



2021 Global Market Report



The cruise industry has proven its resilience throughout its more than 50-year history—as is evident in the industry’s responsible return to operations beginning in July 2020 in Europe. Since then, more than 10 million people have cruised, and intent to cruise is higher than it was prior to the global health crisis.

The combination of robust health and safety protocols implemented by cruise lines, along with the passion of cruise travelers, has created tremendous momentum for a successful restart in about 100 markets worldwide. Importantly, the cruise industry is supporting both an economic and societal recovery as more and more people are able to reconnect with family and friends during a cruise holiday.

With cruise well on its way to full resumption in 2022, our cruise line members are building on an ambitious environmental agenda, which cruise lines initiated well before the global health crisis and continued during the pandemic, for the long-term sustainability of the industry. CLIA cruise line members are committed to sailing toward a better future, and as part of that effort are pursuing the goal of net zero cruising by 2050.

Global Report: 2019 to 2021

Passenger Volume (K)

2019	2020	2021
29,673	5,769 (-80.6% ▼)	4,753 (-17.6% ▼)

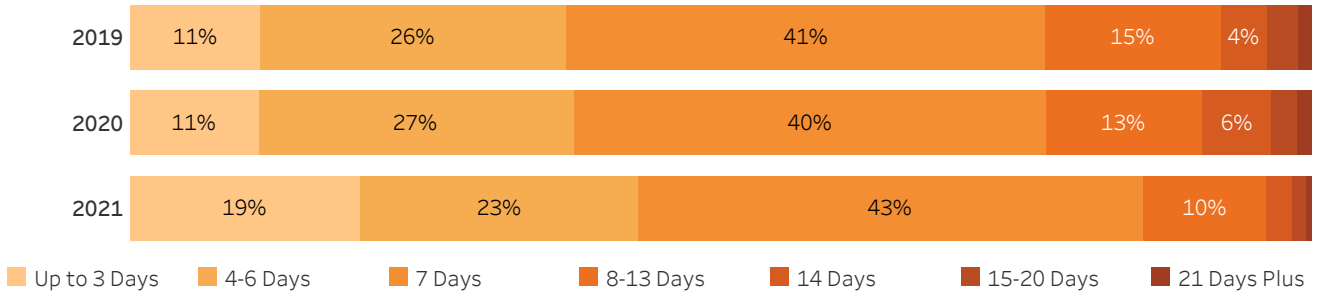
Average Duration, in Days

2019	2020	2021
7.1	7.2	6.6

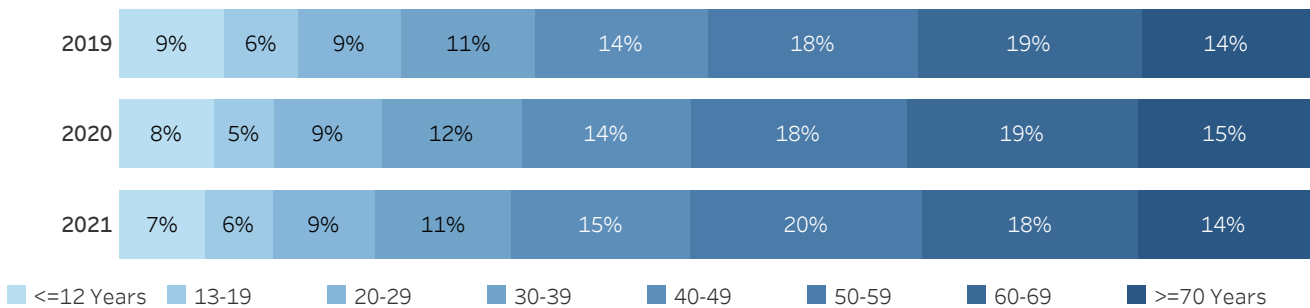
Average Age

2019	2020	2021
46.8	47.6	47.7

Average Cruise Duration



Average Passenger Age Groups



Passenger Volume (K) by Source Passenger Regions

	2019	2020	2021
North America	15,408	3,008 (-80.5% ▼)	2,215 (-26.4% ▼)
Western Europe	7,226	1,223 (-83.1% ▼)	1,671 (36.6% ▲)
Asia	3,738	497 (-86.7% ▼)	626 (26.0% ▲)
South America	935	458 (-51.0% ▼)	89 (-80.7% ▼)
Scandinavia/Iceland	218	52 (-76.2% ▼)	45 (-12.7% ▼)
Eastern Europe	263	72 (-72.6% ▼)	32 (-55.1% ▼)
Middle East/Arabia	108	8 (-92.3% ▼)	22 (168.1% ▲)
Caribbean	57	7 (-87.7% ▼)	7 (-1.7% ▼)
Australia/NZ/Pacific	1,351	340 (-74.8% ▼)	7 (-98.1% ▼)
Central America	49	14 (-71.3% ▼)	(-100.0% ▼)
Africa	169	68 (-59.6% ▼)	(-100.0% ▼)

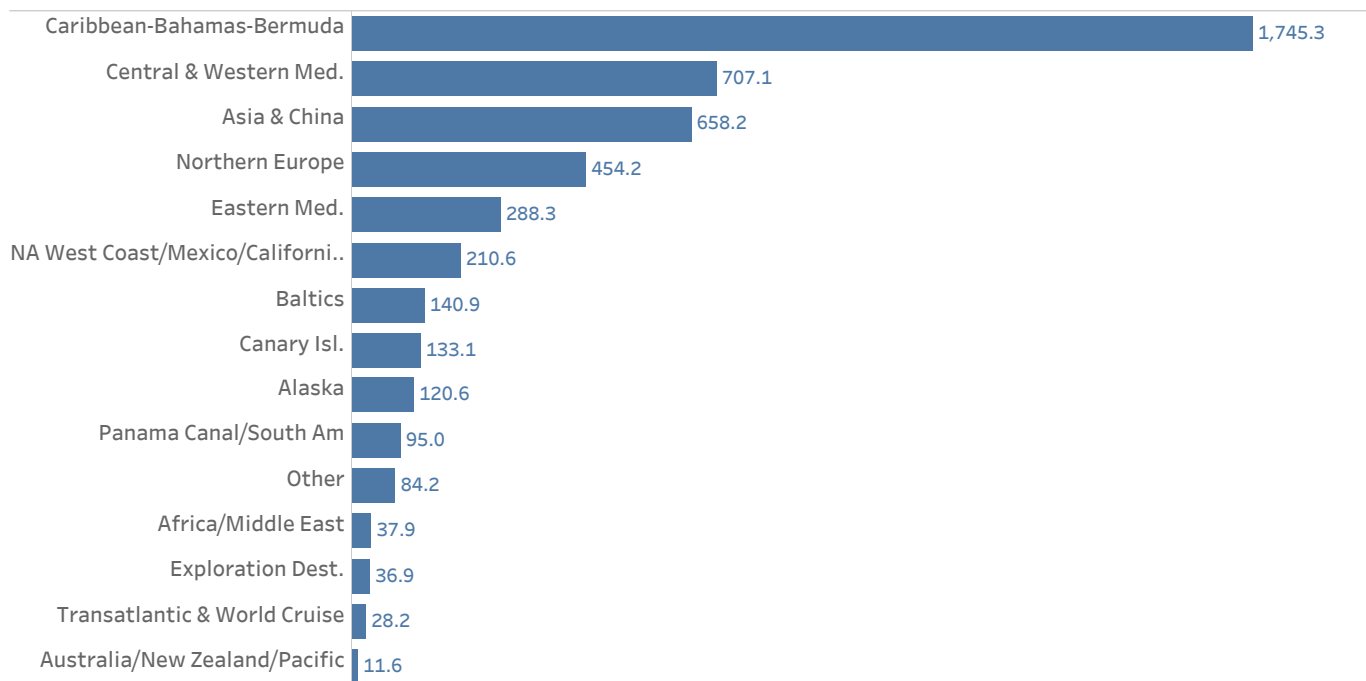
Global Report (Continued)

Passenger Volume (K) for Top Countries

	2019	2020	2021
United States	14,199	2,732 (-80.8% ▼)	2,168 (-20.7% ▼)
Germany	2,587	531 (-79.5% ▼)	576 (8.4% ▲)
UK & Ireland	1,992	259 (-87.0% ▼)	479 (84.5% ▲)
Singapore	325	72 (-78.0% ▼)	360 (403.1% ▲)
Italy	950	151 (-84.1% ▼)	340 (124.6% ▲)
India	313	46 (-85.4% ▼)	123 (168.0% ▲)
France	545	146 (-73.2% ▼)	116 (-20.7% ▼)
Hong Kong	191	36 (-81.2% ▼)	77 (113.2% ▲)
Spain	553	45 (-91.9% ▼)	74 (65.4% ▲)
Brazil	567	331 (-41.7% ▼)	72 (-78.3% ▼)
Norway	98	20 (-79.3% ▼)	35 (71.2% ▲)
Canada	1,037	257 (-75.2% ▼)	33 (-87.0% ▼)
Malaysia	121	13 (-88.9% ▼)	25 (83.1% ▲)
Taiwan Region	389	83 (-78.8% ▼)	23 (-71.9% ▼)
Switzerland	140	23 (-83.8% ▼)	20 (-11.5% ▼)
Austria	136	25 (-81.9% ▼)	15 (-40.2% ▼)
Mexico	167	18 (-89.2% ▼)	14 (-24.9% ▼)
Netherlands	123	18 (-85.6% ▼)	13 (-26.1% ▼)
Japan	296	19 (-93.7% ▼)	12 (-37.8% ▼)
Mainland China	1,919	205 (-89.3% ▼)	6 (-97.1% ▼)
Australia	1,241	312 (-74.9% ▼)	5 (-98.5% ▼)
South Africa	158	67 (-57.4% ▼)	(-100.0% ▼)
New Zealand	106	24 (-77.6% ▼)	(-100.0% ▼)
Argentina	151	76 (-49.8% ▼)	(-100.0% ▼)

Volume of Passengers (in K) to Destinations, 2021

At least 4K Passengers per Destination

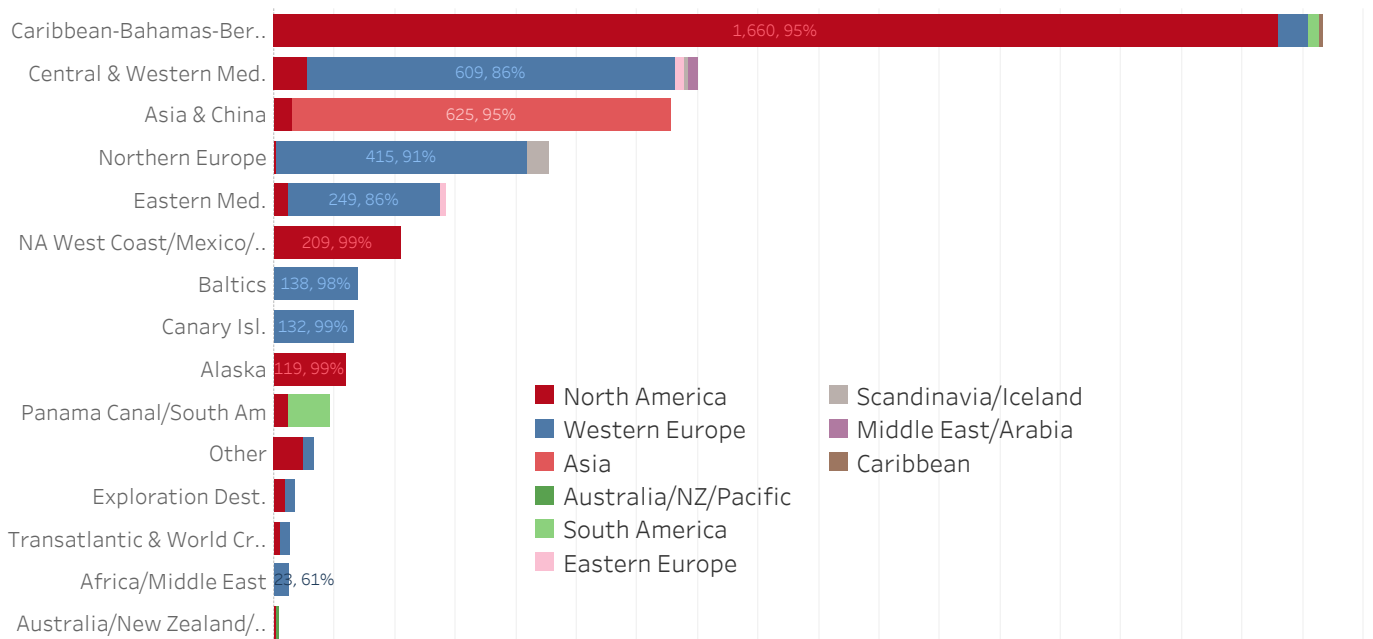


Global Report (Continued)

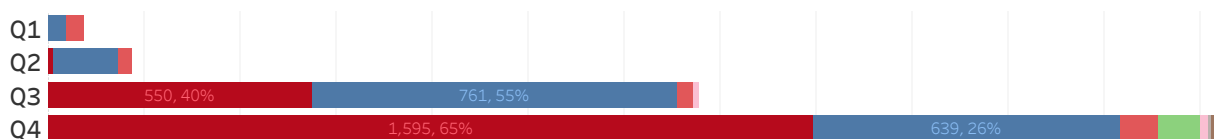
Passenger Volume by Trade (K)

	2019	2020	2021
Caribbean-Bahamas-Bermuda	11,983	2,986 (-75% ▼)	1,745 (-42% ▼)
Central & Western Med.	3,211	225 (-93% ▼)	707 (215% ▲)
Asia & China	3,977	643 (-84% ▼)	658 (2% ▲)
Northern Europe	1,708	52 (-97% ▼)	454 (779% ▲)
Eastern Med.	1,226	30 (-98% ▼)	288 (855% ▲)
NA West Coast/Mexico/California/Pacific Coast	1,165	231 (-80% ▼)	211 (-9% ▼)
Baltics	594	(-100% ▼)	141
Canary Isl.	496	180 (-64% ▼)	133 (-26% ▼)
Alaska	1,215	(-100% ▼)	121
Panama Canal/South Am	807	484 (-40% ▼)	95 (-80% ▼)
Other	304	53 (-82% ▼)	84 (57% ▲)
Africa/Middle East	515	267 (-48% ▼)	38 (-86% ▼)
Exploration Dest.	187	11 (-94% ▼)	37 (226% ▲)
Transatlantic & World Cruise	393	45 (-89% ▼)	28 (-37% ▼)
Australia/New Zealand/Pacific	1,178	366 (-69% ▼)	12 (-97% ▼)
No Trade Identified	170	151 (-11% ▼)	(-100% ▼)
Hawaii	243	43 (-82% ▼)	(-100% ▼)
Canada/New England	302	(-100% ▼)	

Passenger Volume (K) by Trade & Source Regions in 2021

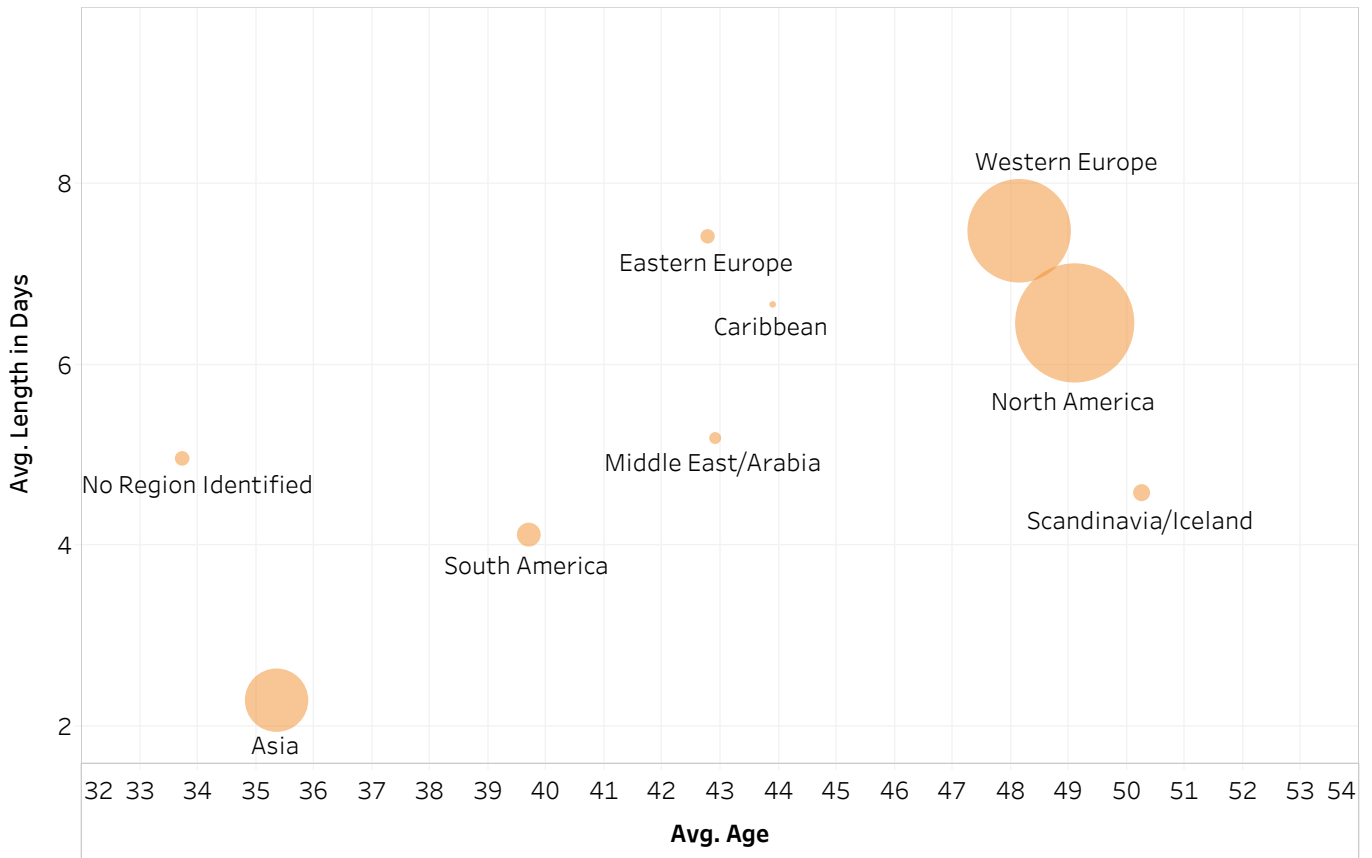


Passenger Volume (K) by Quarter & Top Source Regions in 2021

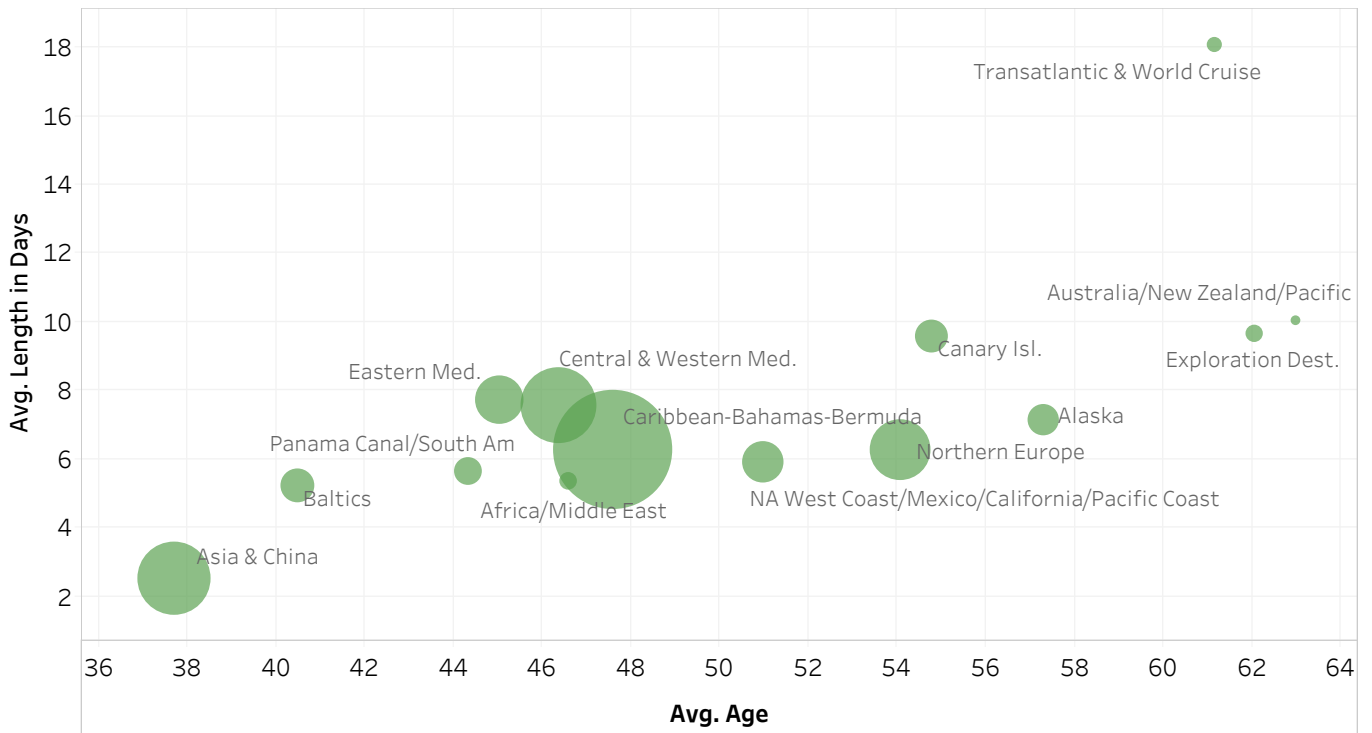


Global Report (Continued)

Average Age and Cruise Length for Top Source Markets, 2021



Average Age and Cruise Length by Destination / Trade Route, 2021



GLOSSARY

This report is based on 2021 calendar year passenger statistics provided by the ocean-going cruise line members of the Cruise Lines International Association (CLIA), who represent nearly 90% of global cruise industry capacity, plus additional data collected by IRN and CHART Management Consultants from non-CLIA cruise lines. The research is based on a methodology that is used in similar studies around the world. This consistent approach facilitates comparisons with other major cruise markets. Data points below 2,000 passengers (for source markets) and 4,000 (for destinations) are not displayed.

All analyses and information exclude one-night cruises, consistent with past CLIA Asia source market reports. Destinations and trade routes are determined by the area where the ship is predominantly sailing, with the exception of the following:

- “Mainland China, Hong Kong, and Taiwan” represents sailings that embark from these markets and sail within Asia.
- “Rest of Asia” excludes sailings that embark from Mainland China, Hong Kong, and Taiwan.
- References to “Other” in the destinations/trade routes consist of transatlantic, world cruise, Africa/Middle East, Panama Canal/South America, Canada/New England, exploration, no trade route identified, and others.

