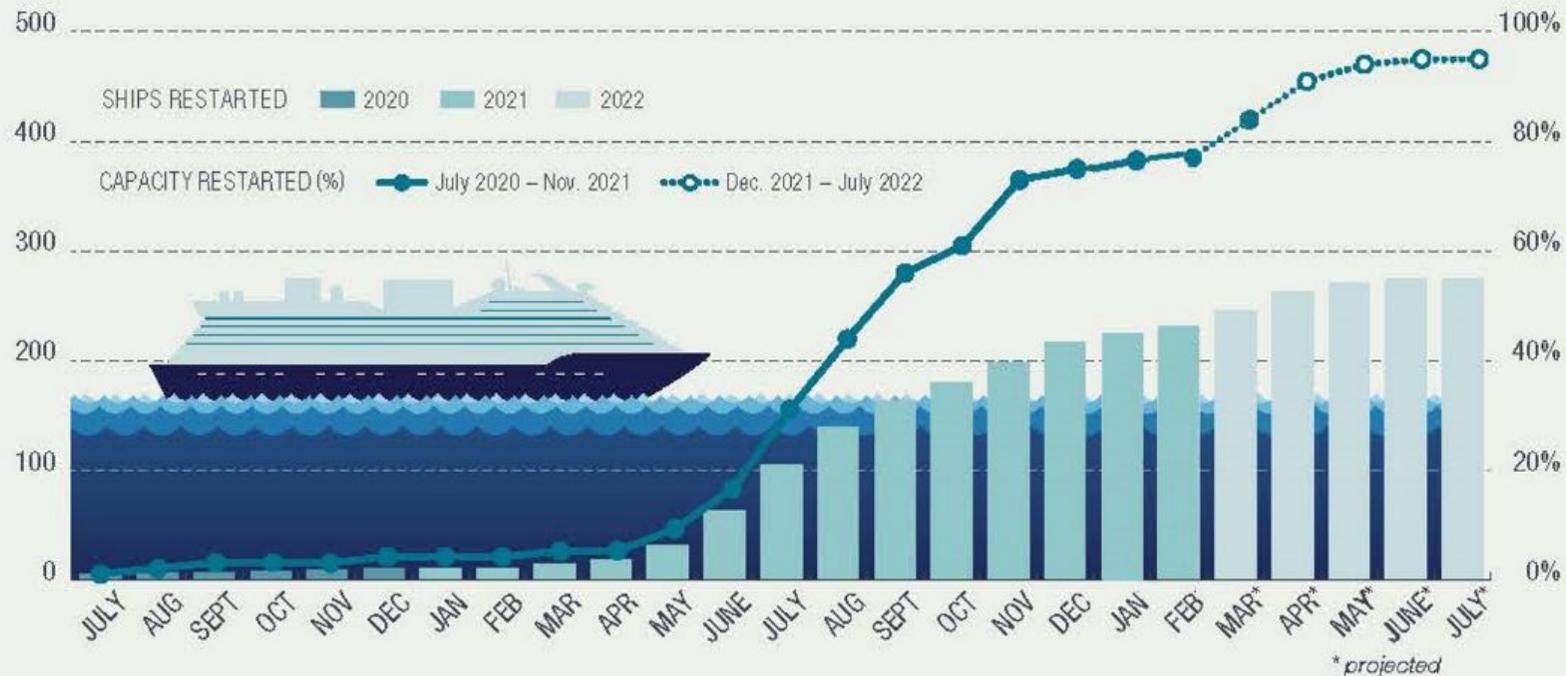
The CLIA community includes the world's most prestigious ocean, river and specialty cruise lines; a highly trained and certified travel agent community; and cruise line suppliers and partners, including ports & destinations, ship development, suppliers and business services.

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

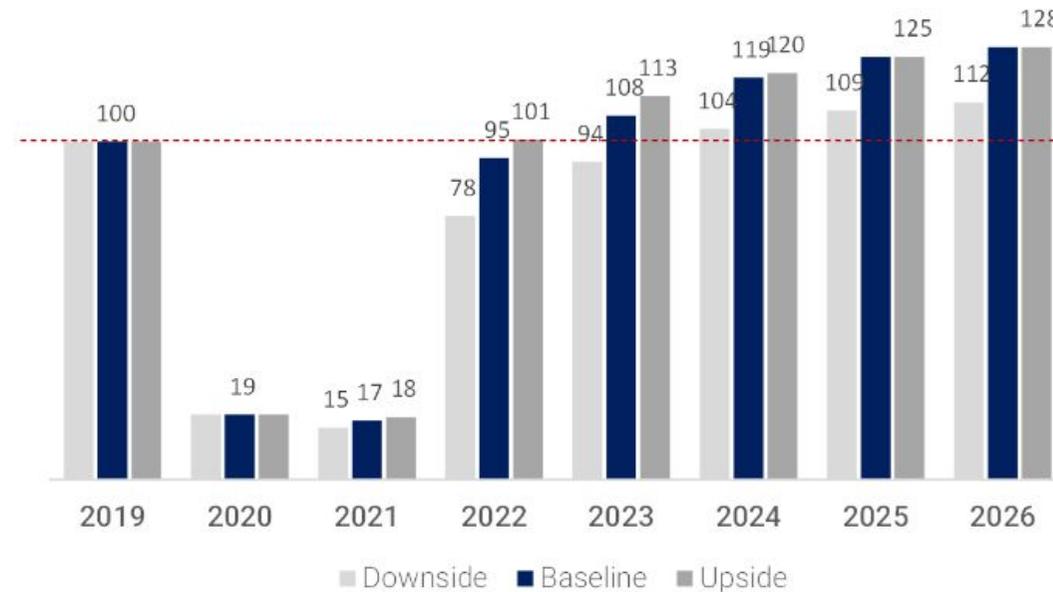


The Outlook for Cruise Recovery



2022 is a pivotal transition year for the industry—with a forecast for the cruise recovery by the end of 2023.

Projected global cruise passenger volume
Index (2019=100)



Source: CLIA; Tourism Economics

Numbers represent an index of volume relative to 2019 (2019=100).

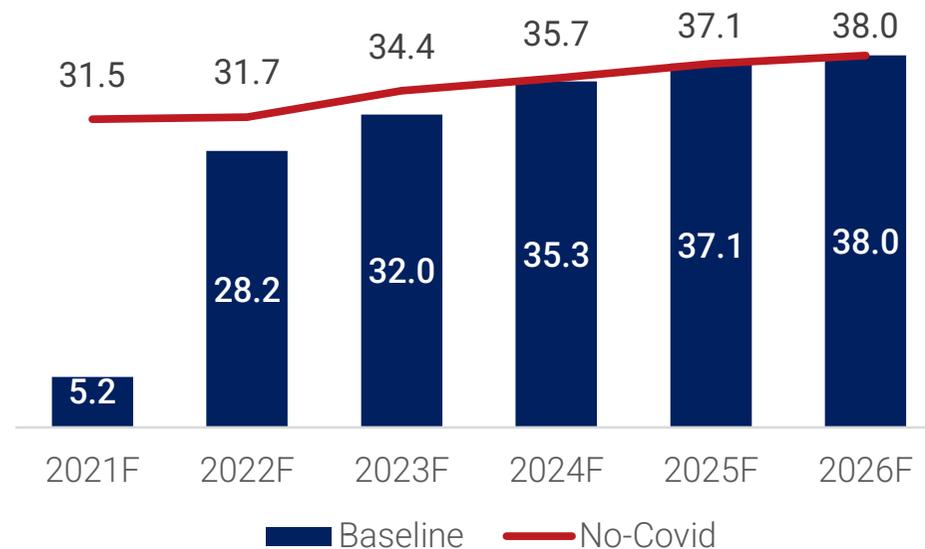
The 7 Million Passenger Equation



A successful recovery means the industry must find 7 million additional passengers by 2025 to meet the available capacity of 37 million passengers forecast.

A 25% increase compared to 2019

Projected passenger volume in baseline scenario (millions) CY 2021 – 2025



Source: CLIA; Tourism Economics

Leading the Way with Proven Public Health Protocols



Cruise line protocols represent some of the strongest of any industry

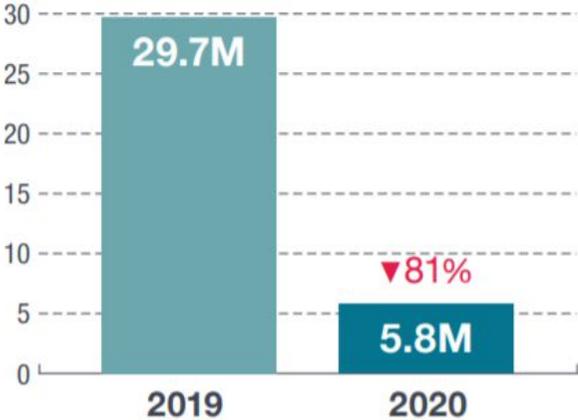
In sharp contrast to land-based venues and experiences, on CLIA ocean-going cruise lines:

- 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

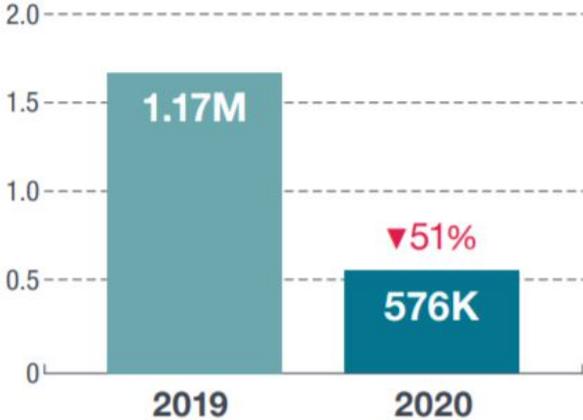
The Pandemic Revealed the Significant Economic Impact of Cruise Tourism



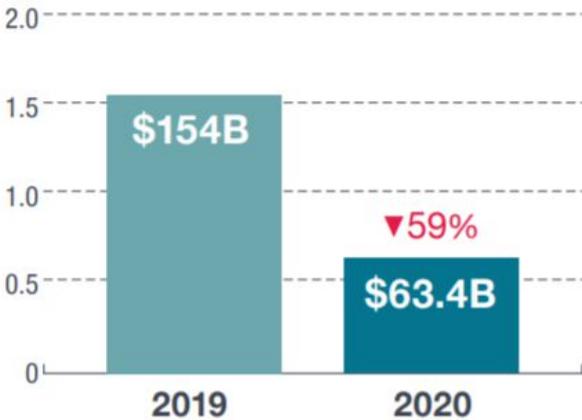
Passenger Embarkations
(millions)



Cruise-Supported Jobs
(millions)

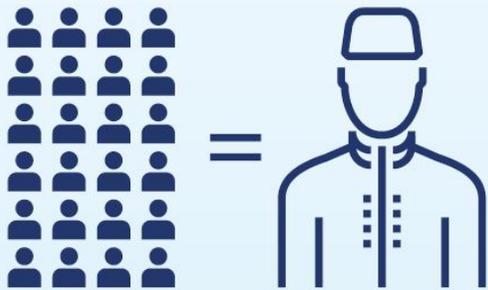


Total Economic Contribution
(billions of USD)



Source: The Global Economic Contribution of Cruise Tourism in 2020, BRE

Cruise Tourists Add Value Before, During and After Sailing



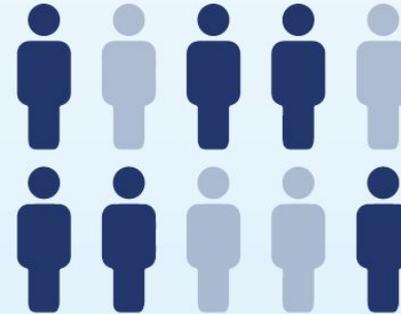
**Every 24
cruisers**
worldwide supports
one full-time
equivalent job

Source: The Global Economic Contribution of Cruise Tourism
in 2019, BREA



Cruisers spend
an average of
\$750 USD
per passenger in
port cities over the
course of a typical
seven-day cruise

Source: The Global Economic Contribution of Cruise Tourism
in 2019, BREA



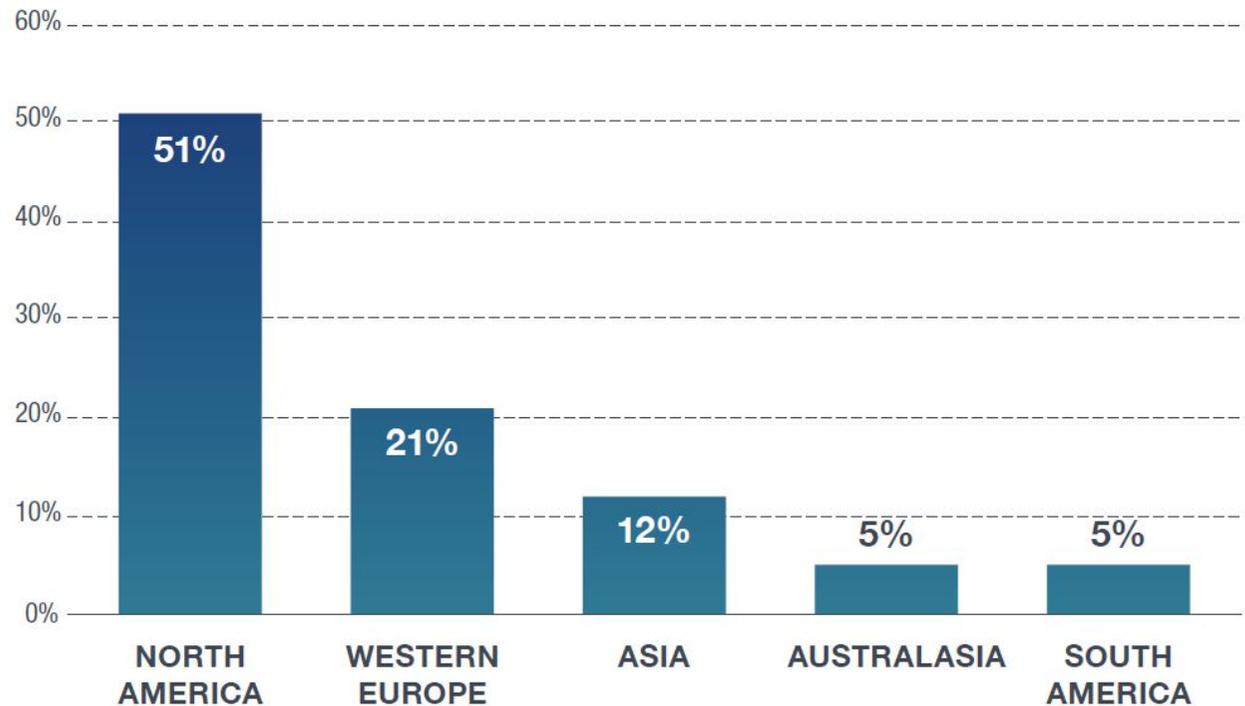
6 in 10 people
who have taken a
cruise say that they
have returned to a
destination that they
first visited via
cruise ship

Source: CLIA SPI Survey, November 2021

North America Remains the Largest Source Market—with Other Markets Growing Rapidly



Top Five Source Regions on Average from 2018-2020

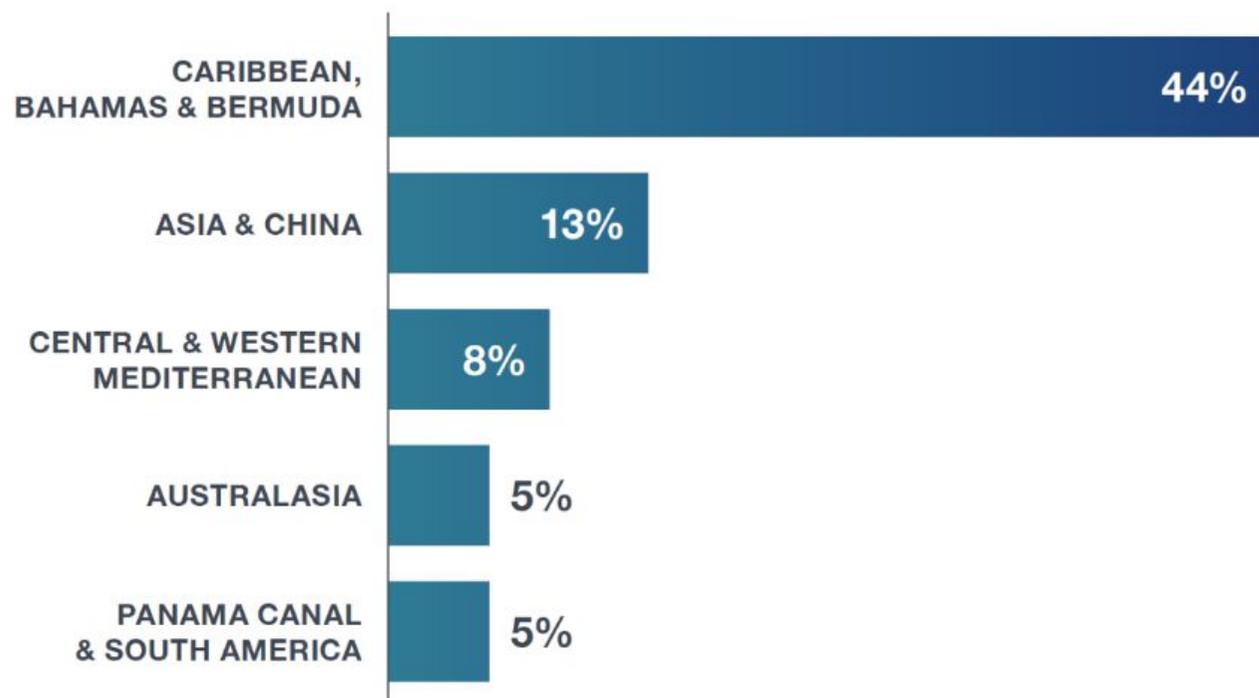


Source: CLIA Global Market Report, 2020

The Caribbean Remains a Top Destination



Top Five Destinations by Average Passenger Volume from 2018-2020



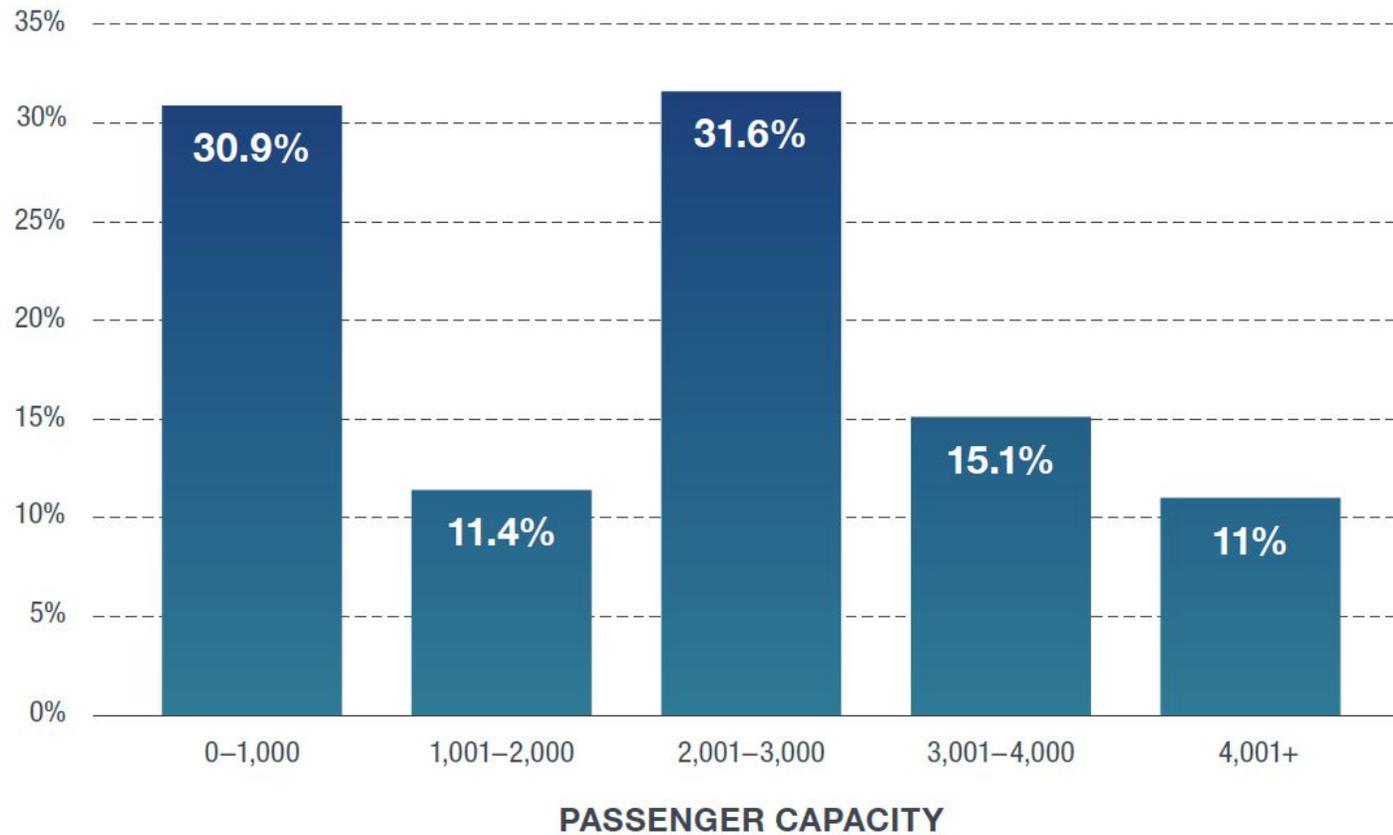
Source: CLIA Global Market Report, 2020



2022 CLIA Ocean-Going Member Fleet



2022 Project Member Fleet (% of ships)



Objectives



40% reduction of rate of CO₂ emissions by 2030



Net carbon zero cruising by 2050

What Have We Achieved So Far?



- Typically, each new class of ship brought into service is 20 to 25% more efficient than the one it replaces
- 78 new ships on order between 2022-2027 = 50,4 B USD investment
- European industrial excellence: 80% of ships currently on the orderbook, representing 93% of the new capacity, are being built in Europe

Three Pillars of Action for Sustainable Cruising



Reduce vessels
emissions



Reduce energy and
environmental
footprint of hotel
operations



Sustainable
tourism practices
in the destinations

Innovative Solutions - Having a Positive Impact Today



TODAY, THE CLIA OCEAN-GOING MEMBER FLEET INCLUDES



4

LNG-powered
CLIA ocean-going
cruise ships
currently sailing

22 more ships
to be delivered



74%

of global capacity
equipped with
advanced
wastewater systems

+6%
from 2020



14.1

average age
of ships in the CLIA
ocean-going fleet

1 year younger
than in 2020



76%

of global capacity
utilizes exhaust gas
cleaning systems

+10%
from 2020



35%

of global capacity
fitted to operate
on shoreside
electricity systems

+9%
from 2020

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

Reduce Vessel Emissions – At Berth



- 66% of global capacity equipped with Shore-Side Electricity (SSE) connection capability by 2027
- EU goal is to have full SSE coverage or 'zero-emission' solutions by 2035
- BUT only 7% of cruise berths will be equipped with SSE by 2025

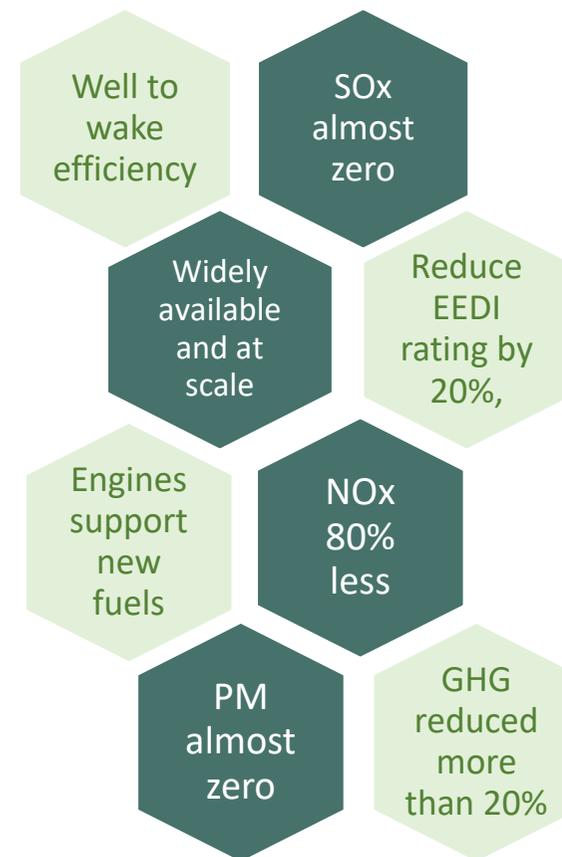


Reduce Vessel Emissions – At Sea

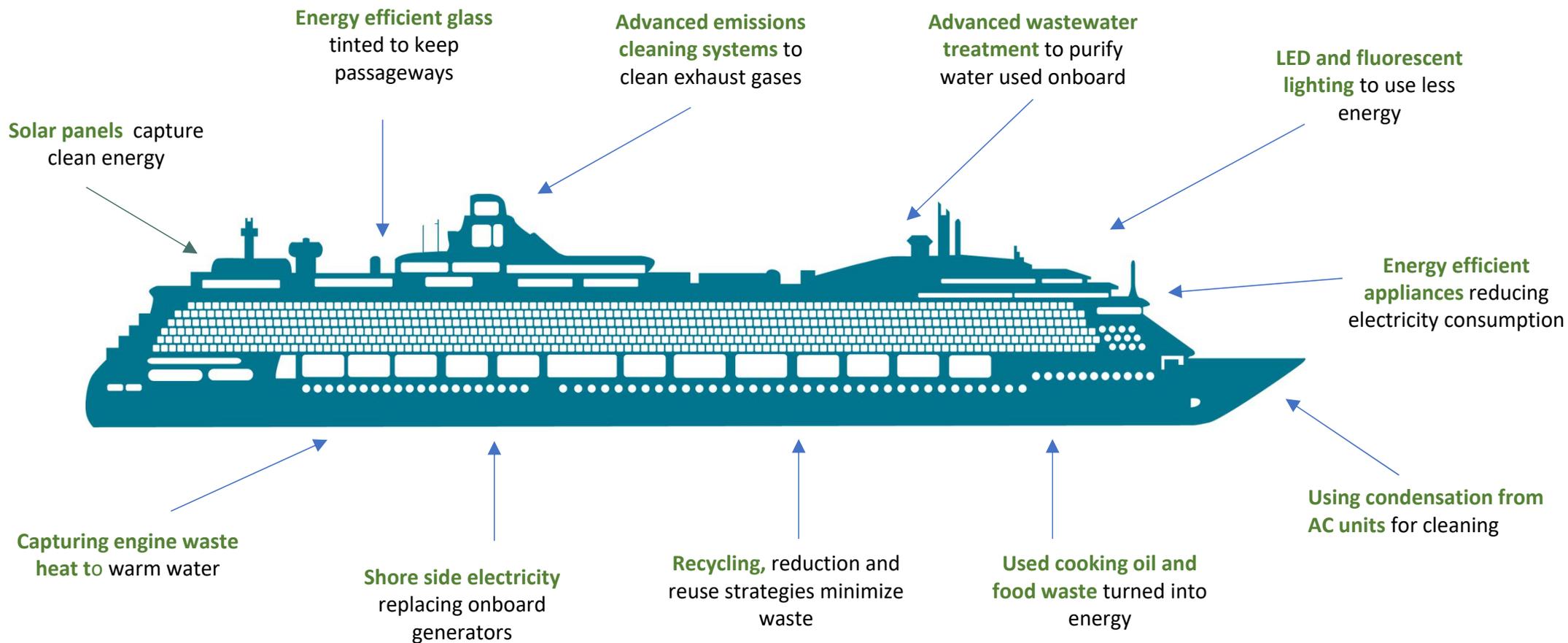


- Investment in new propulsion:
 - 52% of new build ships use LNG
 - Pilot projects studying the use of alternative fuels and battery assistance underway
- Operational measures and new technologies for more efficient operations including:
 - Itinerary planning
 - Hull coatings
 - Air lubrication systems etc

Benefits of LNG



Reduce Energy & Environmental Footprint of Hotel Operations



Sustainability in the destinations



- Dialogue between the cruise industry with ports and destinations is at the heart of responsible cruise tourism around the world.
- Solutions include:
 - Certification of sustainable supply chains and excursions,
 - Use of mobile technologies to avoid congestion in key sites,
 - Diversification of excursions



Thank You

