



2019 North American Market Report



NORTH AMERICAN MARKETS 2019

The largest cruise market in the world experienced a healthy 8% growth last year, following a 9% growth in 2018. The United States and Canada experienced an increase of 8.5% and 6.8%, respectively. The Caribbean, the most popular cruise destination in the world, has grown 7% for two years in a row. The growth in Alaska is accelerating, with a 20% increase following a 14% increase last year. Most remarkably, with more than 250,000 passengers from North America, Canada and New England experienced a sharp increase of 49% following a flat year in 2018.

While the North American market 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 inspire hope for the future, and CLIA and our cruise line members will continue to work with public health authorities to identify the necessary steps to resume sailing in North America in a responsible manner that keeps public health in the forefront.

Regional Overview: North America

Passenger Volume (K)

2016	2017	2018	2019
12,403	13,019 (5.0%)	14,240 (9.4%)	15,408 (8.2%)

Average Duration, in Days

2016	2017	2018	2019
7.0	6.9	6.9	6.9

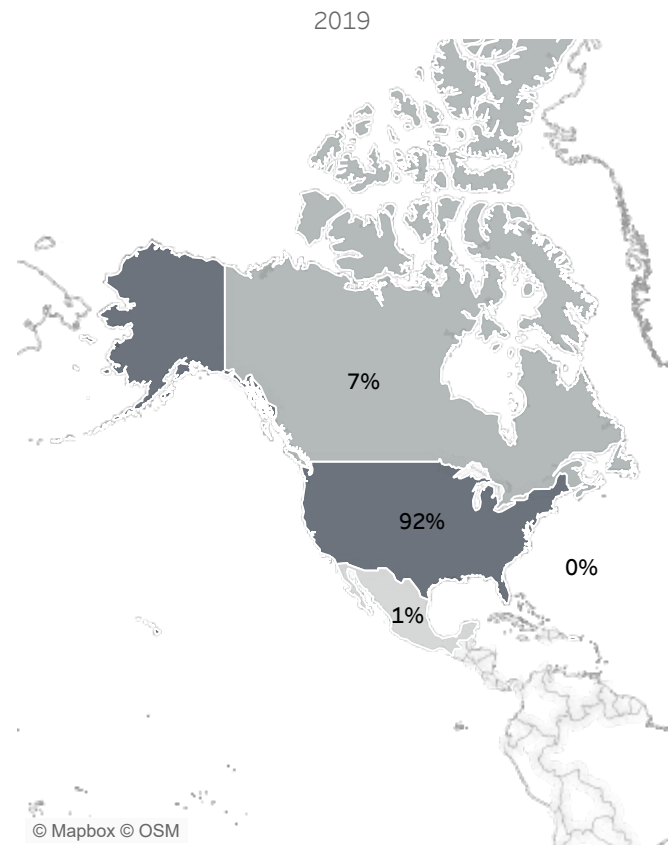
Average Age

2016	2017	2018	2019
45.5	45.6	45.8	45.7

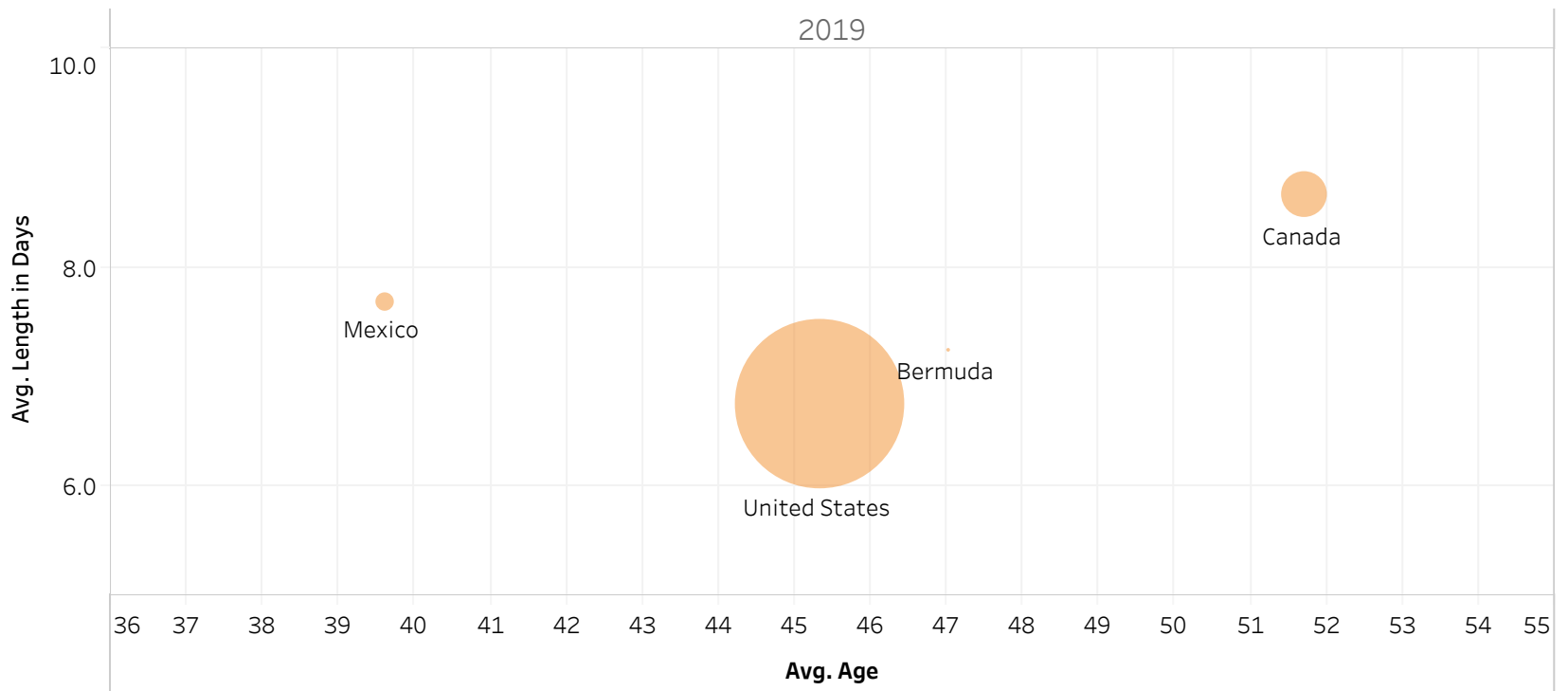
Passenger Volume (K) for Top Countries

	2016	2017	2018	2019
United States	11,392	11,944 (4.9%)	13,091 (9.6%)	14,199 (8.5%)
Canada	865	921 (6.5%)	971 (5.4%)	1,037 (6.8%)
Mexico	142	149 (4.8%)	174 (16.6%)	167 (-3.6%)
Bermuda	4	4 (4.7%)	5 (10.8%)	5 (5.2%)

Share of Source Passengers, 2019 Geographic Projection

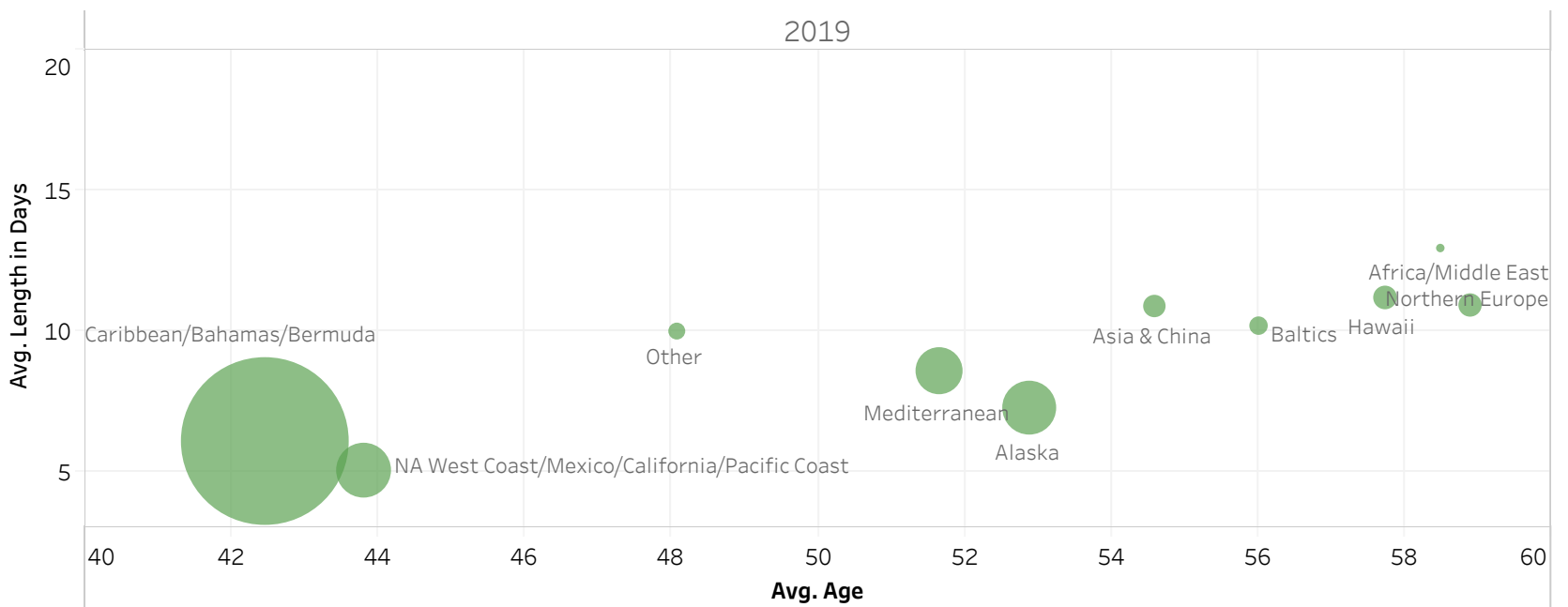


Average Age and Cruise Length for Top Source Markets, 2019

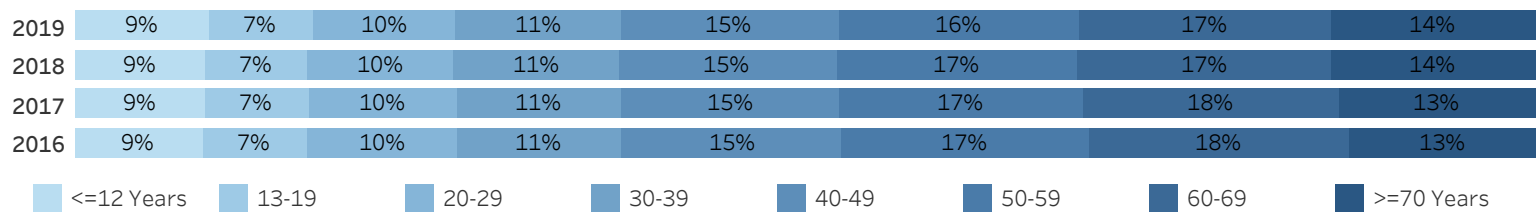


Regional Overview: North America (Continued)

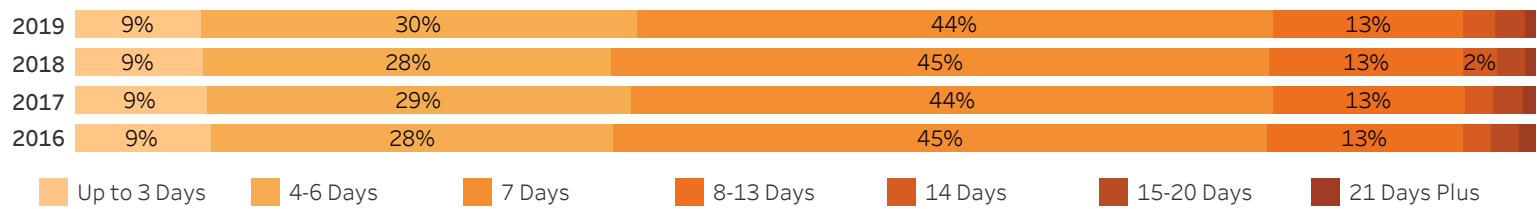
Average Age and Cruise Length by Destination / Trade Route, 2019



Average Passenger Age Groups

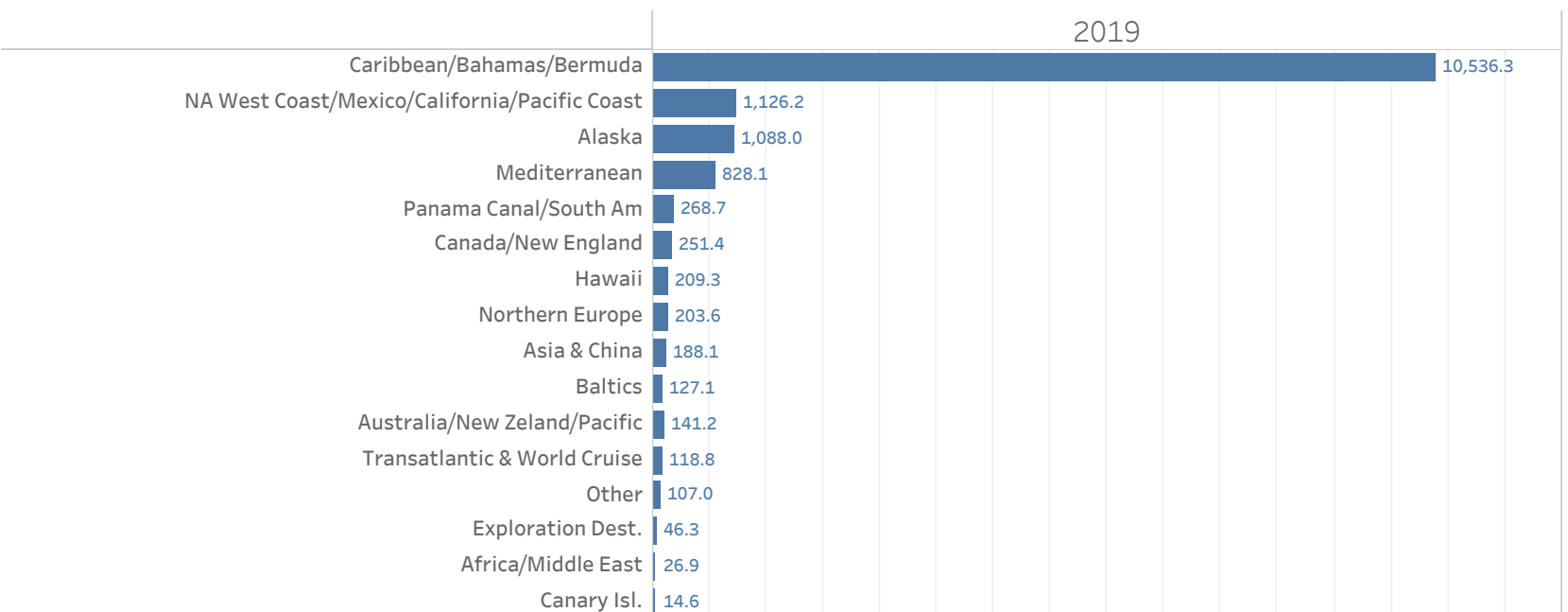


Average Cruise Duration



Volume of Passengers (in K) to Destinations, 2019

At least 4K Passengers per Destination

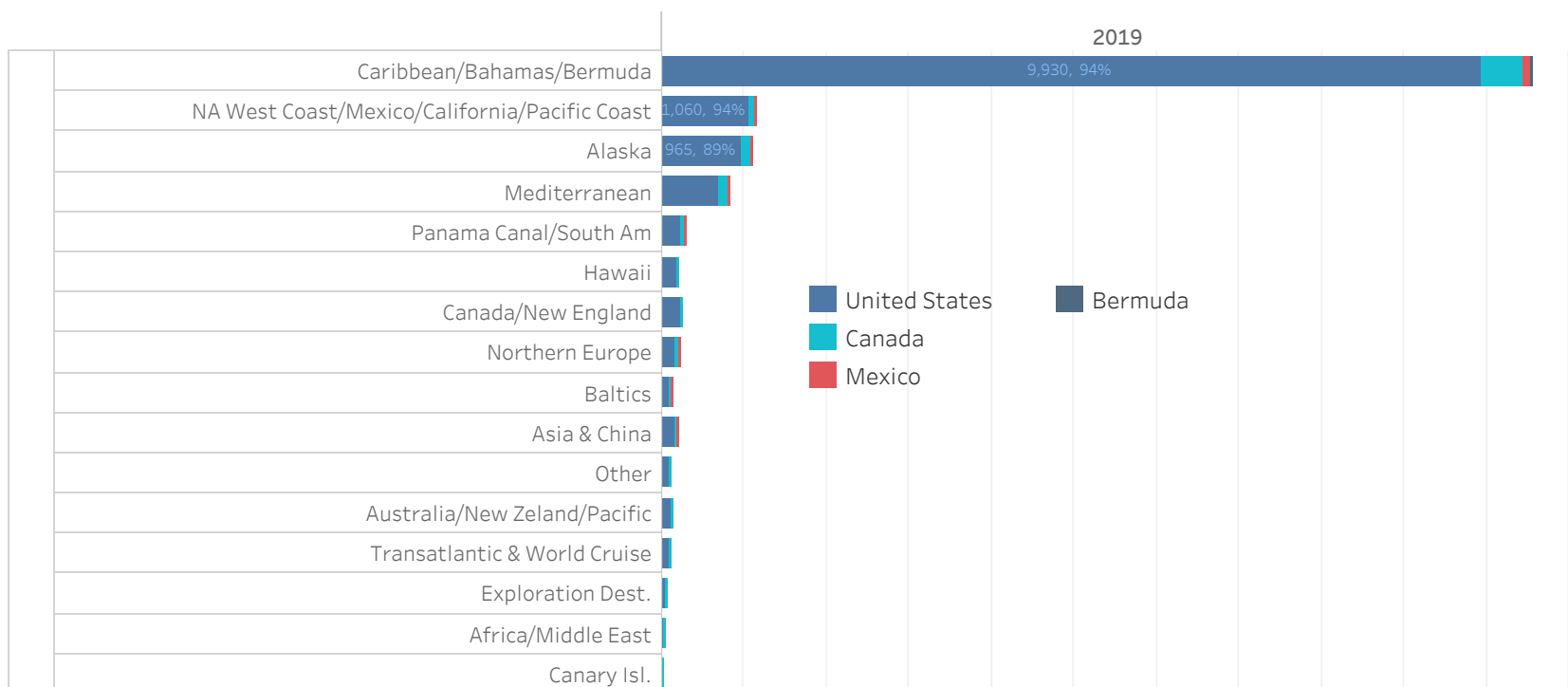


Regional Overview: North America (Continued)

Passenger Volume by Trade (K)

	2016	2017	2018	2019
Caribbean/Bahamas/Bermuda	8,754	9,199 (5% ▲)	9,841 (7% ▲)	10,536 (7% ▲)
NA West Coast/Mexico/California/Pacific Coast	1,148	1,040 (-9% ▼)	1,081 (4% ▲)	1,126 (4% ▲)
Alaska	679	794 (17% ▲)	906 (14% ▲)	1,088 (20% ▲)
Mediterranean	592	553 (-7% ▼)	711 (29% ▲)	828 (16% ▲)
Panama Canal/South Am	203	242 (19% ▲)	259 (7% ▲)	269 (4% ▲)
Canada/New England	135	169 (25% ▲)	169 (0% ▲)	251 (49% ▲)
Hawaii	157	177 (13% ▲)	186 (5% ▲)	209 (12% ▲)
Northern Europe	103	145 (41% ▲)	200 (38% ▲)	204 (2% ▲)
Asia & China	98	109 (12% ▲)	129 (18% ▲)	188 (46% ▲)
Australia/New Zeland/Pacific	85	103 (21% ▲)	125 (21% ▲)	141 (13% ▲)
Baltics	115	163 (42% ▲)	123 (-25% ▼)	127 (4% ▲)
Transatlantic & World Cruise	64	79 (23% ▲)	109 (37% ▲)	119 (9% ▲)
Other	73	73 (0% ▲)	247 (240% ▲)	107 (-57% ▼)
Exploration Dest.	27	27 (1% ▲)	44 (64% ▲)	46 (5% ▲)
Africa/Middle East	15	15 (1% ▲)	18 (22% ▲)	27 (46% ▲)
Canary Isl.	13	15 (17% ▲)	17 (12% ▲)	15 (-15% ▼)

Passenger Volume (K) by Trade & Top Source Countries in 2019



Passenger Volume (K) by Quarter & Top Source Countries

