



2020 North America 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.

Regional Overview: North America

Passenger Volume (K)

2018	2019	2020
14,240	15,408 (8.2%)	3,008 (-80.5%)

Average Duration, in Days

2018	2019	2020
6.9	6.9	6.8

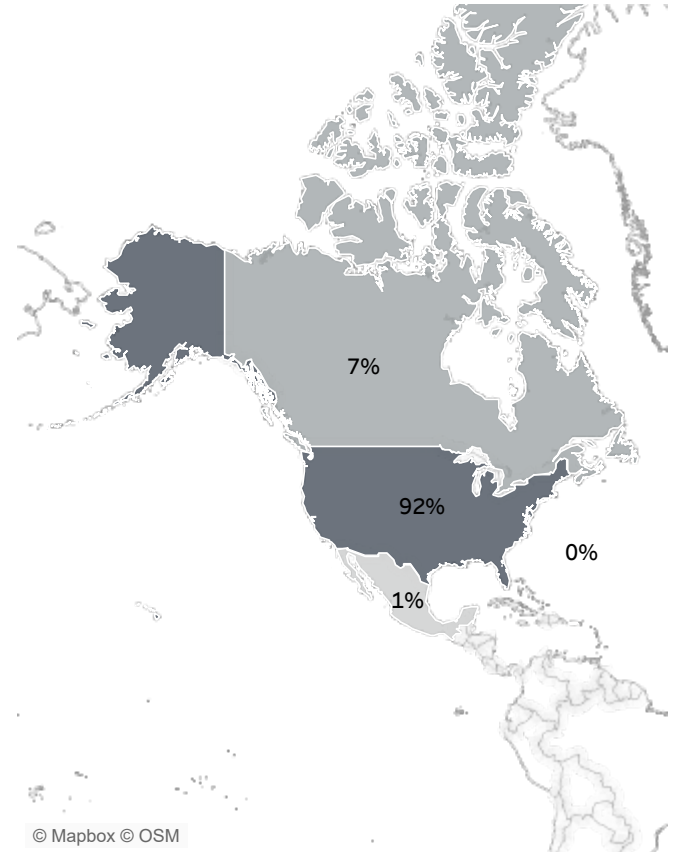
Average Age

2018	2019	2020
45.8	45.7	47.4

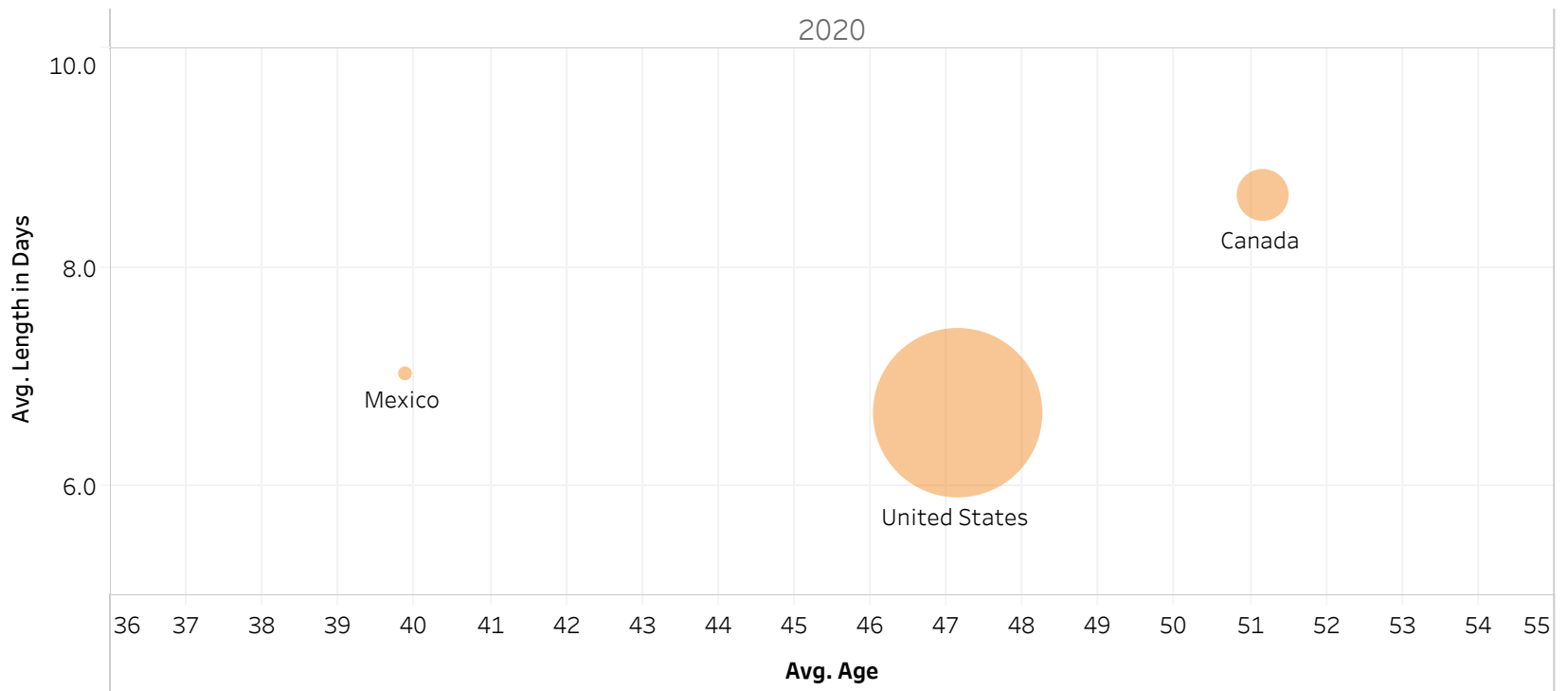
Passenger Volume (K) for Top Countries

	2018	2019	2020
United States	13,091	14,199 (8.5%)	2,732 (-80.8%)
Canada	971	1,037 (6.8%)	257 (-75.2%)
Mexico	174	167 (-3.6%)	18 (-89.2%)
Bermuda	5	5 (5.2%)	

Share of Source Passengers, 2018, 2019, 2020 Geographic Projection

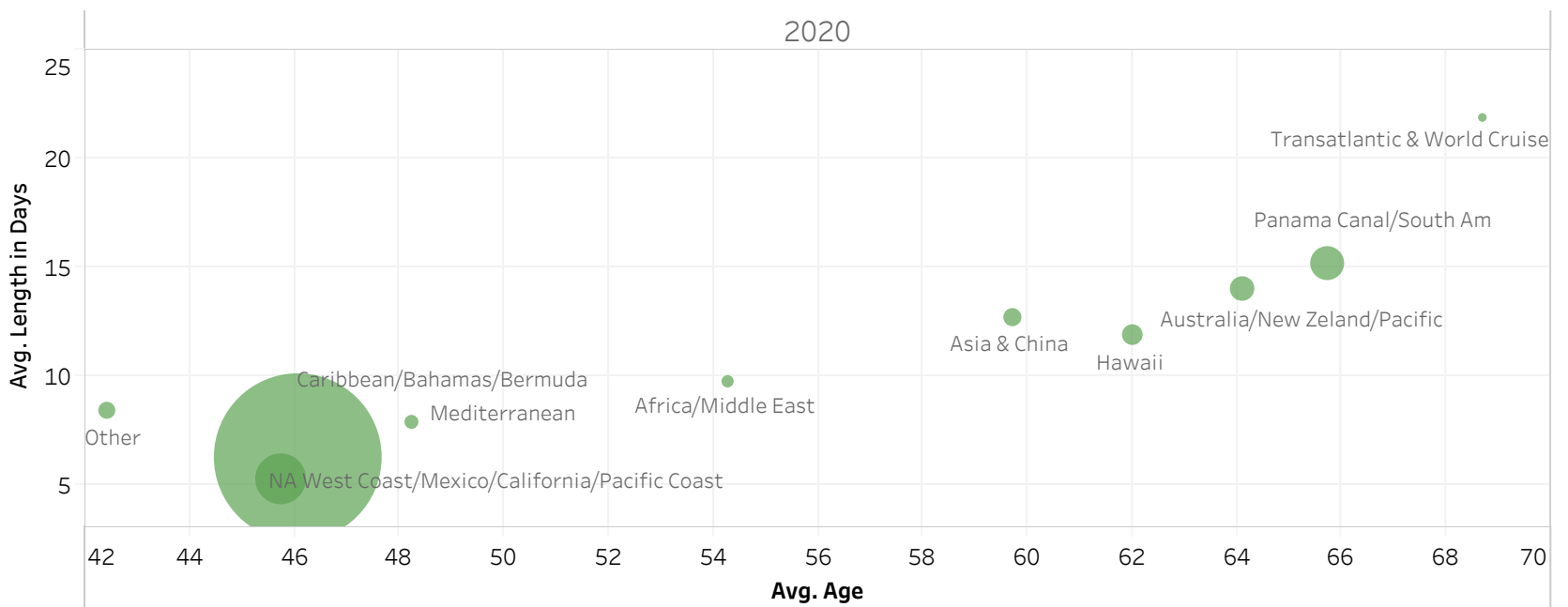


Average Age and Cruise Length for Top Source Markets, 2020

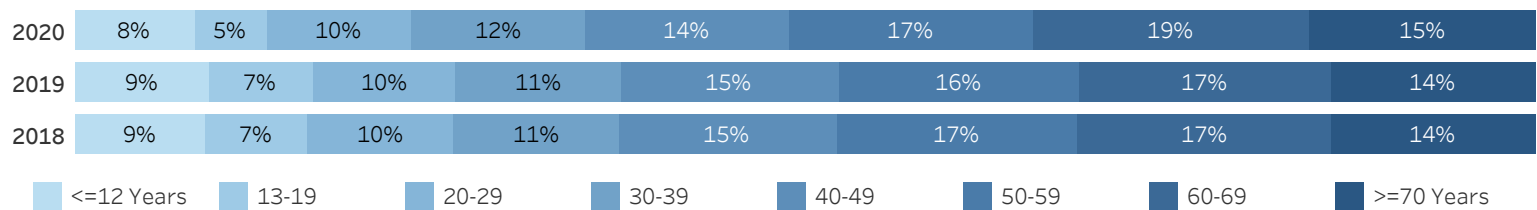


Regional Overview: North America (Continued)

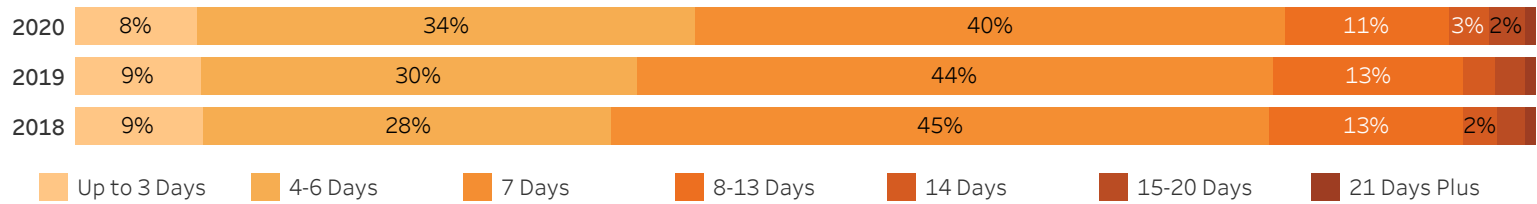
Average Age and Cruise Length by Destination / Trade Route, 2020



Average Passenger Age Groups

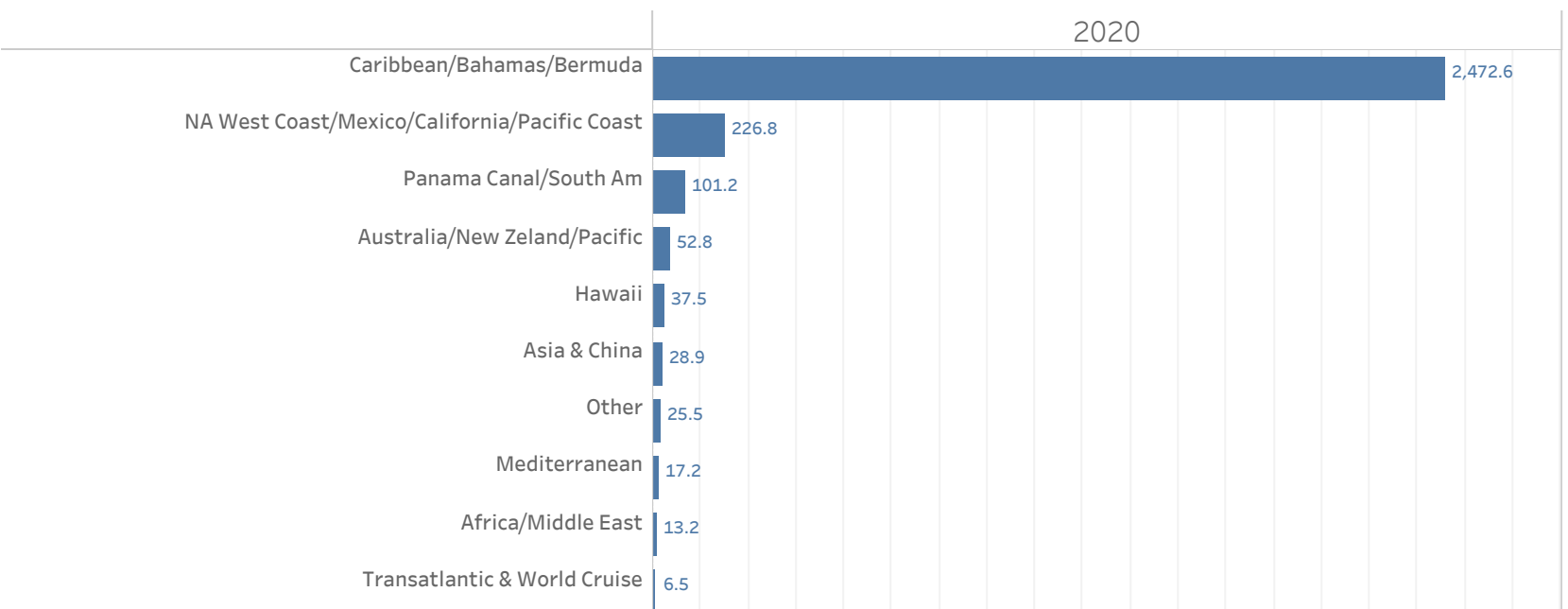


Average Cruise Duration



Volume of Passengers (in K) to Destinations, 2020

At least 4K Passengers per Destination

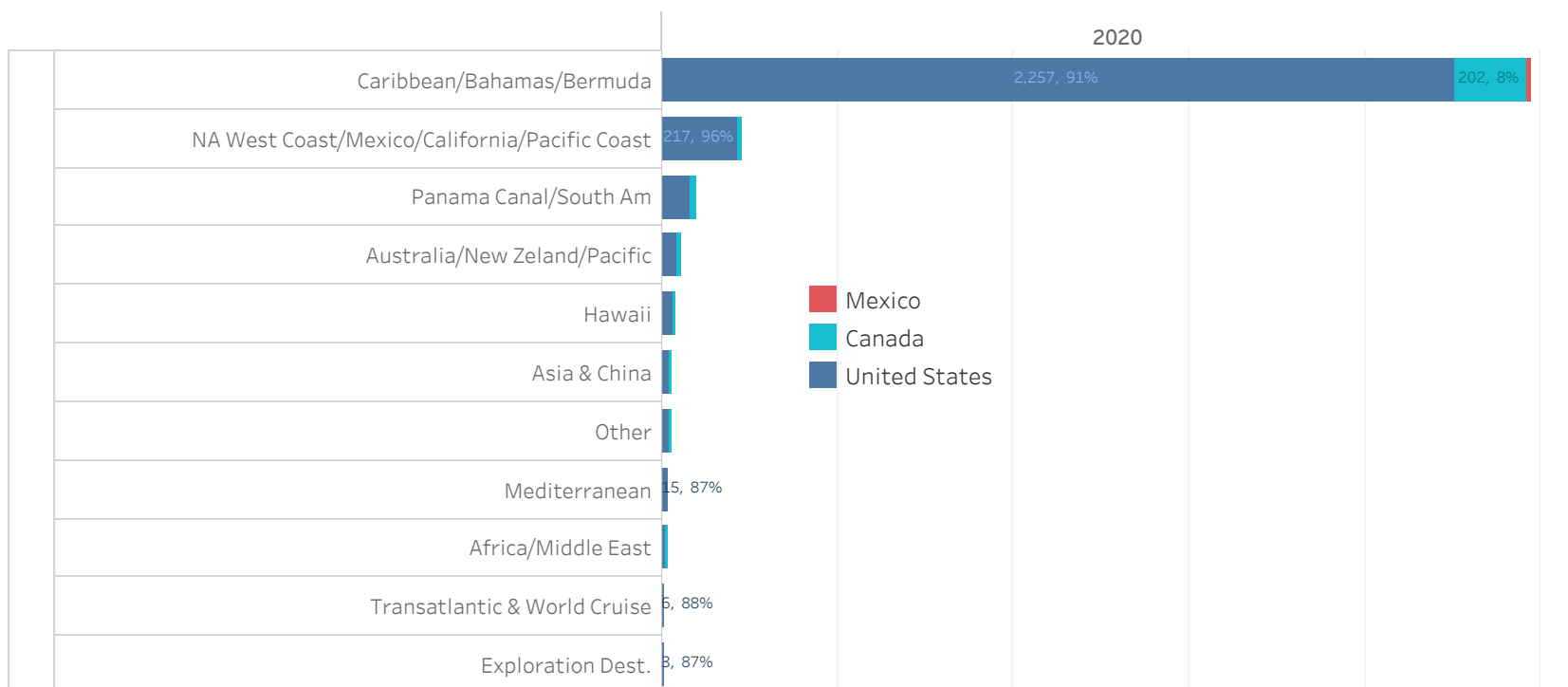


Regional Overview: North America (Continued)

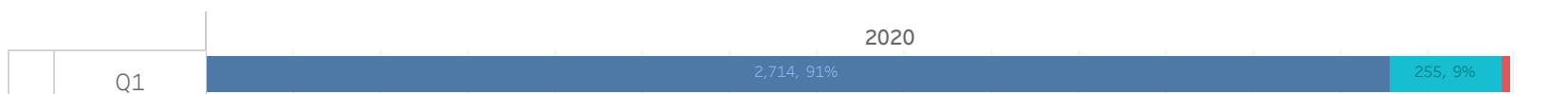
Passenger Volume by Trade (K)

	2018	2019	2020
Caribbean/Bahamas/Bermuda	9,841	10,536 (7% ▲)	2,473 (-77% ▼)
NA West Coast/Mexico/California/Pacific Coast	1,081	1,126 (4% ▲)	227 (-80% ▼)
Panama Canal/South Am	259	269 (4% ▲)	101 (-62% ▼)
Australia/New Zeland/Pacific	125	141 (13% ▲)	53 (-63% ▼)
Hawaii	186	209 (12% ▲)	37 (-82% ▼)
Asia & China	129	188 (46% ▲)	29 (-85% ▼)
Other	247	107 (-57% ▼)	25 (-76% ▼)
Mediterranean	711	828 (16% ▲)	17 (-98% ▼)
Africa/Middle East	18	27 (46% ▲)	13 (-51% ▼)
Transatlantic & World Cruise	109	119 (9% ▲)	7 (-94% ▼)
Northern Europe	200	204 (2% ▲)	
Exploration Dest.	44	46 (5% ▲)	
Canary Isl.	17	15 (-15% ▼)	
Canada/New England	169	251 (49% ▲)	
Baltics	123	127 (4% ▲)	
Alaska	906	1,088 (20% ▲)	

Passenger Volume (K) by Trade & Top Source Countries in 2020



Passenger Volume (K) by Quarter & Top Source Countries in 2020





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