

# STATE OF THE CRUISE INDUSTRY 2023







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# CRUISE UPDATE & FORECAST



## CRUISE UPDATE & FORECAST

Intent to cruise is higher than it was in December 2019—continuing a trend that began in the last quarter of 2020

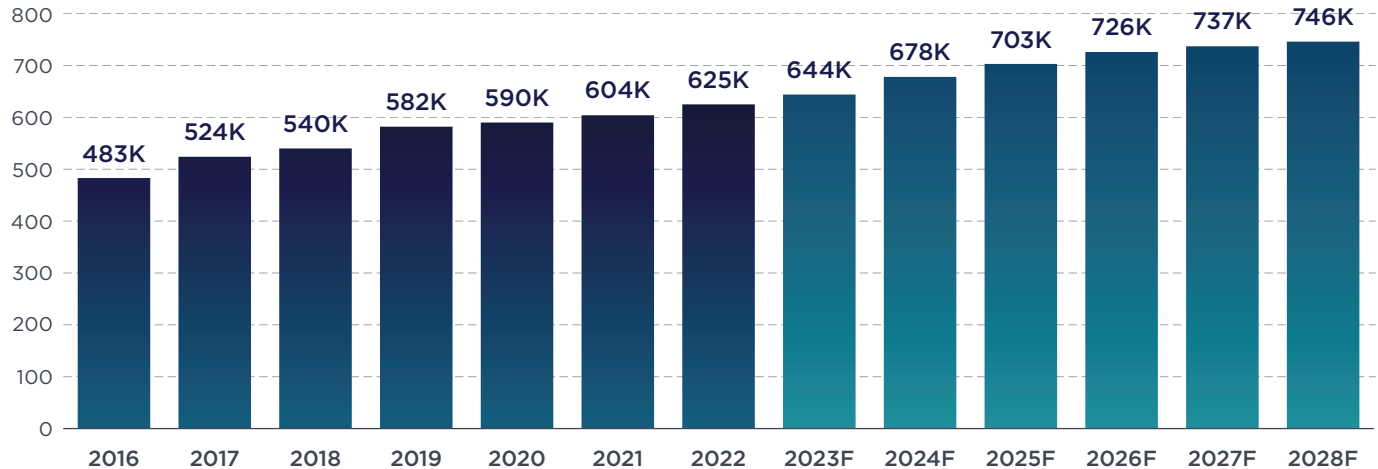
**85%** of travelers who have cruised will cruise again, **6%** higher than pre-pandemic

*Source: CLIA Cruise Traveler Sentiment, Perception, and Intent Survey (Dec.2022)*

## CRUISE UPDATE & FORECAST

Global cruise capacity is forecast to grow 19% to more than 746K lower berths from 2022 to 2028

Cruise capacity projections



Source: CLIA Cruise Forecast /Tourism Economics Note: Capacity measured at the beginning of the year.

## CRUISE UPDATE & FORECAST

Attracting 4 million new-to-cruise travelers is key to meeting the increase in global cruise capacity projected from 2023 to 2025

Every 1% increase in first-time cruise travelers (international travelers who have never cruised and are open to cruise) is equivalent to 4 million new-to-cruise travelers.

*Source: Analysis of CLIA Passenger Data, 2019 – 2021, CLIA Cruise Forecast /Tourism Economics (Dec. 2022); and UNWTO international tourist arrivals data (Jan. 2023)*

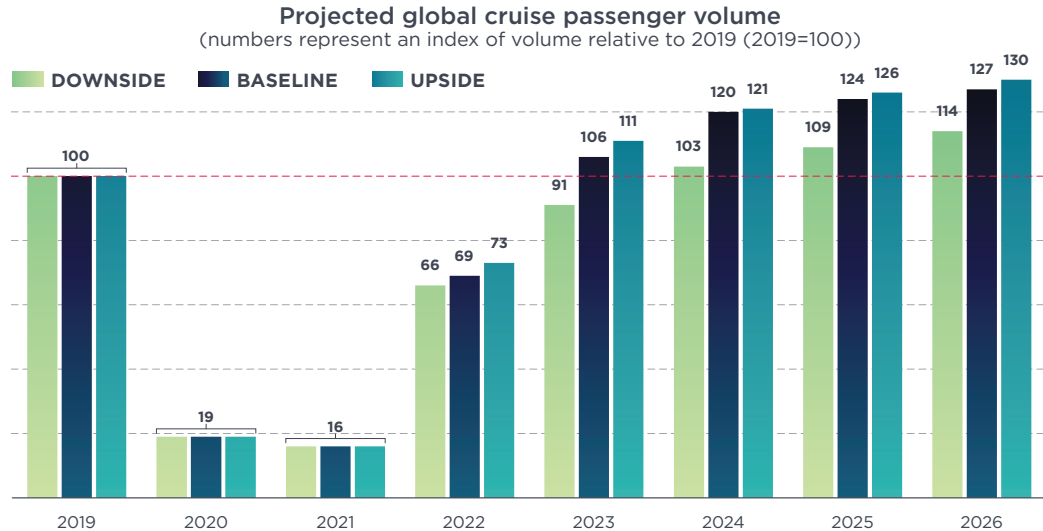
## CRUISE UPDATE & FORECAST

# Cruise tourism is rebounding faster than international tourism arrivals

Cruise passenger volume is forecast to reach 106% of 2019 levels in 2023—with 31.5 million passengers sailing.

This compares to the UNWTO forecast (January 2023) that international tourist arrivals in 2023 will be 80% to 95% of 2019 levels.

*\*Forecast based on the baseline forecast from CLIA's Cruise Forecast (December 2022). This chart shows the range of passengers forecast based on a downside to upside analysis. The middle bar provides the baseline percentage of 2019 passenger volume; bars to the left and right provide the downside and upside forecast, respectively). CLIA analysis indicates the baseline forecast is the most likely scenario.*

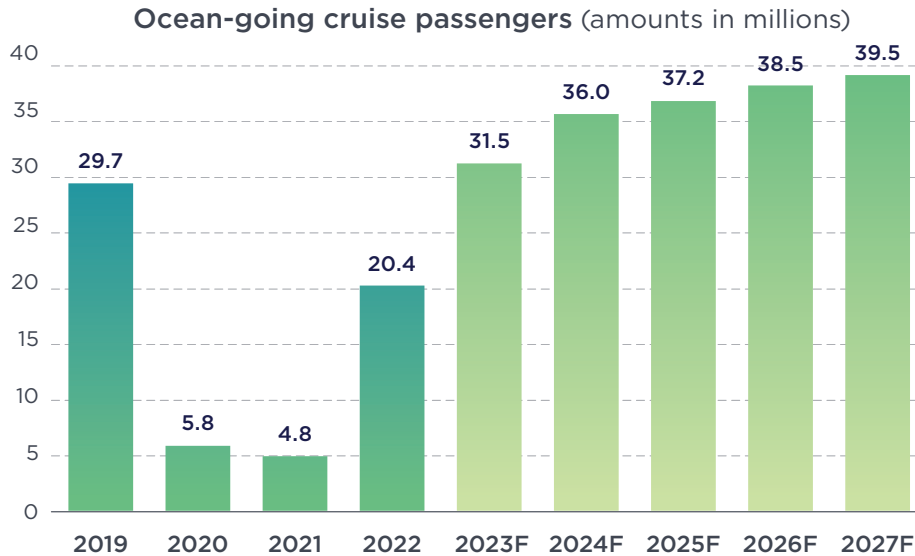


Source: CLIA Cruise Forecast/Tourism Economics (December 2022)



## CRUISE UPDATE & FORECAST

Cruise continues to be one of the fastest-growing sectors of tourism



Source: CLIA Passenger Data, 2019 – 2021 and CLIA Cruise Forecast/Tourism Economics (December 2022)



# CRUISE LEADERSHIP IN RESPONSIBLE TOURISM

## CRUISE LEADERSHIP IN RESPONSIBLE TOURISM

Cruise lines are following a path to decarbonisation with advancements in technology, infrastructure, and operations

- Multiple pilot projects and collaborative initiatives are underway.
- New engines and propulsion technologies are actively being planned and tested for use on cruise ships.

### Technology



### Infrastructure



### Operations



## CRUISE LEADERSHIP IN RESPONSIBLE TOURISM

Cruise lines are utilizing LNG now as a transitional fuel while cruise lines explore sustainable marine fuels and propulsion technologies

- LNG is currently the cleanest fuel available at scale while cruise lines are exploring sustainable marine fuels, including advanced biofuels and other renewable energy solutions, such as synthetic fuels, methanol, hydrogen, fuel cells and batteries.
- LNG-fueled vessels and infrastructure can use and deliver bioLNG and renewable synthetic LNG once these fuels become more broadly available

**75%**

of the CLIA-member cruise line fleet able to utilize sustainable fuels once available at scale

**60%**

of ships scheduled to debut between 2023 and 2028 will rely on LNG fuel for their primary propulsion

## CRUISE LEADERSHIP IN RESPONSIBLE TOURISM

The number of CLIA-member cruise ships with shoreside power capability will more than double by 2028\*

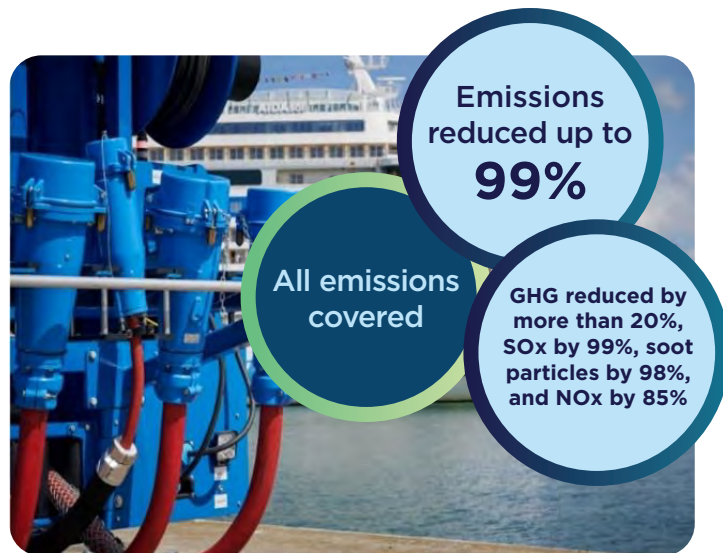
Every CLIA-member ship being built today through 2028, except expedition, is scheduled to be fitted with shoreside power capabilities

- Currently, 30% of ships, representing 40% of capacity, is plug-in ready; 30% to be retrofitted

29 cruise ports worldwide have at least one berth with onshore power; 20 additional ports funded or planned (by 2025)

- Less than 2% of the world's cruise ports have on-shore power; by 2025, 3% will have shoreside power

*\*Based on scheduled orders as of the February 2022 order book*



# PORTS WITH AT LEAST ONE CRUISE BERTH WITH SHORESIDE POWER (AS OF APRIL 2023)



## ACTIVE (29)

**AUSTRALIA** Sydney

**CANADA** Halifax, NS | Montreal, QC | Vancouver, BC

**CHINA** Qingdao | Shanghai | Shenzhen | Xiamen

**GERMANY** Hamburg-Altona | Kiel | Rostock-Warnemünde

**ITALY** Genoa

**NORWAY** Bergen | Flam | Karlsund | KristiansandTrondheim

**SOUTH KOREA** Incheon

**SWEDEN** Verkö | Ystad

**UK** Southampton

**USA** Brooklyn, NY | Juneau, AK | Long Beach, CA Los Angeles/San Pedro, CA | Oakland, CA | San Diego, CA San Francisco, CA Seattle, WA

## FUNDED (8)

**FRANCE** Marseille

**ITALY** Civitavecchia | Livorno

**NORWAY** Alesund | Stavanger | Tromsø

**SPAIN** Cadiz

**USA** Miami, FL

## PLANNED (19)

**DENMARK** Aarhus

**ESTONIA** Tallin

**FRANCE** Le Havre | Nice | Toulon

**GERMANY** Bremen

**GREECE** Heraklion

**ITALY** La Spezia

**MALTA** Valetta

**NETHERLANDS** Amsterdam | Rotterdam

**NORWAY** Haugesund | Oslo

**SPAIN** Barcelona | Bilbao

**SWEDEN** Stockholm

**UK** Portsmouth |Tyne

**USA** Port Everglades, FL

## CRUISE LEADERSHIP IN RESPONSIBLE TOURISM

# Cruise is a model for responsible and sustainable tourism

### Managed tourism

- Active collaboration with ports and destinations helps maximize the benefits of tourism for communities.
- Ship arrival and departure schedules are established with ports up to three years in advance—and most passengers participate in shore excursions organized by the cruise lines with local providers—providing destinations with advance information about tourism flows so they can plan accordingly.
- Collaborative, sustainable tourism initiatives led by the cruise industry, destinations, ports, community organizations, and stakeholders are helping to achieve mutual objectives to preserve the integrity, cultural heritage, and beauty of the world's most treasured destinations for future generations.

*“We’re seeing the cruise industry acting much more proactively in collaborating with port managers to better manage visitor flows.”*

Randy Durband, CEO  
Global Sustainable Tourism Council





## CRUISE LEADERSHIP IN RESPONSIBLE TOURISM

# Cruise is a model for responsible and sustainable tourism

### Responsible sourcing for food and supplies

- Cruise lines are working with organizations to source food responsibly (e.g., Marine Stewardship Council, the Aquaculture Stewardship Council, and others).
- Prioritizing local sourcing of food and other supplies:
  - Reduces the carbon footprint of the supply chain by reducing the distance food and supplies need to travel to get to the ships.
  - Supports local businesses and communities and, as a result, helps improve lives and the quality of life in the destinations our member-line ships visit.

### Water production and conservation

- Cruise ships produce up to 90% of fresh water onboard and, through state-of-the-art systems and practices, conserve and repurpose water rather than draw from areas where resources are limited.

*The top three food trends this year and next are local culinary (61.11%), sustainable seafood (35.19%) and meat substitutes (24.07%).*

2023 F&B at Sea Trends Report



## CRUISE LEADERSHIP IN RESPONSIBLE TOURISM

# Cruise is a model for responsible and sustainable tourism

### Sustainable and locally sourced tour excursions

- Many cruise lines offer a variety of shore excursion programs that are focused on sustainability and are pursuing sustainable tour excursion certification with respected conservation organizations and other groups based on the Global Sustainable Tourism Council's Industry Standard criteria.
- The wide range of sustainable shore excursions include those that take travelers to national parks, wildlife rehabilitation centers, biodynamic farms and sustainable businesses, as well as support species and habitat protection.
- In addition, many excursions include carbon-free walk, cycle, paddle or sail experiences rather than a coach tour.
- And because shore excursions are locally sourced, they create jobs that benefit local communities.

*Cruise travel also provides opportunities for personal growth and greater understanding of the world by connecting people to places in ways that create greater understanding and appreciation for each other's cultures, as well as better awareness of the environment.*



## CRUISE LEADERSHIP IN RESPONSIBLE TOURISM

### Ocean and marine life protection

Cruise lines have a range of dedicated programs for ocean and marine life protection. Examples include:

- Coral reef restoration
- Advanced wastewater treatment systems that rival land-based systems
- Agreement by CLIA cruise line members to avoid or voluntarily reduce vessel speed in sensitive areas or when marine life is observed
- Underwater noise and vibration reduction systems, including specially designed hulls, propellers, and noise suppression devices
- Partnerships with a variety of research and ocean and marine life protection organizations
- On-board scientists to support important research for the benefit of the ocean and marine life



## CRUISE LEADERSHIP IN RESPONSIBLE TOURISM

### CLIA-member cruise ships and operations become more sustainable and efficient every year

Cruise ships are subject to multiple inspections each year –announced and unannounced – for compliance with strict environmental and safety regulations.

*Source: CLIA Environmental Technologies and Practices Report (October 2022) and individual cruise line sustainability reports. Projections are for the CLIA-member cruise line fleet, inclusive of current ships in service plus new ships coming online from the date of this report through 2028, and do not account for vessel retirements during that period. Vessels most likely to be retired first are those without, or unable to be retrofitted with, advanced environmental technologies.*

#### Using digital technology to be more energy efficient

- From tracking the energy use of appliances in a ship's galley to routing ships optimally, digital technologies offer a new energy-saving tool
- Each new class of ship that is launched is around **20% more** efficient than the last

Average age of ships in the CLIA-member fleet is **14.1 years**

**75% of the CLIA-member fleet capable of using sustainable fuels once available at scale**

**88% of non-LNG new-build ships specified for EGCS**

#### Exhaust gas cleaning systems (EGCS)

- 98% reduction** in sulfur oxide levels
- 50% reduction** in typical total particulate matter (including elemental and organic carbon and black carbon)
- 12% reduction** in nitrogen oxides
- 79%** of global capacity utilizes EGCS

#### 96% of ships have low-friction hull coatings

Air lubrication systems and special hull coatings increase fuel efficiency by nearly **10%**

#### 100% of new ships specified for Advanced Wastewater Treatment Systems

- Advanced wastewater treatment systems (AWTS) rival land-based facilities
- 78%** of CLIA-member ships sailing fitted with AWTS

#### 38 LNG-powered ships specified to be in service by 2028

- LNG reduces GHG **more than 20%**, SOx (**99%**), soot particles (**98%**), NOx (**85%**)
- LNG-fueled vessels can transition to bioLNG and renewable synthetic LNG once available at scale

#### Some ships repurpose 100% of waste

- Programs supporting land-free ship operations
- Surplus heat transferred from machinery to heat water for showers and pools
- Bio-digesters reduce food waste

#### Up to 90% of fresh water produced onboard

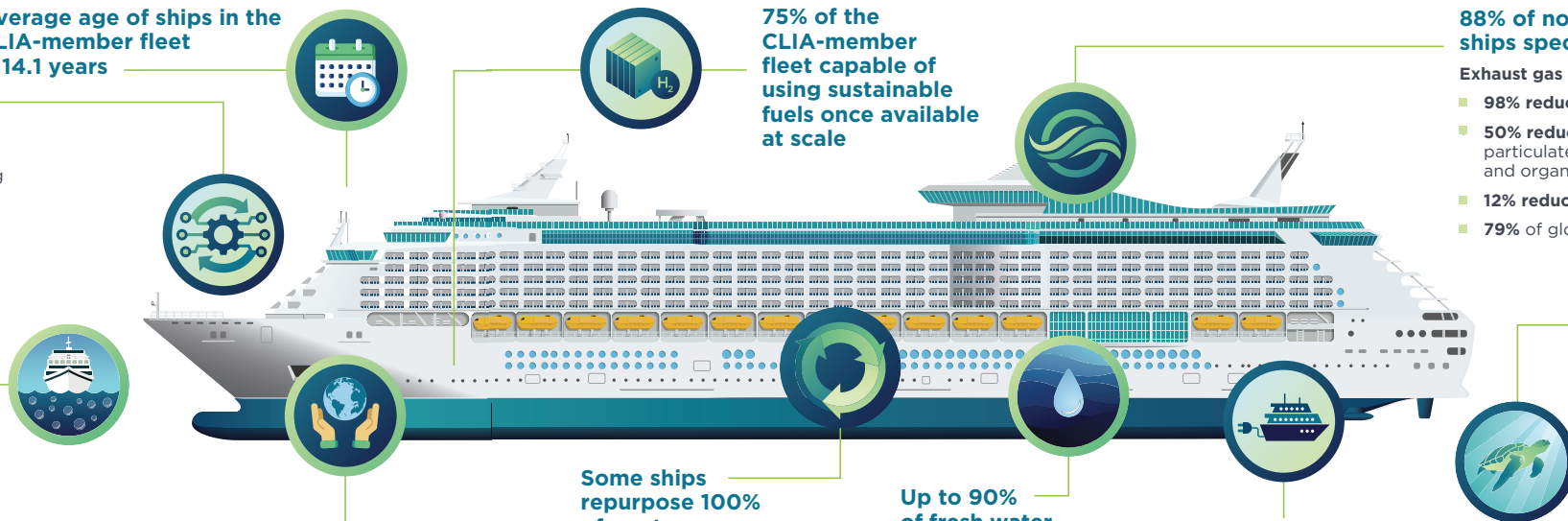
Through state-of-the-art systems and practices, cruise lines are able to conserve and repurpose onboard rather than drawing from areas where resources are limited

#### Every CLIA-member ship being built today, except expedition, is specified to have shoreside power capability

- 40%** of the CLIA cruise line member fleet is plug-in ready, **30%** to be retrofitted
- Only 3%** of the world's ports have onshore power

#### Cruise lines have dedicated programs and systems designed to protect marine life

- Members agree to avoid or voluntarily reduce vessel speed in sensitive areas
- Underwater noise and vibration reduction systems
- Onboard scientists to support important ocean and marine life research



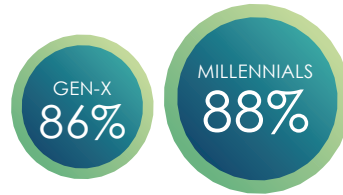


# CRUISE FACTS, FIGURES, & TRENDS

# CRUISE FACTS, FIGURES, & TRENDS

## Top 15 trends we are tracking now

**1. Younger generations are the future of cruise** with 88% of Millennials and 86% of Gen-X travelers who have cruised before say they plan to cruise again.



Percentage of Millennials and Gen-X cruisers that plan to cruise again

**2. There is more interest than ever before among Millennials and Gen-X travelers to take their first cruise** with 73% of those who have never cruised indicating they will consider a cruise vacation. Millennials were most interested at 77%, followed by Gen-X at 73%.

Percentage of first-time cruisers interested in cruising



**3. To attract more first-time cruisers and meet the needs of repeat cruisers, cruise lines are offering both shorter and longer cruise itineraries.** As a result, while the average cruise length continues to be around 7 days, the range of options for cruise duration has expanded.

## CRUISE FACTS, FIGURES, & TRENDS

### Top 15 trends we are tracking now



**4. Solo cruise travel is on the rise.** Cruise lines are responding by increasing the number of single-cabins in new ships and retrofitting some of their existing ships to include additional cabins designed for those traveling alone.

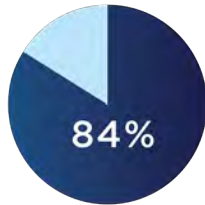


**5. There is an acceleration of environmental technologies and practices present on cruise ships** as the industry pursues net-zero carbon cruising by 2050. See pages 20-21 for examples of some of these features.

**6. The commitment of cruise travelers and potential new-to-cruise travelers to the environment is on the rise** with 50% of current and potential cruise travelers saying they are more committed to making travel decisions based on environmental impacts than they were three years ago.

## CRUISE FACTS, FIGURES, & TRENDS

### Top 15 trends we are tracking now



**7. Cruise lines are increasingly offering environmental education and sustainable tour experiences for passengers.** As a result, 84% of cruise travelers are more aware of the responsible nature of cruise travel and the importance of the environment.

**8. The number of accessible cabins across the cruise line fleet is increasing.** The increase is helping to meet the needs of cruise travelers who have limited mobility, or who are traveling with someone with limited mobility—the vast majority of whom (across every generation) say they view a cruise holiday as the only travel option that meets their needs. Similar results are showing up related to sensory and cognitive considerations.



**9. Younger cruise travelers—from Gen Z to Millennials to Gen X—turn to travel advisors to book their cruises more so than any other generation (50% more than Traditionalists and Baby Boomers).**



## CRUISE FACTS, FIGURES, & TRENDS

### Top 15 trends we are tracking now

**10. Cruise holidays appeal to those looking for multi-generational travel options.** Today 73% of cruise travelers are sailing with family members that represent at least two generations.



**11. The CLIA-member cruise line fleet of ships is projected to exceed 300 ocean-going vessels for the first time in 2024.** The increase in ships and itineraries is well-timed to meet strong demand for cruise travel, which is rebounding faster than international arrivals. Based on CLIA's forecast, cruise tourism will likely reach 106% of 2019 passenger volume in 2023. This compares to the UNWTO forecast (January 2023) that international tourist arrivals in 2023 will be 80% to 95% of 2019 levels.

**12. Traveler interest in booking an expedition cruise is higher than ever** as travelers seek more immersive, responsible, bucket-list travel experiences. The trend is evident across all age groups as the number of passengers sailing on expedition cruises more than doubled from 2016 to 2022. Other signs: Search results for expedition cruise travel to Antarctica increased 51% in 2022 compared to 2019. In addition, during 2022, 137,000 cruise travelers sailed on expedition ships. Though this number is lower than 2019 when 187,000 cruise travelers chose an expedition cruise, 2022 expedition passenger volume was nearly 70% higher than it was in 2016.

## CRUISE FACTS, FIGURES, & TRENDS

### Top 15 trends we are tracking now

**13. Cruise lines are offering more immersive cruise travel opportunities to passengers.** Cruise lines are scheduling longer stays, including overnight stays, in certain ports of call.

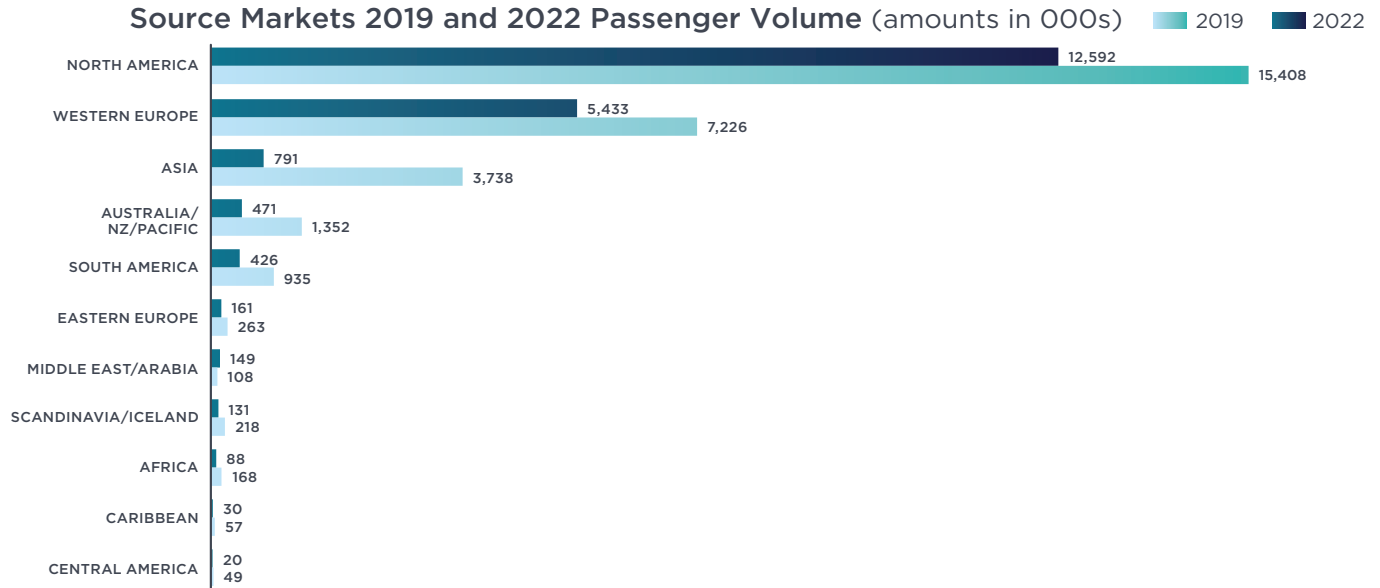


**14. More cruise travelers plan to book longer cruises for their next holiday** with 43% saying they plan to book a longer cruise and 43% saying they plan to book a similar-length cruise.

**15. Family and friends have the most influence on traveler decisions to book a cruise or not** with 86% of cruise travelers saying family and friends had either some influence or significant influence in their choice to cruise.

## CRUISE FACTS, FIGURES, & TRENDS

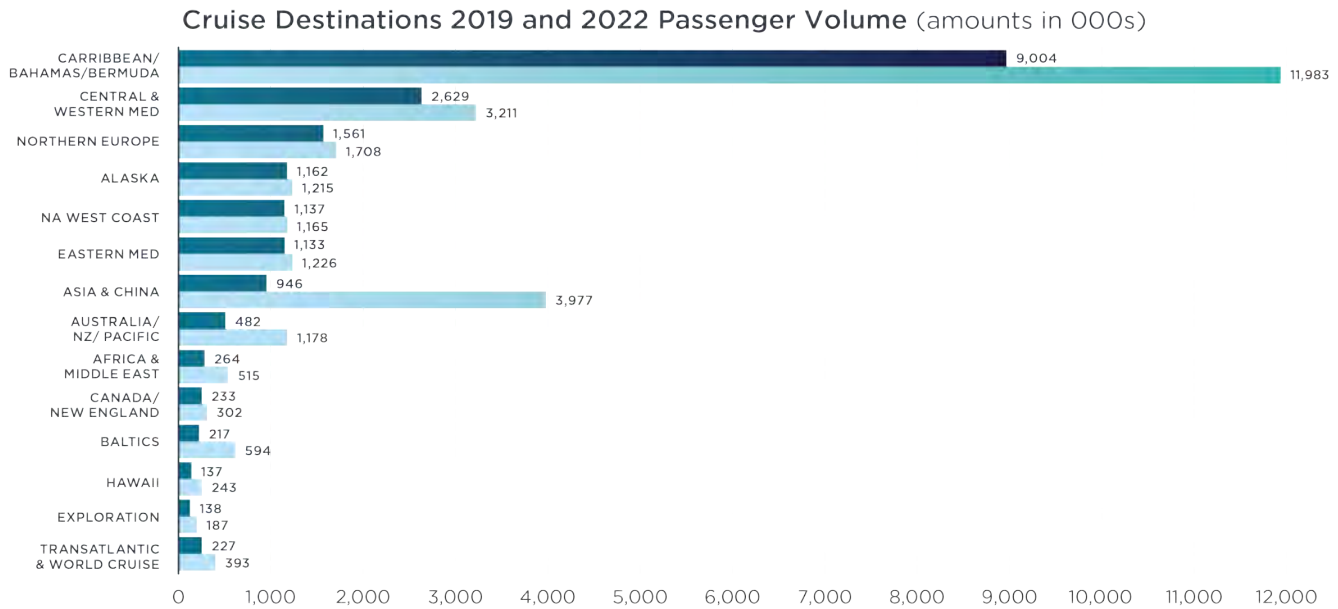
North America remains the largest source market with other markets increasing in popularity, especially the Med



Source: CLIA One Resource 2022 Passenger Data

# CRUISE FACTS, FIGURES, & TRENDS

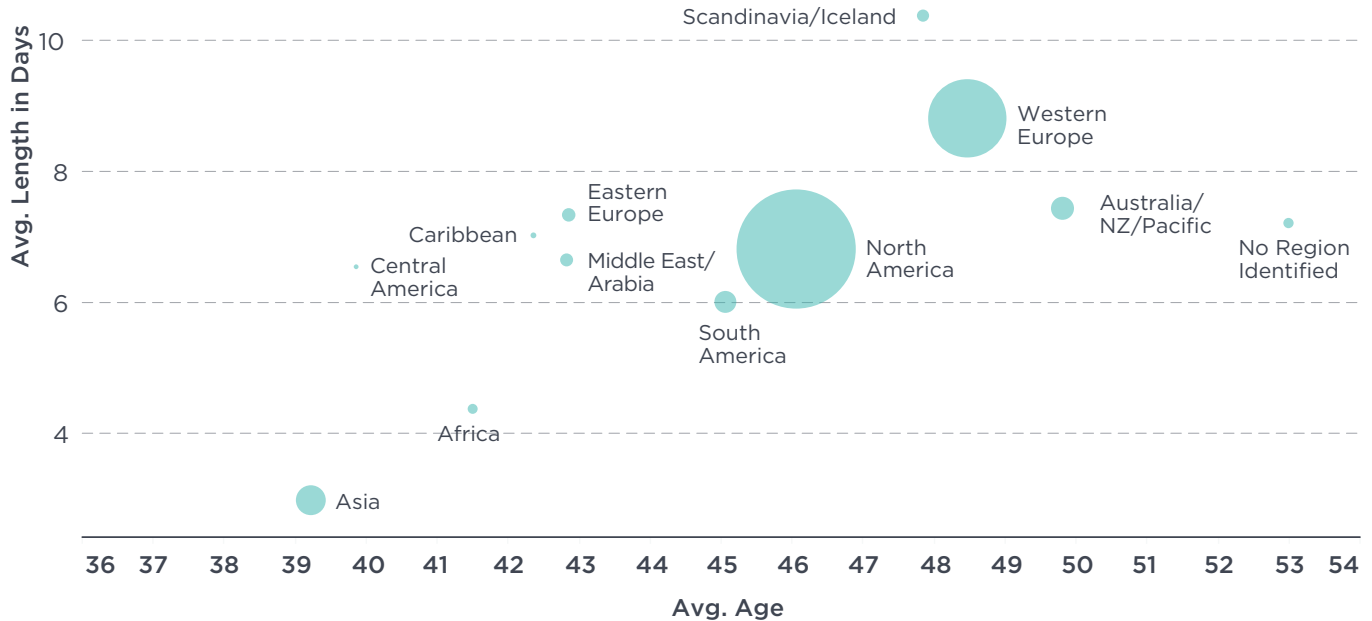
## The Caribbean remains the top destination for cruise travelers



Source: CLIA One Resource 2022 Passenger Data

## CRUISE FACTS, FIGURES, & TRENDS

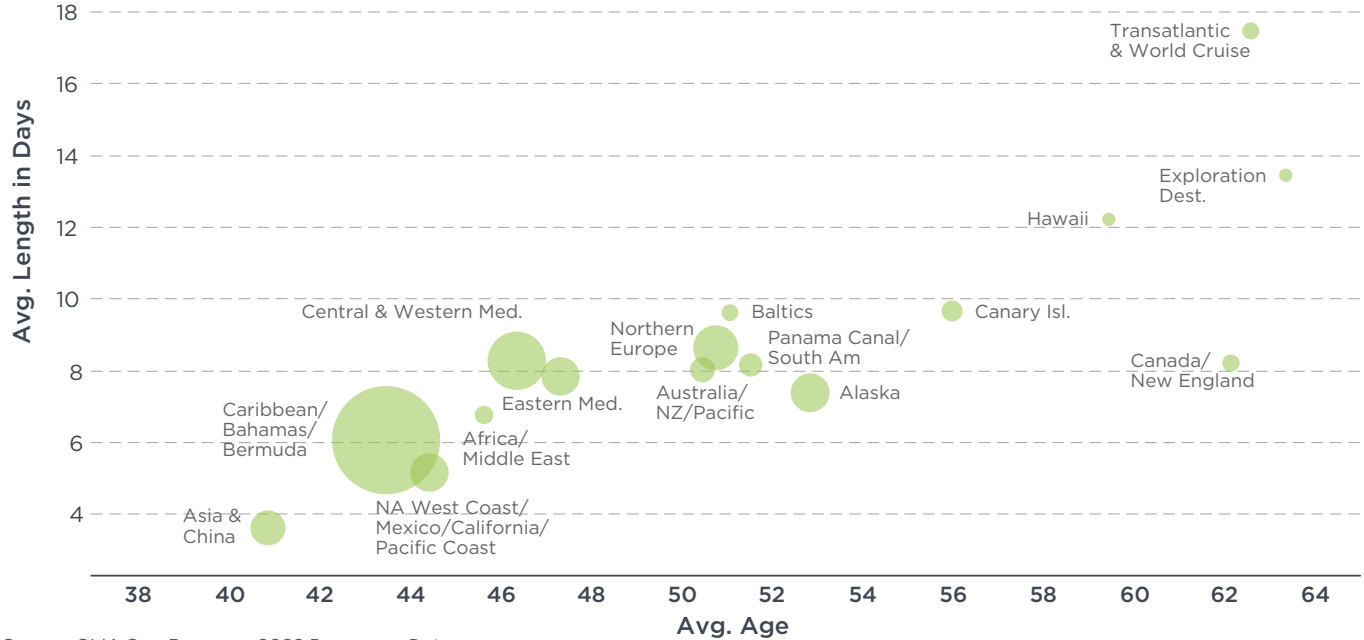
### Average age and cruise length for top source markets, 2022



Source: CLIA One Resource 2022 Passenger Data

# CRUISE FACTS, FIGURES, & TRENDS

## Average age and cruise length by destination/itinerary, 2022



Source: CLIA One Resource 2022 Passenger Data

## CRUISE FACTS, FIGURES, & TRENDS

### Top 20 ports visited per year

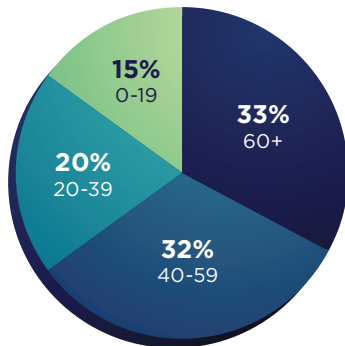
PORT/DESTINATION	EMBARK & DISEMBARK	TRANSIT	TOTAL
Miami	2,526,900	42,350	5,096,150
Port Canaveral	2,013,340	282,700	4,308,940
Cozumel	31,820	3,893,590	3,893,590
Port Everglades	1,757,340	10,100	3,524,780
Nassau	500	3,311,700	3,312,700
Shanghai	1,622,700	13,500	3,258,900
Barcelona	661,630	1,215,000	2,538,260
Civitavecchia	596,650	1,218,000	2,412,100
Southampton	929,700	228,000	2,087,400
San Juan	399,870	1,219,600	2,019,340

## CRUISE FACTS, FIGURES, & TRENDS

The future of cruise is the younger generation—and getting younger. GenX and Millennials are the most enthusiastic about planning a cruise holiday

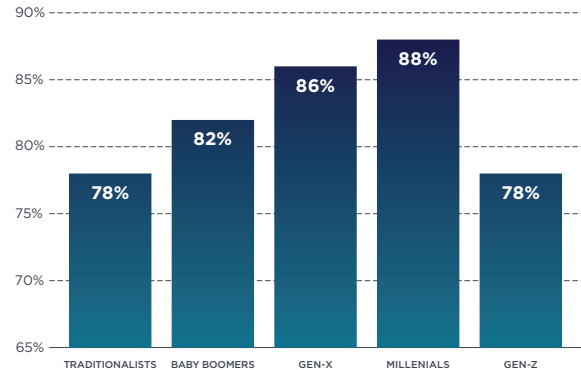
**46.5** Average age of cruise tourist

Cruise Tourist Age Averages from 2018-2022



Millennials are the most enthusiastic cruisers of the future

% of Cruise Passengers Who Plan to Cruise Again



Source: CLIA Cruise Traveler Sentiment, Perception, and Intent Survey (March 2023)

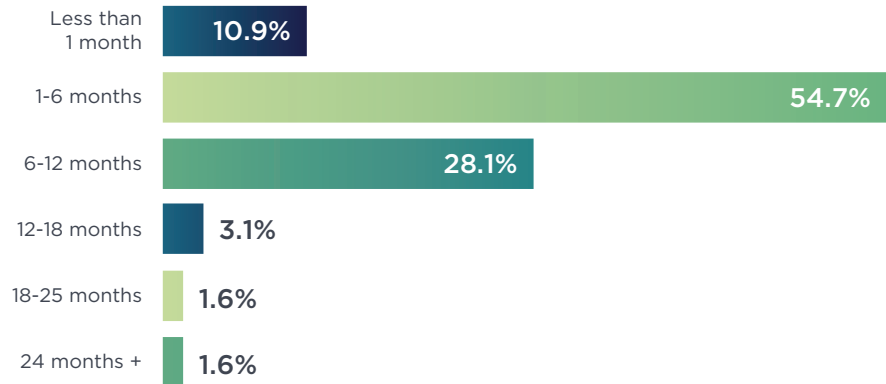


## CRUISE FACTS, FIGURES, & TRENDS

Many cruise lines are increasing the number of single cabins as an increasing number of cruise travelers choose to cruise solo. Here's how far in advance solo travelers book their cruises:

Most solo travelers book their cruises between 1 and 12 months prior to sailing

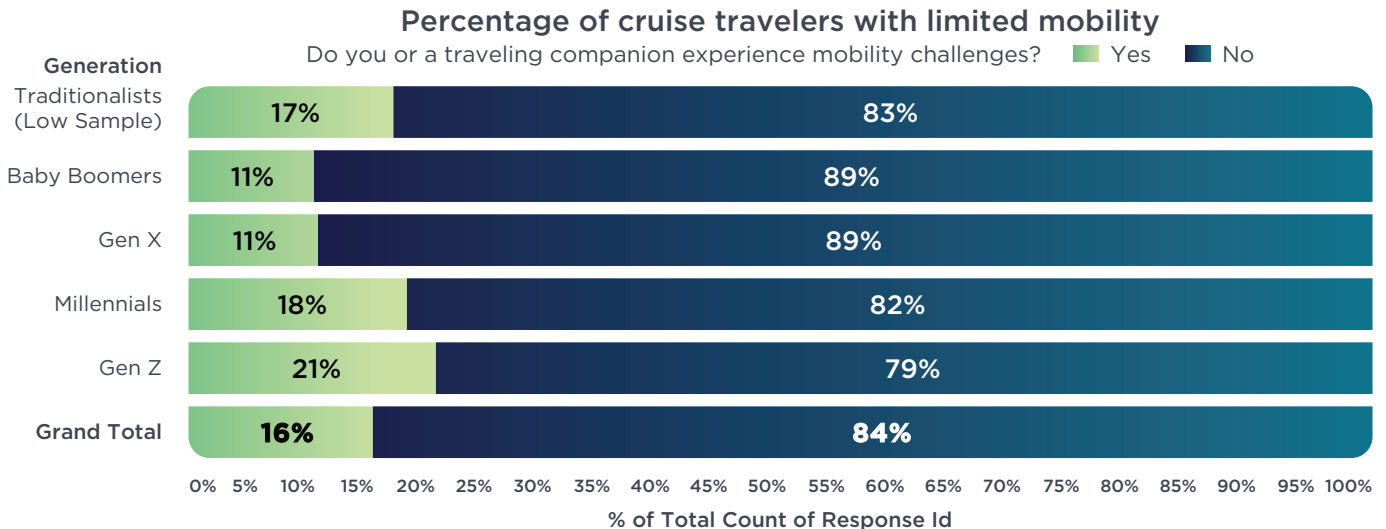
**How far in advance do you book your sailing?**  
(solo travelers who have cruised before and will cruise again)



Source: CLIA Cruise Traveler Sentiment, Perception, and Intent Survey (March 2023)

## CRUISE FACTS, FIGURES, & TRENDS

# Accessibility is a growing need...and cruise lines are providing more wheelchair accessible options



Source: CLIA Cruise Traveler Sentiment, Perception, and Intent Survey (March 2023)

## CRUISE FACTS, FIGURES, & TRENDS

A cruise holiday meets the needs of travelers with limited mobility more often than other holiday travel options

### Percentage of travelers who said cruise is the only holiday travel option for them

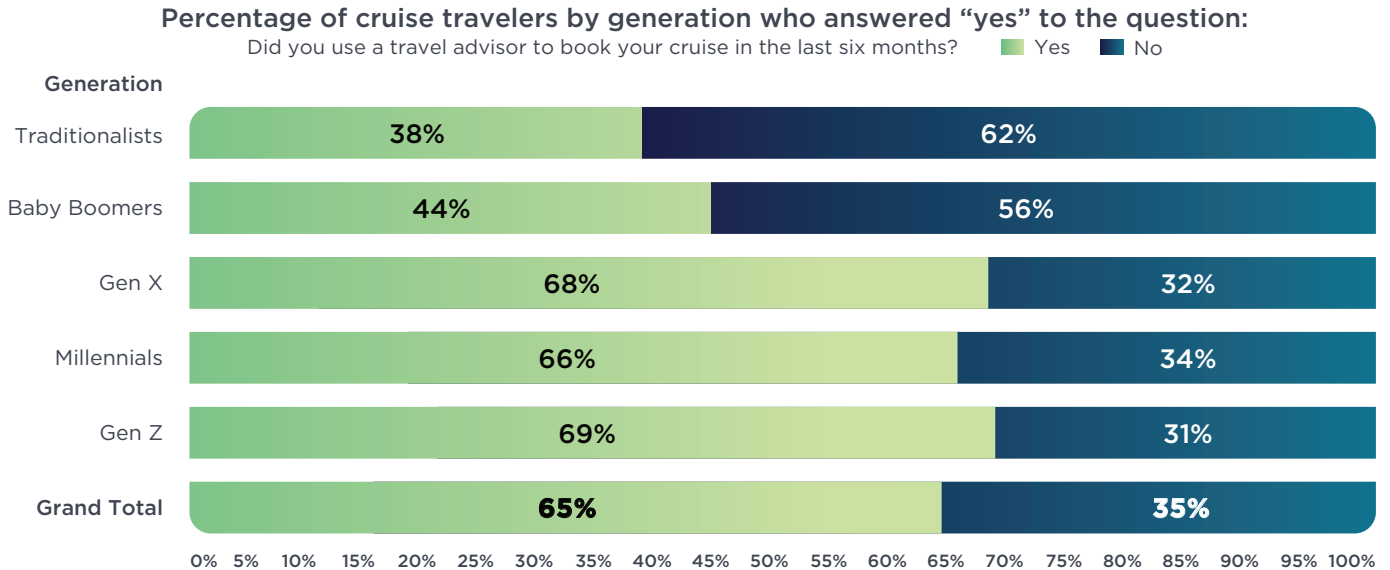
Percentage of cruise travelers or those traveling with someone with limited mobility who responded yes



Source: CLIA Cruise Traveler Sentiment, Perception, and Intent Survey (March 2023)

## CRUISE FACTS, FIGURES, & TRENDS

Younger generations are using travel advisors to book cruises at a higher rate than other generations (who are more seasoned cruisers)

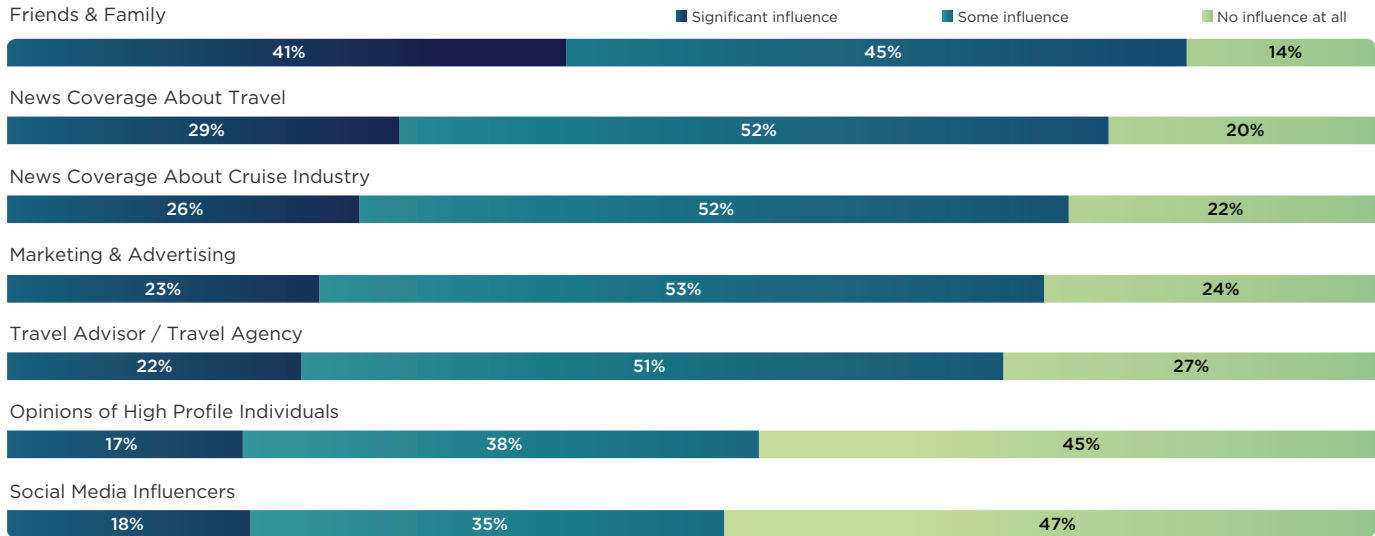


Source: CLIA Cruise Traveler Sentiment, Perception, and Intent Survey (March 2023)

## CRUISE FACTS, FIGURES, & TRENDS

### Family and friends have the strongest influence on traveler decisions to book a cruise or not

What level of influence do the following have on your decision to book a cruise?



Source: CLIA Cruise Traveler Sentiment, Perception, and Intent Survey (December 2022)



# THE PRESENT & FUTURE VALUE OF CRUISE TOURISM

## THE PRESENT & FUTURE VALUE OF CRUISE TOURISM

### Economic impact highlights 2021

**Operational ramp up and shipbuilding helped cruise contribute meaningful economic contributions despite loss in passenger volume**

Although the majority of cruise markets remained closed during 2021, and restart in North America did not begin until the end of June, the cruise sector still produced some meaningful economic benefits.



Global:

**\$75B in total economic contribution, supporting 848K jobs**



Europe:

**\$44B in total economic contribution, supporting 315K jobs**



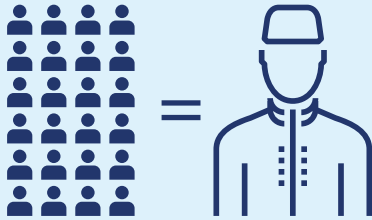
Rest of the world:

**\$11B in total economic contribution, supporting 411K jobs**

*Source: CLIA 2021 Economic Impact Study, Oxford Economics. 2022 (Economic Impact results to be released in September 2023)*

## THE PRESENT & FUTURE VALUE OF CRUISE TOURISM

Cruise tourists add value before, during, and after sailing

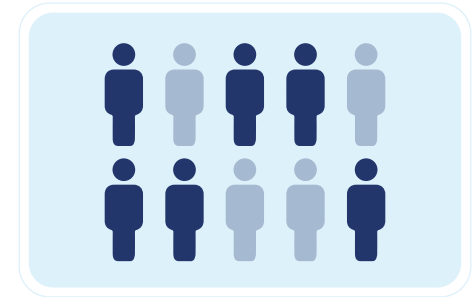


**Every 24  
cruisers**  
worldwide supports  
one full-time  
equivalent job

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



**More than 6 in 10  
people (63%)**  
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



# THE PRESENT & FUTURE VALUE OF CRUISE TOURISM

## Economic impact set to rebound

Strong demand and forecast for passenger volume bodes well for future economic contributions from cruise

Looking ahead, the cruise sector is expected to move closer to 2019 levels in 2023 with passenger volume forecast to reach 27 million to 33 million cruisers globally.

**\$155B**

TO THE GLOBAL ECONOMY



**1.2M**

JOBS



**\$50B**

IN WAGES



Source: CLIA 2019 Economic Impact Study, Oxford Economics

# THE PRESENT AND FUTURE VALUE OF CRUISE TOURISM

## Economic impact highlights 2021

Even though passenger and crew onshore visits were down nearly 90% in 2021 compared to 2019, total economic contribution from global cruise activity was only down 53% for the year.

As part of the responsible resumption of cruise, cruise lines generated direct spend as they ramped up operations. This helped mitigate the loss of cruise activity during a year where the largest cruise market in the world was open for just six months and other key markets had virtually no cruise activity (e.g., Asia, Australia, and Canada).

LEVELS	2021	2020	2019
PASSENGER AND CREW ONSHORE VISITS, MILLIONS	16	26	148
DIRECT EXPENDITURES, \$ BILLIONS	\$34	\$29	\$72
TOTAL OUTPUT CONTRIBUTION, \$ BILLIONS	\$75	\$63	\$54
TOTAL INCOME CONTRIBUTION, \$ BILLIONS	\$25	\$26	\$51
TOTAL EMPLOYMENT CONTRIBUTION, HEADCOUNT	862,025	576,451	1,166,213

% CHANGE RELATIVES TO 2019	2021	2020
PASSENGER AND CREW ONSHORE VISITS	-89%	-82%
DIRECT EXPENDITURES	-53%	-60%
TOTAL OUTPUT CONTRIBUTION	38%	17%
TOTAL INCOME CONTRIBUTION	-51%	-49%
TOTAL EMPLOYMENT CONTRIBUTION	-26%	-51%

Source: CLIA 2021 Economic Impact Study, Oxford Economics (2022 Economic Impact results to be released in September 2023)

# THE PRESENT AND FUTURE VALUE OF CRUISE TOURISM

## Economic impact highlights 2021



**Cruise line purchases were the main driver of economic contribution from cruise in the United States during 2021:**

- U.S. embarkations in 2021 were 86% lower than levels in 2019—directly affecting the level of passenger and cruise spend during the year.
- However, cruise line purchases as part of the ramp-up of operations for cruise resumption in the U.S. at the end of June 2021 limited the impact.
- Wages for crew and staff appear to have been relatively stable during the pause in operations, and even increased in nominal terms.

*Source: CLIA 2021 Economic Impact Study, Oxford Economics (2022 Economic Impact results to be released in September 2023)*

# THE PRESENT AND FUTURE VALUE OF CRUISE TOURISM

## Economic impact highlights 2021

ECONOMIC CONTRIBUTIONS	2021	2019	%CHANGE
<b>DIRECT</b>			
DIRECT CRUISE INDUSTRY EXPENDITURES, \$ BILLIONS	\$8.7	\$25.1	-65%
EMPLOYMENT	52,461	178,104	-71%
GROSS INCOME, \$ BILLIONS	\$3.0	\$9.0	-67%
<b>TOTAL ECONOMIC IMPACT</b>			
TOTAL OUTPUT, \$ BILLIONS	\$19.0	\$55.0	-65%
EMPLOYMENT	109,517	436,611	-75%
TOTAL GROSS INCOME, \$ BILLIONS	\$8.0	\$24.0	-67%

EXPENDITURES	2021	2019	%CHANGE
PASSENGERS SIURCED FROM US, MILLIONS	2.5	14.2	-82%
US EMBARKATION, MILLIONS	2.0	13.8	-86%
CRUISE LINES, \$ BILLIONS	\$6.3	\$18.1	-65%
PASSENGERS AND CREW, \$ BILLIONS	\$0.7	\$5.1	-86%
CREW GROSS WAGES, \$ BILLIONS	\$1.7	\$1.9	-12%
DIRECT US-BASED SPENDING, \$ BILLIONS	\$8.7	\$25.1	-65%

Source: CLIA 2021 Economic Impact Study, Oxford Economics (2022 Economic Impact results to be released in September 2023)

# THE PRESENT AND FUTURE VALUE OF CRUISE TOURISM

## Economic impact highlights 2021

A strong shipbuilding sector was key to supporting economic impact in Europe

### Regional view of direct economic impact

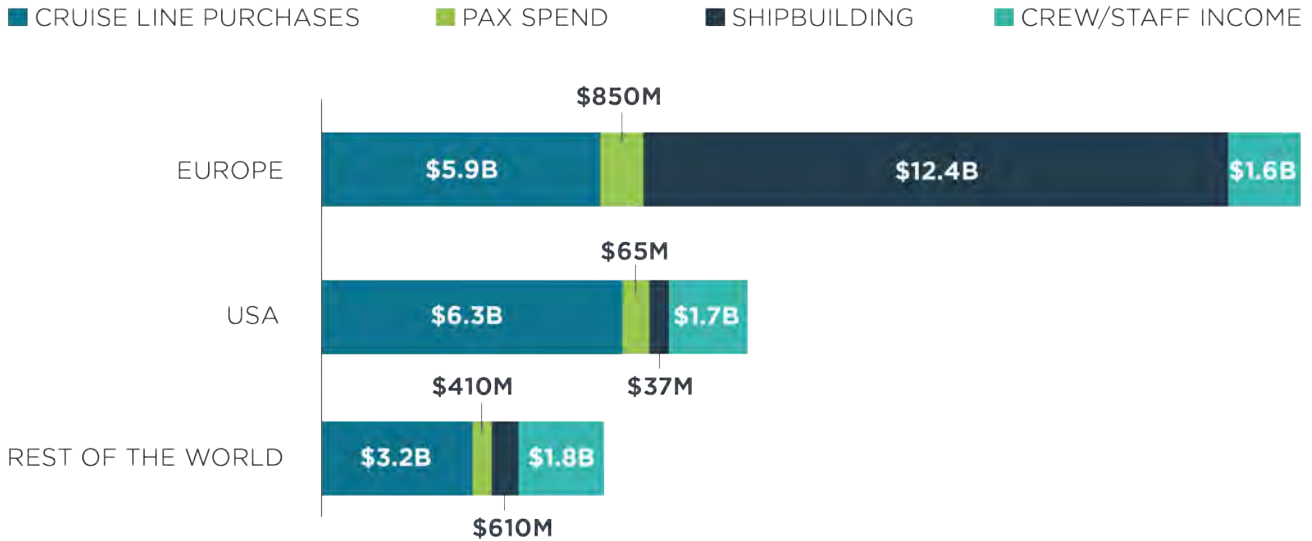
MARKET AREA	TOTAL SPEND	CRUISE LINE PURCHASES	PAX SPEND	SHIPBUILDING	CREW/STAFF INCOME
<b>\$ AMOUNTS IN MILLIONS</b>					
<b>GLOBAL</b>	\$35,371	\$15,415	\$1,912	\$13,033	\$5,011
<b>EUROPE</b>	\$20,740	\$5,944	\$847	\$12,381	\$1,558
<b>USA</b>	\$8,676	\$6,310	\$654	\$37	\$1,674
<b>REST OF THE WORLD</b>	\$5,955	\$3,160	\$411	\$605	\$1,779
<b>€ AMOUNTS IN MILLIONS</b>					
<b>EUROPE</b>	€17,629	€5,052	€720	€10,533	€1,324
<b>REGIONAL DISTRIBUTION</b>					
<b>EUROPE</b>	59%	39%	44%	95%	31%
<b>USA</b>	25%	41%	34%	0%	33%
<b>REST OF THE WORLD</b>	17%	21%	22%	55%	36%

Source: CLIA 2021 Economic Impact Study, Oxford Economics (2022 Economic Impact results to be released in September 2023)

# THE PRESENT AND FUTURE VALUE OF CRUISE TOURISM

## Economic impact highlights 2021

Direct spend (cruise line purchases) by region



Source: CLIA 2021 Economic Impact Study, Oxford Economics (2022 Economic Impact results to be released in September 2023)



# THE 2023-2028 ORDERBOOK

## THE 2023-2028 ORDERBOOK

14 new ships will enter service during 2023, offering new itineraries and experiences

CRUISE LINE	SHIP	SHIPYARD	FIRST SAILING*
<b>CARNIVAL CRUISE LINE</b>	<i>Jubilee</i>	<i>Meyer-Werft (Germany)</i>	<i>Dec 2023</i>
<b>CELEBRITY CRUISES</b>	<i>Ascent</i>	<i>Chantiers de L'Atlantique (France)</i>	<i>Dec 2023</i>
<b>EMERALD CRUISES</b>	<i>Sakara</i>	<i>Halong Shipbuilding (Vietnam)</i>	<i>Aug 2023</i>
<b>EXPLORA JOURNEYS</b>	<i>Explora I</i>	<i>Fincantieri (Italy)</i>	<i>July 2023</i>
<b>MSC CRUISES</b>	<i>Euribia</i>	<i>Chantiers de L'Atlantique (France)</i>	<i>June 2023</i>
<b>NORWEGIAN CRUISE LINE</b>	<i>Viva</i>	<i>Fincantieri (Italy)</i>	<i>Aug 2023</i>
<b>OCEANIA CRUISES</b>	<i>Vista</i>	<i>Fincantieri (Italy)</i>	<i>May 2023</i>
<b>REGENT SEVEN SEAS CRUISES</b>	<i>Seven Seas Grandeur</i>	<i>Fincantieri (Italy)</i>	<i>Nov 2023</i>
<b>SCENIC YACHT CRUISES</b>	<i>Eclipse II</i>	<i>Rijeka (Croatia)</i>	<i>April 2023</i>
<b>SEABOURN</b>	<i>Pursuit</i>	<i>T. Mariotti (Italy)</i>	<i>Aug 2023</i>
<b>SILVERSEA CRUISES</b>	<i>Silver Nova</i>	<i>Meyer Werft (Germany)</i>	<i>Aug 2023</i>
<b>SWAN HELLENIC CRUISES</b>	<i>Hellenic Diana</i>	<i>Helsinki (Finland)</i>	<i>April 2023</i>
<b>VIRGIN CRUISE LINE</b>	<i>Brilliant Lady</i>	<i>Fincantieri (Italy)</i>	<i>Dec 2023</i>
<b>VIRGIN CRUISE LINE</b>	<i>Resilient Lady</i>	<i>Fincantieri (Italy)</i>	<i>May 2023</i>

Source: CLIA orderbook data (\*CLIA cruise line member vessels scheduled for delivery in 2023, launch dates subject to change)



## THE 2023-2028 ORDERBOOK

CLIA cruise line members are introducing 44 new ships from 2023 through 2028

YEAR	# SHIPS	# LB CAPACITY	AVG. CAPACITY	MIN. CAPACITY	MAX. CAPACITY
2023	14	29,527	2,109	100	5,610
2024	12	30,064	2,505	200	5,714
2025	8	31,820	3,978	1,200	6,000
2026	4	14,082	3,521	922	5,610
2027	4	10,894	2,724	922	5,400
2028	2	4,572	2,286	922	3,650
<b>Total</b>	<b>44</b>	<b>120,959</b>	<b>2,749</b>	<b>100</b>	<b>6,000</b>

Source: CLIA orderbook data (2023-2028)

# About Cruise Lines International Association

Cruise Lines International Association (CLIA) is the world's largest cruise association, providing a unified voice for the industry as the leading authority of the global cruise community. Together with our members and partners, CLIA supports policies and practices that foster safe, healthy, and sustainable cruise operations; tourism strategies that maximize the socio-economic benefits of cruise travel; and technologies and innovations that protect and preserve our planet.

Our commitment to sailing to a better future extends well beyond minimizing environmental impacts to also include harnessing the power of travel to contribute to responsible tourism, connect people and places, and create positive travel experiences that inspire lifelong cruisers and generations of new-to-cruise travelers to sail responsibly.

CLIA's global headquarters are in Washington, DC, with regional offices located in North and South America, Europe, Asia, and Australasia. To learn more about the advancements our industry is making toward sustainable development goals that make cruise the best way to see the world, please visit [cruising.org](https://cruising.org) and [cruiseinfohub.com](https://cruiseinfohub.com).

## CLIA MEMBERSHIP

### 53 Member Cruise Lines

- 43 Ocean Members (28 global + 15 regional) with 293 vessels
- 10 River Cruise Marketing Affiliates (3 global + 7 regional) with 194 vessels

OCEAN LOWER BERTHS	2021	2022	2023
Global	514,000	547,000	580,000
Regional	46,000	32,000	34,000
<b>Total</b>	<b>560,000</b>	<b>579,000</b>	<b>614,000</b>

*Includes 95% of global ocean-going cruise passenger capacity*

- **Nearly 300** Executive Partners
- **75,000** Travel Trade Members:  
*15,000 Agencies*  
*60,000 Agents*

# CLIA MEMBERSHIP

## CLIA global ocean cruise line members



Notes:  
 Carnival Corporation brands P&O UK and P&O Australia are CLIA regional cruise line members in Europe and Australia, respectively.  
 TUI Cruises (a CLIA global cruise line member) and Hapag-Lloyd (a CLIA regional cruise line member in Europe) are part of a joint venture with Royal Caribbean Group.

# CLIA MEMBERSHIP

## CLIA regional ocean cruise line members

### EUROPE REGIONAL CRUISE LINES



### AUSTRALIA REGIONAL CRUISE LINES



## CLIA MEMBERSHIP

### CLIA river cruise marketing affiliate members

#### GLOBAL RIVER CRUISE MARKETING AFFILIATES



#### AUSTRALASIA RIVER CRUISE MARKETING AFFILIATES



#### EUROPE RIVER CRUISE MARKETING AFFILIATES



