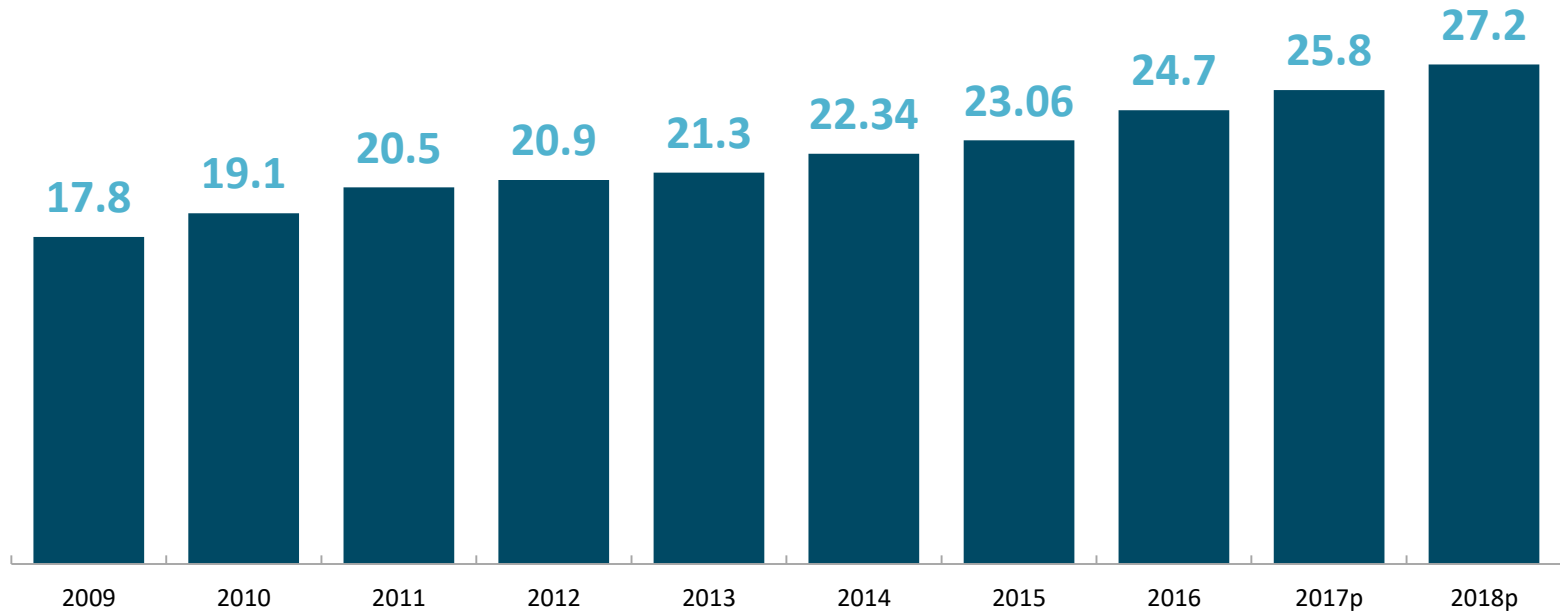


2018 Cruise Overview

Stephanie Jones Stebbins
Managing Director, Maritime Division

Michael McLaughlin
Director, Cruise Operations

Industry Serves More Than 27 Million Guests Globally



Steady Growth Continues Worldwide

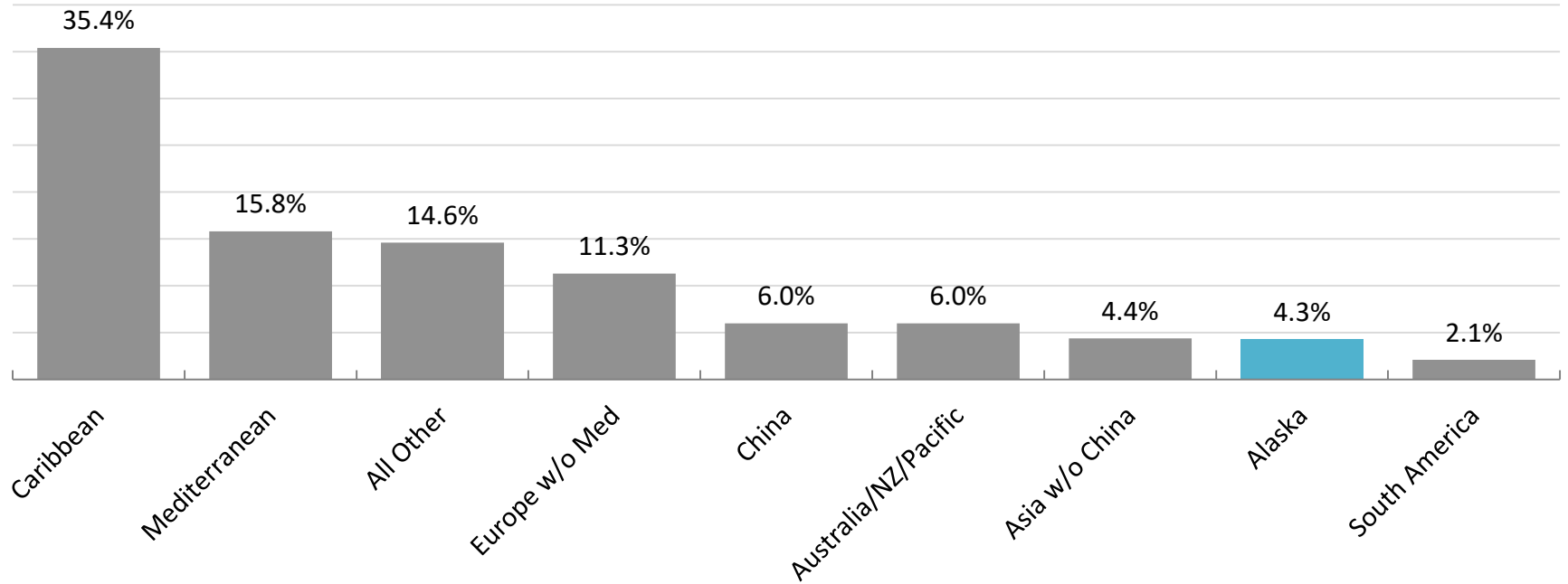
Additional Industry Capacity Planned Through 2026

Year	2018	2019	2020	2021	2022	2023	2024	2025	2026
# of New Ships	16	23	16	13	14	5	4	2	1

+94 New Ships by 2026

New Ships On Order To Meet Demand

2017 Global Deployment by Region



Alaska Itinerary Remains Popular

Alaska's EcoTourism Economy



Cruise Guests Value The Environment

5 Tools to Green Cruise



- Collaborative Partnerships
- Incentives
- Recognition
- Leveraging Technology
- Tariff

Seattle's Cruise Passenger Growth 1999 – 2018

Seattle is **THE** Gateway to Alaska



2018: 214 Vessel Calls With an Estimated 1,100,468 Revenue Passengers

Homeported Vessel Call Contribution To The Local Economy

Seattle Ranks #1 - West Coast Cruise Ports

Seattle's 2017 Cruise Season



- Hosted More Than 1 Million passengers
- 218 Vessel Calls
- Eight Homeport Cruise Lines with Eleven Premier Ships

2017 Was A Milestone Year for Seattle

Local Economic Impact



\$501 million
annual business revenue



\$18.9 million
annual state & local taxes

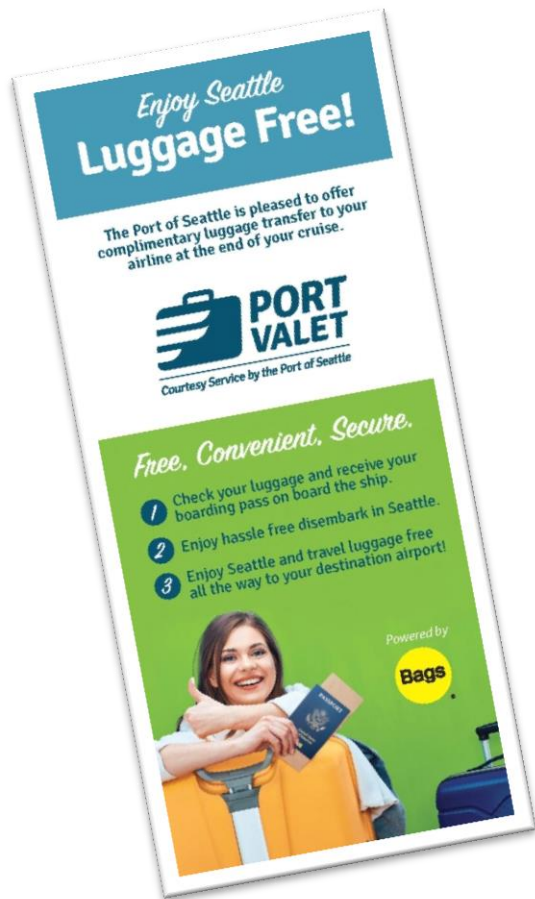


4,029
jobs



Each Vessel Call Contributes \$2.7 Million To The Economy

*2017 data



- Port Valet was launched in 2017.
- The complimentary luggage & airline check-in program attracted 63,500 guests.
- Participating guests spend \$63 per day each .
- Results:
 - More than \$4 Million Spent in Seattle
 - 71,000 bags trucked to Sea-Tac Airport

Port Valet Gives Guests An Opportunity To Enjoy Seattle



CRUISE CONNECTIONS

2018

**FRIDAY
JANUARY 19, 2018**

Bell Harbor International
Conference Center at Pier 66
Seattle, Washington

**Program: 8 a.m. – 4 p.m.
Networking Session: 4–6 p.m.**

250 Local Businesses Learned About Industry Opportunities

Seattle's Newest Homeports Largest Ships Deployed to Alaska

- Norwegian Bliss, 2018
(4,200 passengers)
- Ovation of the Seas, 2019
(4,800 passengers)



Norwegian Bliss, under construction at the Meyer Werft Shipyard, 2017

Cruise Ships Getting Larger



