



2019 Global Market Report



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 a 4% increase from 2018 to 2019, totaling 29.7 million passengers.

Research also shows North American travelers continued to embrace cruising with an annual passenger increase of 8% (15.4 million passengers) in 2019. Europe experienced a healthy 7.4% increase as new ships were launched in two key markets. The average age of cruisers has been remarkably consistent at 46.8, while the average cruise length has also been stable, at around seven days. As expected, due to a reduction in deployment in Asia and Australia, the number of cruisers in these regions was lower than in previous years. The Caribbean, once again, benefited from the healthy gain in the U.S. market, and the volume of cruisers to the region grew by 6%. The growth in Alaska accelerated with a sharp 19% increase, the third year in a row with double-digit growth. The rebound in the Eastern Mediterranean has accelerated with a healthy 19%, following a 15% increase last year and following a few years of retraction before 2018.

While the cruise industry experienced growth in 2019, the emergence of COVID-19 in 2020 led the cruise industry to take immediate and aggressive action to mitigate the risk of the virus—which culminated in a global pause in operations in mid-March.

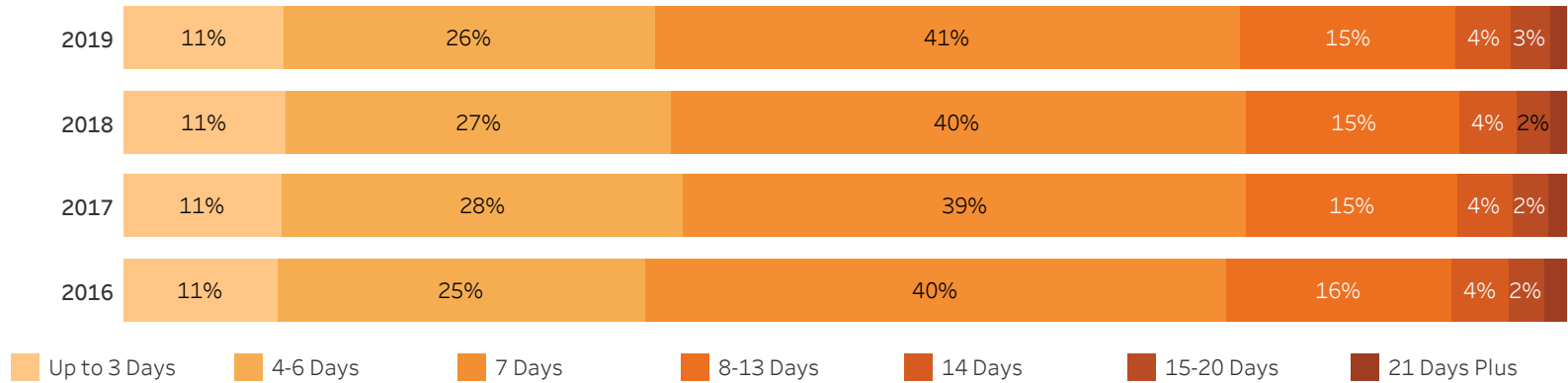
Following the pause in operations, with strict protocols in place, and with the approval and support of local and regional authorities, cruise lines were able to successfully resume limited operations in Europe and other parts of the world. The successes of these initial sailings demonstrate that the new protocols are working as designed, and CLIA and our cruise line members look forward to continue welcoming back passengers from around the world.

Global Report: 2016 to 2019

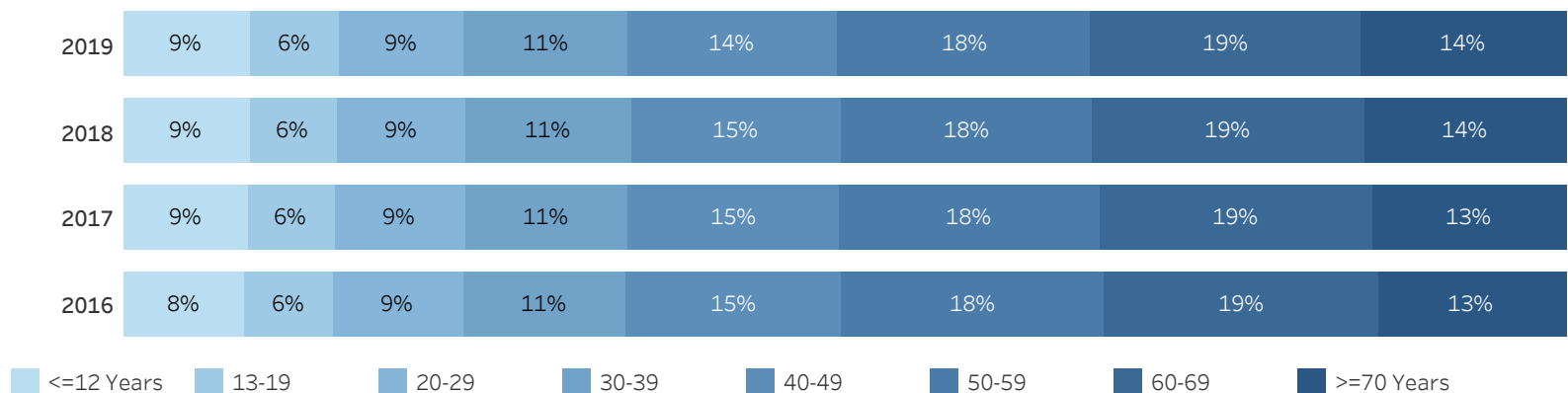
Passenger Volume (K)

Passenger Volume (K)				Average Duration, in Days				Average Age			
2016	2017	2018	2019	2016	2017	2018	2019	2016	2017	2018	2019
25,155	26,716 (6.2% ▲)	28,515 (6.7% ▲)	29,673 (4.1% ▲)	7.2	7.1	7.0	7.1	46.7	46.7	46.7	46.8

Average Cruise Duration



Average Passenger Age Groups



Passenger Volume (K) by Source Passenger Regions

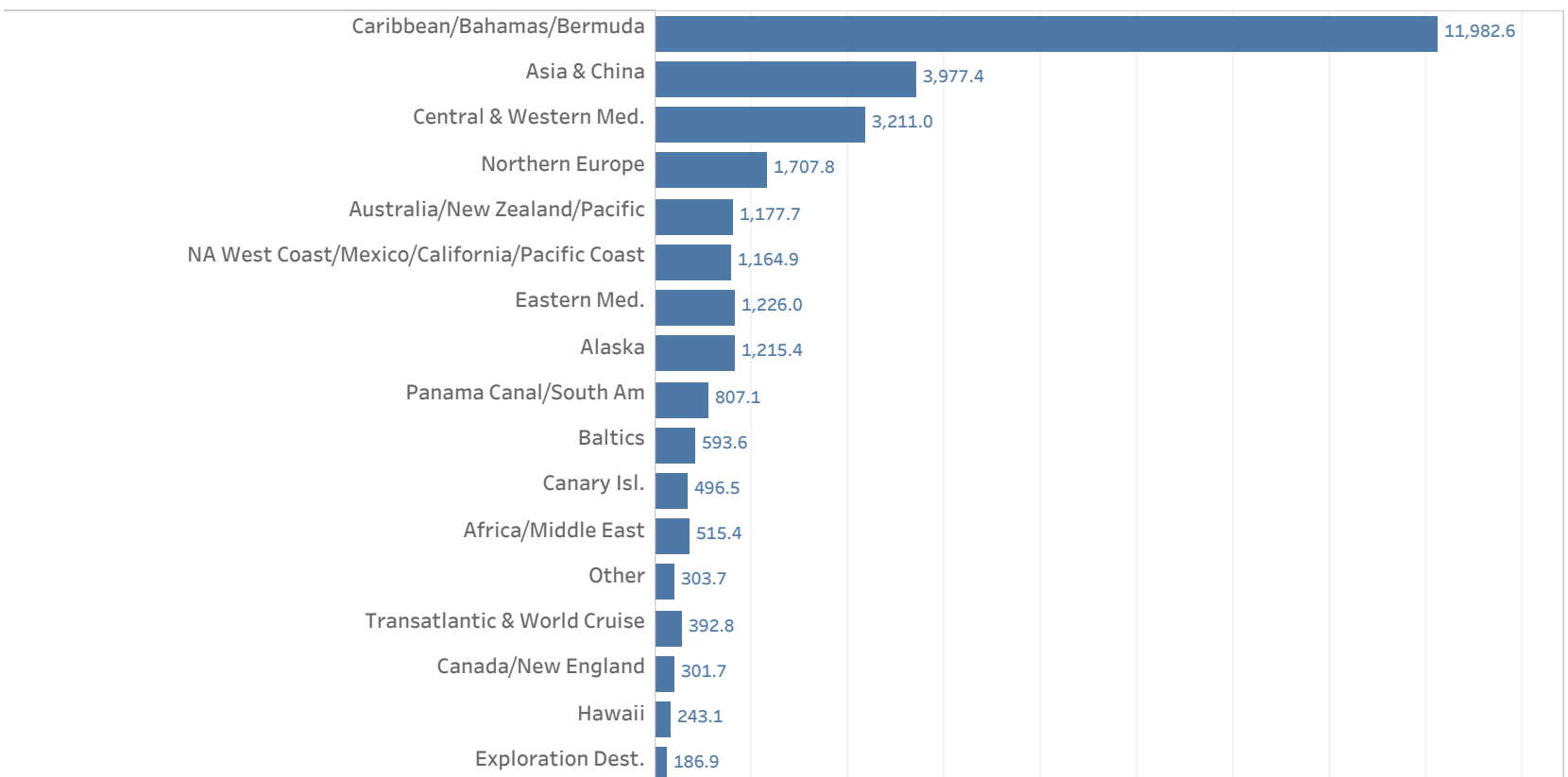
	2016	2017	2018	2019
North America	12,403	13,019 (5.0% ▲)	14,240 (9.4% ▲)	15,408 (8.2% ▲)
Western Europe	6,344	6,516 (2.7% ▲)	6,731 (3.3% ▲)	7,226 (7.4% ▲)
Asia	3,370	4,052 (20.3% ▲)	4,240 (4.6% ▲)	3,738 (-11.8% ▼)
Australia/NZ/Pacific	1,370	1,434 (4.7% ▲)	1,460 (1.8% ▲)	1,351 (-7.5% ▼)
South America	791	799 (1.0% ▲)	883 (10.5% ▲)	935 (5.9% ▲)
Eastern Europe	205	192 (-6.0% ▼)	213 (10.9% ▲)	263 (23.3% ▲)
Scandinavia/Iceland	241	229 (-4.8% ▼)	225 (-1.8% ▼)	218 (-3.0% ▼)
Africa	144	151 (4.8% ▲)	154 (1.9% ▲)	169 (9.8% ▲)
Middle East/Arabia	112	104 (-7.7% ▼)	111 (6.6% ▲)	108 (-2.2% ▼)
Caribbean	50	54 (8.7% ▲)	56 (3.1% ▲)	57 (1.0% ▲)
Central America	39	51 (30.3% ▲)	47 (-8.3% ▼)	49 (5.7% ▲)

Global Report (Continued)

Passenger Volume (K) for Top Countries

	2016	2017	2018	2019
United States	11,392	11,944 (4.9% ▲)	13,091 (9.6% ▲)	14,199 (8.5% ▲)
Germany	2,018	2,169 (7.5% ▲)	2,233 (3.0% ▲)	2,587 (15.8% ▲)
UK & Ireland	1,960	1,971 (0.5% ▲)	2,009 (2.0% ▲)	1,992 (-0.9% ▼)
Mainland China	2,113	2,397 (13.4% ▲)	2,357 (-1.6% ▼)	1,919 (-18.6% ▼)
Australia	1,281	1,333 (4.1% ▲)	1,345 (0.9% ▲)	1,241 (-7.7% ▼)
Canada	865	921 (6.5% ▲)	971 (5.4% ▲)	1,037 (6.8% ▲)
Italy	751	769 (2.5% ▲)	831 (8.0% ▲)	950 (14.3% ▲)
Brazil	465	445 (-4.2% ▼)	510 (14.6% ▲)	567 (11.3% ▲)
Spain	480	510 (6.4% ▲)	530 (3.9% ▲)	553 (4.3% ▲)
France	554	504 (-9.1% ▼)	521 (3.4% ▲)	545 (4.6% ▲)
Taiwan Region	299	374 (24.8% ▲)	391 (4.7% ▲)	389 (-0.4% ▼)
Singapore	214	267 (24.4% ▲)	373 (39.9% ▲)	325 (-12.7% ▼)
India	148	172 (16.1% ▲)	221 (28.1% ▲)	313 (41.5% ▲)
Japan	207	255 (22.9% ▲)	266 (4.5% ▲)	296 (11.4% ▲)
Hong Kong	127	230 (80.6% ▲)	250 (8.6% ▲)	191 (-23.4% ▼)
Mexico	142	149 (4.8% ▲)	174 (16.6% ▲)	167 (-3.6% ▼)
South Africa	132	140 (6.7% ▲)	143 (2.1% ▲)	158 (10.2% ▲)
Argentina	163	178 (9.1% ▲)	187 (4.9% ▲)	151 (-19.2% ▼)
Switzerland	147	152 (3.2% ▲)	154 (1.5% ▲)	140 (-9.2% ▼)
Austria	125	130 (3.5% ▲)	136 (4.8% ▲)	136 (0.1% ▲)
Netherlands	104	110 (5.9% ▲)	113 (2.2% ▲)	123 (8.7% ▲)
Malaysia	100	188 (87.8% ▲)	150 (-19.9% ▼)	121 (-19.6% ▼)
New Zealand	86	98 (13.5% ▲)	112 (14.7% ▲)	106 (-5.1% ▼)
Norway	111	104 (-6.8% ▼)	101 (-2.7% ▼)	98 (-3.0% ▼)

Volume of Passengers (in K) to Destinations, 2019 At least 4K Passengers per Destination

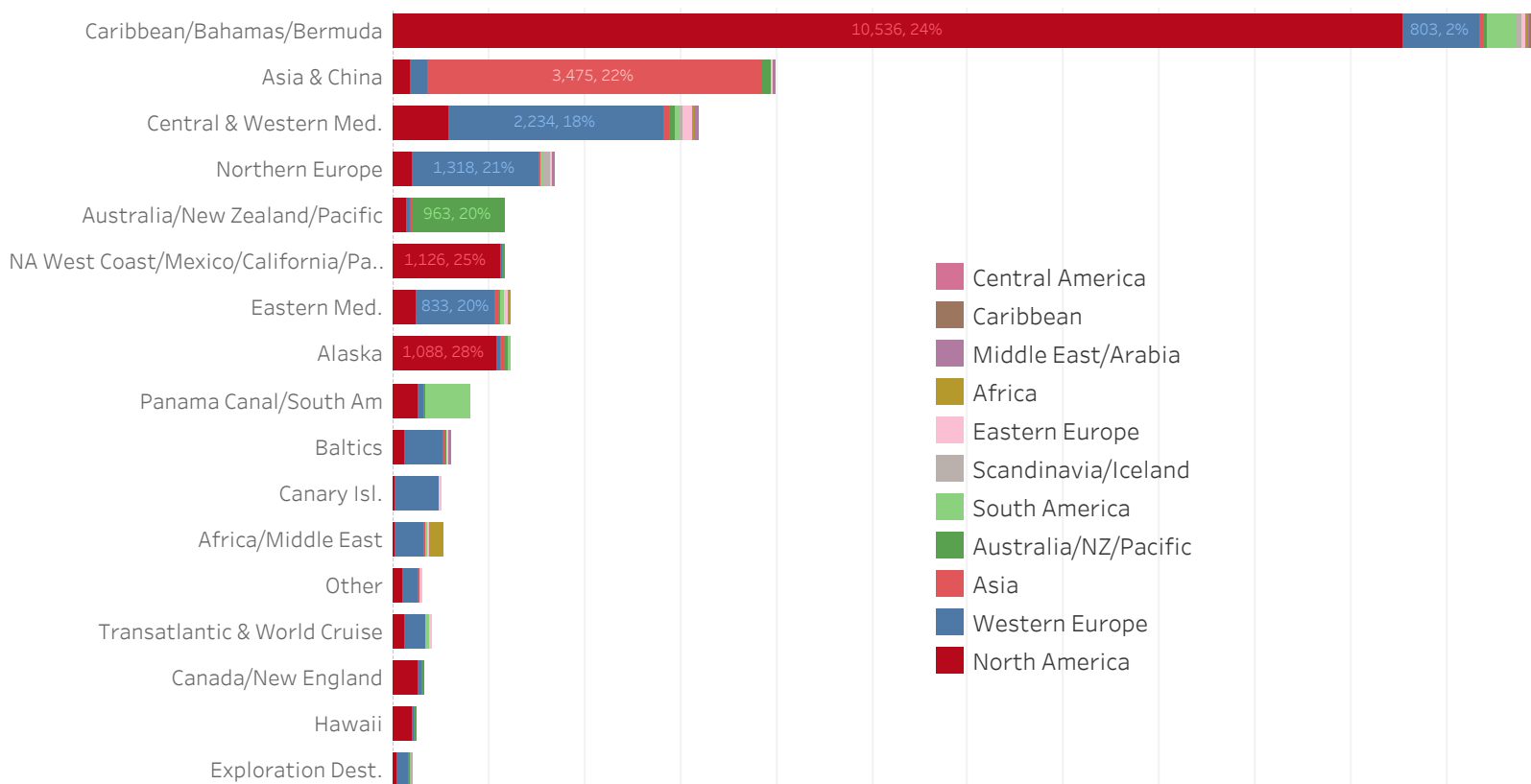


Global Report (Continued)

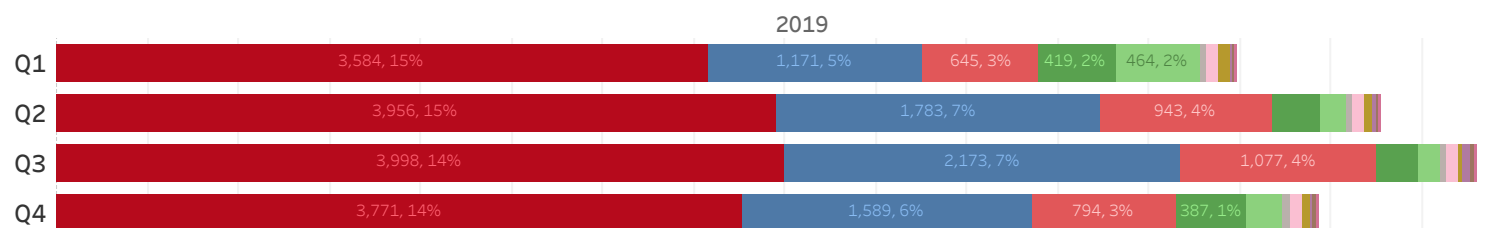
Passenger Volume by Trade (K)

	2016	2017	2018	2019
Caribbean/Bahamas/Bermuda	10,135	10,695 (6% ▲)	11,335 (6% ▲)	11,983 (6% ▲)
Asia & China	3,386	4,005 (18% ▲)	4,254 (6% ▲)	3,977 (-7% ▼)
Central & Western Med.	2,920	2,907 (0% ▲)	3,068 (6% ▲)	3,211 (5% ▲)
Northern Europe	1,419	1,569 (11% ▲)	1,731 (10% ▲)	1,708 (-1% ▼)
Eastern Med.	1,020	896 (-12% ▼)	1,027 (15% ▲)	1,226 (19% ▲)
Alaska	779	905 (16% ▲)	1,025 (13% ▲)	1,215 (19% ▲)
Australia/New Zealand/Pacific	1,180	1,262 (7% ▲)	1,299 (3% ▲)	1,178 (-9% ▼)
NA West Coast/Mexico/California/Pacific Coast	1,209	1,089 (-10% ▼)	1,126 (3% ▲)	1,165 (3% ▲)
Panama Canal/South Am	657	678 (3% ▲)	745 (10% ▲)	807 (8% ▲)
Baltics	480	564 (18% ▲)	539 (-4% ▼)	594 (10% ▲)
Africa/Middle East	390	383 (-2% ▼)	370 (-3% ▼)	515 (39% ▲)
Canary Isl.	371	403 (9% ▲)	444 (10% ▲)	496 (12% ▲)
Transatlantic & World Cruise	261	288 (10% ▲)	365 (26% ▲)	393 (8% ▲)
Other	218	318 (46% ▲)	490 (54% ▲)	304 (-38% ▼)
Canada/New England	167	205 (23% ▲)	218 (6% ▲)	302 (39% ▲)
Hawaii	190	215 (14% ▲)	218 (1% ▲)	243 (11% ▲)
Exploration Dest.	82	114 (39% ▲)	148 (30% ▲)	187 (26% ▲)
No Trade Identified	292	220 (-25% ▼)	113 (-48% ▼)	170 (50% ▲)

Passenger Volume (K) by Trade & Source Regions in 2019

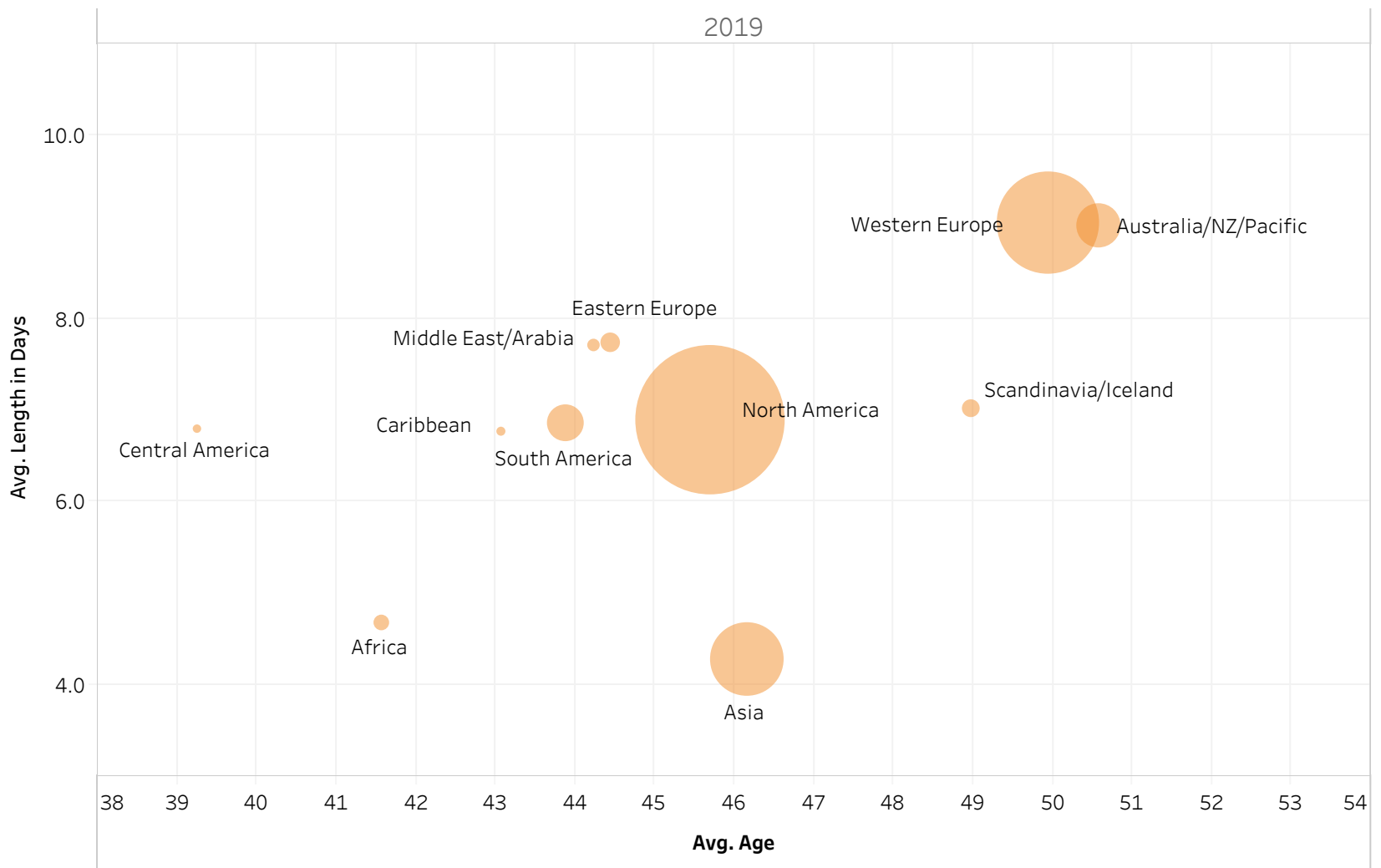


Passenger Volume (K) by Quarter & 10 Source Regions in 2019



Global Report (Continued)

Average Age and Cruise Length for Top Source Markets, 2019



Average Age and Cruise Length by Destination / Trade Route, 2019

