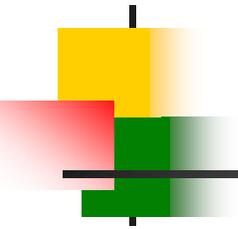
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# CLIA 2006 Forecast

*Terry Dale, President & CEO*

**San Diego – February 8, 2006**

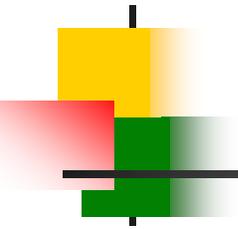
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# 2005 – Sustained Growth

## *Six Vessels Joined CLIA Cruise Fleet*

- 3 new ships launched
  - Carnival Liberty
  - Norwegian Jewel
  - Pride of America
- 3 ships re-introduced
  - Nautica
  - MSC Sinfonia
  - Sea Princess



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# 2005 – The Numbers

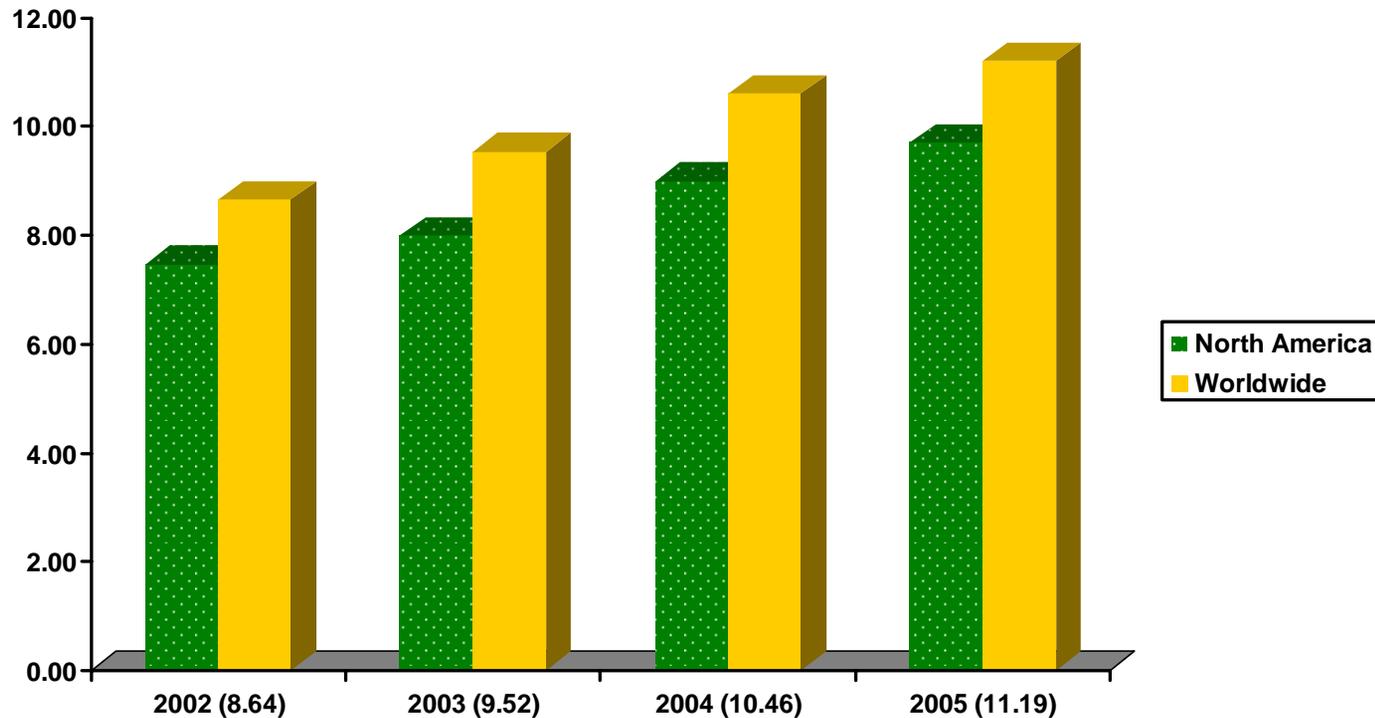
## *CLIA Member-Line Ships Sailed Full*

- 2005 year-end estimate 103% occupancy
- Economic impact of cruise industry \$23 billion\*

\* Total in 2004 based on ICCL/Business Research & Economic Advisors study

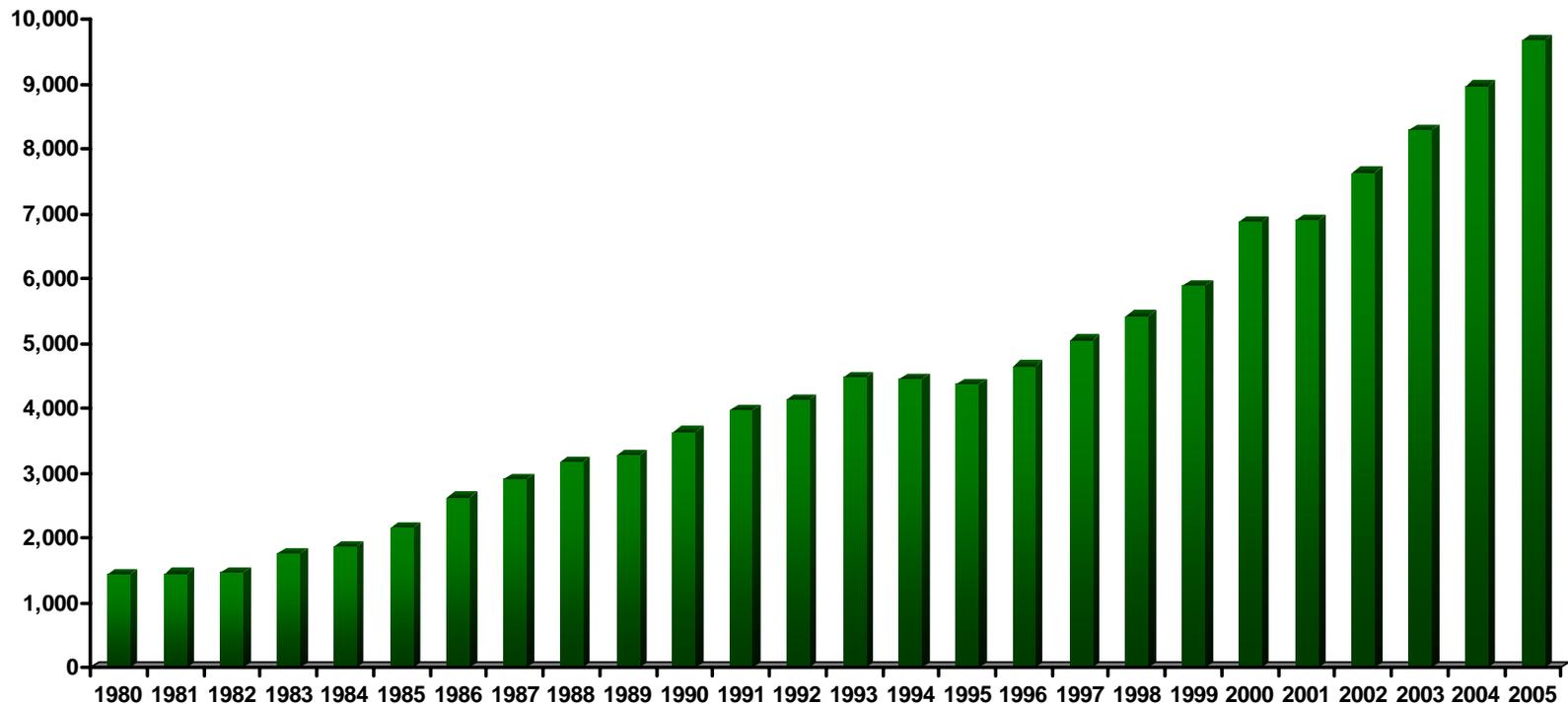
# Record Numbers of Guests

2005 Year-End Estimate = 11.19 Million



# A History of Success

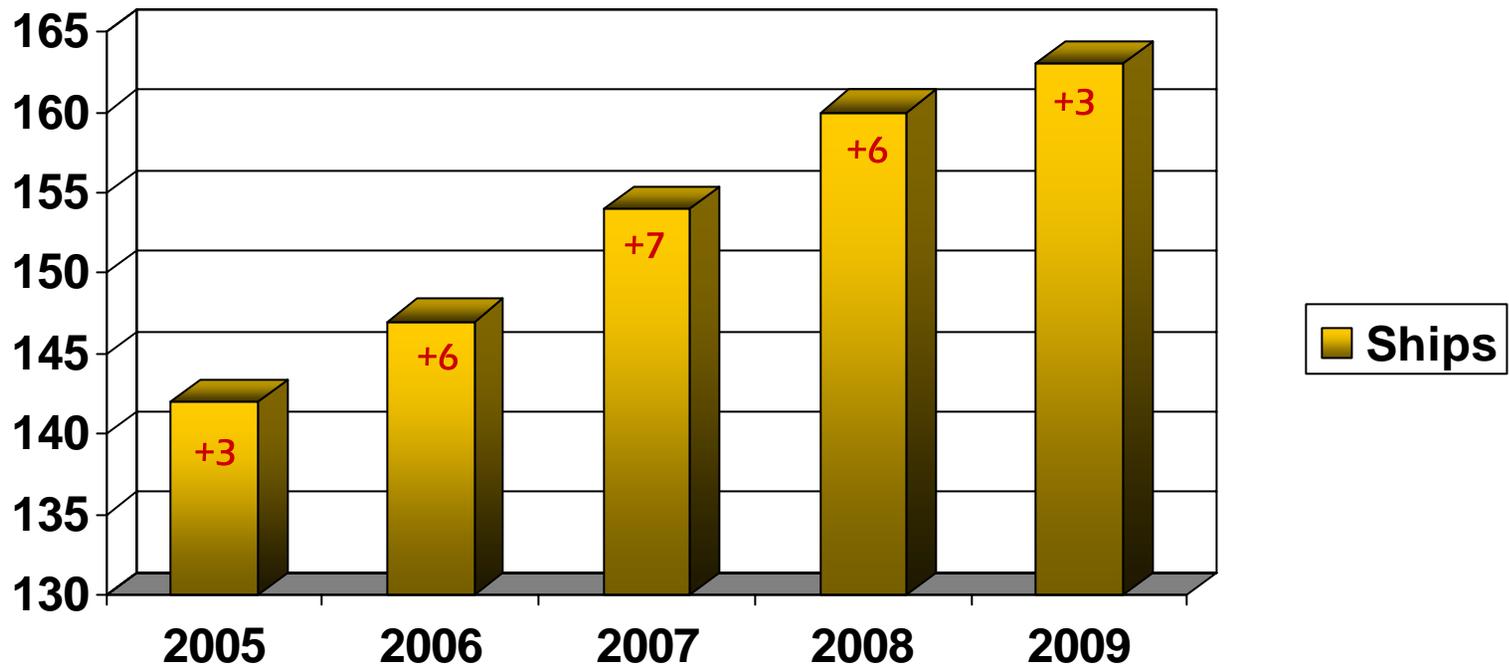
More Than 8% Annualized Growth



Average North American Growth Rate 1980 – 2005: +8.5%

# 22 New Ships on Order

**\$13.5 Billion Investment**



22 New Ships to be Introduced from 2006 – 2009

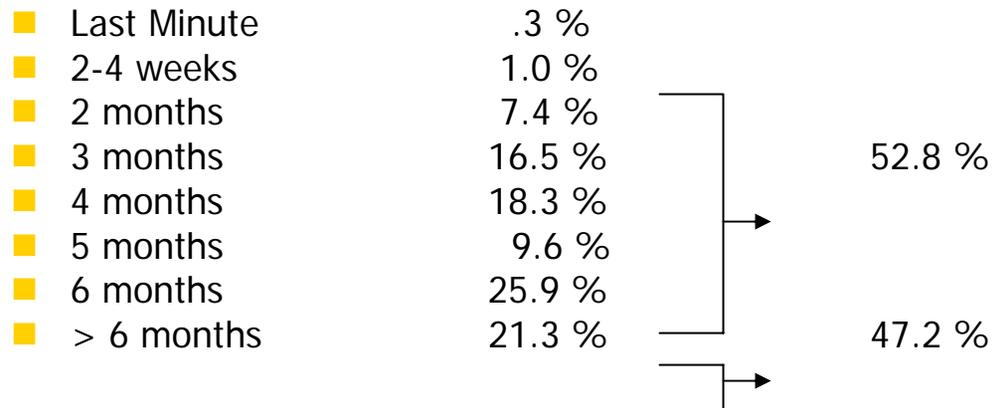
# Travel Agents Are Bullish

## CLIA-Member E-Mail Survey Results\*

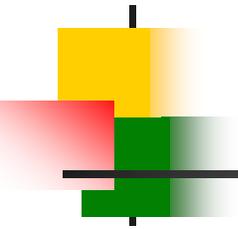
- How were 2005 cruise sales vs 2004?

- 71.7 % Moderately/Substantially higher

- How far in advance did clients book cruises in 2005?



\* CLIA Member Agencies: 850 responses, 45 % retail locations, 55 % home-based

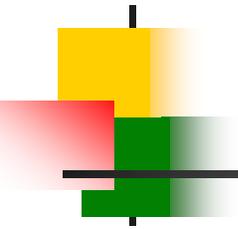
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# Travel Agents Are Bullish

## CLIA-Member E-Mail Survey Results\*

- What are your “Wave Season” cruise sales expectations for 2006?
  - 54.8 %      Significantly/moderately more sales
  
- What 5 cruise destinations will be most popular in 2006?
  - Caribbean                      87.6 %
  - Alaska                            85.0 %
  - Hawaii                            52.8 %
  - Mediterranean                40.1 %
  - Europe                            37.9 %

\* CLIA Member Agencies: 850 responses, 45 % retail locations, 55 % home-based

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# 2006 – Six New Ships

**4.5% Increase in Net Capacity\***

## **HOLLAND AMERICA LINE (Jan.)**

- Noordam
- 1,848 passengers
- 85,000 tons

## **NCL AMERICA (April)**

- Pride of Hawaii
- 2,400 passengers
- 93,000 tons

## **MSC CRUISES (Spring)**

- MSC Musica
- 2,568 passengers
- 90,000 tons

## **PRINCESS CRUISES (May)**

- Crown Princess
- 3,100 passengers
- 116,000 tons

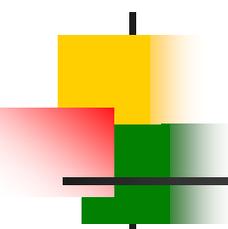
## **ROYAL CARIBBEAN INTL (May)**

- Freedom of the Seas
- 3,600 passengers
- 160,000 tons

## **COSTA CRUISES (June)**

- Costa Concordia
- 3,800 passengers
- 112,000 tons

\* Based on bed days

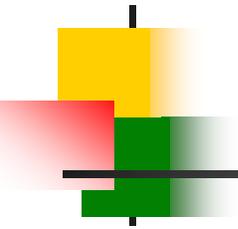
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# 2006 – Passenger Forecast

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## *Continued Strong Demand*

- 11.7 million passengers (+500,000)
  - 10.14 million passengers – North America
  - 1.56 million passengers – International
- Occupancies ~ 103%
  - Based on two lower berths

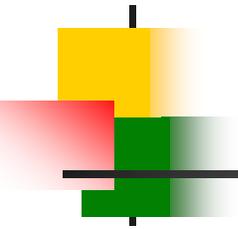
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# 2006 – Full Steam Ahead

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## *Why More Travelers Are Cruising*

- Tremendous value for money
- Inclusive nature of cruises
- More close-to-home ports
  - Appeals to drive market
  - Reduce need to fly (lower cost/more convenient)
  - Attracts first timers
- Shipboard fun for the whole family
- Industry meets and exceeds vacationers' needs
  - Innovative onboard programs and amenities
  - A world of choice in cuisine and entertainment
  - Itineraries to worldwide destinations

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# 32 Homeports and Growing

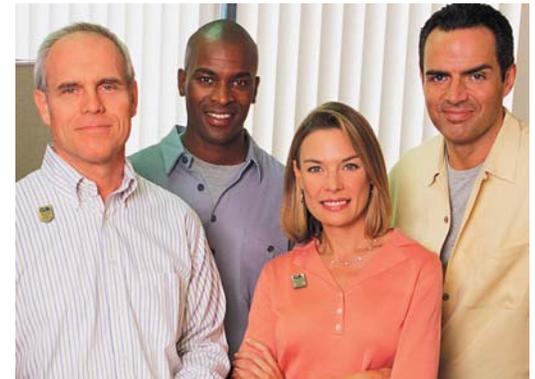
## *Lower Costs, Increased Convenience*

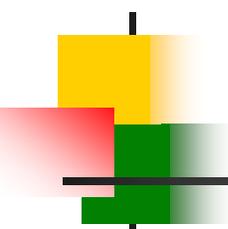
- Baltimore
- Bayonne
- Boston
- Brooklyn
- Charleston
- Corpus Christi
- Fort Lauderdale
- Galveston
- Honolulu
- Houston
- Jacksonville
- Long Beach
- Los Angeles
- Miami
- Mobile
- Montreal
- New Orleans
- New York City
- Norfolk
- Philadelphia
- Port Canaveral
- Portland
- Quebec City
- San Diego
- San Francisco
- San Juan
- Savannah
- Seattle
- Seward
- Tampa
- Vancouver
- Whittier

# CLIA-Member Agencies

## *Supporting Travel Professionals*

- 16,700 travel agency members
  - Travel industry's largest and most relevant association
- Educates, informs and supports members
  - Nearly 40,000 individual training events planned for 2006
- "Gold Standard" certification programs
  - ACC – Accredited Cruise Counsellor
  - MCC – Master Cruise Counsellor
  - ECC – Elite Cruise Counsellor
  - Over 12,000 agents certified



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# 2006: CLIA Means Business

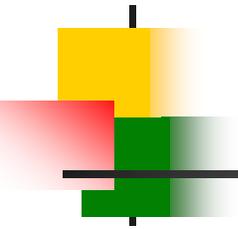
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## *New Travel Agent Training Options*

- Classroom
  - Building a Smart Business Plan
- Video – CLIA Tech Tips
  - Making Today's Technology Work for You
- Online
  - Cruise Destinations: A Fam Tour of Ports
- Complementing 20 existing CLIA training programs

Presented by:





# CLIA cruise3sixty

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Fort Lauderdale, FL: April 8-11, 2006



cruise  
3sixty  
>CLIA's Global Cruise Event

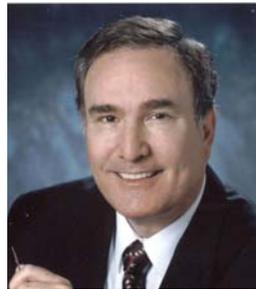
# CLIA cruise3sixty



*"Where the Best in Cruising Meet"*



**Micky Arison**  
Chairman & CEO  
Carnival Corporation and plc

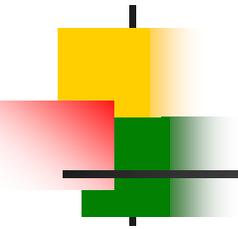


**Richard Fain**  
Chairman & CEO  
Royal Caribbean Cruises Ltd.



**Gregg Michel**  
President & COO  
Crystal Cruises, Inc.

April 8 – 11, Ft. Lauderdale

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# CLIA Hall of Fame

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## *Honoring Leadership and Dedication*

- Nomination process begins today
- Nominations close February 15th
- 2006 honorees inducted at cruise3sixty
  - Cruise Retailer
  - Cruise Executive
  - At-Large Recipient

# World's Largest Cruise Night

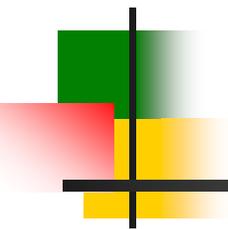
## National Cruise Vacation Month

- Promotional event – U.S. and Canada
- Thursday, October 19, 2006
- 2005 results
  - 25,000\* consumers participated
  - 415 travel agencies hosted events
  - Generated 7,273\* new bookings
  - Resulting in \$9 million\* in cruise sales
  - 41.6 million<sup>1</sup> media impressions



\* CLIA estimate

<sup>1</sup> Burrelle's and other monitoring sources

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Thank You  
AAPA Cruise Workshop