



Cruise 2022 Season Update

Stephanie Jones Stebbins

Managing Director, Maritime Division

Marie Ellingson

Cruise Operations & Business Development Manager



1 2022
SEASON

2 SUSTAINABILITY

3 SAFE RETURN



1

2022 CRUISE SEASON



2022 Cruise Season Preliminary Schedule



296 ship calls

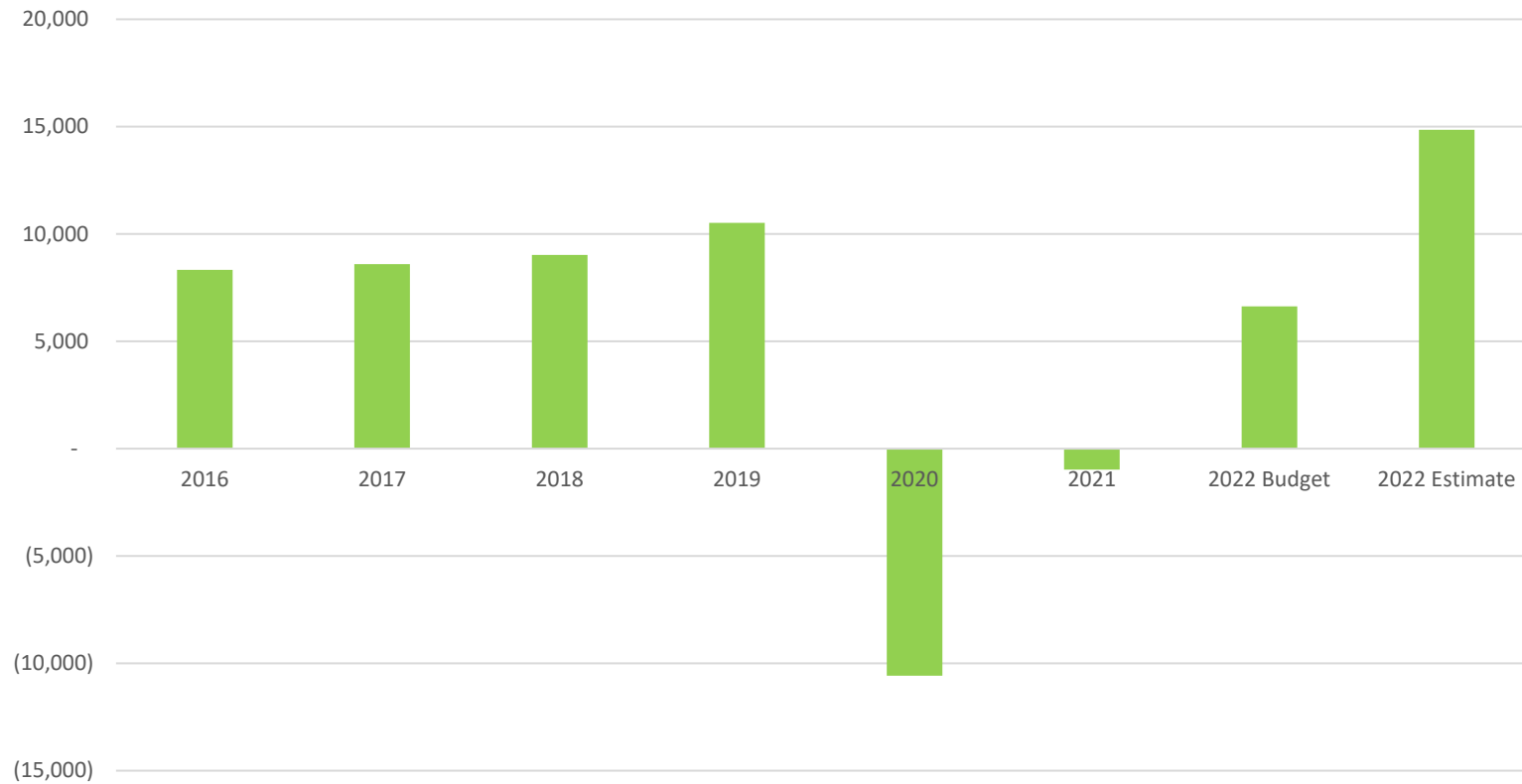


**1.26 million
revenue
passengers
(estimated)**



Forecast \$15 Million to Maritime/Port in 2022

NOI Before Depreciation in \$000s



- Aggressive fee raises
- Expense control
- Supports other Maritime Businesses and Capital programs

Regional Economic Benefit



\$900 million
annual business revenue



5,500 jobs



Suppliers



Tourism



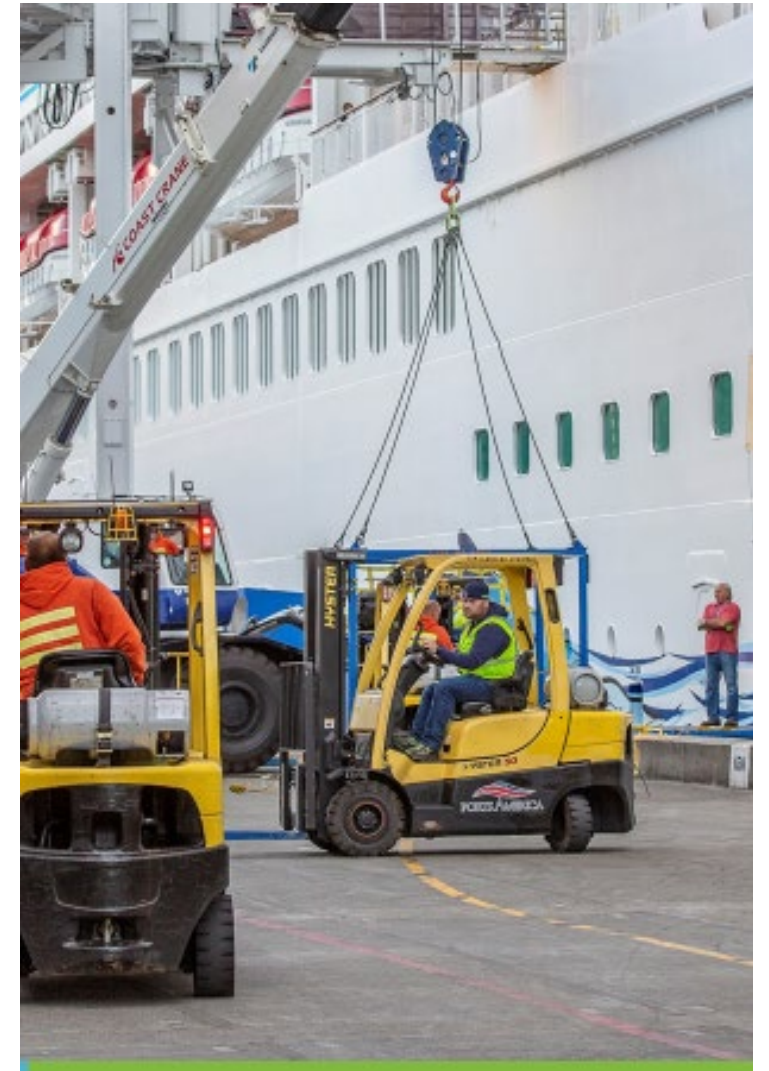
Vessel services



Direct Impacts by Activity

Projected Direct Impacts by Economic Activity of Cruise Operations of the Port of Seattle

Activity	Revenues (mils 2018 \$)	Wages (mils 2018 \$)
Passenger Spending	\$226.8	\$83.2
On Shore Staff	\$28.4	\$14.5
Maritime Services	\$27.8	\$14.2
Maintenance	\$24.2	\$7.4
Provisioning	\$60.2	\$0.7
Fuel	\$98.3	\$1.7
Crew Spending	\$2.1	\$0.9
Total	\$467.8	\$122.7



Economic Equity: Benchmarking other Ports

2020 Research Study: “EQUITABLE ECONOMIC CRUISE INVESTMENTS AT OTHER PORTS”

- Researched what Ports around the world (4 U.S. and 17 International Ports) What can we learn?
- Cruise-specific programs more common outside of U.S.
- Domestically, multiple maritime programs similar to the Port’s current work;
- Notable exception is **Icy Strait Point**, in Hoonah, Alaska.
 - Owned by Huna Totem Corporation, with over 1,550 shareholders whose aboriginal ties are to the Village of Hoonah in Southeast Alaska.



Image courtesy www.hunatotem.com

2022-2023 Priority Economic Equity Initiatives



- Expand workforce development for youth and adults



- Grow utilization of local suppliers, service providers and WMBE
- Local craft and souvenir vendor opportunities



- Connectivity and opportunity to Alaska communities

2022 Job Fairs

New partnership to support four job fairs

- Full-time, part-time seasonal jobs
- Flexibility for high school and college students, and teachers
 - March 25 & 26: Port and cruise employers host job fair at Pier 91
 - March 29: Cruise employers join OEDI South King County Job Fair
 - April 2: Port and cruise employers host job fair at HUB



Port and Cruise
Job Fair @ T-91

Port and Cruise
Job Fair @ HUB

South King
County Job Fair

Community Engagement

April 6 webinar

- Community
- Travel industry stakeholders

Community and tourism meetings

- In Q1, 30+ pre-season stakeholder engagement and outreach events directly connecting to 750 local residents and businesses

Email and newsroom outreach

- Pier to Pier Waterfront Newsletter
- Regular blogs and media releases from pre to post season

The screenshot displays the Port of Seattle website's news section. At the top, there is a navigation bar with links for HOME, SEA AIRPORT, MARITIME, BUSINESS, COMMUNITY, and ABOUT. A search bar is located on the right. Below the navigation, a breadcrumb trail reads: Home / Maritime / Cruise / Cruise Industry Buoy the Statewide Economy. The main article is titled "Cruise Industry Buoy the Statewide Economy" and features a large image of cardboard boxes filled with fresh seafood. A yellow banner above the image contains a warning icon and the text "COVID-19 and travel at SEA Airport" with a "More Information" link. Below the image are social media sharing icons for Facebook, Twitter, LinkedIn, YouTube, and Instagram. The article is attributed to "Drawhorn, Ormie" and dated "July 2, 2019". Below the article is a video player showing a woman speaking. To the right of the main article is a sidebar titled "Other Posts" containing several article teasers with dates and author names: "Cultural Connections Unveil International Arrivals Facility" (March 14, 2022, by Kate Hudson), "SEA Airport Tenants Donate to Community Food Bank" (March 11, 2022, by Ormie Drawhorn), "A New Direction - SEA Volunteer Shows Lost Passengers the Way" (March 9, 2022, by Ormie Drawhorn), "Elevating the SEA Experience - Why Airport Ratings Matter" (March 7, 2022, by Ormie Drawhorn), and "Secrets of SEA Airport" (March 1, 2022, by Bryanna Bui). At the bottom of the sidebar, there is a link to "See All Port of Seattle Blog Posts" and a section titled "Explore More" with links to various FAQs and reports.

From our Native community of Hoonah to the Yukon River beyond Denali, the cruise industry drives the economy for small villages across Alaska.

- *Russell Dick, President and CEO, Huna Totem Corporation*

The past two years have been incredibly difficult for our local businesses, and we're excited to welcome visitors back.

- *Alexandra Pierce, Tourism Manager of the City and Borough of Juneau, Alaska*



2

SUSTAINABILITY



Environmental Regulatory Agencies

International, Federal, and State Regulators

- International Maritime Organization
- United States Coast Guard
- U.S. Environmental Protection Agency
- Washington Department of Ecology
- Puget Sound Clean Air Agency
- Transport Canada
- Alaska Department of Environmental Conservation

Port Influence Mechanisms

- Port Terminal Tariff #5
- Berthing Agreements and Leases
- Cruise at-berth best management practices and compliance observers
- Cruise Memorandum of Understanding

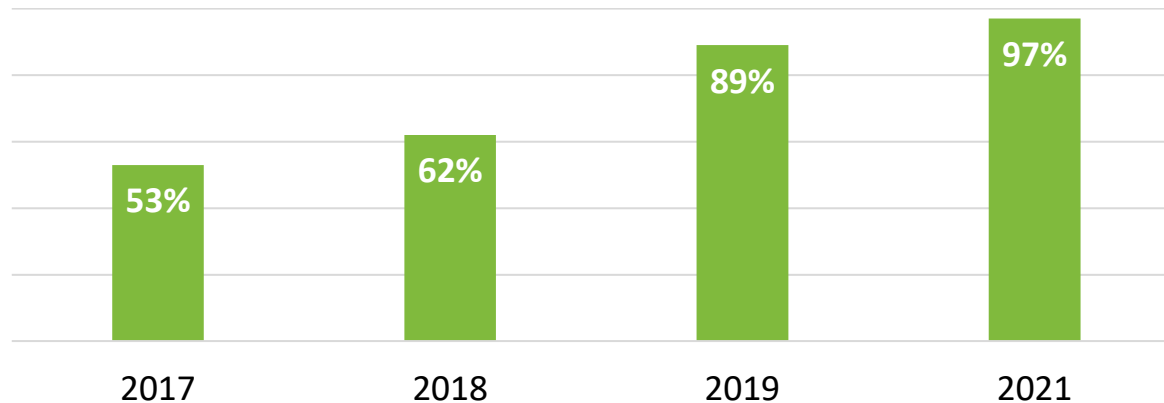


Cruise Industry

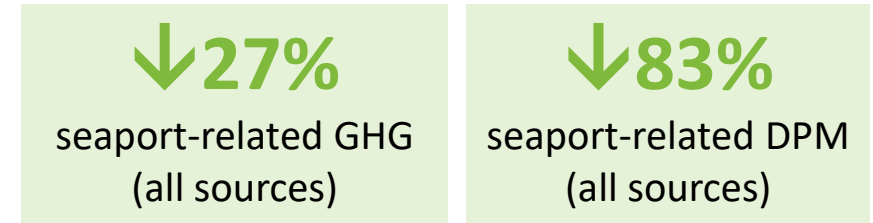
Maritime Emissions in Seattle Declined Since 2005

- Collaboration between NW Ports, regulation, cleaner technology and shore power reduced emissions
- Since 2018, shore power has reduced nearly 6,000 tons of CO₂

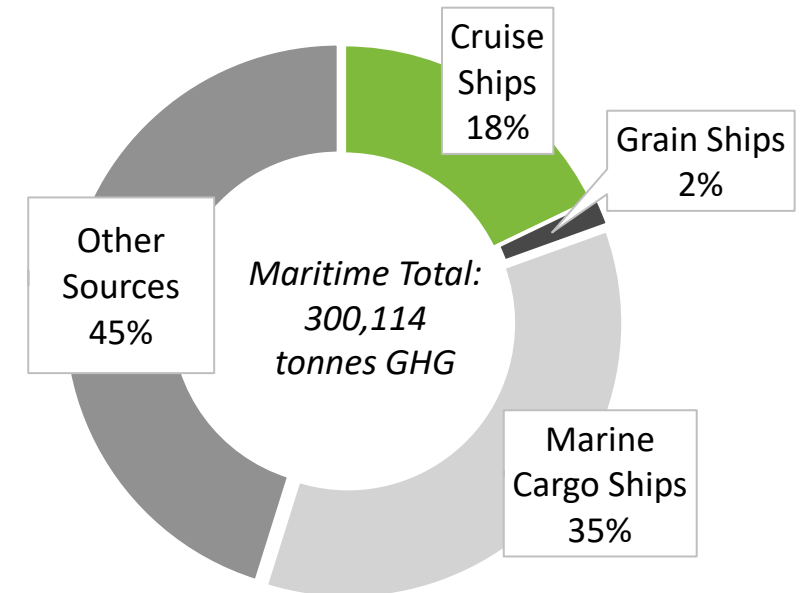
Connection rates at T91 by SP-Equipped Ships



Emission Reduction Progress, 2005-2016



Cruise ships account for 18% of Seattle's seaport-related GHG emissions, 20% DPM emissions in the airshed



2021-2022 Clean Air Initiatives

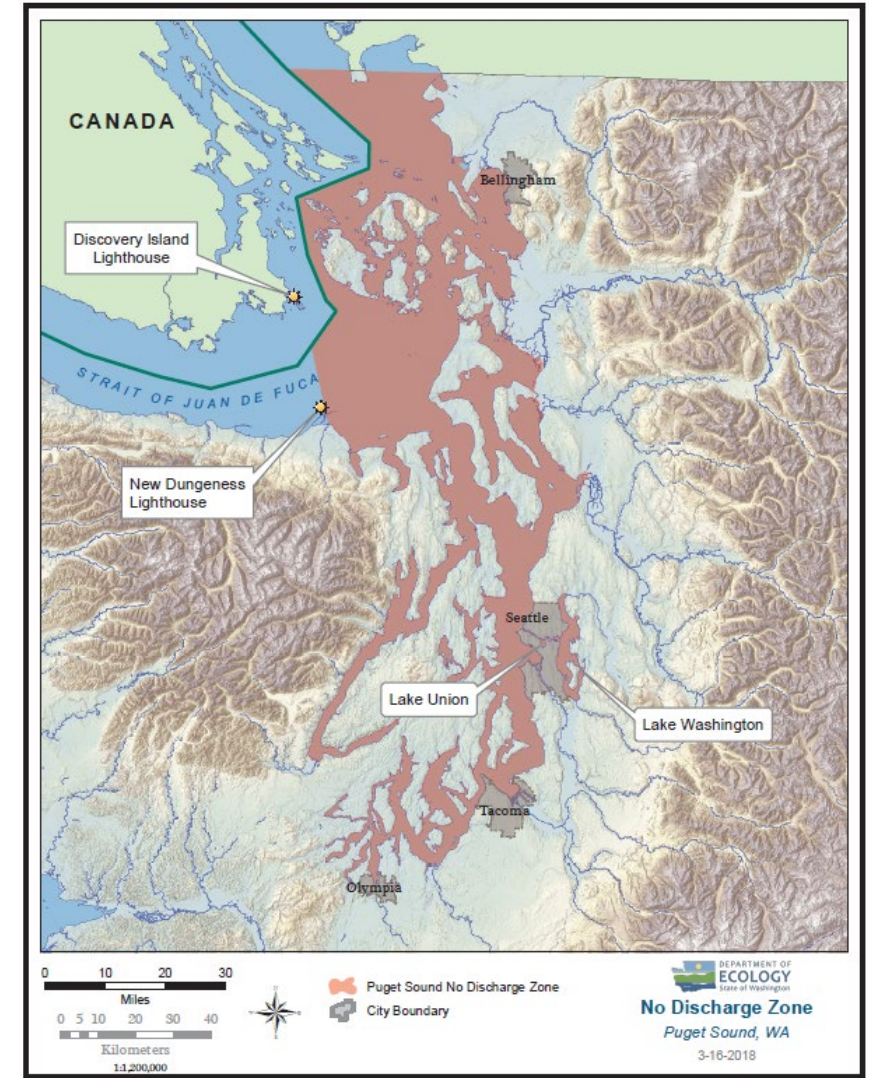
- NW Ports Clean Air Strategy
- Joined Getting to Zero Coalition
- Updated GHG reduction goals to net zero scope 1&2 by 2040, carbon neutral scope 3 by 2050
- Complete the Seattle Waterfront Clean Energy Strategy
- \$2 million in Washington state funding for clean electricity shore power at Pier 66



Shore Power Plugs at Terminal 91

2021-2022 Clean Water Initiatives

- In 2020, exhaust gas cleaning system (EGCS) wash water discharge from cruise ships was banned at berth, and in 2021 paused in Puget Sound
- Participate in a Puget Sound EGCS water quality study
- Became first port to join International Alliance to Combat Ocean Acidification and issued Action Plan



2022-2023 Priority Sustainability Initiatives



Leverage business relationships to drive sustainability

- Leases
- Preferential Use Agreements
- Tariff



Getting to Zero

- Complete shore power connections
- 100% shore connection rate by all cruise ships by 2030
- Collaborating with PNW Partners

3

**SAFE
RETURN**



Success Requires Partnership



Safe & Successful 2021 Season

Multiple Layers Improved Success



- Terminal upgrades

- Vaccinated:
- Passengers
 - Crew

- Clean facilities
- Masks

- Testing
- Health Screening

2022 Season COVID Measures Checklist



CDC publishes voluntarily program protocols



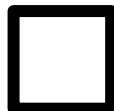
Cruise lines opt-in to program and define staff and employee vaccine and testing measures



Canada issues cruising protocols



Cruise terminal operators and Port approve sanitation plan



Port – Cruise Line Agreements

Port Agreements for 2022

Port Agreements define a cruise line's local health protocols

Prevention

- Embarkation and disembarkation procedures
- Health Screening
- Testing
- Social distancing
- Training for land-based staff
- Cleaning landside spaces

Response

- Emergency response plans
- Medical care agreements
- Transportation providers
- Quarantine housing



Local public health agencies provide input and review
External review by independent epidemiologist

Questions?

