



2022
STATE OF THE CRUISE
INDUSTRY OUTLOOK



**MESSAGE FROM
PRESIDENT AND CEO**

**KELLY
CRAIGHEAD**

Leadership. Opportunity. Community.

These are the three words that come to mind as I think about the cruise industry in 2022. I see an industry that has navigated uncharted waters to overcome insurmountable challenges. I see an industry whose value reaches millions of people, creating opportunities for growth and enrichment. I see a future that is brighter than ever, driven by an insatiable spirit of partnership, collaboration and innovation.

More than any year in the history of the State of the Cruise Industry Report, the 2022 report embodies the cruise industry's forward resolve. Our members are looking ahead, leading the way in responsible tourism and maritime practices, investing in new ships, and pursuing the goal of net carbon neutral cruising by 2050.

Beyond the facts and figures lies a story about an industry that is best described as a community. From the passengers and crewmembers, to ports and destinations, travel agents, suppliers, shop owners, and the millions of others. Together, we are setting the course to drive positive, sustainable change for the communities we serve. I look forward to seeing this story continue to unfold in the months and years ahead.

Together in cruise,

Kelly Craighead

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PANDEMIC IMPACT AND RECOVERY



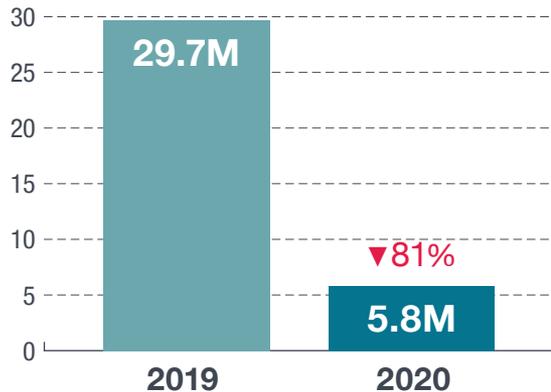
PANDEMIC IMPACT AND RECOVERY

Pandemic Reveals Significance of Cruise Economic Impact

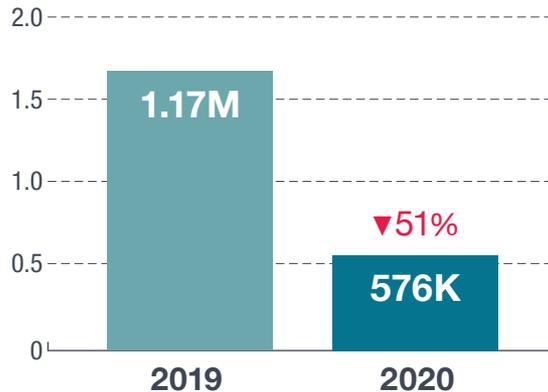
Given the importance of cruise tourism to economies around the world, the impact of the suspension of cruising in 2020 had far-reaching effects across the cruise community, which includes ports, destinations, service providers, tour operators, travel agents, and hundreds of thousands of small and medium-sized businesses.



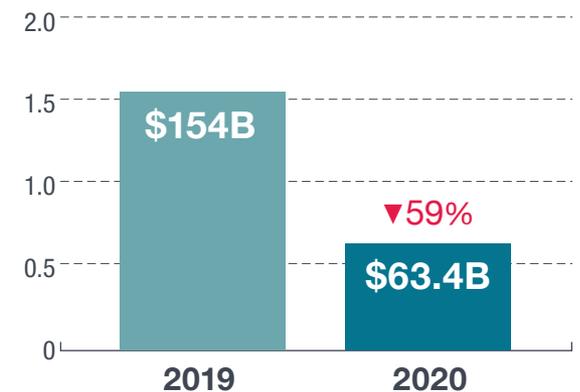
Passenger Embarkations
(millions)



Cruise-Supported Jobs
(millions)



Total Economic Contribution
(billions of USD)



Source: The Global Economic Contribution of Cruise Tourism in 2020, BRE

PANDEMIC IMPACT AND RECOVERY

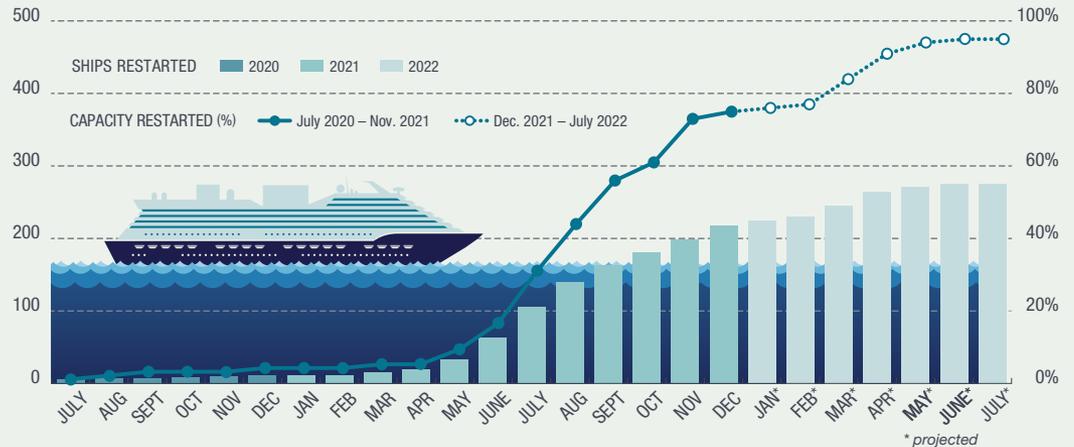
Responsible Resumption of Cruise Is a Model for Others

With science-backed protocols that are leading the way across the entire travel and tourism sector, the responsible return of cruise tourism has been underpinned by collaboration with governments and public health experts, as well as the unshakable love of cruising amongst those who have cruised before.

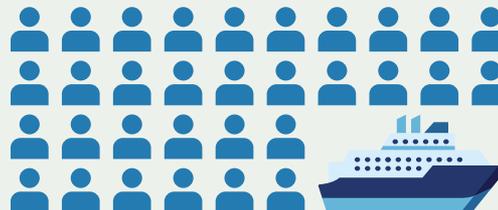
Nearly **80%** of travelers who have cruised before say they will cruise again — **the same percentage as before the pandemic.**

Since restart began in July 2020

Nearly **100%** of CLIA ocean-going capacity projected to be **in operation by end of July 2022**



Over **5 MILLION PASSENGERS** have sailed



86 COUNTRIES/MARKETS reopened



Source: CLIA SPI Survey, November 2021

PANDEMIC IMPACT AND RECOVERY

2022 is a Pivotal Transition Year for the Cruise Industry, with Full Recovery Projected in 2023

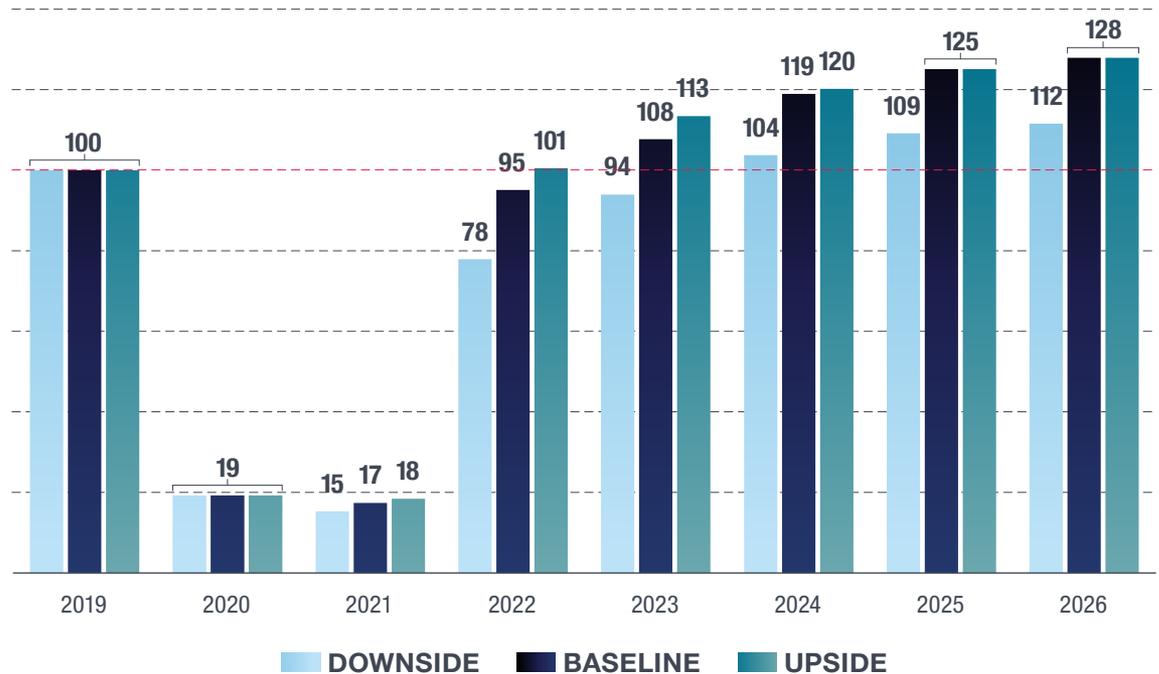
A Resilient Industry

The cruise industry has proven its resilience throughout its more than 50-year history—as is evident in the responsible return to operations that began in July 2020.

In the baseline forecast, passenger volume is expected to recover and surpass 2019 levels by the end of 2023. In the upside forecast, passenger volume is expected to recover to 101% of 2019 levels a year earlier, by the end of 2022. In all three scenarios, passenger volume is projected to recover in excess of 12% above 2019 levels by the end of 2026.

Projected global cruise passenger volume

Index (2019=100)



Numbers represent an index of volume relative to 2019 (2019=100).

Source: CLIA; Tourism Economics

PANDEMIC IMPACT AND RECOVERY

Restart of Cruise Tourism Is Driving Economic Recovery

Furloughs and lay-offs were common within the wider cruise community as a result of the pandemic, affecting real people and families around the world. Fortunately, the responsible resumption of cruise tourism is putting people back to work and reinvigorating local and national economies.

About **70%** of cruise-related businesses and organizations reported layoffs and furloughs as a result of the pandemic.

Approximately **60%** of cruise-related businesses and organizations are hiring.



MANDY GODDARD, CLIA ELITE CRUISE COUNSELOR

CRUISE BY MANDY LLC

“With the new, science backed safety protocols implemented, the cruise industry continues to excel in being a global leader by providing one of the safest forms of vacation. As a cruise advisor, I feel confident stepping onboard myself and I am also at ease sending my clients, parents, children, and others. Not only is my business back, but so is the mental and emotional health of all who are rejuvenated by smelling that fresh sea breeze while gazing across the waters - OUR waters!”



DANNY GENUNG, CEO / CLIA MASTER CRUISE COUNSELOR

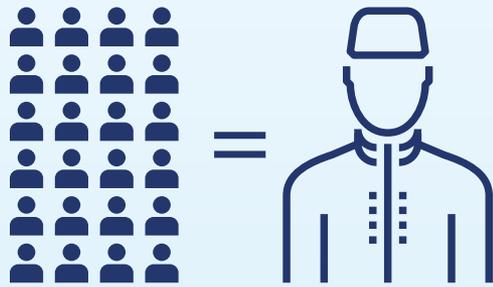
HARR TRAVEL, INC.

“I love cruising and we are so grateful for the incredible investments made by the cruise industry to bring back the industry using scientifically backed protocols to make the cruise experience once again the best way to travel the world, meet new people and create memories that last a lifetime.”



PANDEMIC IMPACT AND RECOVERY

Cruise Tourists Add Value Before, During, and After Sailing



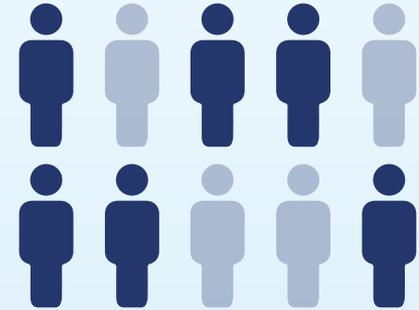
**Every 24
cruisers**
worldwide supports
one full-time
equivalent job

Source: The Global Economic Contribution of Cruise Tourism
in 2019, BREA



Cruisers spend
an average of
\$750 USD
per passenger in
port cities over the
course of a typical
seven-day cruise

Source: The Global Economic Contribution of Cruise Tourism
in 2019, BREA



6 in 10 people
who have taken a
cruise say that they
have returned to a
destination that they
first visited via
cruise ship

Source: CLIA SPI Survey, November 2021



LAURA MCDONNELL, SHOP OWNER

JUNEAU, ALASKA

“Cruise tourism is a sustainable piece of our economy that has longevity for generations like mine. Seeing that first ship back in Juneau after a whole year without any cruises felt like such a step forward and I just thought, wow, maybe we’re going to be okay.”



ALEX FRAILE, TOUR GUIDE

PALMA DE MALLORCA, SPAIN

“Cruise tourists are the tourists every destination wants to have; a tourist who is aware and sensitive to the environmental and cultural traditions. They breathe life to the island and support thousands of jobs.”

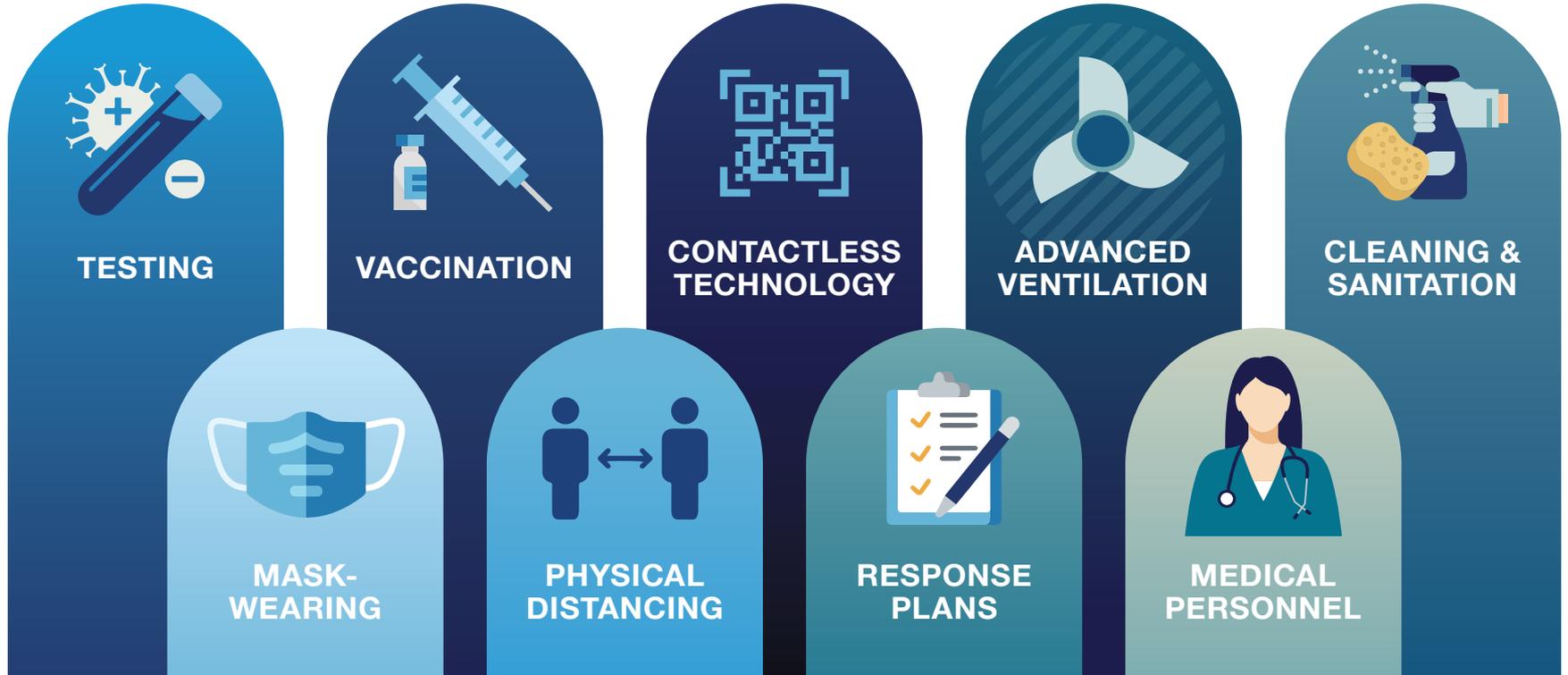


SPOTLIGHT ON RESPONSIBLE CRUISE TOURISM

SPOTLIGHT ON RESPONSIBLE CRUISE TOURISM

Leading the Way with Proven Public Health Protocols

Cruise line protocols represent some of the strongest actions taken by any industry to address and mitigate Covid-19, and cruise ships operating today offer one of the most highly-vaccinated, tightly controlled environments for travelers to experience the world. Even as the pandemic has persisted, cruise industry protocols continue to prove effective to mitigate the risk of COVID-19 and to virtually eliminate severe outcomes.



SPOTLIGHT ON RESPONSIBLE CRUISE TOURISM

On the Front Lines in Pursuit of Net Carbon Neutral Cruising by 2050

As the cruise industry pursues the ambition of net carbon neutrality by 2050, CLIA members are pursuing innovative solutions which are already having a significant impact.



Advanced recycling protocols



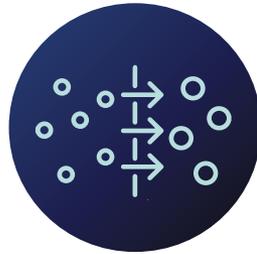
Waste to energy initiatives



Energy efficient ship design



Supply chain sustainability programs



Reverse osmosis water filtration systems



Pursuit of alternative fuels



SPOTLIGHT ON RESPONSIBLE CRUISE TOURISM

Driving Innovation and Transformation Across the Maritime Sector

Over the next five years, the CLIA ocean-going cruise line member fleet will undergo immense transformation as part of the industry's pursuit of a more efficient future.

BY 2027, THE CLIA MEMBER FLEET WILL INCLUDE



26

LNG-powered
cruise ships

16%

of global capacity



231

cruise ships fitted with
Advanced Wastewater
Treatment Systems

81%

of global capacity



174

cruise ships with
shoreside power
connectivity

66%

of global capacity



176

cruise ships with
Exhaust Gas Cleaning
Systems installed

81%

of global capacity
not powered by LNG

Projections do not account for retirement of vessels; vessels without these technologies, and/or unable to be retrofitted with these technologies, are more likely to be retired first

SPOTLIGHT ON RESPONSIBLE CRUISE TOURISM

Building Trust, Respect, and Partnership with Destinations and Communities

CLIA members continue to collaborate with local communities to balance the needs of destinations and maintain the visitor experience.

Transparency of reporting, robust protocols, and trust built through dialogue between the cruise industry with ports and destinations is at the heart of the responsible resumption of cruise tourism around the world.

The Memorandum of Understanding between CLIA and the city leadership in Dubrovnik remains in effect and the cruise industry is working closely with local officials in the historic city to implement innovative solutions to help manage tourism flows.

As part of the agreement, CLIA funded a destination sustainability assessment by the Global Sustainable Tourism Council (GSTC), which served as a springboard for the city to develop an action plan for sustainability “Respect the City”.

The cruise industry is further partnering with city leaders to address local challenges in destinations around the world, including in the Greek destinations of Corfu and Heraklion, and the city of Palma in the Balearic Islands.



MAYOR MATO FRANKOVIĆ

DUBROVNIK, CROATIA

“The partnership between the cruise industry and Dubrovnik helps us to ensure this great city remains a special place for residents to live and for the world to visit.”



ROBERT COURTS MP

UNITED KINGDOM MARITIME MINISTER

“Building state-of-the-art green infrastructure at cruise terminals, such as shore side electricity capability, is exactly the kind of investment that we all want to see more of.”



2022 FLEET



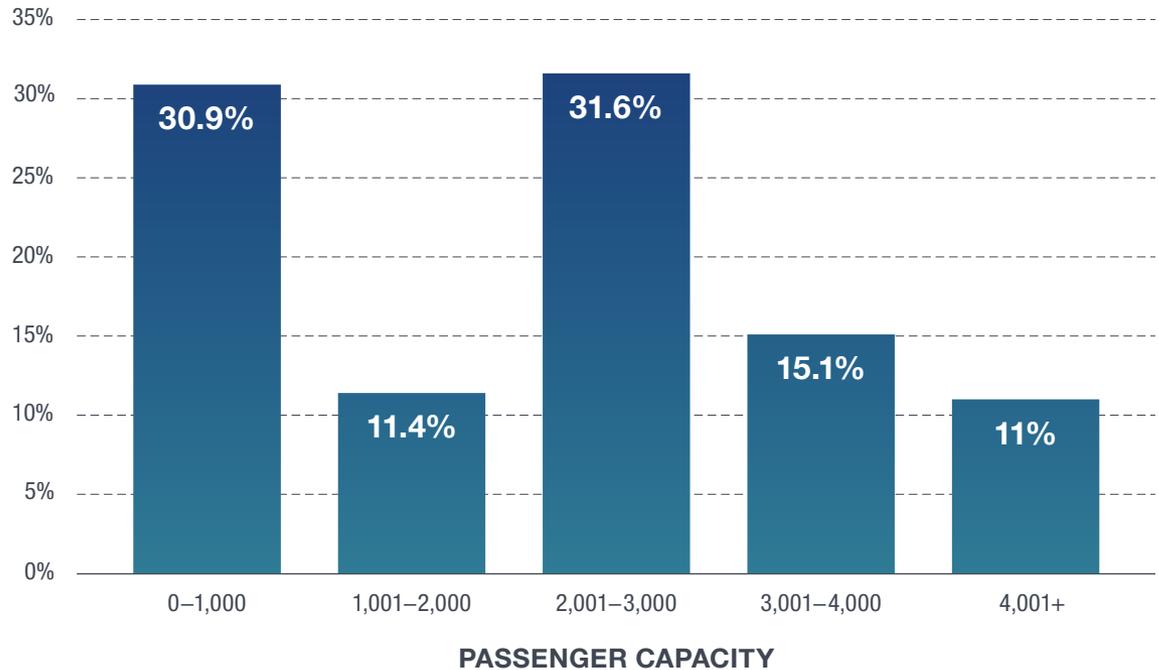
2022 FLEET

2022 CLIA Ocean-Going Member Fleet

272 ships projected
in operation in 2022

2,126 average
passenger capacity

2022 Projected Member Fleet (% of ships)



2022 FLEET

One of the Cleanest and Most Sophisticated Classes of New Cruise Ships Ever

16 CLIA ocean-going member ships are expected to debut in 2022

SWAN HELLENIC	<i>Vega</i>
SWAN HELLENIC	<i>Unnamed</i>
MYSTIC/ATLAS	<i>World Traveller</i>
MYSTIC/ATLAS	<i>World Seeker</i>
SEABOURN	<i>Venture</i>
DISNEY	<i>Disney Wish</i>
VIRGIN VOYAGES	<i>Resilient Lady</i>
CUNARD LINE	<i>Unnamed</i>
NORWEGIAN	<i>Norwegian Prima</i>
CELEBRITY	<i>Celebrity Beyond</i>
CARNIVAL	<i>Carnival Celebration</i>
P&O CRUISES	<i>Arvia</i>
AIDA CRUISES	<i>AIDAcosma</i>
MSC CRUISES	<i>MSC World Europa</i>
MSC CRUISES	<i>MSC Seascape</i>
ROYAL CARIBBEAN	<i>Wonder of the Seas</i>

5

LNG-powered ships

\$617M

Average cost

9

Expedition ships

2,603

Average passenger capacity

100%

Equipped with Advanced Wastewater Treatment Systems



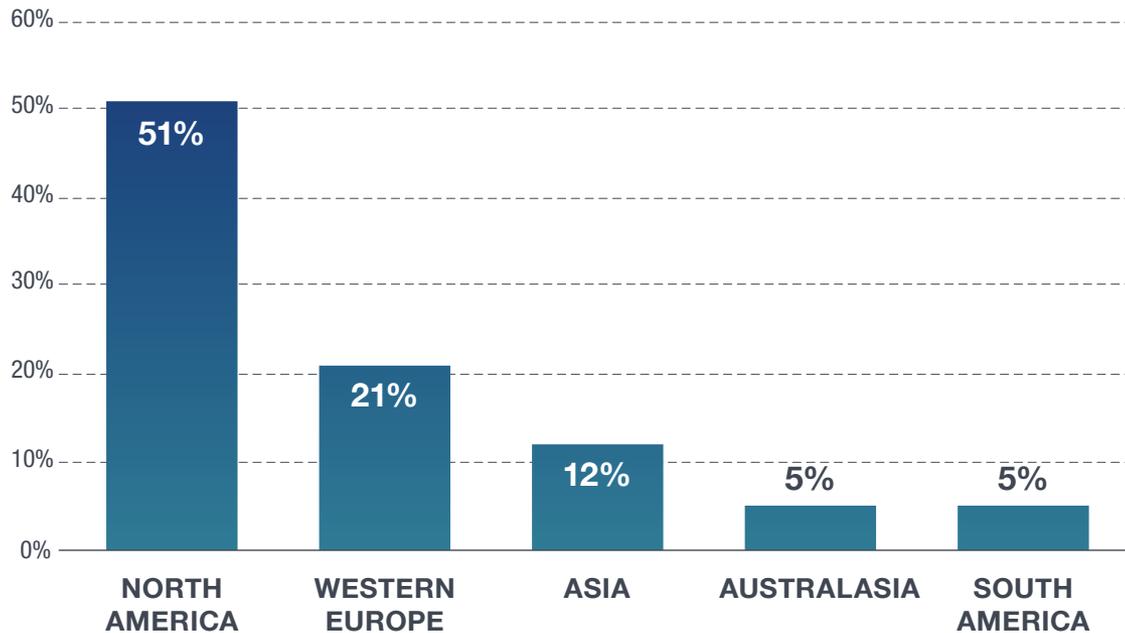
FACTS AND TRENDS



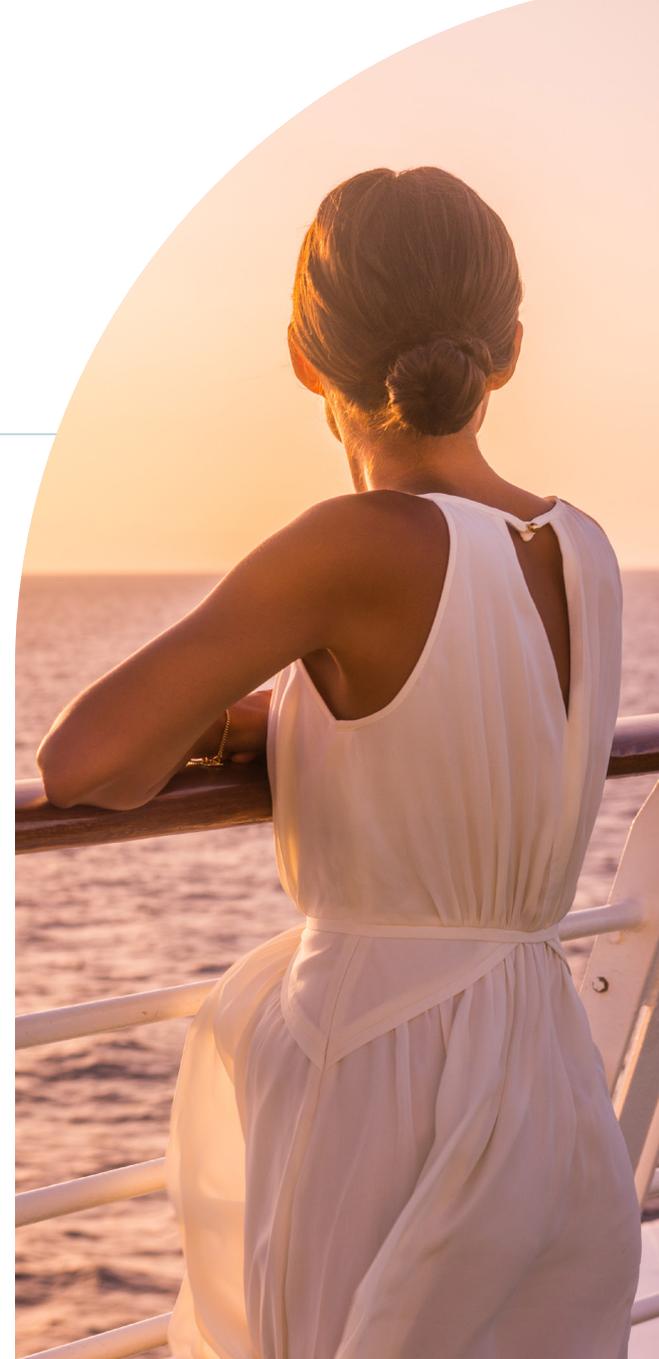
FACTS AND TRENDS

North America Remains Largest Source Market, with Other Markets Growing Rapidly

Top Five Source Regions on Average from 2018-2020



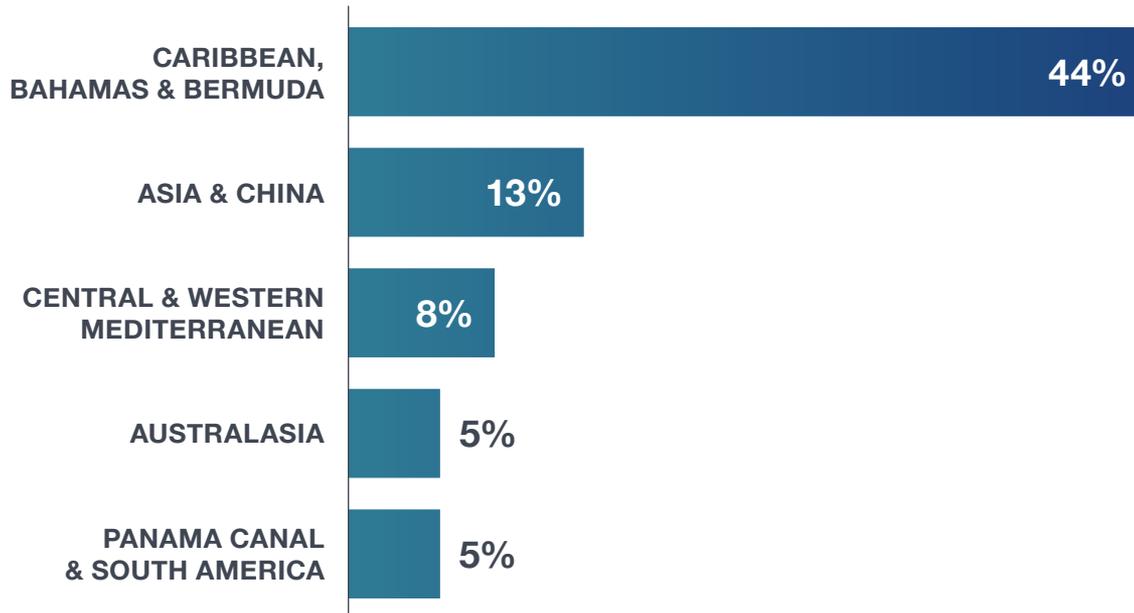
Source: CLIA Global Market Report, 2020



FACTS AND TRENDS

Caribbean Remains Top Cruise Destination

Top Five Destinations by Average Passenger Volume from 2018-2020



Source: CLIA Global Market Report, 2020



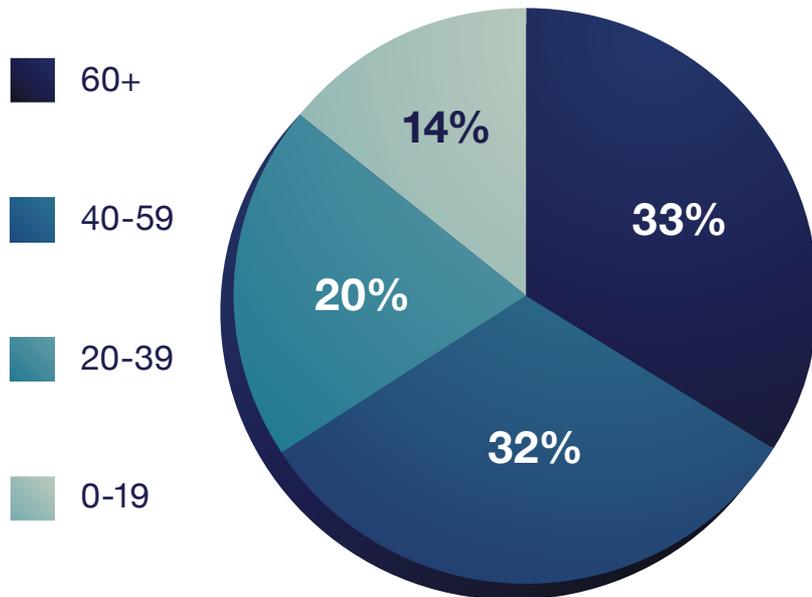
FACTS AND TRENDS

A Popular Vacation Choice at Every Age

47.6 Average age of cruise tourist

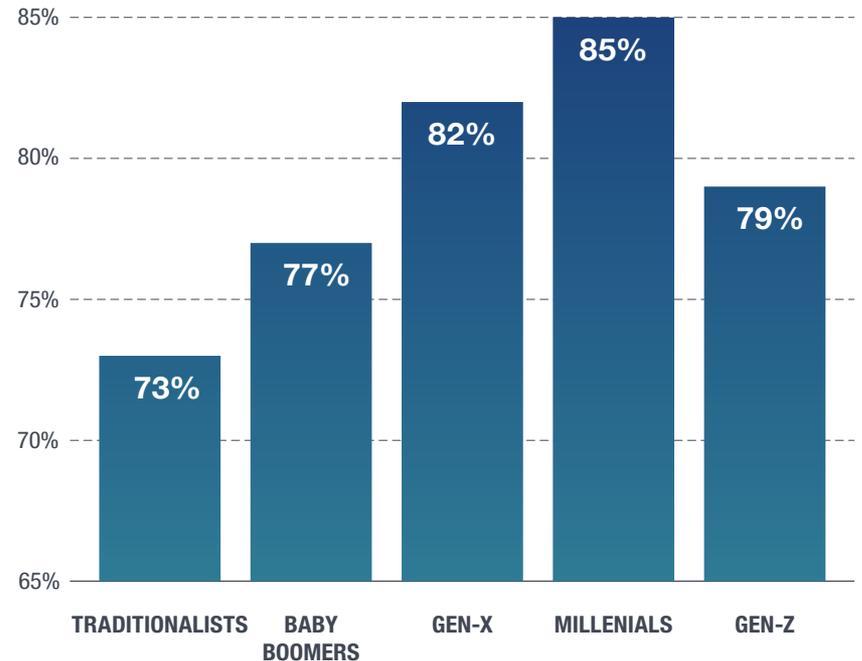
Millennials are the most enthusiastic cruisers of the future

Cruise Tourist Age Averages from 2018-2020



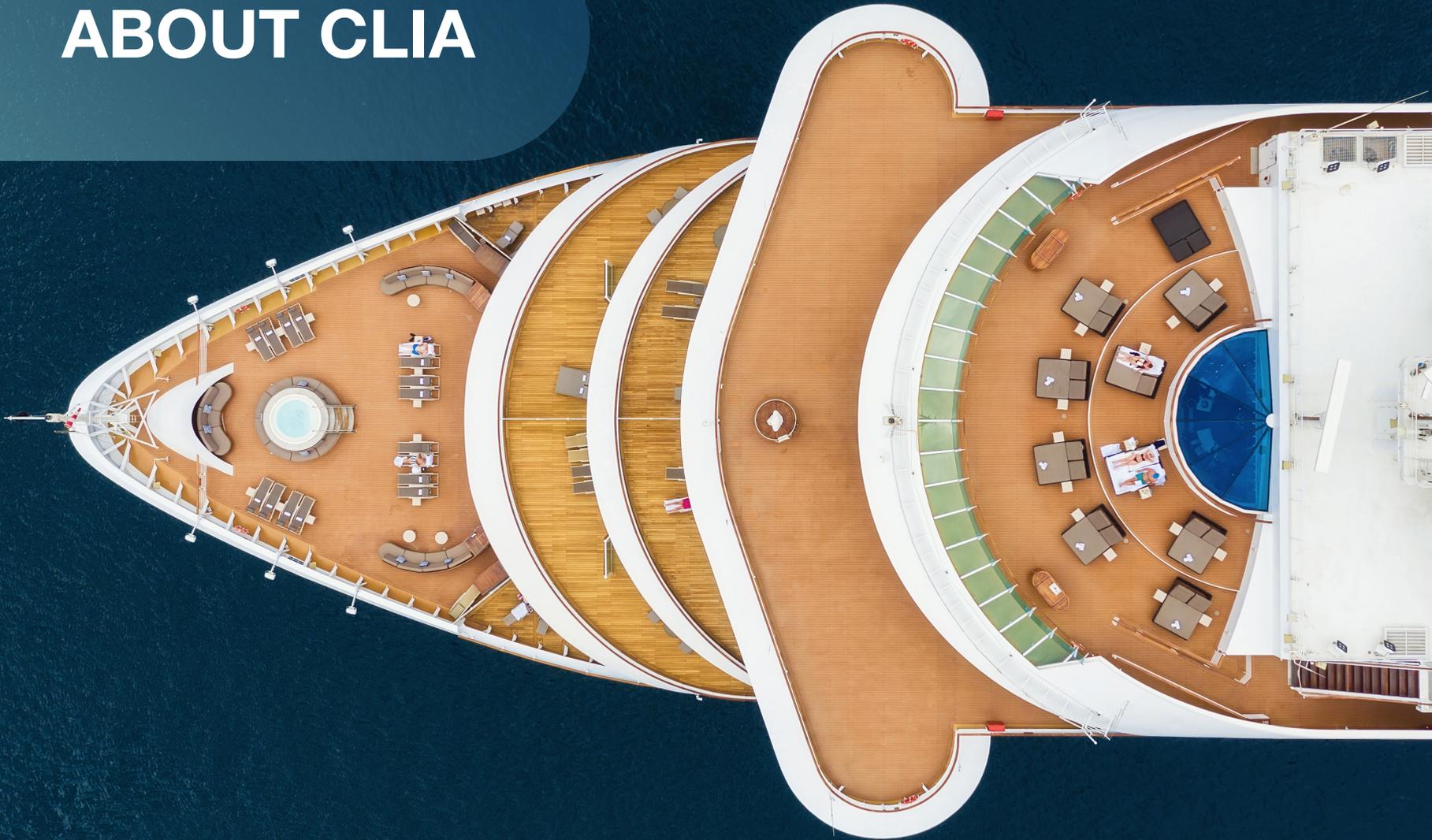
Source: CLIA Global Market Report, 2020

% of Cruise Passengers Who Plan to Cruise Again



Source: CLIA Global Market Report, 2020

ABOUT CLIA





CLIA is the world's largest cruise industry trade association, providing a unified voice and leading authority of the global cruise community.

On behalf of its members, affiliates and partners, the organization supports policies and practices that foster a secure, healthy, and sustainable cruise ship environment, promoting positive travel experiences for the nearly 30 million passengers who have cruised annually.

The CLIA community includes the world's most prestigious ocean, river, and specialty cruise lines; a highly trained and certified travel agent community; and a widespread network of stakeholders, including ports & destinations, ship development, suppliers, and business services. CLIA represents more than 90% of the world's ocean-going cruise capacity, as well as nearly 60,000 travel agents and agencies from around the world. The travel agent and agency members represent the largest network of travel professionals specializing in cruise travel.

The organization's global headquarters are in Washington, DC, with regional offices located in North and South America, Europe, and Australasia.



THANK YOU

For more information, please visit
cruising.org/research and follow us on social media.

