The cruise industry continues to grow, which benefits communities around the world. Our 2013 economic impact reports show we supported nearly 900,000 jobs and generated a worldwide economic impact of $117 billion.

CLIA’s 62 cruise line members represent more than 90 percent of global cruise capacity, with 482,000 berths on CLIA Member ships. With more than 22 million people cruising worldwide each year, the cruise industry will invest $25 billion to launch 55 new ships between 2015 and 2020. In 2015, the industry will introduce six new oceangoing cruise ships and 16 new river cruise ships.

With this growth comes responsibility to continuously review best practices and advance industry policies that further operational excellence, guest comfort and care, and sustainable approaches to conserving the environment—all while working in partnership with local communities. In 2014, CLIA and its Members implemented new policies on public health, waste management and fire safety as part of our continuous efforts to raise the bar on our performance.

CLIA continues to better serve its Members globally with 15 offices around the world. In addition to the formation of CLIA Italy, the establishment of CLIA Southeast Asia and CLIA North Asia in 2014 recognizes that this significant part of the world is no longer a developing market, but has emerged as a major focus for industry expansion. In 2015, 52 ships will provide 1,065 cruises and voyages in Asia with capacity for 2.17 million guests.

Engagement with our Executive Partners was instrumental to CLIA’s activities during 2014. An enhanced global program was launched to support our 275 Executive Partner Members. These Partners play an important role in the successful operation of cruising, from ship development and ports & destinations to suppliers and business services.

CLIA remains the largest travel agent association in the world. The majority of cruise bookings are made through travel agents; therefore a strong partnership between cruise lines and travel agents is a key to the cruise industry’s continued success. CLIA collaborated with travel agents, agencies and Member cruise lines to redesign its North American Travel Agency and Agent Membership Program for 2015 which offers unprecedented new benefits that truly address the changing needs of cruise-focused agents.

As always, the enjoyment and well-being of passengers is at the center of everything the industry does. CLIA re-launched CruiseForward.org to educate and inform the public and industry stakeholders about cruising and our commitment to people, communities and the environments in which we operate. We continue to further strengthen communications on the exceptional return on vacation experience that cruising offers every age and recreation preference.

In 2015, CLIA will celebrate its 40th anniversary. As we turn over leadership to a new Chairman and President and CEO, there is much on the horizon for CLIA and its Members to look forward to.
2014 IN REVIEW

JANUARY
- State of the Industry Press Conference & Media Marketplace
  14 member cruise lines and 45 media outlets attend an event to discuss 2014 cruise industry growth.

MARCH
- ITB Berlin – Christine Duffy delivers remarks on the state of the cruise industry in Europe and globally.
- As part of Cruise Shipping Miami, CLIA hosts networking events for hundreds of cruise line and Executive Partner members.
- Establishment of CLIA Italy is announced at Cruise Shipping Miami.
- CLIA U.K. & Ireland Cruise Journalism Awards – Travel journalists, bloggers and cruise trade members attend an event spotlighting ten award winners.
- CLIA and Members participate in U.S. National Transportation Safety Board two-day Forum on Cruise Ship Safety.

APRIL
- 10th Anniversary of Cruise3sixty – CLIA hosts the annual conference with more than 1,500 registered delegates and 300 exhibitors.
- CLIA U.K. & Ireland River Cruise Expo – For the first time, the annual river cruise expo is hosted in London.

MAY
- CLIA U.K. and Ireland Selling Cruise Conference – Held in Southampton, the event is Europe’s largest gathering of cruise travel agents.

JUNE
- Congressional Cruise Caucus – CLIA North America hosts its annual event in Washington, DC to bring together cruise industry executives, Executive Partners and Members of Congress.
- CLIA Technical & Regulatory team meets with cruise industry leaders to discuss Norovirus/Vessel Sanitation Program (VSP).
- CLIA Germany hosts Environment Day in cooperation with the June Baltic Sea Forum in Hamburg.

JULY
- Cruise Industry Manifesto for EU Institutions – CLIA Europe presents the Cruise Industry’s five EU policy priorities for the next five years.

SEPTEMBER
- First Annual European Port & Destination Summit – 196 delegates gather in Barcelona for an open dialogue and networking.
- Seatrade Med – Alongside the trade show and conference program, CLIA U.K. and Ireland exclusively provide official travel agent training.
- CLIA Cruise Week – U.K., Ireland, Australia and New Zealand hold #lovecruise events to promote cruise vacations.
- CLIA Australasia signs a memorandum of understanding with South Pacific Tourism Association to promote sustainable development of cruise tourism.
- CLIA establishes a Task Force on Gastrointestinal Illness and holds a workshop that includes experts from the Centers for Disease Control & Prevention.

OCTOBER
- Cruise Shipping Asia-Pacific – The 4th annual event, delivered by CLIA Australasia in Hong Kong, features a trade show, conference program and travel agent training.
- CLIA Cruise Week – North America’s most successful cruise promotion, CLIA works with cruise lines and travel agents to host events and promote cruise travel to consumers.
- CLIA adopts new public health policy, including pre-boarding health screening and best practices.
- New Travel Agency and Agent Membership Program – CLIA North America announces newly designed program to better serve today’s travel agent community.
- CLIA is awarded the NAMEPA 2014 Marine Environment Protection Association Award.
- CLIA and cruise line Members participate in IMO’s Marine Environment Protection Committee meeting in London.

NOVEMBER
- CLIA Leadership Forum – Executive Partners and Cruise Line Members meet in Miami for two days of educational sessions focused on Technical & Regulatory and Port & Destination topics.
- Executive Partner Program – CLIA announces enhanced Executive Partner Membership Program to better support global cruise industry business partners.
- 4th Annual CLIA U.K. and Ireland River Cruise Convention – Held in Amsterdam, the event attracts more than 300 delegates.
- CLIA Southeast and North Asia established.
- IMO adopts Polar Code to enhance safety and environmental protection in Antarctic and Arctic regions.

DECEMBER
- The newly designed Cruise Forward program launches.

Top global cruise line executives came together at Seatrade Med. Left to right: Adam Goldstein, Royal Caribbean Cruises Ltd.; Jorge Velches, Pullmantur; Manfredi Lefebvre d’Ovidio, Silversea Cruises; Arnold Donald, Carnival Corporation; Christine Duffy, CLIA; Howard Frank, Carnival Corporation; Pierfrancesco Vago, MSC Cruises; Richard Fain, Carnival Corporation; Arnold Donald, Carnival Corporation; Jonathan Wright, Carnival Corporation; Jan Swartz, President of Princess Cruises; and Jan Swartz, President of Princess Cruises; at Seatrade Med.

Holland America Group COO Stein Kruse.
CLIA President & CEO Christine Duffy, and Royal Caribbean Cruises Ltd President and CEO Adam Goldstein at Congressional Cruise Caucus.

At Congressional Cruise Caucus, CLIA recognized the retirement of Stan Deno, who supported the cruise industry at CLIA for over 15 years as Director of Technical and Regulatory Affairs for Operations & Security. With Stan is his wife, Sheryl Dickison.

CLIA’s Technical & Regulatory staff celebrates the retirement of their colleague Ted Thompson (center), Senior Technical Advisor, at Leadership Forum.

Top CLIA President and CEO Christine Duffy joined with cruise line and Caribbean leaders for a discussion of tourism in the Americas at the National Press Club in October. Left to right: Tom Bow, Vice President, Public Affairs, Carnival Corporation; Jorge Barán, Chief of the Secretariat of the Inter-American Committee on Ports, Organization of American States; Román Macaya Hayes, Ambassador, Embassy of Costa Rica; Duffy; David Candie, Vice President, Development & Operations, Global Port & Destination Development Group, Carnival Corporation.
A Catalyst to Connect Business Partners

CLIA announced an enhanced Executive Partner Membership Program for 2015 to better support cruise industry business partners around the world. Communities of interest, new events and other exclusive offerings have been created for each of the four new categories of Executive Partner membership:

- Port & Destination
- Travel Operator
- Technical & Supply Chain Provider
- Business Services Provider

Cruise Shipping Miami

Cruise line executives and business partners met in March for Cruise Shipping Miami, which attracted 12,000 attendees and 900 exhibitors.

A highlight was the global state of the cruise industry panel, moderated by Katty Kay of the BBC. Left to Right: Pierfrancesco Vago, Executive Chairman of MSC Cruises; Kevin Sheehan, President and CEO of Norwegian Cruise Line; Richard Fain, Chairman and CEO of Royal Caribbean Cruises Ltd.; Arnold Donald, President and CEO of Carnival Corporation & plc.

Leadership Forum

CLIA Leadership Forum brought 175 Executive Partners and 65 cruise line executives together in Miami, where they enjoyed two days of exclusive networking opportunities, and education focused on Port and Destination, and Technical and Regulatory topics.

Port & Destination Summit

New for 2014, the CLIA Port & Destination Summit in Barcelona gathered 196 delegates from the Port & Destination Community in September, including 27 cruise line executives, for a day of networking and open dialogue in a fresh new format.

Giora Israel, Chairman of CLIA’s Global Port and Destination Advisory Committee and Senior Vice President of Global Port and Destination Development at Carnival, addresses attendees.

The annual Lobster Fest, sponsored by members of the Cruise Canada New England Alliance: Cruise Atlantic Canada, Cruiseport Boston, CruiseMaine, Cruise the St. Lawrence, and NYCruise, was a highlight of Leadership Forum.

The Presidents Panel at Leadership Forum was moderated by CLIA President & CEO Christine Duffy. Sharing their insights were Larry Pimentel, President & CEO of Azamara Club Cruises; Charles Robinson, President of American Cruise Lines; and Rick Sasso, President & CEO of MSC Cruises (USA).

2014 CLIA MEMBERS

62 CRUISE LINES
275 EXECUTIVE PARTNERS
13,500 TRAVEL AGENCIES REPRESENTING
22M+ PASSENGERS SERVED
50,000 TRAVEL AGENTS
Advocates of Best Practices and Responsible Policies

The well-being of passengers and crew always comes first. CLIA and its Member cruise lines never stop reviewing operational protocols and procedures to improve safety. CLIA brings together cruise industry and outside experts through our committees, working groups and task forces. For example, CLIA’s Independent Panel of Experts—distinguished professionals in the maritime safety, regulatory and accident investigation fields—continue to advise and provide impartial input on industry policies and best practices.

Passenger Well-Being

Working closely with public health authorities, CLIA and its Member cruise lines developed an updated pre-boarding public health screening policy, to further reduce the already low risk of a public health incident on a cruise ship.

International Shipping Community Accomplishments

CLIA successfully represented the cruise industry in the International Maritime Organization’s (IMO) development of the Polar Code. This Code, which will be mandatory for all ships operating in the Antarctic and Arctic regions, will enhance safety and environmental protection in these highly sensitive and remote areas. Many years of hard work resulted in a Code that continues to allow the cruise industry to operate in the Polar Regions with sufficient capacity to meet consumer demand.

CLIA and its Members provided leadership in facilitation and deliberations of the Cruise Ship Safety Forum—comprised of cruise ship owners, classification societies and shipyards—creating a detailed series of proposals to enhance damage stability and survivability of cruise ships. These proposals, representing industry best practice and addressing various topics, including watertight doors, crew training and higher levels of safety in new building design, were strongly embraced by the IMO and will help create a step change in safety without affecting the passenger experience.

Environmental Stewards

CLIA Members remain leaders in the maritime community to develop innovative technologies and practices that preserve and protect the environment.

- CLIA cruise line Members adopted a revised waste management policy with aggressive programs for waste minimization and management above and beyond international treaties and U.S. law.
- CLIA Alaska successfully worked with the Alaska Department of Environmental Conservation to implement a new wastewater statute and 5-year discharge permit.
- CLIA Australasia signed a memorandum of understanding with the South Pacific Tourism Association to promote the sustainable development of cruise tourism in the Pacific region. One of the first initiatives under the partnership is a Pacific Region Cruise research project.
- CLIA Germany hosted a cruise industry “Environment Day” in cooperation with the June Baltic Sea Forum in Hamburg. Discussions focused on environmental protection and air emissions.

CLIA arranged a tour of Holland America’s m.s. Ryndam in Dover, U.K. Thirty IMO delegates responsible for developing international passenger safety standards observed the safety-related processes and procedures of the cruise ship.

TOP 10 DESTINATION MARKETS

- Alaska
- Atlantic Coast
- The Mediterranean
- The Caribbean
- South America
- Indian Ocean
- Asia
- Australia/South Pacific
- Northern Europe
- Hawaii/West Mexico
A United Voice Heard Globally

CLIA continues to grow its communications, research, regulatory, marketing and programmatic efforts, firmly establishing CLIA as the foremost voice in the cruise industry. Great strides have also been made to take a more proactive and aggressive stance on our industry’s issues, countering myths and establishing a clear perspective for policymakers, the media and other stakeholders.

CLIA Southeast Asia and North Asia
As Asia emerges as a major cruise market, CLIA established CLIA Southeast Asia, chaired by Carnival Australia CEO Ann Sherry, and CLIA North Asia, chaired by Royal Caribbean’s Managing Director Asia and China Dr. Zinan Liu, in November. These CLIA offices are focused on infrastructure, advocacy and promoting cruise travel, and have already undertaken an Asia Cruise Trends research project to identify trends in deployment, capacity and source markets.

CLIA European Expansion
CLIA Italy, headquartered in Rome, was announced in March, joining CLIA U.K. & Ireland, CLIA Germany, CLIA France, CLIA Spain, CLIA Netherlands, CLIA Belgium & Luxembourg, and the CLIA Europe regional office in Brussels.

Initiating Dialogues on Key Topics
During the first week of June, CLIA North America hosted its annual Congressional Cruise Caucus in Washington, DC. Cruise line CEOs and CLIA Executive Partners met with key members of Congress, their staff and policy experts to discuss legislative and regulatory developments of importance to the cruise industry and our business partners.

In October, CLIA brought together public health and communications staff from Member cruise lines for an in-person meeting to discuss public health and safety on cruise ships. The group reviewed public health response plans and focused on ensuring the industry is clearly and consistently communicating its efforts to the public.

CLIA Europe recommended a Pan-European dialogue between the cruise industry, ports and tourism stakeholders which was approved as a key action of the new Maritime and Coastal Tourism Strategy, endorsed by EU Institutions.

Alliances to Advance Travel & Tourism
CLIA continued to join forces with the broader U.S. travel community to advocate for policies that encourage travel and facilitate tourism. CLIA worked with U.S. Travel Association, Brand USA, the American Hotel & Lodging Association and many other groups to urge Congress and the Administration to enhance the visa waiver program and reauthorize the Travel Promotion Act.

In Europe, CLIA engaged with the European Commission in support of legislative revisions to facilitate visas for non-EU travelers and crew, advocating the cruise industry’s interests in the ongoing negotiations at the EU level and reaching out to Governments and other EU institutions. The result was an ambitious reform of the Schengen Visa Code.

Cruise Forward
CLIA refreshed the Cruise Forward program, which originally launched in 2012 to educate and inform a broad range of stakeholders about the cruise industry’s responsible practices, exceptional performance and commitment to passengers, Crewmembers, communities and the environment. A newly designed website - CruiseForward.org – was launched with fact sheets, myths vs. reality, research based infographics and other resources to clearly communicate the industry’s leadership and positive actions in areas such as health, safety, environment and giving back to the communities we serve.
Champions for the Travel Agent Community

CLIA-certified travel agents remain a significant channel for consumers looking to take a cruise, as the majority of cruise bookings are made through travel agents. The collaboration between cruise lines and travel agents is fundamental to the cruise industry’s success. Travel agents and agencies around the world benefit from CLIA training and certification, enhanced incentives, participation in CLIA Cruise Weeks and conferences across the globe.

Promoting Cruise Travel to Consumers

CLIA Cruise Week, formerly National Cruise Vacation Week, is recognized as the cruise industry’s single largest and most successful cruise promotion, with more than 280 million media impressions in the U.S. alone in 2014. The “World’s Largest Cruise Sale” went global in 2014 with Fall events in the U.S., U.K., Ireland, Australia and New Zealand. Throughout the promotion, travel agents worldwide held a variety of sales events to entice travelers to book a cruise on the world’s most popular cruise ships, including specialty and river cruises.

Programs that Offer More Value

The relationship between CLIA and travel agents was further strengthened in 2014 with the introduction of CLIA’s new North American travel agent and agency membership program developed by agents and for agents.

CLIA U.K. & Ireland focused on a continued investment in travel agent professional development. As a result, there was a 118% increase in the number of online courses completed and a 44% increase in travel agent membership.

2013 CRUISE INDUSTRY GLOBAL ECONOMIC IMPACT

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<thead>
<tr>
<th>TOTAL OUTPUT</th>
<th>TOTAL FULL-TIME JOBS</th>
<th>TOTAL WAGES</th>
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<tbody>
<tr>
<td>USD $117 B</td>
<td>891,000</td>
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A Long-Standing Commitment to Charitable Efforts

CLIA Member Cruise Lines recognize the importance of giving back and supporting local communities in North America. Through the Cruise Industry Charitable Foundation (CICF), funded by CLIA Global Member cruise lines, the industry provides much needed support to local charities that offer assistance in critical areas, such as education, healthcare and environmental conservation.

In 2014, CICF provided grants to dozens of organizations around the country, including the Alaska Wildlife Conservation Center, Kids in Distressed Situations (K.I.D.S.), Leukemia and Lymphoma Society, Literacy Council Gulf Coast, Miami Children's Museum, March of Dimes, National Children’s Cancer Society, North American Marine Environment Protection Association, Second Harvest Food Bank and Tourism Cares.

Students in CICF-sponsored Washington Workshops had the opportunity to learn about the legislative process from Members of Congress, including Sen. Ron Wyden (D-OR).

CICF presents a check supporting the Barbara Bush Foundation for Family Literacy at the annual “Literacy At Sea” event. Left to right: Jeb Bush, Jr., Barbara Bush Foundation; Mike McGarry, CICF Executive Director; Jim Border, CICF Chairman; Liza McFadden, President, Barbara Bush Foundation; Tom Dow, CICF Board Member.
Port Canaveral is Florida's fastest-growing cruise port! Less than one hour from Orlando and the attractions of Central Florida, trends indicate our cruise business will more than double. That is why we continue to build new cruise terminals. “Smart” Cruise Terminal One opened in December of 2014 and can accommodate the largest cruise ships in the world. Future plans are to keep building yearly to meet this demand. Congratulations to CLIA as you continue to push forward the “One Industry, One Voice” to protect and grow the entire cruise industry. Port Canaveral is proud to be a Diamond Executive Partner of CLIA.

PortMiami, the Cruise Capital of the World, continues to expand as the world’s leading cruise port. Last year, PortMiami welcomed nearly 4.8 million multi-day passengers from the most distinguished cruise lines. CLIA’s economic impact study shows the powerful impact of the cruise industry on the State of Florida and the opportunity for continued growth worldwide. PortMiami is a proud Diamond Executive Partner of CLIA.

As a world-leading “Powerhouse Port,” Port Everglades provides cruise guests and cruise lines with a first-class experience. From our modern, efficiently operated terminals to our attention to customer service, cruising is a breeze at Port Everglades. We are proud of our long history as an Executive Partner with CLIA, and look forward to hosting Cruise3Sixty and the 2016 Seatrade Global Cruise conference in Broward County/Greater Fort Lauderdale.

CLIA is grateful to the following sponsors of this annual report.

2014 GLOBAL CRUISE LINE MEMBERS

2014 DIAMOND EXECUTIVE PARTNERS