

CLIA MEMBERSHIP

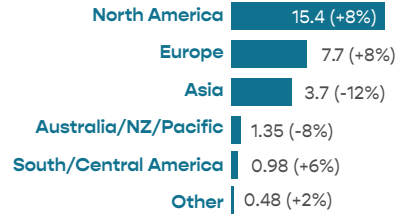
- 56 Member Cruise Lines
 - 42 Ocean Members
 - 14 River Cruise
 - 268 Ocean-Going Vessels
 - Marketing Affiliates
 - Includes 95% of global ocean-going cruise passenger capacity

| Ocean Lower Berths | 2020 | 2021 |
|--------------------|----------------|----------------|
| Global | 529,000 | 514,000 |
| Regional | 41,000 | 46,000 |
| Total | 569,000 | 560,000 |

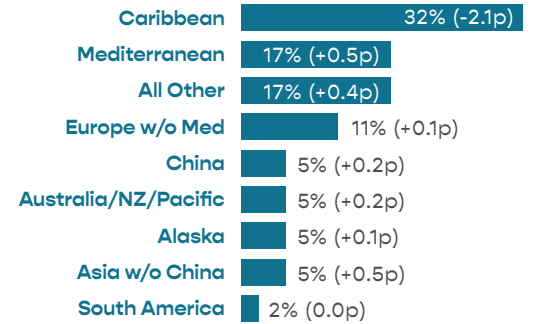
- 50,000 Travel Agent Members
- 13,000 Travel Agency Members
- 350 Executive Partners

Source Passenger Regions 2019 (Millions)

29.7M in 2019 (+4.1% from 2018)



Planned Deployment of Global Capacity in 2020



Cruise Industry Global Economic Impact, 2019

- \$154.5B** Total worldwide output
- \$50.53B** Wages & salaries
- 1.17M** Full-time equivalent employees (for every 24 cruisers, a job is created)
- \$385** Average passenger spending pre-embarkation
- \$100** Average passenger spending in each port visited

Top 10 Ports Visited Per Year*

| Port/Destination | Embark & Disembark | Transit | Total |
|------------------|--------------------|-----------|-----------|
| Miami | 2,526,900 | 42,350 | 5,096,150 |
| Port Canaveral | 2,013,340 | 282,700 | 4,308,940 |
| Cozumel | 0 | 3,893,590 | 3,893,590 |
| Port Everglades | 1,757,340 | 10,100 | 3,524,780 |
| Nassau | 500 | 3,311,700 | 3,312,700 |
| Shanghai | 1,622,700 | 13,500 | 3,258,900 |
| Barcelona | 661,630 | 1,215,000 | 2,538,260 |
| Civitavecchia | 596,650 | 1,218,000 | 2,412,100 |
| Southampton | 929,700 | 228,000 | 2,087,400 |
| San Juan | 399,870 | 1,219,600 | 2,019,340 |



2021 Environmental Technologies & Practices

- 40%** Target reduction in rate of carbon emissions by 2030 (from 2008)
- \$22.5B** Invested in new energy efficient tech & cleaner fuels
- 76%** Of ocean-going fleet capacity using exhaust gas cleaning system
- 82%** Ships in orderbook to be shore-side electricity equipped
- 100%** Ships in orderbook to use advanced water treatment system
- 74%** Of ocean-going fleet capacity using advanced water treatment system

Cruise Ship Orderbook Schedule

\$63.2Billion Investment through 2027;
24 Ships to be powered by liquid natural gas

| Year | Ocean Ships | New Capacity |
|--------------|-------------|---------------|
| 2021 | 13 | 16494 |
| 2022 | 28 | 49620 |
| 2023 | 21 | 55196 |
| 2024 | 10 | 31640 |
| 2025 | 11 | 25804 |
| 2026 | 5 | 10560 |
| 2027 | 3 | 9530 |
| Total | 91 | 198844 |

82% of cruisers will cruise again
62% of non-cruisers are open to cruising

*Source for Top Ports: GP Wild; All Other Data Sources, CLIA Proprietary