



# 2020 Global Market Report



With the emergence of COVID-19 in 2020, the cruise industry took immediate and aggressive action to mitigate the risk of the virus. This culminated in a global pause in operations in mid-March.

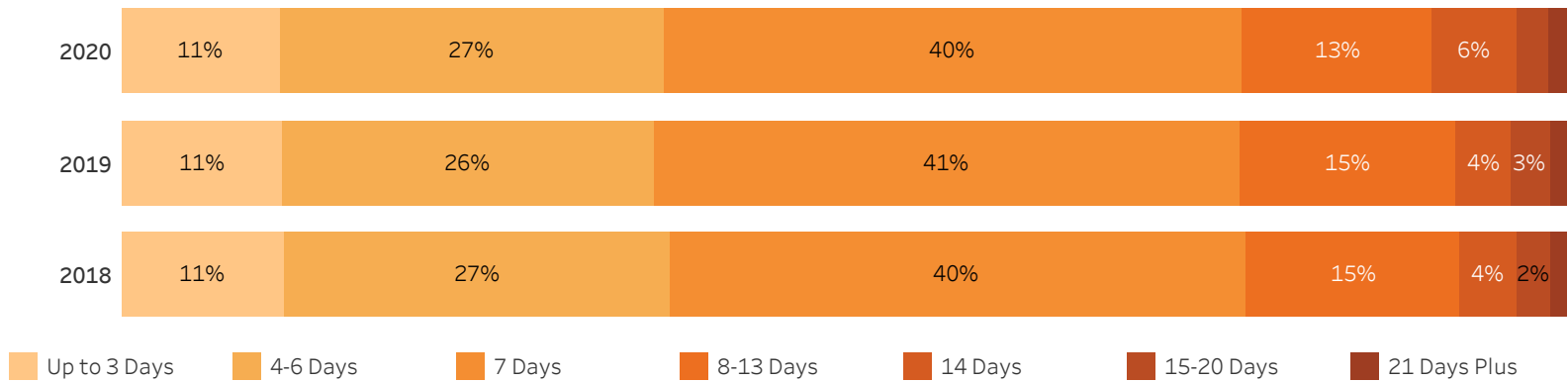
Since then, the industry developed and implemented extensive public health protocols that allowed cruising to resume in Europe, parts of Asia and the South Pacific. As a result of the extensive protocols that have been adopted by cruise lines since resumption began, the incidence rate of COVID-19 onboard cruise ships is far lower than practically any other setting—a remarkable achievement that continues to inspire cruise confidence.

As we continue to work towards resuming operations around the world, and the demand for cruise remaining high, we expect to see the passenger numbers and the growth trajectory rebound to pre-pandemic numbers in the coming years. People love to cruise, and we know that people will return to the seas, just as they will return to restaurants, bars, movie theatres, airplanes, resorts and beyond.

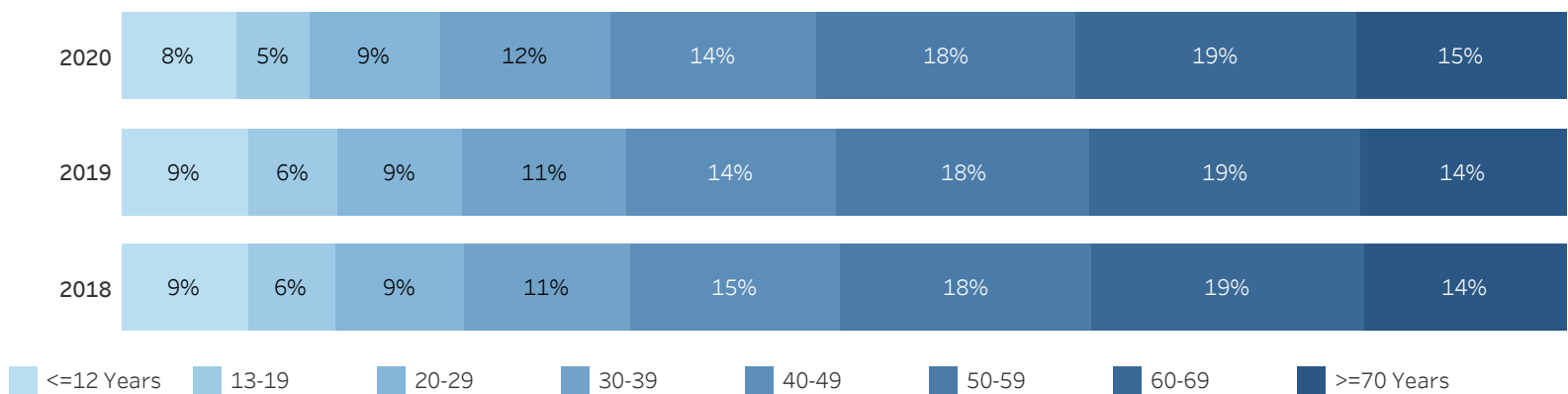
## Passenger Volume in K

Passenger Volume in K			Average Duration, in Days			Average Age		
2018	2019	2020	2018	2019	2020	2018	2019	2020
28,515	29,673 (4.1% ▲)	5,769 (-80.6% ▼)	7.0	7.1	7.2	46.7	46.8	47.6

## Average Cruise Duration



## Average Passenger Age Groups



## Passenger Volume (K) by Source Passenger Regions

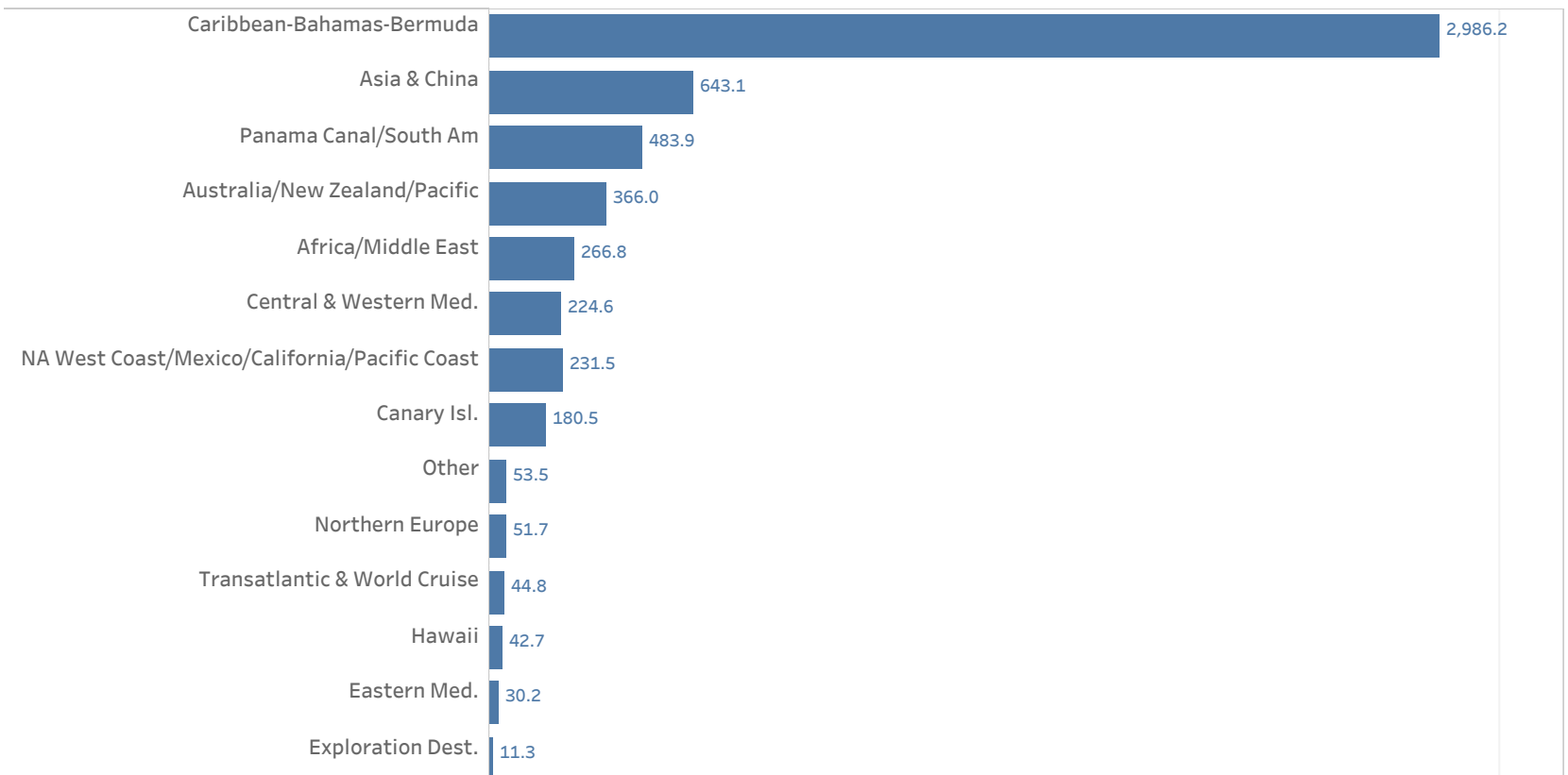
	2018	2019	2020
North America	14,240	15,408 (8.2% ▲)	3,008 (-80.5% ▼)
Western Europe	6,731	7,226 (7.4% ▲)	1,223 (-83.1% ▼)
Asia	4,240	3,738 (-11.8% ▼)	497 (-86.7% ▼)
South America	883	935 (5.9% ▲)	458 (-51.0% ▼)
Australia/NZ/Pacific	1,460	1,351 (-7.5% ▼)	340 (-74.8% ▼)
Eastern Europe	213	263 (23.3% ▲)	72 (-72.6% ▼)
Africa	154	169 (9.8% ▲)	68 (-59.6% ▼)
Scandinavia/Iceland	225	218 (-3.0% ▼)	52 (-76.2% ▼)
Central America	47	49 (5.7% ▲)	14 (-71.3% ▼)
Middle East/Arabia	111	108 (-2.2% ▼)	8 (-92.3% ▼)
Caribbean	56	57 (1.0% ▲)	7 (-87.7% ▼)

## Global Report (Continued)

### Passenger Volume (K) for Top Countries

	2018	2019	2020
United States	13,091	14,199 (8.5% ▲)	2,732 (-80.8% ▼)
Germany	2,233	2,587 (15.8% ▲)	531 (-79.5% ▼)
Brazil	510	567 (11.3% ▲)	331 (-41.7% ▼)
Australia	1,345	1,241 (-7.7% ▼)	312 (-74.9% ▼)
UK & Ireland	2,009	1,992 (-0.9% ▼)	259 (-87.0% ▼)
Canada	971	1,037 (6.8% ▲)	257 (-75.2% ▼)
Mainland China	2,357	1,919 (-18.6% ▼)	205 (-89.3% ▼)
Italy	831	950 (14.3% ▲)	151 (-84.1% ▼)
France	521	545 (4.6% ▲)	146 (-73.2% ▼)
Taiwan Region	391	389 (-0.4% ▼)	83 (-78.8% ▼)
Argentina	187	151 (-19.2% ▼)	76 (-49.8% ▼)
Singapore	373	325 (-12.7% ▼)	72 (-78.0% ▼)
South Africa	143	158 (10.2% ▲)	67 (-57.4% ▼)
India	221	313 (41.5% ▲)	46 (-85.4% ▼)
Spain	530	553 (4.3% ▲)	45 (-91.9% ▼)
Hong Kong	250	191 (-23.4% ▼)	36 (-81.2% ▼)
Austria	136	136 (0.1% ▲)	25 (-81.9% ▼)
New Zealand	112	106 (-5.1% ▼)	24 (-77.6% ▼)
Switzerland	154	140 (-9.2% ▼)	23 (-83.8% ▼)
Norway	101	98 (-3.0% ▼)	20 (-79.3% ▼)
Japan	266	296 (11.4% ▲)	19 (-93.7% ▼)
Mexico	174	167 (-3.6% ▼)	18 (-89.2% ▼)
Netherlands	113	123 (8.7% ▲)	18 (-85.6% ▼)
Malaysia	150	121 (-19.6% ▼)	13 (-88.9% ▼)

### Volume of Passengers (in K) to Destinations, 2020 At least 4K Passengers per Destination

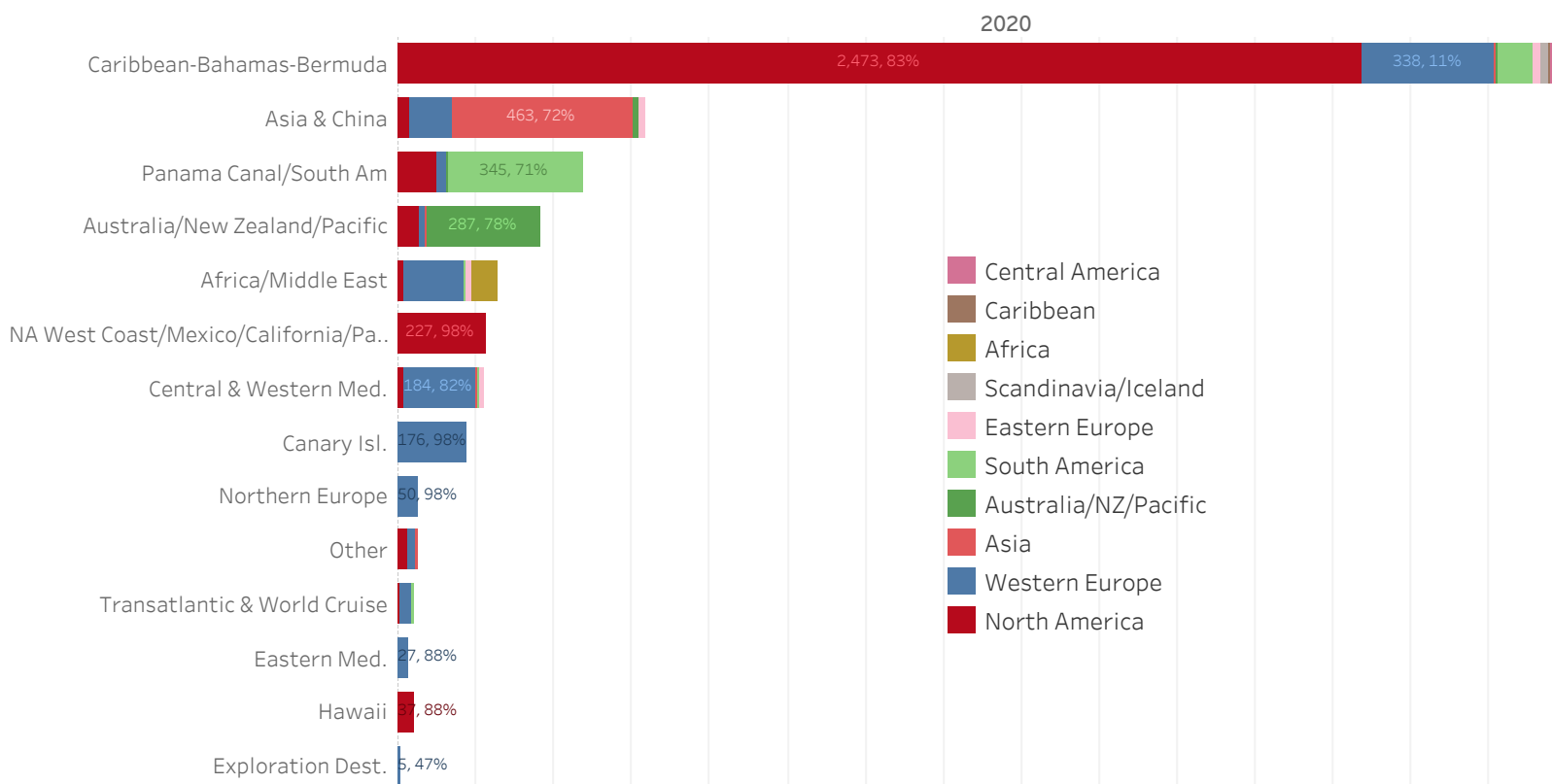


# Global Report (Continued)

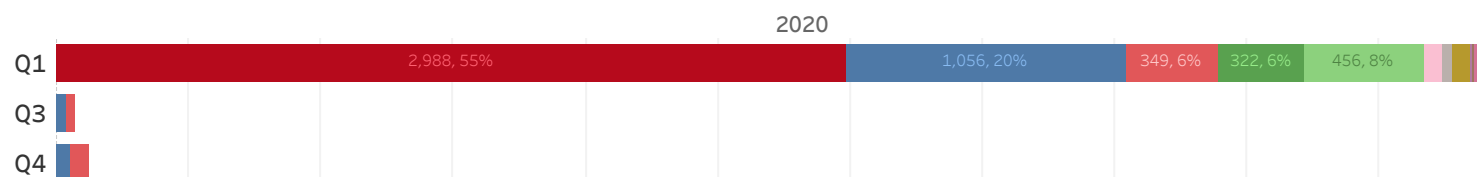
## Passenger Volume by Trade (K)

	2018	2019	2020
Caribbean-Bahamas-Bermuda	11,335	11,983 (6% ▲)	2,986 (-75% ▼)
Asia & China	4,254	3,977 (-7% ▼)	643 (-84% ▼)
Panama Canal/South Am	745	807 (8% ▲)	484 (-40% ▼)
Australia/New Zealand/Pacific	1,299	1,178 (-9% ▼)	366 (-69% ▼)
Africa/Middle East	370	515 (39% ▲)	267 (-48% ▼)
NA West Coast/Mexico/California/Pacific Coast	1,126	1,165 (3% ▲)	231 (-80% ▼)
Central & Western Med.	3,068	3,211 (5% ▲)	225 (-93% ▼)
Canary Isl.	444	496 (12% ▲)	180 (-64% ▼)
No Trade Identified	113	170 (50% ▲)	151 (-11% ▼)
Other	490	304 (-38% ▼)	53 (-82% ▼)
Northern Europe	1,731	1,708 (-1% ▼)	52 (-97% ▼)
Transatlantic & World Cruise	365	393 (8% ▲)	45 (-89% ▼)
Hawaii	218	243 (11% ▲)	43 (-82% ▼)
Eastern Med.	1,027	1,226 (19% ▲)	30 (-98% ▼)
Exploration Dest.	148	187 (26% ▲)	11 (-94% ▼)
Canada/New England	218	302 (39% ▲)	
Baltics	539	594 (10% ▲)	
Alaska	1,025	1,215 (19% ▲)	

## Passenger Volume (K) by Trade & Source Regions in 2020



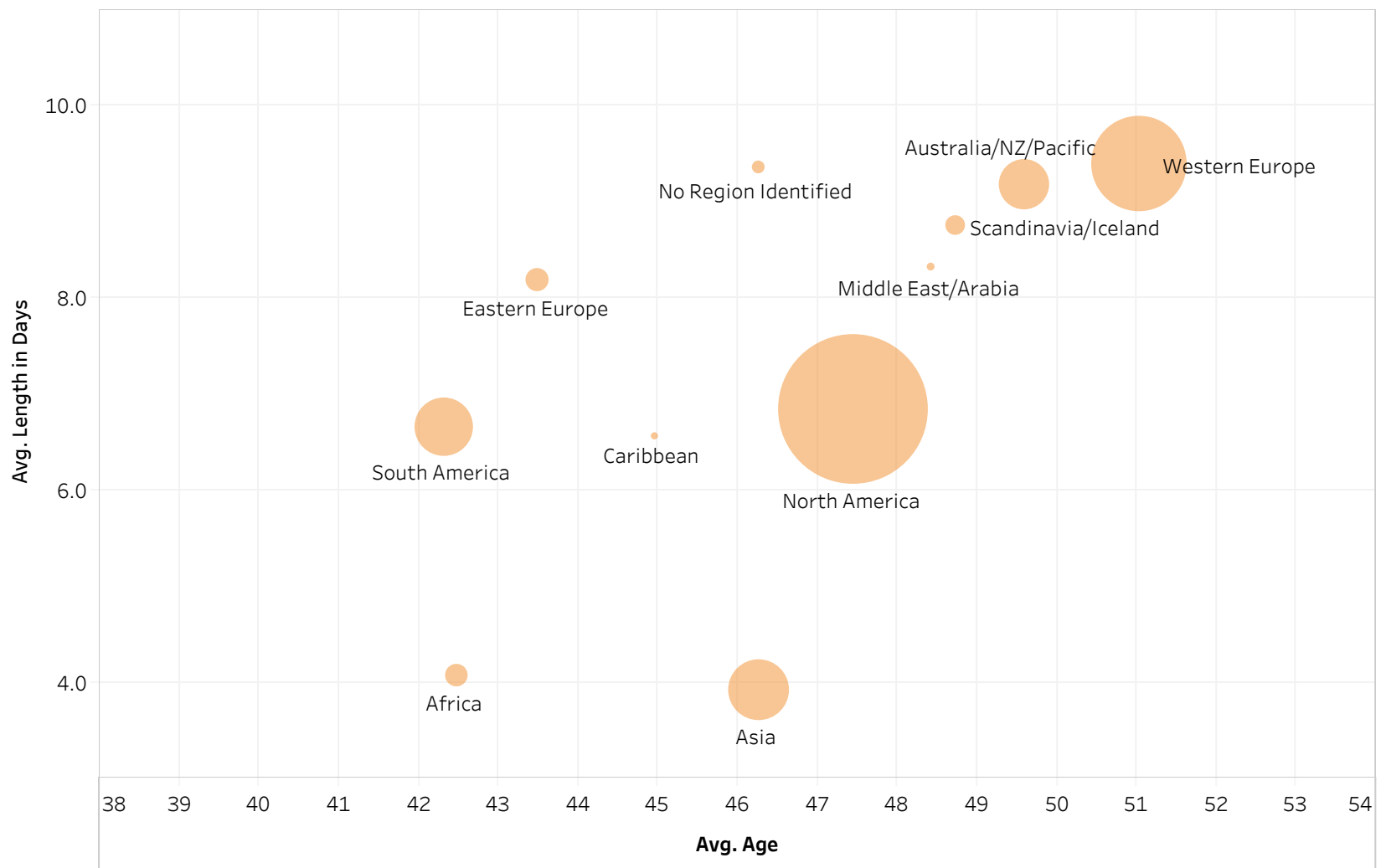
## Passenger Volume (K) by Quarter & Top 10 Source Regions in 2020



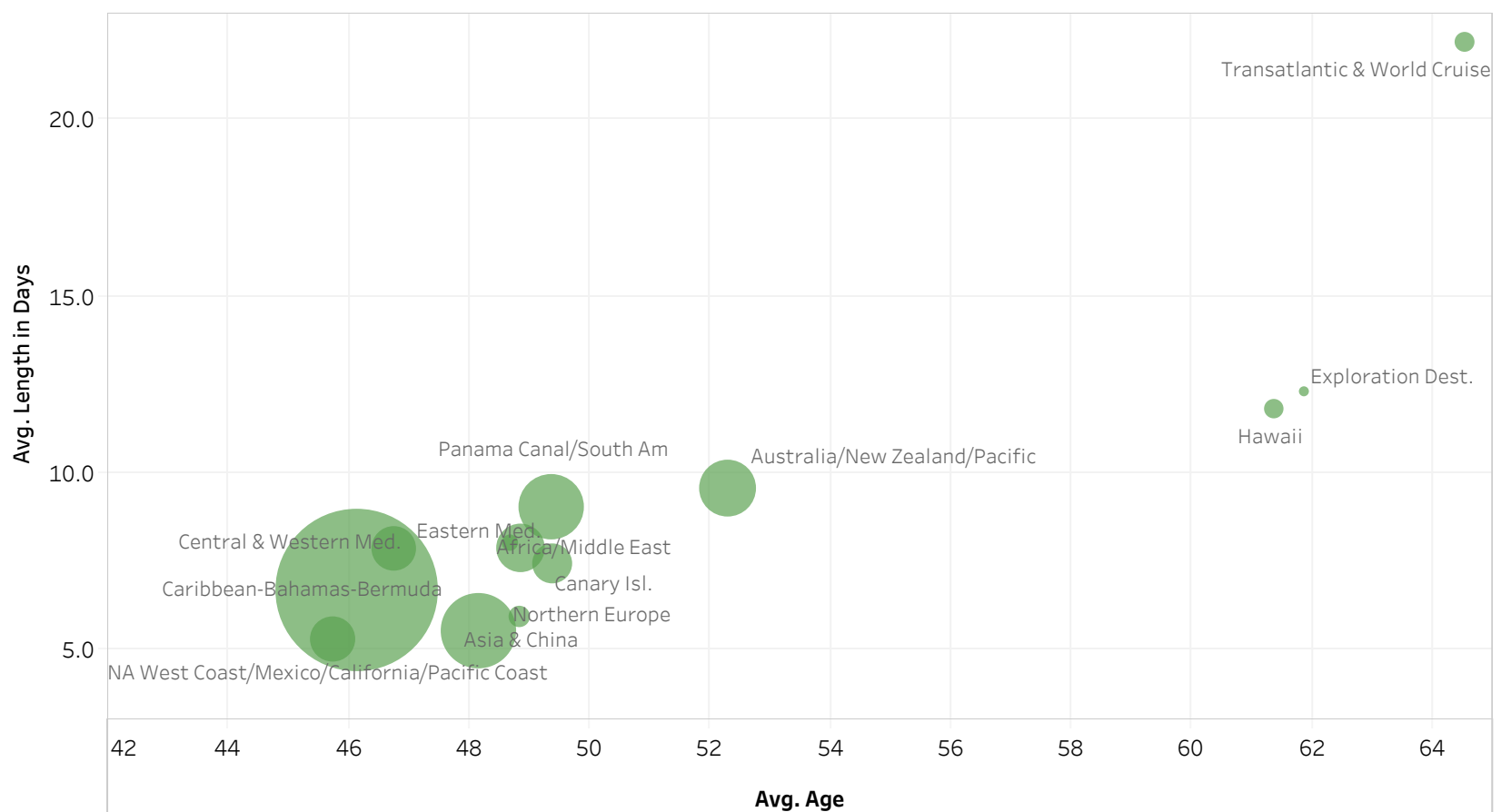


# Global Report (Continued)

## Average Age and Cruise Length for Top Source Markets, 2020



## Average Age and Cruise Length by Destination / Trade Route, 2020





CRUISING.ORG