



CLIN

OCEAN & RIVER **CRUISE REVIEW** 2018

Published June 2019

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INTRODUCTION

Cruise Lines International Association (CLIA), the world's largest cruise industry trade organization, is releasing the latest global cruise passenger statistics. Playing a significant role in international tourism, cruising continues at a paced growth around the world with an almost 7 percent increase from 2017 to 2018, totaling 28.5 million passengers. Research also shows North American travelers continue to embrace cruising with an annual passenger increase of 9 percent (14.2 million passengers) in 2018.

While the cruise sector represents 2 percent of the overall global travel industry, this segment is on pace with international tourism worldwide. According to the latest UNWTO World Tourism Barometer, international tourist arrivals grew 6 percent in 2018, totaling 1.4 billion while cruise travel grew at almost 7 percent during the same timing.

"It is not surprising that cruise travel is on par with overall international tourism growth. Cruising makes international travel accessible for travelers worldwide and it is apparent in the 2018 CLIA global passenger findings," said Kelly Craighead, president and CEO, CLIA. "From a renewed interest in cruises to the Mediterranean to a significant increase in adventure cruising, travelers are embracing cruise travel more than ever before."



CRUISE PASSENGER INSIGHTS AROUND THE GLOBE

- Mediterranean Moves – Cruises in the Mediterranean are moving up in popularity with an impressive 8 percent increase from 2017 to 2018 totaling more than 4 million cruise passengers.
- Shorter Cruises – Passengers are preferring shorter cruise durations. Seven-day cruise itineraries are up 9 percent while three-day and under cruises are also up 10 percent in 2018.
- Caribbean Rebounds – Cruisers love the Caribbean and the latest insight reveal travel to the islands is still in full swing. An impressive 11.3 million cruise passengers traveled to the Caribbean in 2018 an annual increase of 6 percent.
- Destination Alaska – As adventure travel continues to thrive, so do adventurous cruise destinations. Alaska has experienced double-digit growth with a year-over-year 17 percent increase in passengers in 2017 and another 13 percent increase in 2018 accounting for more than one million cruisers travelling to this destination.
- Moderate Growth in Asia – When compared to the rapid increases of the past, 2018 saw moderate cruise passenger growth throughout Asia and China with a 5 percent increase in cruise passengers from the region totaling a still impressive 4.2 million.
- Cruise Travel on the Rise - North American passenger numbers reached 14.2 million in 2018, showing an increase of 9 percent from 2017.
- Eyes on the Mediterranean– Globally, Mediterranean cruises grew substantially in popularity last year, totaling more than 4 million cruise passengers worldwide. Of those, more than 700,000 passengers came from North America up 29 percent from the previous year.
- Craving the Caribbean – Cruise travelers from North America dominate cruise travel to the easily accessible Caribbean. Continued growth in cruising to the Caribbean, Bahamas, and Bermuda, is up 7 percent to 9.8 million passengers in 2018.
- Alaskan Adventures Preferred – Aligning with global insights, North American cruisers made up the significant portion of cruise passengers traveling to Alaska in 2018 with 906,019 cruise passengers increasing to 14 percent from 2017.
- Additional Destinations - Other growing North American destinations include the Hawaii & North Atlantic Coast region, Mexico, California, and Pacific which increased 4 percent in 2018, totaling 1.3 million cruise passengers.

2018 – A RECORD BREAKING YEAR

By any standard, 2018 was a significant year for the ocean and river cruise industry in the UK and Ireland.

2
MILLION
CRUISES

Over two million ocean cruises were taken by UK and Irish passengers, surpassing the two million mark two years earlier than predicted and illustrating how cruise has become a major player within the UK and Irish travel sector.



DID YOU KNOW?

We hit the 2 million benchmark over a year earlier than predicted.

The river cruise market also experienced a healthy growth with 232,000 cruises taken, an increase of over 10 per cent.

Our love of cruising in Europe still reigns supreme for both ocean and river passengers with Central and Western Europe representing the largest market share – reinforcing how incredibly lucky we are to have easy access to these amazing destinations that are within easy reach for British and Irish holidaymakers.

Increasingly, however, we are looking further afield as our desire to explore new places continues to rise. Destinations such as Asia, the Americas and the polar regions saw significant growth in passenger numbers last year.

With such a wide choice of ships and itineraries, there truly has never been a better time to take a cruise. And the future is looking bright, with the industry committing to investing \$61 billion in building new ships over the next ten years.

We look forward to continuing to work with you to get people to choose cruise as their preferred choice of holiday.



OCEAN CRUISE REVIEW 2018

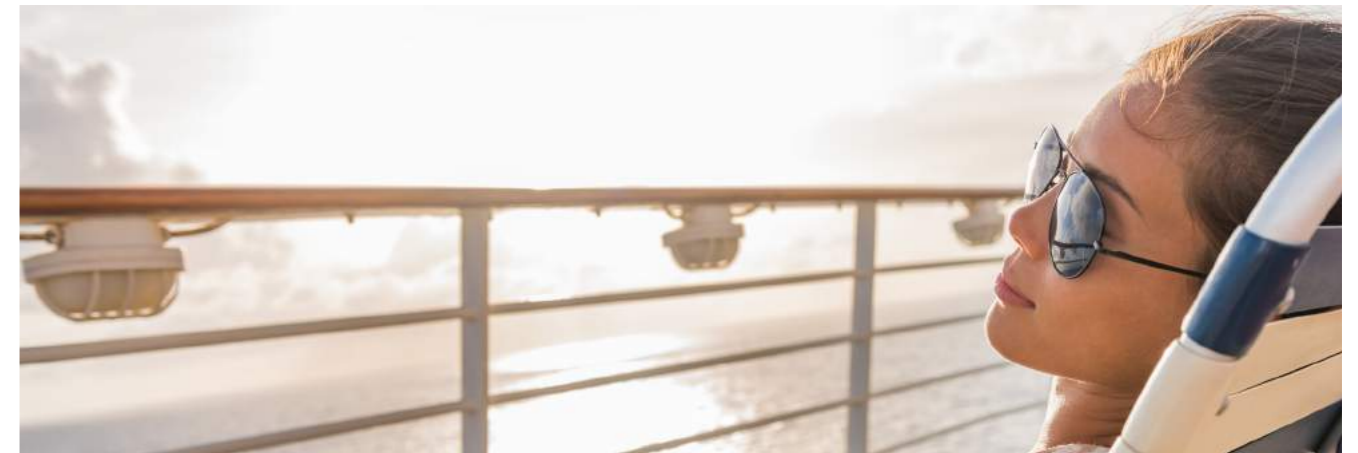


EXECUTIVE SUMMARY

- A record number of cruises were taken by British & Irish passengers in 2018, with 2,009,000 sailings, a rise of 2 per cent compared to 2017
- The average cruise passenger age was largely unchanged at 57 years
- The UK and Ireland cruise market is still dominated by 'The Big Three' – the Mediterranean, Caribbean and Northern Europe
- Cruises in exploration destinations saw the most growth in passenger numbers with an increase of 44 per cent
- The over-60s are leading the way in cruises in far-flung destinations such as Australasia, South America, the Galapagos and the polar regions
- Cruises are being booked further in advance of departure and nine-in-ten cruise takers would book a cruise again within the next year



HOW MANY PEOPLE IN UK AND IRELAND TOOK AN OCEAN CRUISE IN 2018?



PASSENGER VOLUME

2009	1,533	3.9
2010	1,622	5.8
2011	1,700	4.8
2012	1,701	0.1
2013	1,726	1.5
2014	1,644	4.8
2015	1,789	8.8
2016	1,889	5.6
2017	1,971	4.3
2018	2,009	2.0

Passenger in K

Source: iRN research for CLIA UK & Ireland 2017

A record breaking 2,009,000 ocean cruises were taken by UK and Irish passengers in 2018, an increase of 2 per cent against 2017.

Surpassing the two million mark is a significant milestone for the UK & Ireland market. The first time one million cruises taken by UK & Irish passengers was reached was in 2004. In fourteen years, this figure has doubled which demonstrates the continued strength of cruising as a mainstream holiday choice in the UK and Ireland travel market.

The average cruise duration stood at 10.1 days.

TRAVELLER DEMOGRAPHICS

WHO IS CRUISING?

AVERAGE AGE

2016	2017	2018
56	56	57

PASSENGER VOLUME BY AGE GROUP

In 2018, the average cruise passenger age was largely unchanged at 57 years.

This can be attributed to the growth in the number of families choose cruise as their preferred holiday choice.

The UK and Irish cruise market saw growth across all age profiles, clearly demonstrating that cruise is now resonating with all generations.

Bookings from those aged between 30 – 39 increased by eight per cent and there was a three per cent increase from those in their 20s, which is in line with a recent study in CLIA's 2018 Cruise Travel Report which found that more millennials are embracing cruise travel.

The biggest growth was seen from the over-60s who have the time and money and are becoming increasingly adventurous, wanting to travel widely, comfortably and with purpose.

Passenger in K	2016	2017	2018
<=12 Years	56	53	57
13-19	51	47	49
20-29	65	63	65
30-39	79	77	83
40-49	159	143	144
50-59	318	300	307
60-69	417	388	422
>=70 Years	333	347	413

Source: iRN research for CLIA UK & Ireland 2017

WHERE ARE THEY CRUISING?

PASSENGER VOLUME BY DESTINATION

Our love affair with cruising in Europe continues

The Mediterranean, Northern Europe and the Baltics took up almost 70 per cent of total ocean cruises taken, thanks to the large deployment of incredible ships offering an amazing choice of itineraries in European destinations as well as the number of cruises sailing ex-UK.

The UK and Irish cruise market is still dominated by the 'Big Three'

The Mediterranean, Northern Europe and the Caribbean remain the top three destinations for UK and Irish cruise takers. The Central & Western Mediterranean has kept its number one spot with 27 per cent of the market, followed closely by Northern Europe with 24 per cent and the Caribbean with 15 per cent.

Exploration destinations saw the highest increase in passenger growth

Over recent years, a strong trend in travel is that a growing number of people are seeking adventure and unique experiences for their holiday. This trend can be seen in the cruise sector too, highlighted by the significant increase in the number of cruises taken in 2018 to exploration destinations – such as the polar regions, the Galápagos Islands and Antarctica – which saw bookings increase by 44 per cent year on year.

Travellers no longer want a 'fly and flop' holiday

Another key highlight is the growing popularity of cruises in Asia and South America/Panama Canal, with a growth in passenger numbers of 41 per cent and 29 per cent respectively. This, along with the growth in numbers to exploration destinations, illustrates how travellers are now seeking holidays that are more than just 'fly and flop' – they desire travel that offers authentic and enriching experiences. than just 'fly and flop' – they desire travel that offers authentic and enriching experiences.

Passenger in K	2016	2017	2018
Central & Western Med.	619	588	553
Northern Europe	420	454	490
Caribbean/Bahamas/Bermuda	268	276	295
Canary Isl.	150	149	151
Eastern Med.	159	144	137
Transatlantic/World Cr.	70	74	81
Baltics	76	72	69
Asia/China	37	45	63
Africa/Mid-East	38	48	24
Exploration Dest	22	22	32
Australiasia	22	22	24
Alaska	20	22	24
Panama Canal/South Am	16	20	26
Other	7	8	10
NA West Coast/Mexico/California/Pacific Coast	8	6	9
Canada/New England	5	6	8
Hawaii	6	6	6

Source: iRN research for CLIA UK & Ireland 2017

DESTINATIONS & AVERAGE AGE

WHO IS CRUISING WHERE?

The Caribbean islands attract the youngest demographic, closely followed by the Central and Western Mediterranean and Northern Europe as they are popular destinations for families and first-time ocean cruisers.

Statistically, Alaska, the Baltics and the Asia/China region are popular amongst those in their early 60s, most of whom would have already cruised previously and are looking to explore new destinations.

Unsurprisingly, those aged mid 60s+ are taking cruises in far-flung destinations such as Australasia, Canada/New England and the exploration regions, as they have more time, money and are becoming increasingly adventurous when it comes to travel.



CRUISE BOOKING BEHAVIOUR

CLIA SURVEY RESULTS



Nine-in-ten cruise takers will cruise again over the next year

Similar to the results in 2017, when cruise takers were asked when they were likely to take their next cruise, the majority said they were planning to take a cruise within the next six months and almost nine-in-ten said within the next year.



Cruises are being booked further in advance of departure

Results showed that typically cruise takers booked their cruise 32 weeks prior to departure, showing they're booking further in advance compared with 28 weeks in 2017.



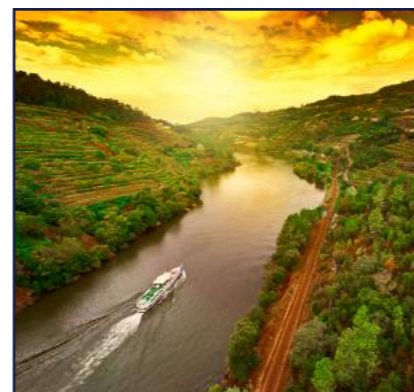
Cruising becomes slightly less Southern-centric

In 2017, 40% of cruise takers lived in Southern England (South East, South West and London) making this area by far the most important for cruising in the UK. In 2018, the share of cruise takers from Southern England declined to 37%. The key regional growth markets in 2018 were the Midlands, Yorkshire & Humberside, North East, Wales and East of England, with adults from the Central belt of England the fastest growing customer base.





RIVER CRUISE REVIEW 2018



EXECUTIVE SUMMARY

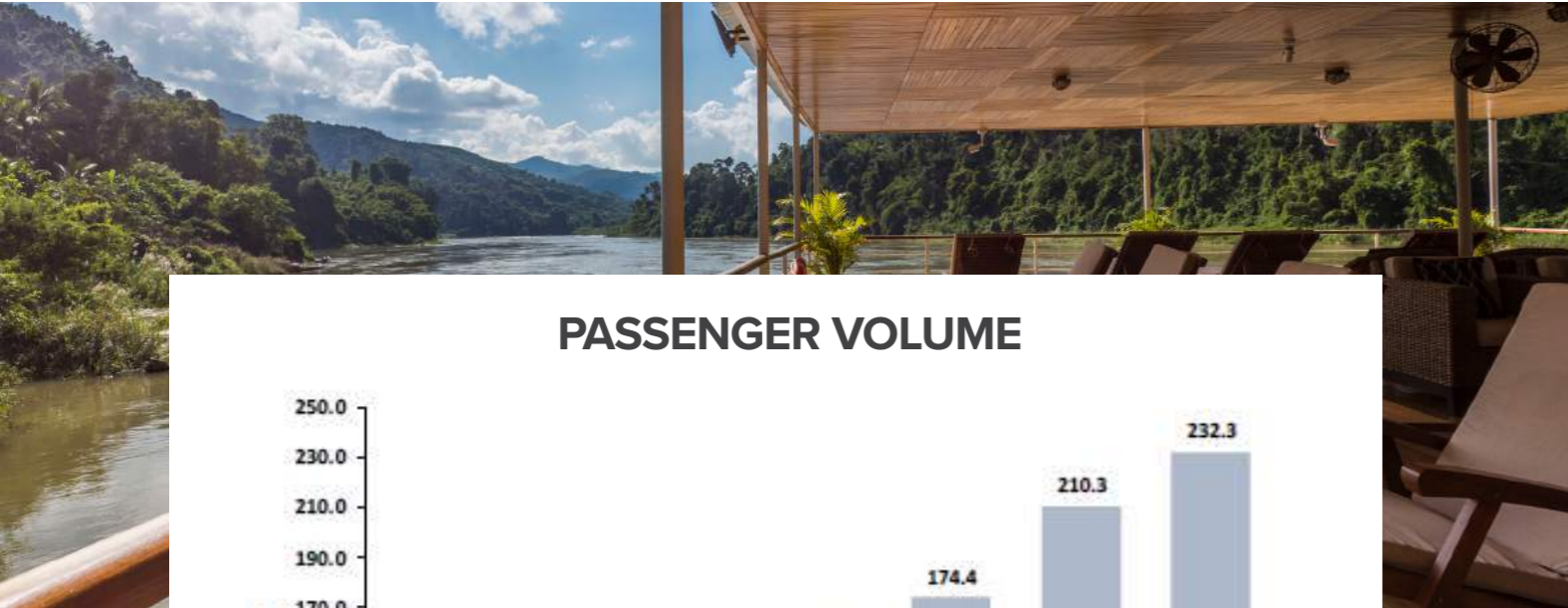
- The UK and Ireland river cruise market grew at a healthy pace in 2018, reaching 232,300 passengers, a growth of 10.4 per cent
- The number of bed nights increased by 12.1 per cent, totalling 1.8 million
- Europe remains the most popular region with Central and Western European destinations representing the largest share of the market at 64 per cent. Outside of Europe, Asia is the main river cruise destination
- The Danube river destinations overtook the Rhine destinations to become the most popular for river cruising
- The best performing regional markets when compared with 2017 were North America, Africa and Central Europe

RIVER CRUISE PASSENGER & BEDNIGHTS BY REGION & DESTINATION

	Passengers				Bednight			
	Numbers (000)			% growth 2017-18	Numbers (000)			% growth 2017-18
	2016	2017	2018		2016	2017	2018	
EUROPEAN								
Rhine/Moselle/tributaries	42.5	49.9	59.1	18.4%	300.0	349.4	413.3	18.3%
Danube	38.9	46.7	55.6	19.0%	302.1	366.9	440.8	20.1%
Rhine and Danube	10.6	15.8	19.5	23.6%	134.3	198.7	275.3	38.6%
<i>Sub total</i>	92.0	112.4	134.2	19.4%	736.4	915.0	1129.4	23.4%
French (Rhône/Seine)	21.6	24.9	25.3	1.4%	148.3	173.7	179.0	3.1%
Portugal (Douro)	11.2	20.7	23.8	15.0%	84.0	156.4	177.7	13.6%
Netherlands/Belgium*	6.4	7.1	7.9	11.4%	33.4	37.3	38.6	3.4%
Russian	6.4	10.8	6.0	-44.5%	67.5	115.4	63.7	-44.8%
Italian (Po)	2.1	1.9	1.5	-18.9%	11.6	9.8	7.9	-19.3%
Elbe	3.5	3.0	3.7	25.1%	28.4	24.2	30.3	25.4%
Other European	8.3	8.0	5.3	-33.4%	63.9	60.3	35.4	-41.3%
Total European	151.4	188.7	207.7	10.0%	1173.5	1492.2	1662.0	11.4%
NON-EUROPEAN								
Nile	4.1	4.7	5.7	22.6%	31.8	36.0	44.9	24.5%
China	1.9	1.0	2.3	144.2%	18.4	8.4	21.9	160.6%
India	1.1	1.4	1.3	-4.7%	8.6	11.5	10.7	-6.7%
Mekong	4.6	5.0	6.2	23.1%	32.4	34.3	39.0	13.7%
Burma	5.0	4.6	2.9	-35.9%	27.9	27.1	18.6	-31.5%
Other non-European	6.2	5.0	6.1	21.1%	27.2	23.0	29.2	27.0%
Total non-European	22.9	21.7	24.6	13.6%	146.3	140.4	164.4	17.1%
TOTAL	174.4	210.4	232.3	10.4%	1319.8	1632.6	1826.4	11.9%

* this data is restricted to only Netherlands and Belgium waterways. In previous years, data from other cruises ending in Netherlands have been included. These are now in the "Other European" category.

HOW MANY PEOPLE IN UK AND IRELAND TOOK A RIVER CRUISE IN 2018?



PASSENGER VOLUME



The number of river cruises taken by UK and Irish passengers in 2018 stood at 232,300, an increase of 10.4 per cent against 2017.

The number of bed nights rose by 12.1 per cent reaching 1.83 million, and the average cruise duration grew from 7.7 days to 7.9, indicating longer duration cruises are becoming more popular.

The continued growth in passenger numbers can be attributed to the incredible experiences a river cruise offers, the plethora of fantastic itineraries and shore excursions and the high standard of ships.

RIVER CRUISE DESTINATIONS

European rivers continue to dominate the market

207,000 river cruises were taken on a European river, up from 188,700 in 2017.

Passenger numbers grew by 13 per cent on non-European rivers, from 21,700 to 24,600.



Central and Western European destinations generate over six-in-ten passengers

The Central and Western European river destinations represent the largest share of the market, collectively accounting for 64 per cent of all passengers.



The Danube overtook the Rhine to become the most popular river for UK and Irish passengers

Together, the Rhine and Danube rivers and their tributaries accounted for 58 per cent of passenger numbers. The Douro stood as the third most popular river with 23,800 UK and Irish passengers has showed an increase of almost 15 per cent from 2017.

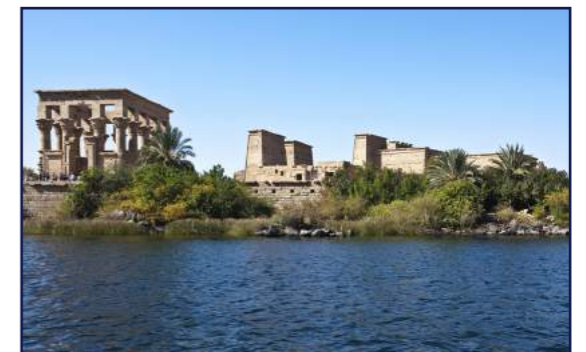


Outside of Europe, Asia is the main destination

River cruises in Asia regions accounted for six per cent of the overall market share, growing from 12,400 passengers to 13,200.

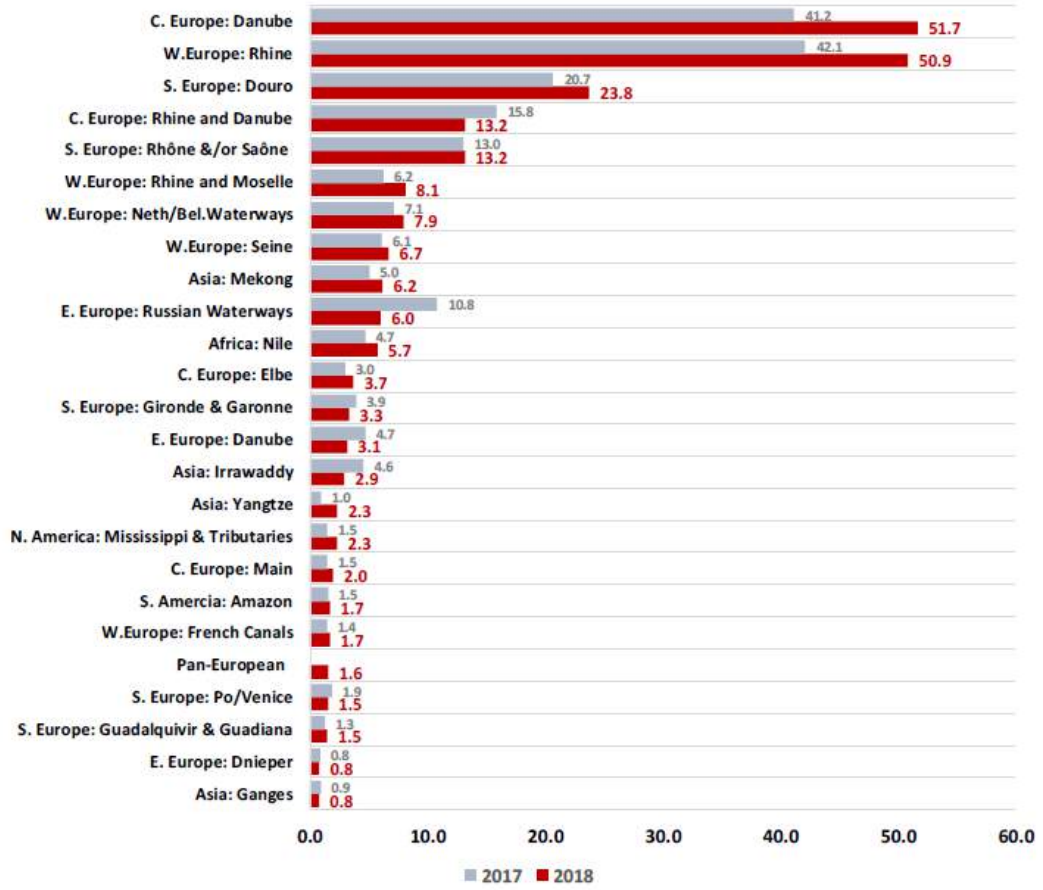
North America and Africa experienced the strongest growth

North America - a relatively new destination to the river cruise market - and Africa, with the resurgence of cruises on the Nile, experienced the highest increase in bookings last year, up 50 per cent and 18 per cent respectively



MOST POPULAR DESTINATIONS BY REGION & RIVER

Passenger in K





ABOUT CLIA

**WORKING TOGETHER TO
GET MORE PEOPLE TO CRUISE**

WHO IS CLIA?




Cruise Lines International Association (CLIA) is the world's largest cruise industry association, providing a unified voice and leading authority of the global cruise community.

CLIA brings the whole cruise industry together – ocean and river cruise lines, travel agents, ports, destinations and industry suppliers.

Our mantra is One Industry – One Voice. We know that the industry is stronger when we all work together with the shared aim of promoting the cruise travel experience.



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 @CLIAUK  CLIAEurope  @CLIAEuro

CONTACT US

OPENING HOURS

Mon – Fri 9:00 – 5:30

WEB & EMAIL:

cruiseexperts.org
ukinfo@cruising.org

PHONE:

0203 903 5450

ADDRESS:

Suite 405 | 54 Fenchurch Street
London | EC3M 3JY