



# CLIA 2023 NORTH AMERICA MARKET REPORT



North American passengers in 2023 exceeded pre-pandemic levels and surpassed 2019 by nearly 2.7M cruisers, representing a 17.5% increase with 18.1M total passengers sailing from the region in 2023. This comprises 57.1% of all 2023 global cruisers.

Durations, on average, are just slightly lower than 2019 – 6.8 days in 2023 vs. 6.9 in 2019 – and have increased from 6.6 days in 2022. Average ages have also slightly decreased, down to 45.4 in 2023 from 45.7 in 2019.

The most popular destination continues to be, overwhelmingly, the Caribbean with 11.8M passengers visiting from North America, or 65% of all cruisers from the region. The second most popular destination for North American passengers is Alaska, with 1.5M passengers or 8.3% of the region's cruisers, followed by North America West Coast/Mexico/California with 1.4M.

A majority of North American passengers are from the United States – 16.9M passengers, up 18.8% from 2019. Consistent with prior years, within the United States,

Florida continued to be the largest source market with 2.9M passengers representing 17% of cruisers from the United States. Second and third largest US source markets were Texas and California; all three states have surpassed Q1-2019 levels. Canada has nearly reached 2019's passenger count and is just 0.5% down from 2019's 1.05M passengers. Mexico has surpassed pre-pandemic levels with 191K passengers in 2023, up 14% from 2019.

Passengers from Mexico are also the youngest on average at 41; Canada's average age is 51, and US passengers fall in the middle at an average age of 46. More than half of North American cruisers are under 40 years old, at 54%.

US passengers had the lowest average duration at 6.6 days; durations from Mexico were higher at 7.4 days and Canada was higher still with 8.7 average days. 80% of North American cruisers took a cruise of 7 days or less.

## Regional Overview: North America , 2019 - 2023 Annual Report (2020 omitted)

### Passenger Volume (K)

2019	2021	2022	2023
15,408	2,218 (-85.6%)	12,592 (467.6%)	18,103 (43.8%)

### Average Duration, in Days

2019	2021	2022	2023
6.9	6.4	6.6	6.8

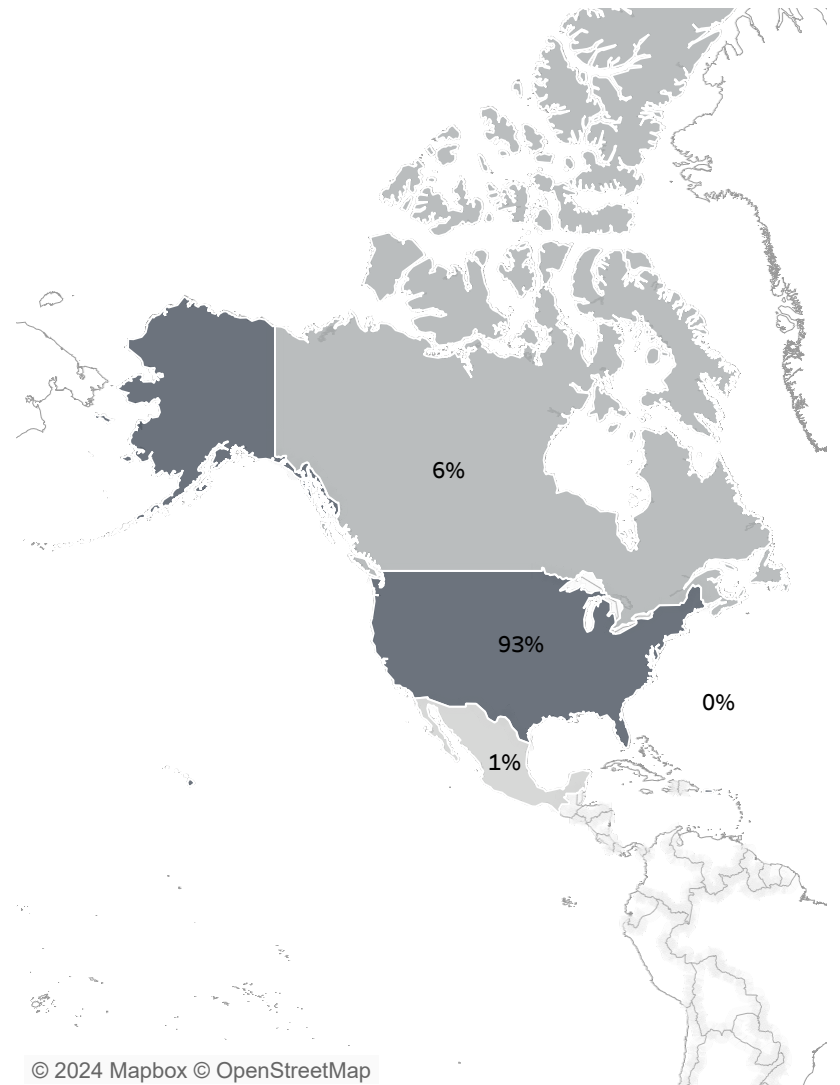
### Average Age

2019	2021	2022	2023
45.7	49.1	46.0	45.4

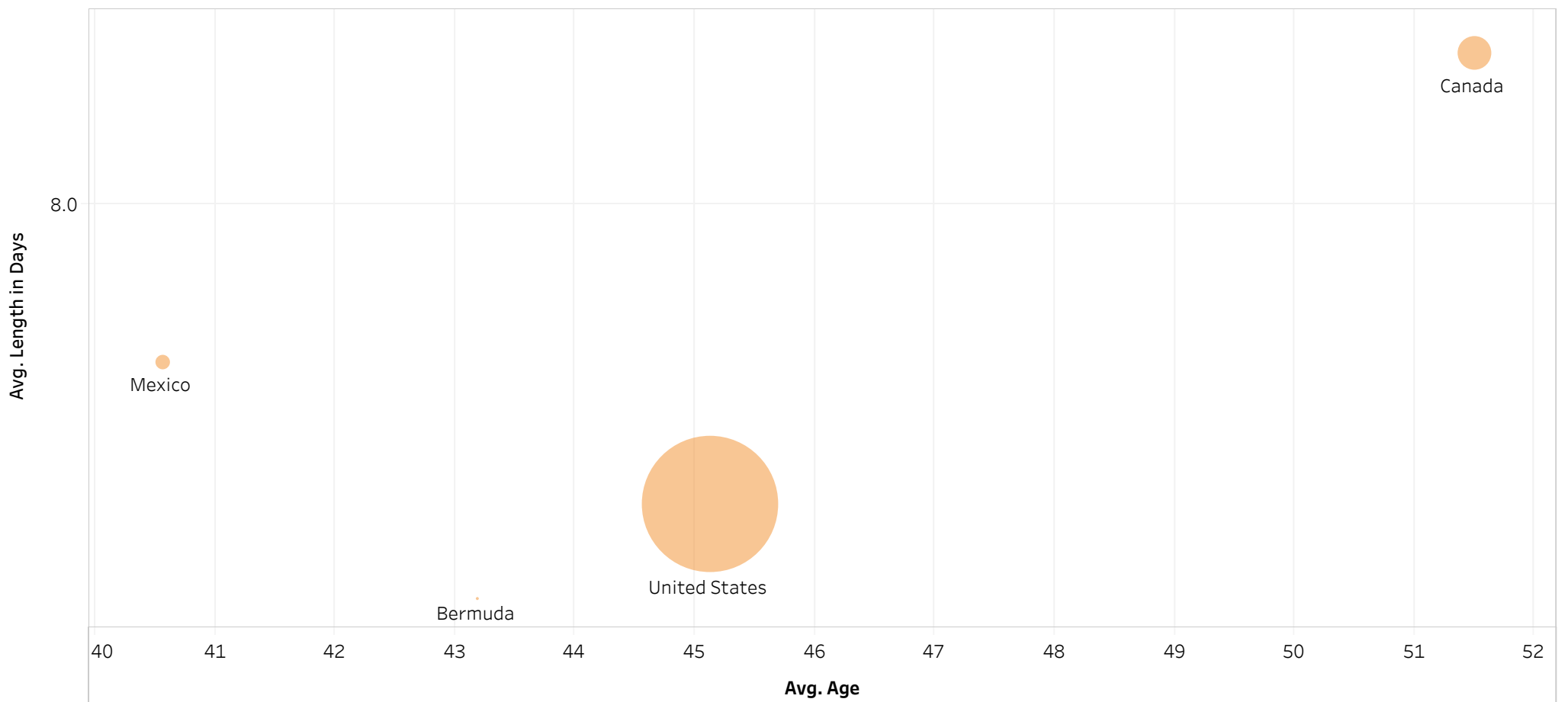
### Passenger Volume (K) for Top Countries

	2019	2021	2022	2023
United States	14,199	2,171 (-84.7%)	11,890 (447.6%)	16,875 (41.9%)
Canada	1,037	33 (-96.8%)	567 (1599.3%)	1,031 (81.6%)
Mexico	167	14 (-91.9%)	133 (880.5%)	191 (43.5%)
Bermuda	5	(-100.0%)		7

### Share of Source Passengers, Geographic Projection

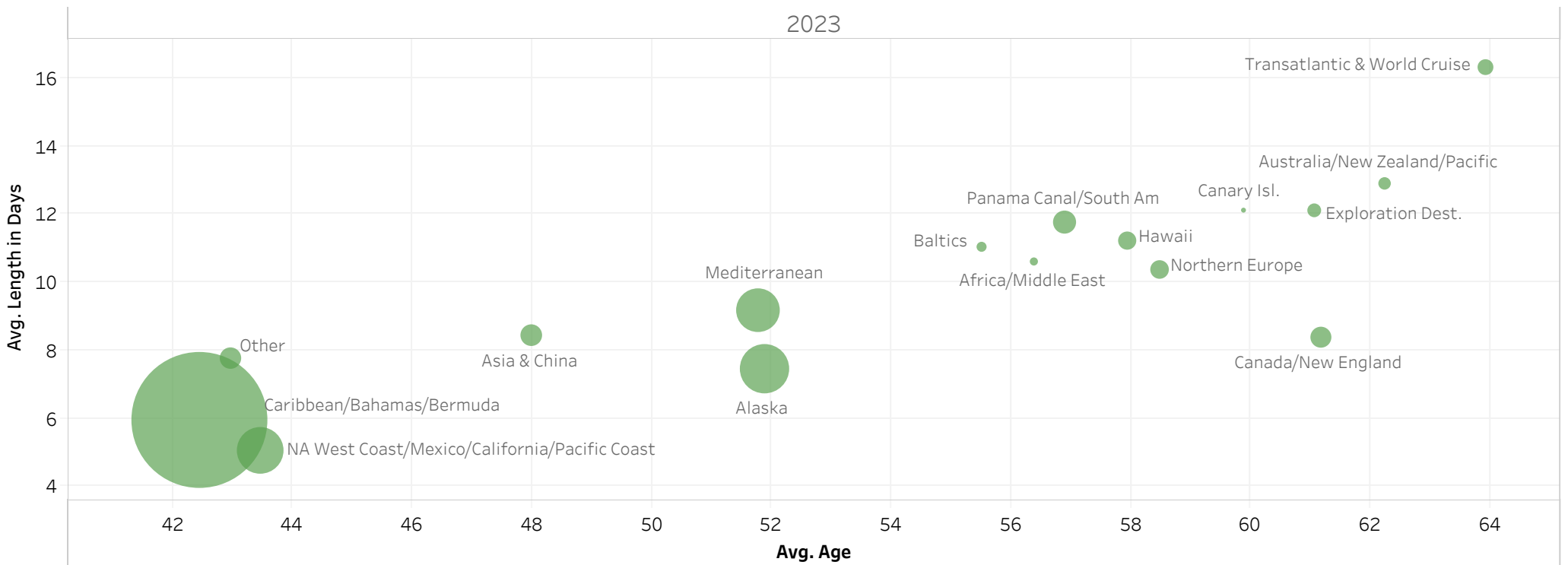


### Average Age and Cruise Length for Top Source Markets, 2023

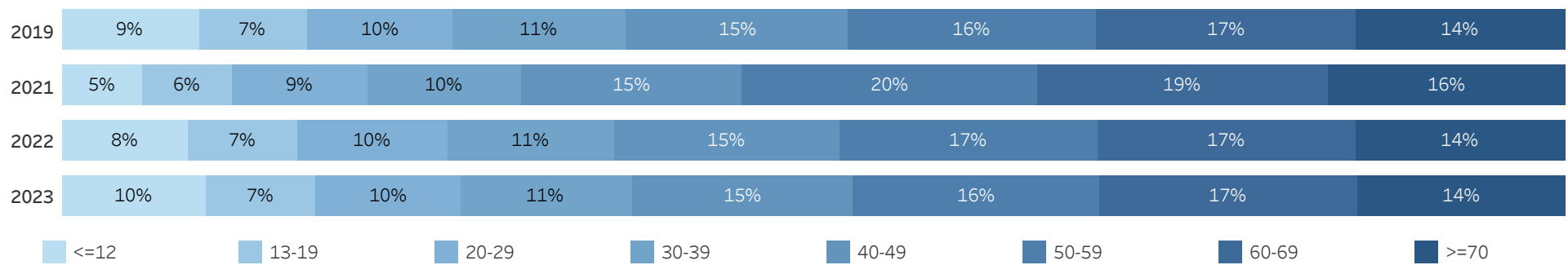


## Regional Overview: North America (Continued)

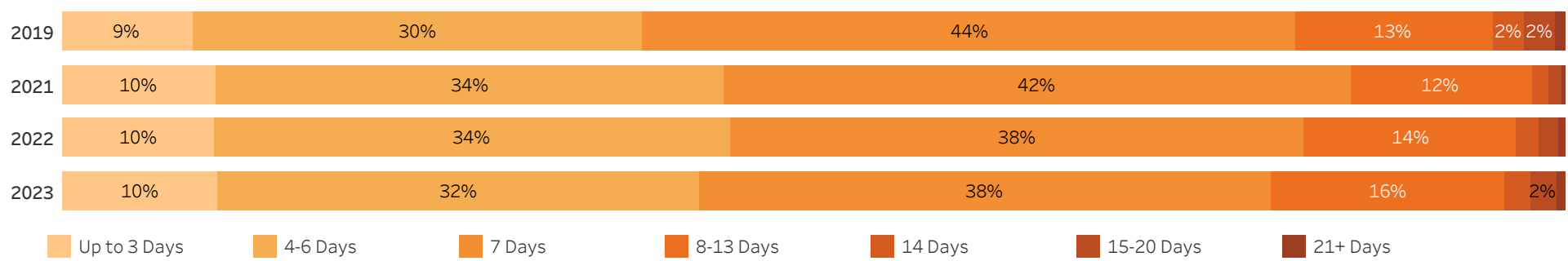
### Average Age and Cruise Length by Destination / Trade Route, 2023



### Average Passenger Age Groups

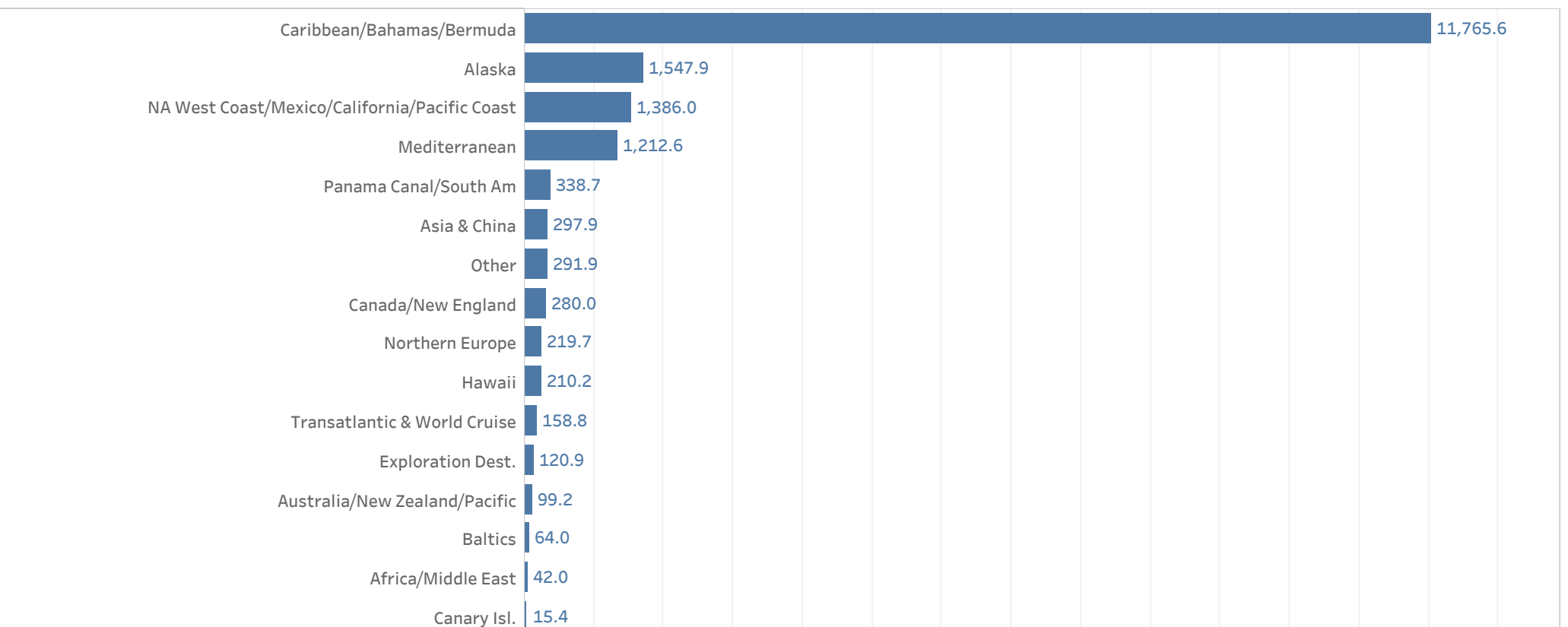


### Average Cruise Duration



### Volume of Passengers (in K) to Destinations, 2023

At least 4K Passengers per Destination

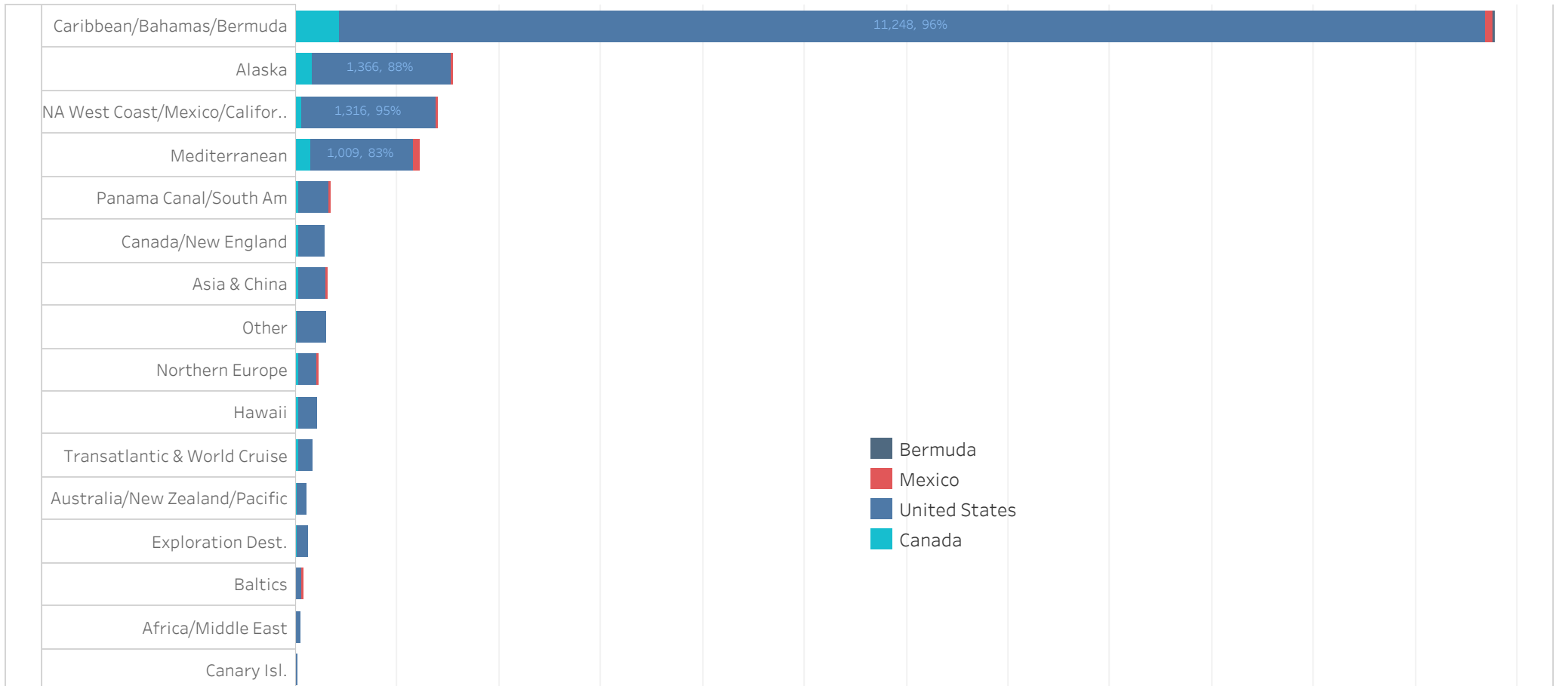


## Regional Overview: North America (Continued)

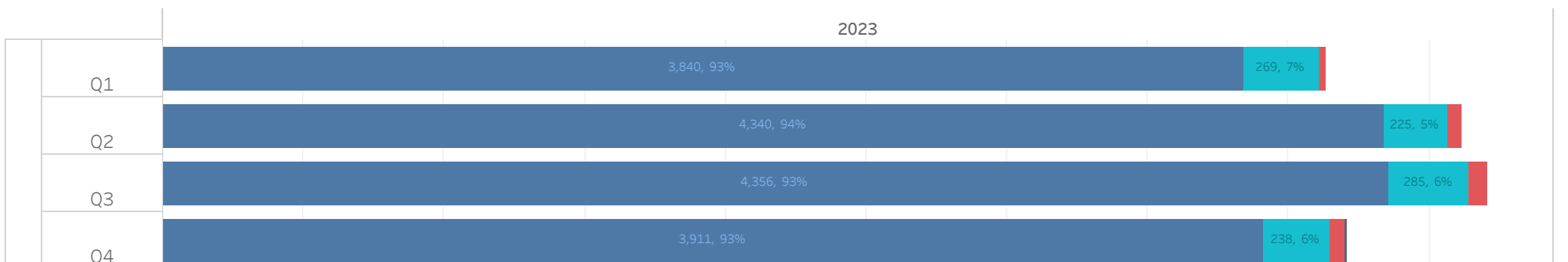
### Passenger Volume by Trade (K)

	2019	2021	2022	2023
Caribbean/Bahamas/Bermuda	10,537	1,646 (-84% ▼)	8,376 (409% ▲)	11,766 (40% ▲)
Alaska	1,088	119 (-89% ▼)	1,107 (829% ▲)	1,548 (40% ▲)
NA West Coast/Mexico/California/Pacific Coast	1,126	209 (-81% ▼)	1,116 (433% ▲)	1,386 (24% ▲)
Mediterranean	828	79 (-90% ▼)	654 (724% ▲)	1,213 (85% ▲)
Panama Canal/South Am	269	25 (-91% ▼)	190 (660% ▲)	339 (78% ▲)
Asia & China	188	30 (-84% ▼)	173 (478% ▲)	298 (73% ▲)
Other	107	48 (-55% ▼)	222 (359% ▲)	292 (31% ▲)
Canada/New England	251	(-100% ▼)	220	280 (27% ▲)
Northern Europe	204	4 (-98% ▼)	126 (2815% ▲)	220 (74% ▲)
Hawaii	209	(-100% ▼)	126	210 (67% ▲)
Transatlantic & World Cruise	119	10 (-91% ▼)	93 (817% ▲)	159 (71% ▲)
Exploration Dest.	46	20 (-57% ▼)	62 (211% ▲)	121 (95% ▲)
Australia/New Zealand/Pacific	141	4 (-97% ▼)	50 (1124% ▲)	99 (97% ▲)
Baltics	127	(-100% ▼)	49	64 (29% ▲)
Africa/Middle East	27	(-100% ▼)	17	42 (145% ▲)
Canary Isl.	15	(-100% ▼)	10	15 (58% ▲)

### Passenger Volume (K) by Trade & Top Source Countries in 2023



### Passenger Volume (K) by Quarter & Top Source Countries



## Regional Overview: North America (Continued)

### % Passenger by Top 10 States - US

Guest State	Sail Year			
	2019	2021	2022	2023
FL	16.36%	23.23%	19.86%	17.10%
TX	9.24%	12.83%	10.28%	9.81%
CA	10.02%	9.71%	10.27%	9.36%
No State Provided	3.88%	2.64%	3.03%	6.02%
NY	5.32%	3.22%	4.26%	4.36%
GA	4.24%	3.62%	4.18%	4.14%
NC	3.23%	2.68%	3.15%	3.31%
PA	2.80%	2.25%	2.54%	2.54%
OH	2.61%	2.25%	2.34%	2.50%
NJ	2.80%	1.98%	2.51%	2.45%
VA	2.35%	2.12%	2.43%	2.36%

### % Passenger by Top 5 Provinces - Canada

Guest State	Sail Year			
	2019	2021	2022	2023
ON	44.53%	47.18%	43.66%	41.71%
BC	21.35%	15.66%	22.78%	20.90%
QC	14.60%	15.28%	14.01%	14.34%
AB	7.88%	10.57%	8.71%	8.25%
No State Provided	4.23%	4.04%	3.49%	7.08%
NS	1.64%	1.38%	1.75%	1.75%

## About CLIA

Cruise Lines International Association (CLIA) is the preeminent cruise association providing a unified voice for the industry as the leading authority of the global cruise community. The association has representation in North and South America, Europe, Asia, and Australasia. CLIA represents member lines which comprise 95% of global cruise passenger capacity, including the world's most prestigious ocean, river, and specialty cruise lines, as well as business services providers and the largest network of travel professionals who specialize in cruise travel.



Data collection of non-CLIA Passengers by:

