



STATEMENT OF

TERRY DALE

**PRESIDENT & CEO
CRUISE LINES INTERNATIONAL ASSOCIATION**

ON

CRIME AGAINST AMERICANS ON CRUISE SHIPS

BEFORE THE

U.S. HOUSE OF REPRESENTATIVES

**COMMITTEE ON TRANSPORTATION AND
INFRASTRUCTURE**

**SUBCOMMITTEE ON COAST GUARD AND MARITIME
TRANSPORTATION**

ON

MARCH 27, 2007

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Good morning Mr. Chairman and members of the Subcommittee. My name is Terry Dale. I am the President and Chief Executive Officer of the Cruise Line International Association (CLIA). Thank you for the opportunity to present testimony on behalf of our membership.

CLIA is North America's largest cruise industry organization with a membership of 21 cruise lines, 16,500 travel agencies and 100 Executive Partners, the industry's strategic business allies. CLIA participates in the regulatory and policy development process while supporting measures that foster a safe, secure and healthy cruise ship environment. It also provides travel agent training, research and marketing communications to promote the value and desirability of cruise vacations.

Also here to support the industry today are senior executives from our travel industry partners: The American Society of Travel Agents; the National Association of Cruise Oriented Agencies; Vacation.com; and Cruise Shoppes. Together with CLIA's agency membership, this group represents millions of satisfied cruise vacationers. We thank these organizations for their support and are happy to have the travel agent community represented here today. Each of these organizations has provided written submissions to you and I would request that these submissions be included in the record of this hearing.

By way of background, in 2006, CLIA merged with the International Council of Cruise Lines (ICCL), thereby expanding both its membership and mission. CLIA is the industry's advocate on a wide variety of issues, including those involving regulatory and legislative matters.

Before I continue, I would like to offer our sincere condolences to those individuals we heard earlier today, and others who have had such an experience on a cruise ship. Nothing that I say today can take away their grief and pain. Any experience of this type, however rare, causes the industry to redouble its efforts to provide a safe vacation experience. The cruise industry seeks to do the right thing and any lessons learned will be applied to minimize the possibility of such an occurrence happening again.

Today, I am here to emphasize to the members of the Subcommittee several important facts.

Cruising is Safe

The cruise industry's highest priority is to ensure the safety and security of its passengers and crew. I am proud to say that the industry has an enviable record when it comes to safety and security. The U.S. Coast Guard, in a comprehensive report conducted in 1995, emphasized the industry's strong record when stating that passenger vessels are among the safest mode of transportation. I know of no reason for that opinion to have changed in the past decade. We take every opportunity to proactively work with our regulatory agencies in the United States and all over the world to accomplish our common goal of providing a safe and secure vacation experience.

With 12 million passengers cruising each year, the industry goes to great lengths to ensure that its passengers are safe and that they have an enjoyable vacation experience.

A cruise vessel is inherently secure because it is a controlled environment with limited access. In order to maintain this secure environment, cruise lines have established strict security procedures and access to our vessels is strictly enforced. Heightened security measures are standard for cruise ships today and include passenger screening procedures similar to those found at U.S. airports including the use of metal detectors.

Cruising is one of the most popular vacation options, in large part because of its excellent safety record and the high level of service provided on board cruise vessels. The cruise industry is committed to providing a secure environment for its passengers. We will continue to work with all appropriate federal and state agencies to ensure the safety and well-being of all passengers embarking on a cruise vacation.

The Cruise Industry Cares about its Passengers

A strong statement regarding the cruise industry's commitment to the safety and security of its passengers comes from the passengers themselves. Cruise passengers have a total satisfaction rate of 95%, including nearly 45% stating an extremely satisfying experience which is the highest satisfaction rating of any other vacation option they have experienced. In addition, the latest statistics indicate that 54% of the industry's passengers are past cruisers. These statistics are based on a 2006 MarketProfile Study¹ conducted by TNS Research on behalf of CLIA every two years. This survey asks passengers to rate their overall satisfaction with their cruise vacation, as compared to other vacation options. We believe that this is a strong indicator that an overwhelming majority of our passengers have had a safe, secure, and enjoyable cruise experience.

The Cruise Industry Has Zero Tolerance for Crime

The cruise industry takes all allegations and incidents of crime on board its vessels seriously and reports them to the proper authorities. While even one incident that occurs on a passenger vessel is one too many, the industry has a strong commitment to ensure the safety and security of all its passengers, regardless of where they may be sailing.

To further demonstrate this commitment, I am pleased to announce today a formal agreement between CLIA, the Federal Bureau of Investigation, and the U.S. Coast Guard. This agreement further clarifies reporting procedures for all serious violations of U.S. law alleged to have occurred aboard cruise ships and outlines the jurisdiction that the U.S. has over crimes committed aboard cruise vessels.

Under these agreed upon procedures, CLIA members will continue to report to the FBI incidents or allegations of all violations of U.S. law. The agreement stipulates that the reporting of all such serious incidents shall be by immediate telephonic communication.

¹ The MarketProfile Study can be found in Attachment 1.

The agreement also stipulates that telephonic report will be followed by written reports of all alleged felonies occurring on board the ship.

The agreement standardizes the industry's existing practice of reporting all unlawful acts as required by U.S. laws adopted in 1998 and published in the Code of Federal Regulations (Title 33 CFR Part 120). We have also sought this agreement to further the industry's own Zero Tolerance for Crime Policy adopted in 1999. The agreement is in accordance with the reach of federal criminal jurisdiction to crimes against Americans on the high seas and even in foreign waters found in Title 18 of the United States Code as part of the "special maritime and territorial jurisdiction of the United States." Let there be no doubt that we continue to be fully committed to bringing perpetrators of crimes on cruise ships to justice wherever and whenever they may occur.

Let me hasten to add, Mr. Chairman, that the industry is willing to work with this Committee as well as U.S. law enforcement agencies to further clarify the laws or regulations dealing with the reporting of crime aboard cruise vessels to whatever extent is needed.

A more detailed explanation of the laws and regulations governing this important matter will be provided in the testimony of Larry Kaye, Counsel to the CLIA Board of Directors.

Mr. Chairman, this is not the first time that the industry has taken steps to ensure the safety and security of its passengers. As just referenced, the 1999 Zero-Tolerance Policy for crimes stipulated that our cruise line members would report crimes involving Americans *on all voyages*, even those that do not touch a U.S. port.

In an effort to formalize this industry policy, the industry entered into discussions with FBI's Southern District in Florida. These discussions resulted in the issuance in January 2000, of an FBI Memorandum, entitled "Crimes on the High Seas - Criminal Conduct on Board Ships Upon the High Seas." This memorandum established reporting guidelines for the cruise industry to follow and defined reportable crimes for incidents aboard ships sailing to and from the United States.

We consider reviewing our security practices as an ongoing process, and in fact, every 60 days CLIA's security committee meets with a number of law enforcement agencies of the United States to ensure that our practices and procedures are appropriate, relevant, and complementary to those of the United States government. These agencies include the U.S. Coast Guard, U.S. Navy, Customs and Border Protection, the FBI, Department of Homeland Security, among others.

Again let me emphasize Mr. Chairman, that cruise ships are extremely safe. Regardless, even one unfortunate incident involving our passengers is one too many. For an industry that carries 12 million passengers annually, our security record demonstrates the importance we place on each and every passenger who chooses to take a cruise vacation.

The Industry has Comprehensive Security Measures in Place

The industry's onboard and shoreside security practices are governed by the International Ship and Port Facility Security Code (ISPS). This international instrument was adopted worldwide in 2002, and applies to all commercial vessels in international commerce. The ISPS code was patterned after U.S. Coast Guard procedures that had been adopted in 1996 for passenger vessels operating from U.S. ports. These include:

- Each vessel must have a security officer and trained security staff whose duties are solely to provide onboard security for the passengers, crew and vessel, as well as a corporate security officer. The gentlemen sitting beside me are corporate security officers for the cruise lines as well as veterans of the Federal Bureau of Investigation.
- Every crewmember has as a collateral duty and responsibility to look out for the security of the passengers and crew.
- Each cruise ship has embarkation and debarkation controls including biometric verification to ensure the integrity of the passenger and crew manifests.
- Everything and everyone coming onto the vessel is screened to protect against explosives or contraband.
- All passenger and crew manifests are electronically submitted to U.S. authorities prior to departure from and before arrival to the United States. These lists are screened against U.S. law enforcement databases.

All crewmembers employed aboard our vessels are recruited from licensed recruiting offices in their home of record. In addition they are required to obtain U.S. visas for working on vessels operating to or from the United States, and subject to the attendant U.S. background check for issuance of a visa.

Additionally, CLIA member lines have trained staff to support families and individuals during emergency situations. In the past year, many of our member lines have strengthened their guest support teams both on board and shoreside to aid in grief and trauma counseling and ensure individuals and families receive proper assistance and special arrangements. In addition, onboard security staff receive routine and comprehensive training from agencies such as the FBI in evidence collection and crime scene preservation.

CLIA and a majority of its member lines have further demonstrated their commitment to ensuring the safety and security of its passengers through onboard medical facilities. All CLIA members that have ships traveling regularly on itineraries beyond territorial waters of coastal states meet these qualifications. In 1995, CLIA and its member lines formed a Medical Facilities Working Group to develop industry-wide guidelines for the facilities, staffing, equipment and procedures in medical infirmaries on cruise ships. This industry

group worked with the American College of Emergency Physicians (ACEP), the nation's leading and largest professional organization of such specialists, representing over 20,000 practicing emergency and other physicians in the U.S. and abroad. ACEP's Section of Cruise Ship and Maritime Medicine, is specifically dedicated to training, education and research in the advancement of shipboard medical care.

In 1996, both AECOP and CLIA published medical facilities guidelines. Included in these guidelines are procedures regarding 24-hour medical services and staff. Medical facility personnel are board certified or hold equivalent international certification, or have general practice and emergency or critical care experience. Personnel must also be conversant in English, possess a current valid medical license, and have three years of clinical experience, including minor surgical skills.

Statistics Demonstrate the Industry's Commitment to Safety

Dr. James Alan Fox, Ph.D., is a nationally renowned criminologist from Northwestern University who testified last year before the House Subcommittee on National Security, Emerging Threats and International Relations on the incidence of crime in the cruise industry.² He concluded "While virtually no place – on land or sea – is totally free of risk, the number of reported incidents of serious crime from cruise lines is extremely low, no matter what benchmark or standard is used."

In order to compare the cruise ship crime rate with that on land, Dr. Fox has annualized the cruise ship population. Passengers are assumed to average one week on board, the typical length of a cruise, while crewmembers are counted year-round. The total average passenger head count per year between 2003 and 2005 was 10,356,000. When you divide that number by 52 weeks, the annualized cruise ship passenger population during any week-long period of exposure is 199,154. Add to that the total number of crewmembers on our ships at any given time of 100,000, and the cruise industry had a total annualized ship population of 299,154.

Dr. Fox next compared, for the years 2003-2005, the average number of "forcible rapes" on land with "sexual assaults" on ships per every 100,000 people. There were on average 59 sexual assault incidents total per year in the cruise industry population of 299,154, as compared with 93,883 forcible rapes alone on land in the U.S. out of a landside population of 290,788,987. Thus the landside rate of such incidents per every 100,000 people was 32.3 as compared with 19.8 per 100,000 on cruise ships. The same analysis in the context of robbery yielded a rate of 142.5 per 100,000 on land, as compared to 1.3 for every 100,000 on cruise ships. Dr. Fox also performed the same comparison for cities and towns (called "Metropolitan Statistical Areas" or "MSAs") of the same approximate size as the cruise ship population (250,000 to 300,000 total size) to see if there was any significant difference. That comparison yielded a landside rate of 38.2 forcible rapes per 100,000 vs. 19.8 sexual assaults in the cruise industry, making the cruise industry statistics even more favorable when compared to like size MSAs.

² Fox's previous testimony can be found in Attachment 2.

Two points underscore these favorable comparisons. First, the category of “forcible rape” (including attempts) under the FBI definition used in the Uniform Crime Reports is much narrower than the category of *all alleged* “sexual assaults” in the cruise industry, which include other types of sexual offenses. Second, the Uniform Crime Reports track *cases* which have led to the opening of an investigative file, whereas the cruise industry number of sexual assaults includes all *allegations*. Therefore, the gap between the 32.3 rate per 100,000 in the U.S. and 19.8 per 100,000 in the cruise industry is significantly understated.

When Dr. Fox compared the offense rate on land for rape and other sex crimes with the rate of all alleged sexual assaults at sea, the cruise ship rate is more than 85% lower. In other words, the rate per 100,000 in the U.S. is 146.7 vs. 19.8 in the cruise industry. The rate per 100,000 in comparable MSAs is 171.9 vs. 19.8 in the cruise industry.

I would also like to address one particular area of concern that has been raised in conjunction with this hearing. Recently, some have questioned the crime statistics that the cruise lines provided to then-Chairman Shays’ Subcommittee a year ago. The cruise lines fully cooperated with Congress and their reporting was honest and accurate. Our industry stands firmly by that data.

The statistics reported to Congressman Shays’ Subcommittee and those provided in unrelated, industry court cases are different. They are different because the questions that were asked were different.

Congressman Shays’ Subcommittee requested data from our industry covering a specific three-year period, January 2003 through December 2005. He specifically asked for data on robberies, sexual assaults and missing persons. The term “sexual assault” does not have a uniform definition within the federal or state statutes. Since that category was not defined for us in Congressman Shays’ request, we consulted with his staff and reached the conclusion that we should base our responses on the federal statutory definitions that most closely related to these terms. These definitions also most closely followed relevant state definitions and could provide meaningful statistics. This also provided statistics that could better be compared to land-based settings (although our figures are more comprehensive than those on land). The industry’s written and verbal responses to Representative Shays clearly set forth not only all the information he requested but also our reliance on these federal definitions.

Disclosures made in civil litigation involving our industry have been much broader in both time and scope. In some cases the data provided in civil litigation covered many, many years – a decade perhaps. Similarly, the data provided in these court cases has included a myriad of information: allegations of sexual assaults, and lesser events such as nonconsensual touching, harassment, guests verbally pestering one another and so forth.

In examining these statistics, the Committee should also be aware that the way our industry measures such incidents exaggerates their importance when compared to land-

based figures. That is because most land-based statistics are calculated only after preliminary law enforcement investigations and the opening of an investigative file, whereas our statistics are based on allegations regardless of such law enforcement review.

For these reasons, the statistics are vastly different, and comparing these vastly different groups of information would be like comparing apples to oranges. In spite of all these issues, one fact remains steadfast, our industry reports all allegations of crime onboard our ships to the FBI. We are aware of no other industry in the United States, or elsewhere in the world, that provides such a reliable and comprehensive scale and scope of reporting to law enforcement. Similarly, we are unaware of another situation in the United States where our country's finest federal agents, working in close coordination with our best federal prosecutors, are the primary point of contact for land-based allegations of crimes like the ones we report.

The Industry has a Significant Economic Impact on the United States

Lastly, it is important to highlight the economic impact the cruise industry has on the United States. The North American cruise industry generated \$32.4 billion into the U.S. economy in 2005, contributing to every state's local economy. This supported more than 330,000 jobs nationwide paying a total of \$13.5 billion in wages and salaries to Americans.

U.S. ports handle approximately 75 percent of all global cruise embarkations. In 2005, more than 8.6 million cruise passengers boarded their cruise from ports in the United States. Worldwide embarkations totaled 11.5 million.

On a local level for the 30 U.S. homeport cities, or where cruise ship passengers regularly embark and disembark from their cruises, there are significant economic advantages. On average, a 2,000-passenger ship with 950 crewmembers generates approximately \$258,000 in onshore spending in a U.S. homeport city. Approximately one third of cruise passengers stay one or more nights in a port city pre- or post-cruise and spend approximately \$250 per visit on hotel stays, local dining and shopping.

The 2005 Cruise Industry Economic Study Executive Summary can be found in Attachment 3 and list of Executive Partners, CLIA's foremost business partners supplying good and services to the industry, in Attachment 4.

Before I conclude, I would also like to acknowledge the cruise industry's efforts to be a socially responsible partner in all areas of our business. Specifically highlighting the environment, the cruise industry has learned from its past and is now the leader of environmental practices and technologies in the worldwide maritime community. As a requirement of CLIA membership, cruise lines agree to the industry waste management practices and procedures, which meet or exceed U.S. and international laws. Our members are adopting and testing the latest technologies to reduce our environmental footprint and to be a part of the solution. The industry also is a partner with Conservation

International to protect biodiversity in top cruise destinations and promote industry practices that minimize the cruise industry's environmental impact.

Conclusion

In conclusion, Mr. Chairman, the 21 member lines of CLIA demonstrate a strong commitment to doing the right thing, of which a highest priority is ensuring the safety and security of our passengers. It is our sincere hope that we have demonstrated how seriously we take this job, and how we are constantly seeking ways to ensure the safety of our passengers. Our future depends on satisfied passengers and enjoyable vacations.

I would again like to offer my sympathies and heartfelt remorse for those people that have experienced otherwise. It is our challenge, and indeed our mandate, to reduce those incidents to as near to zero as we can, and to take action to mitigate the effects of those incidents when they do occur. We are constantly reviewing industry practices and procedures and will apply any lessons that can be learned.

I know the senior management of our industry would unanimously pledge that those goals are their highest priority.

I will be happy to answer any questions you may have.

Attachment 1

CLIA MARKET PROFILE (J133125)
TNS
February 2006

Table 13

Q1. Overall, how satisfied were you with your vacation? Would you say you were extremely satisfied, very satisfied, somewhat satisfied, not very satisfied or not at all satisfied?

** A cruise vacation or an ocean/sea voyage **

Base: All ever taken "A cruise vacation or an ocean/sea voyage" at Q6

	Cruiser							Age				Income			Group type			Gender		
	Total	Total	Desti- nation	Luxury	Premi- um	Conte- mpora- ry	Other	Random sample	25-34	35-54	55+	65+	\$40- \$59K	\$60K+	\$80K+	Cruiser	Vaca- tioner	Non-- cruiser/ non-- vacationer	Male	Female
Unweighted	1150	1083	53	69	345	854	124	943	149	600	217	184	178	972	701	1150	0	0	574	576
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	0%	100%	100%
Weighted	1090	1023	46	57	313	817	107	891	170	580	184	156	246	843	604	1090	0	0	535	554
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	0%	100%	100%
Top 2 Box (Net)	889	859	35	50	283	692	88	722	144	460	156	129	213	675	476	889	0	0	445	443
	81.6%	84.0%	75.1%	87.9%	90.4%	84.7%	82.1%	81.0%	84.6%	79.4%	84.6%	82.8%	86.6%	80.1%	78.8%	81.6%	0.0%	0.0%	83.2%	80.0%
Extremely satisfied (5)	488	473	19	30	167	379	54	403	65	254	98	71	112	375	256	488	0	0	237	251
	44.8%	46.2%	40.4%	51.5%	53.2%	46.4%	50.4%	45.3%	38.6%	43.8%	53.1%	45.4%	45.6%	44.5%	42.4%	44.8%	0.0%	0.0%	44.3%	45.2%
Very satisfied (4)	401	386	16	21	116	313	34	319	78	206	58	58	101	300	219	401	0	0	208	193
	36.8%	37.7%	34.7%	36.4%	37.1%	38.3%	31.7%	35.7%	46.0%	35.6%	31.6%	37.4%	41.1%	35.6%	36.3%	36.8%	0.0%	0.0%	38.9%	34.8%
Somewhat satisfied (3)	142	117	10	5	21	89	15	121	22	80	22	19	21	121	89	142	0	0	65	78
	13.1%	11.5%	21.1%	8.2%	6.7%	10.9%	13.7%	13.6%	12.7%	13.8%	12.1%	12.1%	8.7%	14.4%	14.8%	13.1%	0.0%	0.0%	12.1%	14.0%
Bottom 2 Box (Net)	58	47	2	2	9	36	5	49	5	40	6	8	11	47	39	58	0	0	25	33
	5.4%	4.6%	3.9%	3.9%	2.9%	4.4%	4.2%	5.5%	2.7%	6.9%	3.2%	5.1%	4.7%	5.6%	6.4%	5.4%	0.0%	0.0%	4.7%	5.9%
Not very satisfied (2)	47	37	2	0	6	28	5	39	3	33	5	6	7	39	32	47	0	0	23	24
	4.3%	3.6%	3.9%	0.0%	1.9%	3.5%	4.2%	4.3%	1.8%	5.7%	2.6%	4.0%	3.0%	4.7%	5.3%	4.3%	0.0%	0.0%	4.2%	4.4%
Not at all satisfied (1)	11	10	0	2	3	8	0	10	2	7	1	2	4	7	7	11	0	0	3	9
	1.0%	1.0%	0.0%	3.9%	1.1%	1.0%	0.0%	1.1%	0.9%	1.2%	0.6%	1.1%	1.6%	0.9%	1.1%	1.0%	0.0%	0.0%	0.5%	1.5%
TOTAL MENTIONS	1090	1023	46	57	313	817	107	891	170	580	184	156	246	843	604	1090	0	0	535	554
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	0.0%	0.0%	100.0%	100.0%
Mean	4.20	4.25	4.12	4.32	4.40	4.26	4.28	4.20	4.20	4.15	4.34	4.22	4.26	4.18	4.14	4.20	0.00	0.00	4.22	4.18
Std Dev	0.90	0.87	0.88	0.93	0.78	0.86	0.86	0.91	0.79	0.94	0.84	0.89	0.86	0.91	0.93	0.90	0.00	0.00	0.86	0.94
Std Err	0.026	0.026	0.121	0.112	0.042	0.029	0.077	0.030	0.065	0.039	0.057	0.066	0.065	0.029	0.035	0.026	0.000	0.000	0.036	0.039

Attachment 2
Statement on Crime aboard Cruise Ships
James Alan Fox, Ph.D.
Northeastern University
March 7, 2006

While virtually no place—on land or sea—is totally free of risk, Americans traveling aboard the major cruise lines that serve this country can rest assured of their personal safety. Clearly, it is difficult to derive a statistical matchmate for assessing the relative risk of crime aboard cruise ships given the atypical composition of passenger demographics (that is, the age, race gender and income profile of the population of passengers) and the sometimes spirited climate of cruise-ship activity. Regardless of the methodological complexities, the number of reported incidents of serious crime from cruise lines is extremely low, no matter what benchmark or standard is used.

Compared against their home communities, passengers have an appreciably lower risk of sexual assault and robbery while enjoying a vacation cruise (see table below). Based on passenger and crew counts adjusted for exposure time, the rate of sexual assault on cruise lines is—at worst—half the U.S. rate of forcible rape. For robbery, the cruise-related rate is a tiny fraction of the U.S. rate. The low levels of rape and robbery victimization, makes reasonable sense in view of the confined and highly secured environments offered on major cruise ships.

	Sexual Assault	Robbery
Offenses reported on cruise ships, 2993-2005	149	4
Annual average	49.67	1.33
Passenger count, 2003-2005	31,068,000	31,068,000
Annual average	10,356,000	10,356,000
Average passenger cruise length (days)	6.9	6.9
Annualized passenger exposure		
Annual ave passenger count X (6.9/365)	195,771	195,771
Daily crew size on cruise ships	86,035	86,035
Total annualizes person exposure	281,806	281,806
Rate of crime per 100,000	17.6	0.5
U.S. Rate per 100,000	32.2	136.7

Attachment 3



The Contribution of the North American Cruise Industry to the U.S. Economy in 2005



Prepared for:

International Council of Cruise Lines

August 2006

Executive Summary

Following a year of robust growth in 2004, the North American cruise industry experienced a more moderate rate of expansion during 2005. As indicated in **Table ES-1**, passenger embarkations at U.S. ports increased by 6.3 percent in 2005 to 8.6 million. This rate of increase was less than half the 13.9 percent increase during 2004. The slower growth in embarkations resulted in a reduced rate of growth in passenger and cruise spending. After increasing by 13.8 percent in 2004, the growth in total industry spending declined to 10 percent in 2005, and totaled \$16.18 billion for the year. Because the growth in spending exceeded the growth in embarkations, global spending on a per passenger basis increased from \$1,553 in 2004 to \$1,667 in 2005 (see **Table ES-2**).

Table ES-1 – Economic Contribution of the North American Cruise Industry, 2001 - 2005

	2001	2002	2003	2004	2005	Average Annual Growth				
						2002	2003	2004	2005	
U.S. Passenger Embarkations (Millions)	5.90	6.50	7.11	8.10	8.61	10.2%	9.4%	13.9%	6.3%	
Direct Economic Impacts										
Passenger and Cruise Line Spending (\$ Billions)*	\$ 10.98	\$ 11.95	\$ 12.92	\$ 14.70	\$ 16.18	8.8%	8.1%	13.8%	10.0%	
Employment	101,636	109,553	117,353	135,197	142,720	7.8%	7.1%	15.2%	5.6%	
Wages and Salaries (\$ Billions)	\$ 3.50	\$ 3.92	\$ 4.29	\$ 4.80	\$ 5.19	11.9%	9.6%	11.9%	8.1%	
Total Economic Impacts										
Total Output (\$ Billions)	\$ 18.60	\$ 20.40	\$ 25.44	\$ 30.06	\$ 32.43	9.7%	24.7%	18.2%	7.9%	
Employment	267,762	279,112	295,077	315,830	330,346	4.2%	5.7%	7.0%	4.6%	
Wages and Salaries (\$ Billions)	\$ 9.72	\$ 10.66	\$ 11.62	\$ 12.42	\$ 13.52	9.7%	9.0%	6.9%	8.8%	

* Includes wages and salaries paid to U.S. employees of the cruise lines.

The Contribution of the North American Cruise Industry to the U.S. Economy

The expenditures by the cruise lines and their passengers and crew generated employment, income and other economic benefits throughout the U.S. economy. These economic benefits of the North American cruise industry arise from five principal sources:

- spending by cruise passengers and crew for goods and services associated with their cruise, including travel between their places of residence and the ports of embarkation and pre- and post-cruise vacation spending;
- the shoreside staffing by the cruise lines for their headquarters, marketing and tour operations;

- expenditures by the cruise lines for goods and services necessary for cruise operations, including food and beverages, fuel, hotel supplies and equipment, navigation and communication equipment and so forth;
- spending by the cruise lines for port services at U.S. ports-of-embarkation and ports-of-call; and
- expenditures by cruise lines for the maintenance and repair of vessels at U.S. shipyards, as well as capital expenditures for port terminals, office facilities and other capital equipment.

The total contribution of the cruise industry to the U.S. economy is the sum of the direct and indirect economic impacts. The direct impacts consist of the expenditures made by the cruise lines and their crew and passengers during the course of providing or taking cruises. These included cruise expenditures for headquarters operations, food and beverages provided aboard cruise ships and business services such as advertising and marketing. Additionally, cruise passengers and crew purchase a variety of goods and services including clothing, shore excursions and lodging as part of their cruise vacation or as part of a pre- or post-cruise stay. These types of expenditures are included in the direct cruise industry expenditures.

The expenditures of cruise line vendors and those businesses that provide the goods and services to passengers and crew generate the indirect impacts. For example, food processors must purchase raw foodstuffs for processing; utility services, such as electricity and water, to run equipment and process raw materials; transportation services to deliver finished products to the cruise lines or wholesalers; and insurance for property and employees.

The major economic impacts of the cruise industry during 2005 as shown in Table ES-1 were as follows:

- Cruise passenger embarkations at U.S. ports increased by 6.3 percent and totaled 8.6 million.
- The \$16.2 billion in direct spending by the cruise lines and their passengers was a 10 percent increase over 2004 and generated over 142,700 direct jobs paying \$5.2 billion in wages and salaries.
- The industry spent just over \$8.5 billion in the core cruise travel sector, primarily transportation services and passenger and crew spending. This spending generated just under 100,800 jobs and wage income of \$3.5 billion.

- The cruise lines directly employed just over 31,600 U.S. residents as shoreside staff and crew members, and paid wage income of \$1.1 billion.
- Cruise passengers and crew spent \$1.5 billion in non-transportation expenditures creating just under 21,200 jobs in the retail trade, restaurant and lodging industries. These jobs generated \$442 million in wage income.
- Cruise lines spent another \$7.6 billion for goods and services from suppliers in the United States in support of cruise operations. This spending created slightly more than 41,900 jobs in virtually all industries and generated \$1.7 billion in wage income.
- Including the indirect economic impacts, the spending of the cruise lines and their crew and passengers was responsible for the generation of \$32.4 billion in gross output in the United States, a 7.9 percent increase over 2004. This, in turn, generated just over 330,000 jobs throughout the country paying a total of \$13.5 billion in wages and salaries.

These total economic impacts affect virtually every industry in the United States. Approximately two-thirds of the \$32.4 billion in total gross output and 43 percent of the 330,000 jobs generated by the direct and indirect impacts of the cruise industry affected seven industry groups as follows:

➤ Professional & Technical Services ¹	\$4.1 Billion in Output	26,691 Jobs
➤ Nondurable Goods Manufacturing	\$4.0 Billion in Output	12,867 Jobs
➤ Travel Services ²	\$3.8 Billion in Output	53,095 Jobs
➤ Durable Goods Manufacturing	\$2.6 Billion in Output	11,914 Jobs
➤ Financial Services ³	\$2.3 Billion in Output	14,573 Jobs
➤ Airline Transportation	\$2.2 Billion in Output	9,895 Jobs
➤ Wholesale Trade	\$1.6 Billion in Output	13,737 Jobs

The State of the North American Cruise Industry in 2005

As noted above, the North American cruise industry experienced a more moderate rate of expansion during 2005 relative to prior years. As indicated in **Table ES-2**, the slowdown in growth was brought about largely by the reduction in capacity expansion. In fact, during

¹ Includes such services as legal services, advertising, management consulting, engineering and architectural services and computer consulting services.

² Includes travel agents, ground transportation services and U.S.-based excursions.

³ Includes banking, investment and insurance services.

2005, there was no change in the number of ships in the North American fleet as new introductions were offset by an equal number of withdrawals. The fact that the new cruise ships were larger than the retired ships allowed the lower berth capacity to increase by a modest 2.2 percent, the smallest increase since 1994.

Table ES-2 – Global Summary Statistics for the North American Cruise Industry, 2001 - 2005

	2001	2002	2003	2004	2005	Average Annual Growth				
						2002	2003	2004	2005	
Capacity Measures										
Number of Ships	167	176	184	192	192	5.4%	4.5%	4.3%	0.0%	
Lower Berths	173,846	196,694	215,405	240,401	245,755	13.1%	9.5%	11.6%	2.2%	
Available Bed Days (Millions)	60.85	61.00	63.38	70.60	75.47	0.3%	3.9%	11.4%	6.9%	
Global Passengers and Revenues										
Global Passengers (Millions)	8.40	9.22	9.83	10.85	11.50	9.8%	6.6%	10.3%	6.0%	
Global Passenger Bed Days (Millions)	53.76	61.47	66.17	73.88	80.32	14.3%	7.6%	11.7%	8.7%	
Capacity Utilization (Bed Days)	88.4%	100.8%	104.4%	104.7%	106.4%					
Gross Revenues (\$ Billions)										
Gross Revenues per Passenger	\$ 1,646	\$ 1,549	\$ 1,498	\$ 1,553	\$ 1,667	-5.9%	-3.2%	3.6%	7.3%	
Gross Revenues per Passenger Cruise Day	\$ 257	\$ 232	\$ 223	\$ 226	\$ 239	-9.7%	-4.2%	2.4%	4.7%	

Source: Business Research & Economic Advisors and Cruise Lines International Association

As in prior years, the industry has been able to increase its occupancy rate which rose to 106.4 percent in 2005. As a consequence, passenger carryings and actual passenger bed days,⁴ with respective growth rates of 6.0 percent and 8.7 percent, experienced a higher rate of growth than lower berth capacity. It should be noted that the increase in the occupancy rate is partially attributed to the large number of cancelled cruises during 2005. As a result of the extraordinary number of hurricanes during 2005, especially Hurricanes Katrina, Rita and Wilma, more than 80 cruises were cancelled. Most of the cancelled cruises occurred in New Orleans and Fort Lauderdale. While some cruise ships were redeployed from these ports, such as the *Grandeur of the Seas* which was relocated from New Orleans to Tampa, other ships, such as the *Holiday*, were taken out of service and used to house families and workers in New Orleans following Hurricane Katrina. As a consequence, some passengers rescheduled their cruises on other ships resulting in a generally higher occupancy rate among continuously operating cruise ships.

On the financial front, with demand growth outstripping supply growth, the industry was able to increase revenues per passenger by 7.3 percent. With a slight increase in the average

⁴ Passenger carryings in 2005 are the number of passengers who took cruises during the year, while passenger bed days are the number of days that all berths were occupied during 2005. For example, a single passenger on a 7-day cruise represents one passenger carrying and 7 passenger bed days.

length of cruise, revenues per passenger cruise day increased by a more moderate 4.7 percent. As a result, gross global industry revenues increased by 13.8 percent during 2005 to \$19.2 billion.

With the United States accounting for 75 percent of the activity of the North American cruise industry, U.S. ports have experienced similar growth in passenger embarkations. As shown in **Table ES-3**, embarkations at U.S. ports increased by 6.3 percent, totaling 8.61 million during 2005. Similarly, spending by the industry and its passengers in the United States increased by 10 percent to \$16.2 billion in 2005. Expenditures by the cruise lines for wages, taxes and goods and services accounted for about 80 percent of the direct spending, while passenger and crew spending for transportation, accommodations, food and other retail accounted for the remaining 20 percent.

Table ES-3 – Operating Statistics of the North American Cruise Industry in the United States, 2001 – 2005⁵

	2001	2002	2003	2004	2005	Annual Percent Change			
						2002	2003	2004	2005
Capacity Measures									
Number of Ships	167	176	184	192	192	5.4%	4.5%	4.3%	0.0%
Lower Berths	173,846	196,694	215,405	240,401	245,755	13.1%	9.5%	11.6%	2.2%
Carryings (Millions)									
Global Passengers	8.40	9.22	9.83	10.85	11.50	9.8%	6.6%	10.3%	6.0%
Passengers Residing in the U.S.	6.20	6.99	7.48	8.31	9.06	12.7%	7.0%	11.1%	9.0%
U.S. Embarkations	5.90	6.50	7.11	8.10	8.61	10.2%	9.4%	13.9%	6.3%
Industry Spending in U.S. (\$ Billions)									
Cruise Lines	\$ 9.99	\$ 10.90	\$ 11.85	\$ 13.58	\$ 14.99	9.1%	8.7%	14.6%	10.4%
Goods and Services	\$ 8.14	\$ 8.84	\$ 9.49	\$ 10.70	\$ 11.76	8.6%	7.4%	12.7%	9.9%
Capital Equipment	\$ 7.34	\$ 7.93	\$ 8.46	\$ 9.36	\$ 10.11	8.0%	6.7%	10.6%	8.0%
Passengers and Crew	\$ 0.80	\$ 0.91	\$ 1.03	\$ 1.34	\$ 1.65	13.8%	13.2%	30.5%	22.9%
Wages & Taxes Paid by Cruise Lines	\$ 1.85	\$ 2.06	\$ 2.36	\$ 2.88	\$ 3.23	11.4%	14.6%	22.1%	12.1%
Total U.S.-based Spending	\$ 10.98	\$ 11.95	\$ 12.92	\$ 14.70	\$ 16.18	8.8%	8.1%	13.8%	10.0%

Source: Business Research & Economic Advisors and Cruise Lines International Association

The major characteristics of the cruise industry's activity during 2005 are as follows:

- By year-end 2005, the cruise industry's fleet had remained unchanged at 192 vessels with a combined capacity of 245,755 lower berths.⁶ This was the smallest increase in the industry's capacity since 1994 and reflects the reduced rate of industry newbuilds following 9/11.

⁵ ICCL's member lines accounted for approximately 62 percent of the North American industry's global fleet, 88 percent of the lower berth capacity, and 93 percent of global passengers.

⁶ These capacity estimates were obtained from data published by Cruise Lines International Association (CLIA) and cruise industry survey data collected by Business Research and Economic Advisors (BREA). In an effort to provide a consistent set of industry statistics, we have utilized passenger and capacity data collected and reported by CLIA whenever possible. Thus, some of these data may differ from prior BREA reports.

- During 2005, the industry carried an estimated 11.5 million passengers on cruises around the globe. This represented a six percent increase from the previous year.
- Data published by Cruise Lines International Association (CLIA) shows that an estimated 9.1 million U.S. residents took cruise vacations throughout the world and accounted for 79 percent of the industry's global passengers.
- An estimated 8.6 million cruise passengers embarked on their cruises at U.S. ports during 2005, accounting for 75 percent of global embarkations and represented an increase of 6.3 percent from 2004. Florida, whose ports handled approximately 4.8 million embarkations, accounted for 56 percent of all U.S. cruise embarkations.
- The cruise lines and their passengers directly spent \$16.2 billion on goods and services in the United States, a 10 percent increase over 2004. The cruise lines spent \$13 billion while passengers and crew spent \$3.2 billion.

The Contribution of the North American Cruise Industry to Individual State Economies

The economic impact of the North American cruise industry reached into every state economy. Cruise passengers came from every state and the cruise lines made purchases in support of their operations in just about every state. The principal location factors that influenced the economic impacts by state were:

- cruise lines headquarters and other facilities,
- ports-of-embarkation and ports-of-call,
- place of residence of cruise passengers, and
- place of business of cruise industry vendors.

More than 8.6 million cruise passengers began their cruises from U.S. ports in 2005. As indicated in **Table ES-4**, the top 10 U.S. cruise ports accounted for 84 percent of 2005 embarkations. This represented a decline of three percentage points from 2004 and nine percentage points from 2003. The decline primarily reflects the continued expansion of cruises at new ports, such as Jacksonville; Cape Liberty, NJ; Charleston; Norfolk; Mobile; and mid-sized ports, such as San Diego and Honolulu.

Florida remains the center of cruising in the United States, accounting for 56 percent of all U.S. embarkations. Over the past several years there has been a shift in activity in the state

with embarkations shifting from Miami to Port Everglades, Canaveral and Jacksonville. California's ports (Los Angeles, Long Beach, San Diego and San Francisco) boarded approximately 1.3 million passengers for their cruises, or 15 percent of all U.S. cruise embarkations.

Table ES-4 – U.S. Embarkations by Port, 2003 - 2005

Port	2003	2004	2005	Growth		
				2003	2004	2005
Miami	1,965,000	1,682,000	1,771,000	8.9%	-14.4%	5.3%
Port Everglades	1,213,000	1,324,000	1,283,000	0.9%	9.2%	-3.1%
Port Canaveral	1,089,000	1,220,000	1,234,000	5.9%	12.0%	1.1%
Los Angeles	403,000	470,000	615,000	-25.1%	16.6%	30.9%
Galveston	377,000	435,000	531,000	41.2%	15.4%	22.1%
Tampa	409,000	385,000	408,000	29.0%	-5.9%	6.0%
New York	438,000	547,000	370,000	34.4%	24.9%	-32.4%
Long Beach	272,000	367,000	363,000	N/A	34.9%	-1.1%
Seattle	158,000	285,000	337,000	33.9%	80.4%	18.2%
New Orleans	288,000	327,000	308,000	17.6%	13.5%	-5.8%
All Other Ports	666,000	1,145,000	1,476,000	1.7%	71.9%	28.9%
United States	7,113,000	8,100,000	8,612,000	9.4%	13.9%	6.3%
Top Ten Ports	6,612,000	7,042,000	7,220,000	13.1%	6.5%	2.5%
Share of the U.S.	93.0%	86.9%	83.8%			
Florida Ports	4,676,000	4,724,000	4,843,000	7.5%	1.0%	2.5%
Share of the U.S.	65.7%	58.3%	56.2%			

Source: U.S. Cruise Ports and [MARAD](#), U.S. Department of Transportation

The major economic impacts of the cruise industry by state during 2005 as shown in **Table ES-5** were as follows:

- The economic impacts were concentrated in 10 states. These states accounted for 77 percent of the cruise industry's direct purchases in the United States and 84 percent of the total employment and income impacts.
- Florida, with \$5.5 billion in direct spending and 128,042 jobs paying \$4.8 billion in income, is the center of the cruise industry in the United States, accounting for more than 33 percent of the industry's direct expenditures. In addition, the state of Florida, the home of corporate or administrative offices for most of the cruise lines, accounted for almost 50 percent of the cruise lines' U.S.-based employment during 2005. This share has been falling recently as administrative employment has increased throughout the West and as the number of U.S.-resident crew has grown dramatically in Hawaii.
- California, like Florida, hosts both cruise line headquarters and ports-of-embarkation. With just under 10 percent of the industry's direct expenditures, California businesses received \$1.6 billion in direct industry

spending which in turn generated 47,860 jobs paying nearly \$2.2 billion in wage income.

- New York accounted for 6.4 percent of the industry's direct expenditures with \$1 billion in direct spending. These expenditures generated an estimated 20,000 jobs paying \$992 million in income. While New York held its rank as the third highest state in terms of direct industry purchases, the actual level of expenditures during 2005 declined as some cruise activity moved across the river to Cape Liberty in New Jersey and as the industry's overall purchase of financial services declined in New York and nationally.
- Alaska benefits from the cruise industry primarily as a destination market. Thus, it benefits from cruise passenger spending for shore excursions, pre- and post-cruise stays, food and beverages and general retail. Because of this spending, Alaska accounted for 6.1 percent of the industry's direct spending with \$994 million in expenditures generating 21,389 jobs paying \$792 million in wage income. Cruise passenger visits to the state increased by approximately 12 percent over 2004 and, as a consequence, direct industry purchases increased by more than 25 percent as per passenger and crew expenditures also increased.
- Since 2002, the state of Texas has been the highest growth market with embarkations at the Ports of Galveston and Houston increasing at an average annual rate of more than 30 percent. With \$934 million in direct spending and 15,807 jobs paying \$713 million in income, Texas accounted for just about five percent of the industry's national economic impact.
- The state of Washington is the location of cruise industry facilities with a growing port-of-embarkation in Seattle. With \$562 million in direct spending and 14,082 jobs paying \$624 million in income, Washington accounted for about four percent of the industry's national economic impact.
- Finally, the state of Hawaii, with its rapidly expanding destination market, has increased its share of the cruise industry's impact in the United States. Hawaii's rank rose from 15th in 2003 to 8th in 2005. During 2005, direct spending by the industry in the state reached \$512 million and generated 12,222 jobs (including the U.S. crew employees of NCL America) paying \$394 million in income.
- The impacts in the remaining states were primarily generated by cruise passenger spending for air travel and cruise line purchases from vendors located in each of the states.

Table ES-5 – Total Economic Impact of the North American Cruise Industry by State, 2005

State	Direct Purchases (\$ Millions)	Share of the U.S.	Total Employment	Share of the U.S.	Total Income (\$ Millions)	Share of the U.S.	Average Annual Wage (\$1,000)
Alabama	\$ 98	0.6%	1,489	0.5%	\$ 50	0.4%	\$ 33.8
Alaska	\$ 994	6.1%	21,389	6.5%	\$ 792	5.9%	\$ 37.0
Arizona	\$ 145	0.9%	2,097	0.6%	\$ 78	0.6%	\$ 37.2
Arkansas	\$ 27	0.2%	291	0.1%	\$ 10	0.1%	\$ 34.3
California	\$ 1,606	9.9%	47,860	14.5%	\$ 2,155	15.9%	\$ 45.0
Colorado	\$ 355	2.2%	3,685	1.1%	\$ 189	1.4%	\$ 51.2
Connecticut	\$ 84	0.5%	591	0.2%	\$ 34	0.3%	\$ 58.2
Delaware	\$ 21	0.1%	140	0.0%	\$ 7	0.0%	\$ 48.1
Dist. of Columbia	\$ 17	0.1%	129	0.0%	\$ 10	0.1%	\$ 77.2
Florida	\$ 5,472	33.8%	128,042	38.8%	\$ 4,772	35.3%	\$ 37.3
Georgia	\$ 581	3.6%	9,538	2.9%	\$ 412	3.0%	\$ 43.2
Hawaii	\$ 512	3.2%	12,222	3.7%	\$ 394	2.9%	\$ 32.3
Idaho	\$ 15	0.1%	160	0.0%	\$ 5	0.0%	\$ 33.7
Illinois	\$ 368	2.3%	5,077	1.5%	\$ 239	1.8%	\$ 47.1
Indiana	\$ 199	1.2%	2,864	0.9%	\$ 127	0.9%	\$ 44.3
Iowa	\$ 32	0.2%	278	0.1%	\$ 10	0.1%	\$ 35.4
Kansas	\$ 54	0.3%	3,192	1.0%	\$ 108	0.8%	\$ 33.9
Kentucky	\$ 65	0.4%	1,261	0.4%	\$ 47	0.3%	\$ 37.4
Louisiana	\$ 241	1.5%	4,966	1.5%	\$ 161	1.2%	\$ 32.5
Maine	\$ 31	0.2%	412	0.1%	\$ 14	0.1%	\$ 32.9
Maryland	\$ 112	0.7%	1,154	0.3%	\$ 56	0.4%	\$ 48.4
Massachusetts	\$ 401	2.5%	4,305	1.3%	\$ 245	1.8%	\$ 57.0
Michigan	\$ 196	1.2%	1,873	0.6%	\$ 91	0.7%	\$ 48.7
Minnesota	\$ 91	0.6%	1,362	0.4%	\$ 65	0.5%	\$ 48.1
Mississippi	\$ 33	0.2%	376	0.1%	\$ 12	0.1%	\$ 32.7
Missouri	\$ 88	0.5%	1,238	0.4%	\$ 52	0.4%	\$ 42.0
Montana	\$ 5	0.0%	56	0.0%	\$ 2	0.0%	\$ 30.3
Nebraska	\$ 51	0.3%	496	0.2%	\$ 27	0.2%	\$ 55.0
Nevada	\$ 51	0.3%	349	0.1%	\$ 14	0.1%	\$ 40.4
New Hampshire	\$ 29	0.2%	429	0.1%	\$ 17	0.1%	\$ 39.0
New Jersey	\$ 321	2.0%	5,032	1.5%	\$ 252	1.9%	\$ 50.1
New Mexico	\$ 18	0.1%	507	0.2%	\$ 16	0.1%	\$ 31.0
New York	\$ 1,042	6.4%	20,000	6.1%	\$ 992	7.3%	\$ 49.6
North Carolina	\$ 273	1.7%	2,815	0.9%	\$ 112	0.8%	\$ 39.6
North Dakota	\$ 9	0.1%	172	0.1%	\$ 4	0.0%	\$ 25.9
Ohio	\$ 154	1.0%	1,695	0.5%	\$ 72	0.5%	\$ 42.4
Oklahoma	\$ 30	0.2%	365	0.1%	\$ 13	0.1%	\$ 36.7
Oregon	\$ 64	0.4%	1,664	0.5%	\$ 55	0.4%	\$ 33.2
Pennsylvania	\$ 348	2.2%	4,811	1.5%	\$ 211	1.6%	\$ 43.8
Rhode Island	\$ 26	0.2%	237	0.1%	\$ 9	0.1%	\$ 36.2
South Carolina	\$ 70	0.4%	1,033	0.3%	\$ 34	0.3%	\$ 33.0
South Dakota	\$ 6	0.0%	56	0.0%	\$ 2	0.0%	\$ 30.5
Tennessee	\$ 69	0.4%	746	0.2%	\$ 31	0.2%	\$ 41.4
Texas	\$ 934	5.8%	15,807	4.8%	\$ 713	5.3%	\$ 45.1
Utah	\$ 35	0.2%	455	0.1%	\$ 17	0.1%	\$ 37.0
Vermont	\$ 5	0.0%	42	0.0%	\$ 2	0.0%	\$ 37.2
Virginia	\$ 176	1.1%	2,718	0.8%	\$ 134	1.0%	\$ 49.1
Washington	\$ 562	3.5%	14,082	4.3%	\$ 624	4.6%	\$ 44.3
West Virginia	\$ 8	0.0%	88	0.0%	\$ 3	0.0%	\$ 31.7
Wisconsin	\$ 52	0.3%	672	0.2%	\$ 26	0.2%	\$ 38.4
Wyoming	\$ 3	0.0%	28	0.0%	\$ 1	0.0%	\$ 33.0
U. S. Total	\$ 16,180		330,346		\$ 13,516		\$ 40.9

Attachment 4

CLIA EXECUTIVE PARTNERS

Charter Executive Partners Noted in Bold and Italics

3M Marine

Amadeus North America LLC

American Bureau of Shipping (ABS)

American Guard Services, Inc.

Avendra

Barwil Unitor Ships Service

Bellegrave Medical Supply

The Berkely Group

Board of Commissioners of the Port of New Orleans

Business Research & Economic Advisors (BREA)

Callenberg Engineering Inc.

Campbell & Malafy

Cargill Food Distribution Co.

Chamber of Commerce and Industry of South Corsica (CCIACS)

The Coca-Cola Company

Ecolab Inc.

Fidelio Cruise Software Inc.

Fincantieri-Cantieri Navali Italiani S.p.A.

Fowler White Burnett P.A.

Freeport Harbour Company

Fujifilm USA Inc.

Gard

Halifax Port Authority

Hamilton, Miller & Birthisel LLP

Hamworthy Water Systems LTD

Hill, Betts & Nash LLP

The Image Group

International Paint LLC

Jacksonville Port Authority

Jotun Paints, Inc.

Kaye, Rose & Partners, LLP

The Kezia Group

Lau, Lane, Pieper, Conley & McCreddie, P.A.

Lloyd's Register North America, Inc.

Maine Port Authority

Maltzman Foreman, PA

Maritime Telecommunications Network, Inc./SeaMobile Enterprises *

Marseille-Provence Cruise Club

Marsh Ltd.

Maryland Port Administration

Mase & Lara, P.A.

Massachusetts Port Authority
McAlpin & Conroy, P.A.
McRoberts Maritime Security, Inc.
McIntosh, Sawran, Peltz & Cartaya, PA
MEIKO Marine
Metro Cruise Services LLC
MEYER WERFT GmbH
MHG Services, Inc.
Michael Stapleton Associates (MSA)
Montreal Port Authority
NYCruise
On-Board Movies
P&O Ports North America
Port Canaveral
Port Everglades
Port of Galveston
Port of Houston Authority
The Port of Los Angeles
Port of Miami
The Port of Philadelphia and Camden, a Department of DRPA of PA & NJ
Port of San Diego
Port of San Francisco
Port of Seattle
Shanghai International Port Group, LTD.
Québec Port Authority
RINA S.P.A.
Royal Marine Insurance Group (RMIG)
Rodriguez, Aronson & Essington, P.A.
Seatrade Cruise Shipping Convention/CMP Princeton Inc.
Steamship Insurance Management Services Limited (SIMSL)
Tampa Port Authority
Teakdecking Systems, Inc.
Thordon Bearings Inc.
UK P&I Club
Unisource Worldwide, Inc.
Universal Marine Medical Supply
Vickers Oils
Vitality Foodservice, Inc.
Wärtsilä
Wireless Maritime Services, LLP