

**GROWING THE PNW CRUISE INDUSTRY
PNWER TOURISM PANEL
JULY 22, 2014**

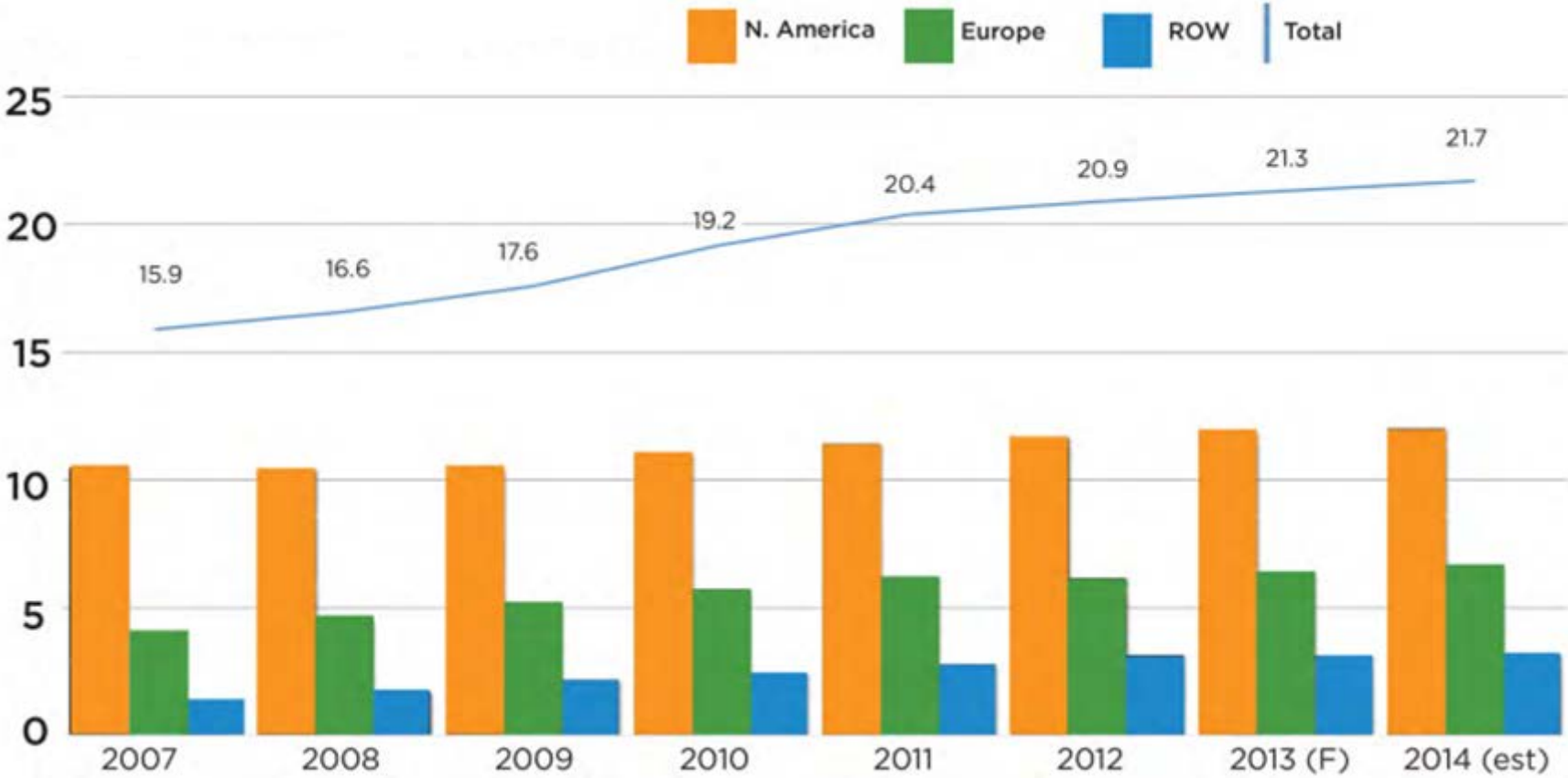
***GREG WIRTZ, PRESIDENT
CLIA NORTH WEST AND CANADA***



Cruise Line Members



Global Passenger Growth



CLIA - Top Cruise Markets

Alaska
4.8%

Europe (no Med)
10.9%

Caribbean
34.4%

Mediterranean
21.7%

Asia
3.4%

South America
3.9%

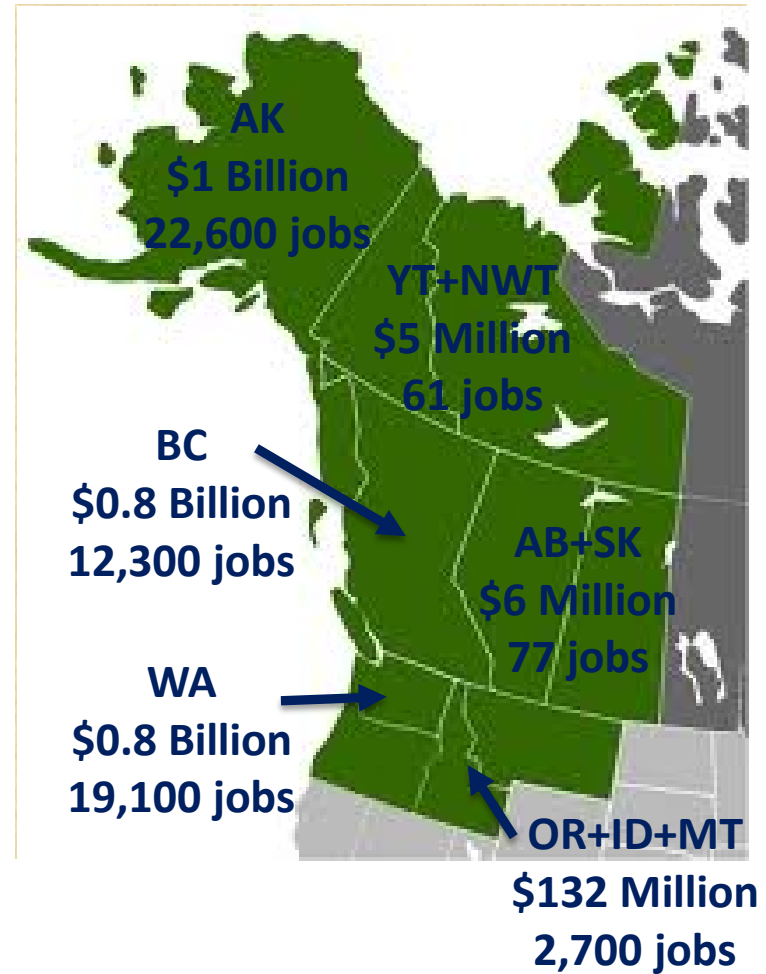
Australasia
5%

Other Markets
15.8%

CLIA

Cruise Benefits PNWER

Total Direct Benefits to PNWER region
\$2.7 Billion direct impact
57,000 direct jobs



PNW Itineraries

The Two Nation Vacation



Vancouver – Round Trip



Vancouver – One Way

Seattle – Round Trip
with Victoria Port Call



Cruise Passenger Border Clearance Considerations

- High volume
- Multiple clearances
- Low risk
- Slow speed getaway
- Global passenger sourcing
- Advanced passenger information

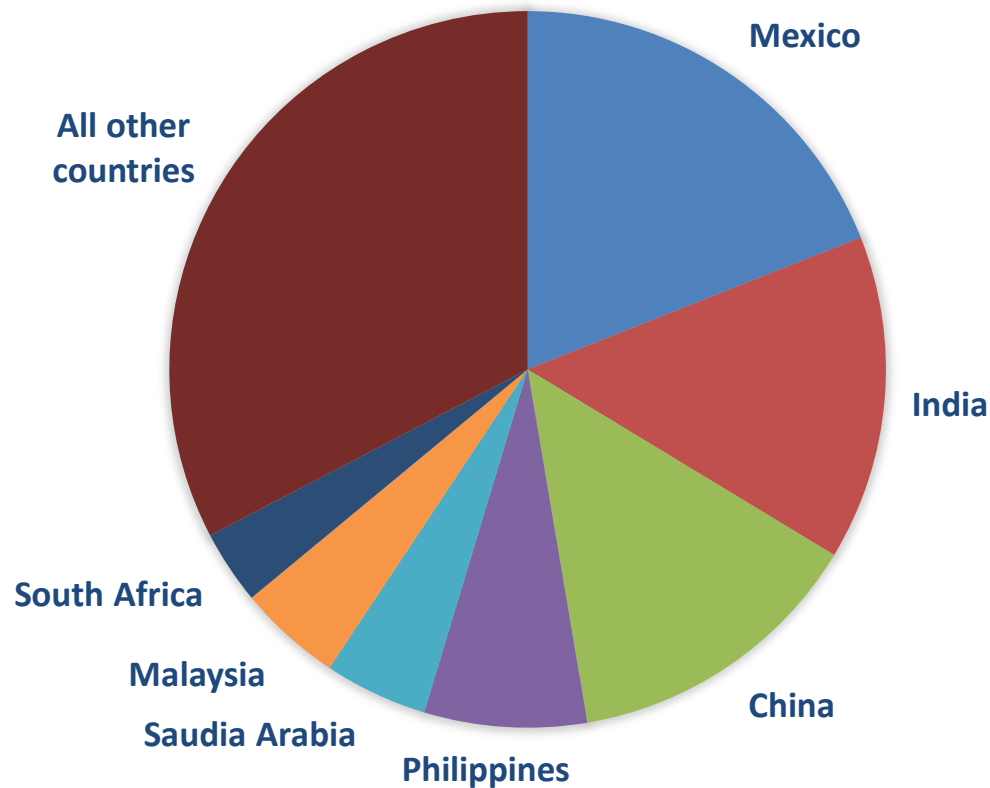
Technology Opportunities



Canadian Visa Issues

500+ passengers left behind in Seattle so far this season.....

2014 mid-season



Advising Overseas Passengers

Dear Guest,

This is the final Canadian Visa reminder you will receive.

The following visa requirement may apply to you or other guests in your cabin.

During your cruise, your ship will visit one or more Canadian ports. Some guests, subject to their citizenship, will require a Canadian Temporary Resident Visa (TRV) in order to embark the ship. The visa must be obtained in advance of sailing. We urge you to contact your local Canadian consulate to confirm your requirements well in advance and allow sufficient time for visa processing, which can be up to 45 days.

Citizens of Australia, Canada, New Zealand, the United Kingdom, and the United States, as well as Permanent Resident Card holders of Canada and the United States do not require this visa

Citizens of the following countries currently REQUIRE a Canadian visitor visa. As this information is subject to change, it is your responsibility to reconfirm your requirements with your local Canadian consulate or visa service and obtain the necessary documents required for your travel.

Afghanistan, Albania, Algeria, Angola, Argentina, Armenia, Azerbaijan, Bahrain, Bangladesh, Belarus, Belize, Benin, Bhutan, Bolivia, Bosnia-Herzegovina, Brazil, Bulgaria, Burkina Faso, Burundi, Cambodia, Republic of Cameroon, Cape Verde, Central African Republic, Chad, Chile, China, Colombia, Comoros, Congo-Republic of the, Congo-Democratic Republic of the, Costa Rica, Cuba, Czech Republic, Djibouti, Dominica, Dominican Republic, East Timor, Ecuador, Egypt, El Salvador, Equatorial Guinea, Eritrea, Ethiopia, Fiji, Gabon, Gambia, Georgia, Ghana, Grenada, Guatemala, Guinea, Guinea-Bissau, Guyana, Haiti, Honduras, India, Indonesia, Iran, Iraq, Israel (only Israeli citizens holding valid Israeli "Travel Document in lieu of National Passport"), Ivory Coast, Jamaica, Jordan, Kazakhstan, Kenya, Kiribati, North Korea, Kosovo, Kuwait, Kyrgyzstan, Laos, Lebanon, Lesotho, Liberia, Libya, Lithuania (holders of non-biometric passports only), Macao S.A.R., Macedonia, Madagascar, Malawi, Malaysia, Maldives Islands, Mali, Marshall Islands, Mauritania, Mauritius, Mexico, Micronesia-Fed. States, Moldova, Mongolia, Montenegro, Morocco, Mozambique, Myanmar (Burma), Nauru, Nepal, Nicaragua, Niger, Nigeria, Oman, Pakistan, Palau, Palestinian Authority, Panama, Paraguay, Peru, Philippines, Poland (holders of non-biometric passports only), Qatar, Romania, Russia, Rwanda, Sao Tomé e Príncipe, Saudi Arabia, Senegal, Serbia, Seychelles, Sierra Leone, Somalia, South Africa, Sri Lanka, Sudan, Surinam, Syria, Taiwan (except holders of the ordinary passport issued by the Ministry of Foreign Affairs in Taiwan that includes their personal identification number), Tajikistan, Tanzania, Thailand, Togo, Tonga, Trinidad and Tobago, Tunisia, Turkey, Turkmenistan, Tuvalu, Uganda, Ukraine, United Arab Emirates, Uruguay, Uzbekistan, Vanuatu, Venezuela, Vietnam, Yemen, Zambia, Zimbabwe.

To obtain the TRV, contact your local Canadian Consulate or visit www.cic.gc.ca/english/visit/apply-how.asp. Guests without the proper documentation required for this cruise will be denied boarding without refund of the cruise or cruisetour fare. If you have attempted to obtain the required TRV and have not been successful, please contact Customer Relations.

Thank you for your attention to this notification, and we look forward to welcoming you on board [SHIP] this [DAY], [DATE] for your Alaskan cruise.

Sincerely,

Notice: This is an automated email; please do not reply as this mailbox is not monitored.

Ensuring a Bon Voyage!

