

THE VALUE OF EXPERIENCE:

How Shorex Influences Deployment Decisions

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Holland  America

Holland America Line | Evolution Through Change

The pandemic reshaped the category — and created an opportunity to evolve without abandoning the brand's core

BEFORE 2020

- Destination-rich itineraries
- Premium service
- Culinary leadership
- Strong repeat guest base
- Heritage & tradition



AFTER THE RESTART

- Greater digital capability
- Health & safety confidence
- Refreshed entertainment & enrichment
- Continued culinary innovation
- More personalized experiences
- Lean-in to our traditions
- Stronger destination storytelling

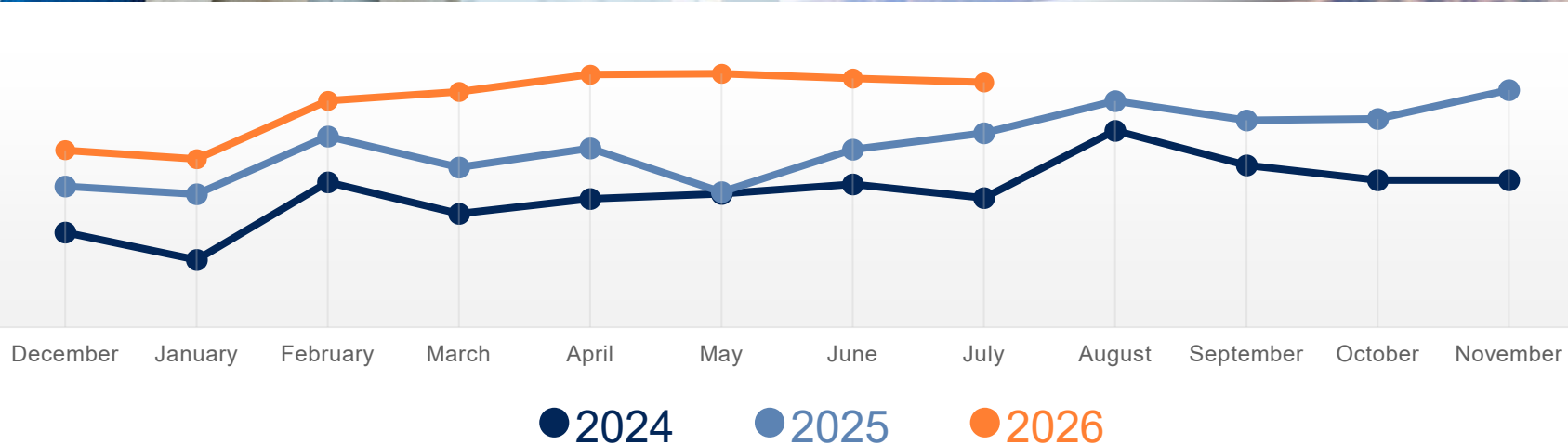
EVOLUTION, NOT REINVENTION: Preserve what guests value most. Modernize how it is delivered.





Driving Our Success

- NPS scores at historical high
- Strong demand pushing out booking window
- *Have it All* bundle-includes shorex
- Cruise vacation is a good value and an amazing experience



Holland America Line

Everything Begins
With Our Guests



Our HVHA Guest

Our High-Value, High-Affinity (HVHA) guests are couples, friends, empty nesters & multi-gen families

Common Ground:

Looking to be taken care of on a well-planned vacation in a friendly, secure environment



Unwinding Silvers

Avg age

71

Annual Cruise Freq

All year



Empty Nesters

58

1-2x per year



Chillaxing Couples

46

1-2x per year



Adult Families

64

Year-round with and without kids

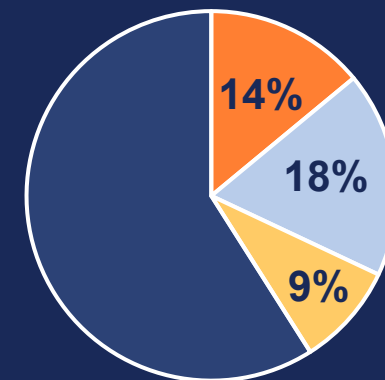


Families with Kids

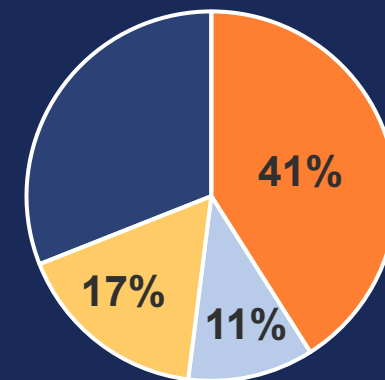
45

1x per year

High-Value Cruise Market



HAL High-Value Guests



High-value cruise market defined as those spending over \$2K on vacation in the last 12 months. US and Canada markets.

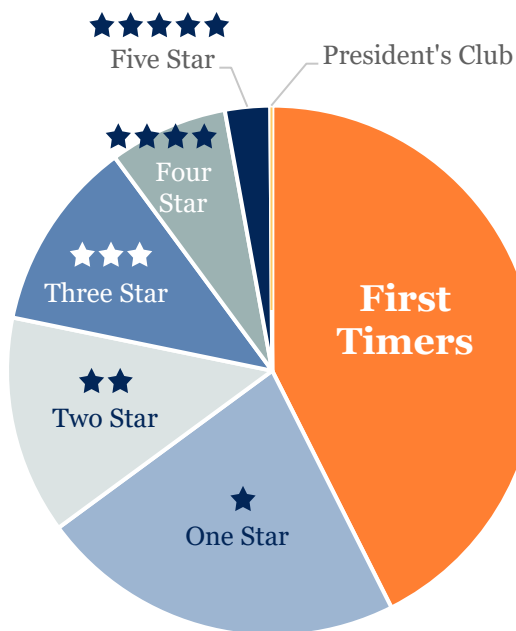


Have a more rewarding experience every time you cruise.

It begins with Mariner Society® membership.*

Star Mariner	2-Star Mariner	3-Star Mariner	4-Star Mariner	5-Star Mariner
One cruise completed	30 Cruise Day credits	75 Cruise Day credits	200 Cruise Day credits	500 Cruise Day credits

Mariners 2025

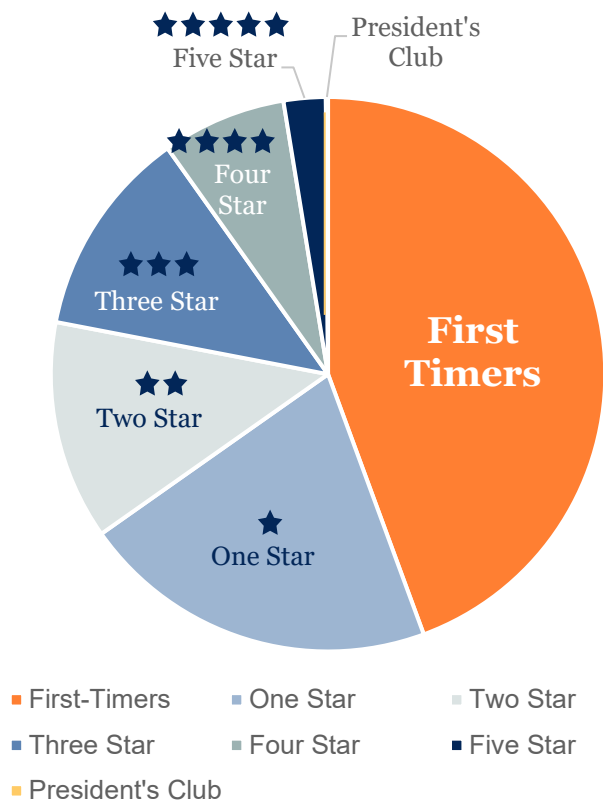


- First-Timers
- One Star
- Two Star
- Three Star
- Four Star
- Five Star
- President's Club

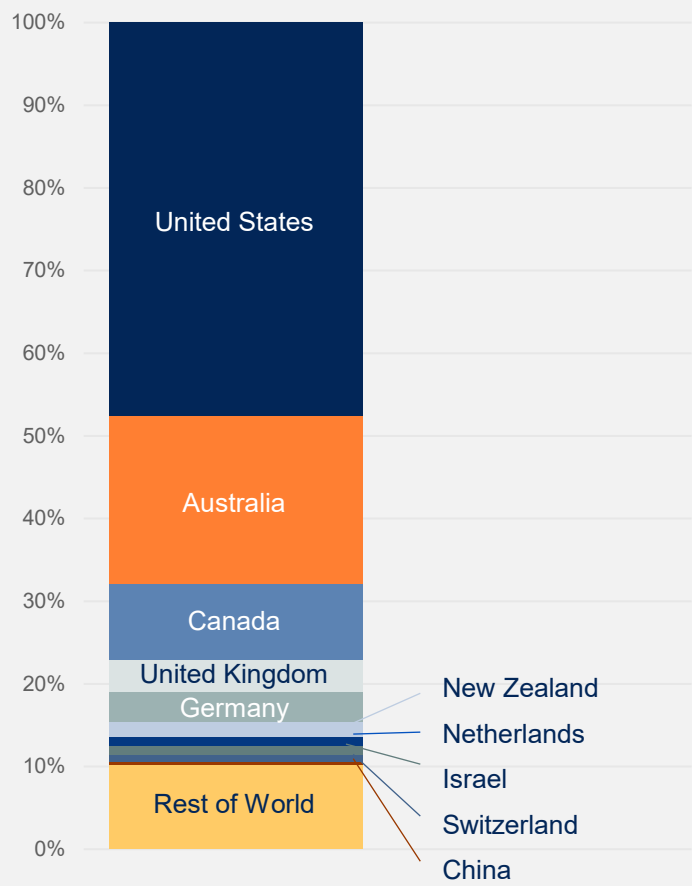


Who is sailing with us in Australia

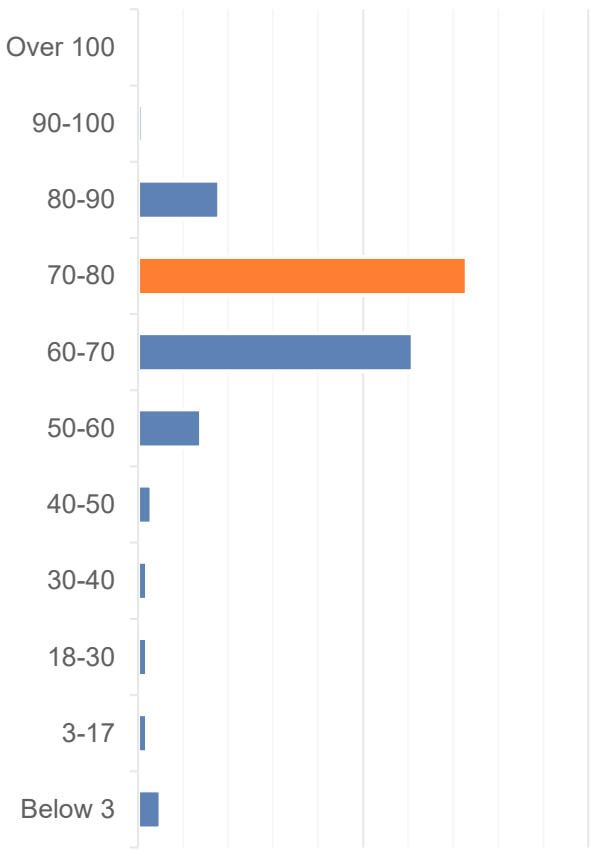
Loyalty Level



Top 10 Nationalities



Guest Age



Guests Will Remember How You Made Them Feel

- Welcoming and friendly-emotional connection
- Expecting to see the highlights
- Seamless experience-they are on vacation
- Signage, access to main attractions
- Safety



Guest Experience is Driving Deployment

- Guest port ratings and feedback
- Social media driving demand
- Access to iconic and amazing experiences
- Port infrastructure and capacity
- Safety and ease of access

Guest experience is no longer simply the outcome of deployment strategy — **it is the driver of it.**



Best Itineraries



Best Cruise Lines for Shore Excursions



Premium Ship Itinerary

Overall Shore Excursions



Best for Asia & Australia

Shore Excursions Driving Commercial Success

- Cruise booking driven by destination experiences
- Overland experiences compete with land-based vacations
- 90% of shore excursions are booked before sailing
- Immersive destination experiences driving guest experience
- Accessibility



Global Trends in Shore Excursions

- Authentic, immersive experiences
- History and cultural
- Local culinary and wine tours
- Active & adventure tours
- Accessible tours



The Perfect Shore Excursion

The Real Australia

- The Guide: The Heart of the Experience
- Emotional Connection Over Checklist Tourism
- A Sense of Exclusivity and Privilege



Immersive Shore Excursions

Meet the
Makers

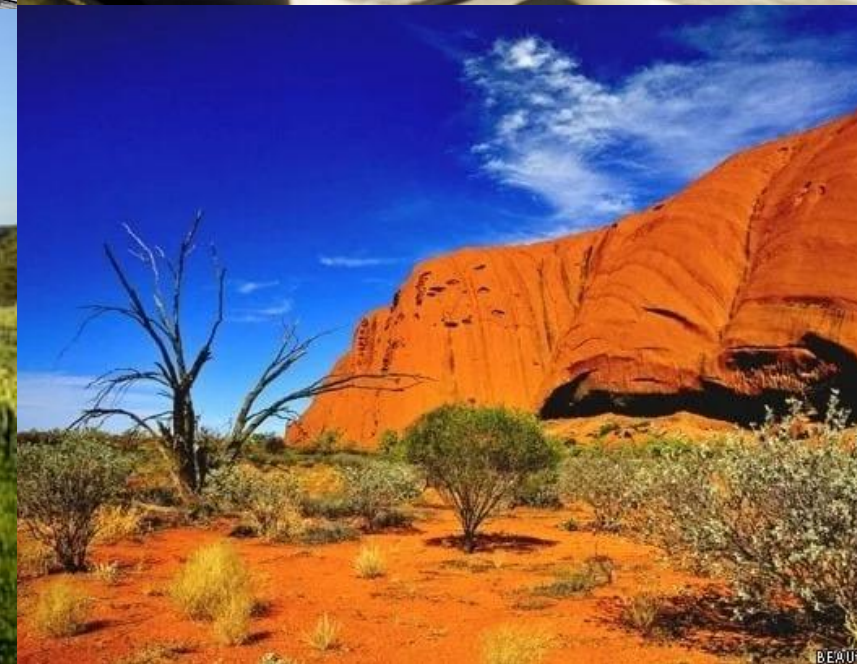
Community
Connection

Behind the
Scenes

Urban
Insider



Overland Experiences





Accessible Travel Solutions

Adelaide, South Australia

Accessible Adelaide: Barossa Valley, Wines & Scenic Views

Brisbane, Australia

Accessible Brisbane: Wild Wonders & Cultural Treasures

Cairns, Australia

Accessible Cairns: From Rainforest Heights to Ocean Depths

Darwin, Australia

Accessible Darwin: Crocodiles, History & Local Flavors

Hobart, Tasmania, Australia

Accessible Hobart: Kunanyi Heights & Heritage Delights

Melbourne, Australia

Accessible Melbourne: Sky-High & Immersive Art Adventure

Fremantle (Perth), Australia

Accessible Fremantle: Gold, Wines & Views

Sydney, Australia

Accessible Sydney: Harbor Views & Ocean Blues

What Works Well in Australia

World-Class Natural Wonders

Great Barrier Reef, Kimberley, Tasmania, unique wildlife — destinations that deliver genuine “wow” moments.

Iconic Cities

Sydney, Brisbane, Melbourne and other major ports provide reliable iconic arrival experiences, and strong pre/post-cruise appeal.

Safety & Hospitality

A fundamental advantage. Guests feel secure and are consistently met with genuine, high-quality hospitality.

Cultural Diversity

Rich opportunities for authentic cultural engagement when delivered with respect and excellence.

Opportunities For Working Together

Partnership is the key to our mutual success

Ports work together with cruise lines to get advice and input on any port improvements.

Port Infrastructure & Reliability

Especially at regional and tender ports — capacity, consistency, and resilience directly affect guest experience and operational confidence.

Cost & Regulatory Clarity

Operating costs and regulatory complexity remain a consideration in deployment decisions relative to other regions. Ports should reach out well in advance of any tariff increases.

Marketing and Communication

Create destination awareness and demand through marketing and communication efforts.

Regional Dispersal

Stronger pre- and post-cruise land packages and inland tourism links increase overall economic impact and guest satisfaction.

Thank You

