CLIA CRUISE LINES INTERNATIONAL ASSOCIATION, INC.

2018 CRUISE INDUSTRY OUTLOOK

December 2017

Cruise Lines International Association (CLIA), the world's largest cruise industry trade association, has released the 2018 State of the Cruise Industry Outlook. The report offers an in-depth look at the continued positive trajectory of the cruise industry's global economic impact as well as the trends impacting cruise travel in the coming year and beyond.

Cruise Lines International Association (CLIA) is the unified global organization helping the cruise industry succeed by advocating, educating and promoting the common interests of the cruise community.

CLIA COMMUNITY

50+ CRUISE LINES

Ocean, river and specialty cruise lines, representing more than 95 percent of global cruise capacity

340+ EXECUTIVE PARTNERS

Key suppliers and cruise line partners, including ports & destinations and ship development, suppliers and business services

15,000 TRAVEL AGENCIES

Includes the largest agencies, hosts, franchises and consortia

25,000 TRAVEL AGENT MEMBERS WORLDWIDE

GLOBAL VOICE

15 Offices Around the World

Brazil / Alaska / Australasia / Belgium & Luxembourg / Europe / France / Germany / Italy / Netherlands / North America / North Asia / North West & Canada / Southeast Asia / Spain / UK & Ireland

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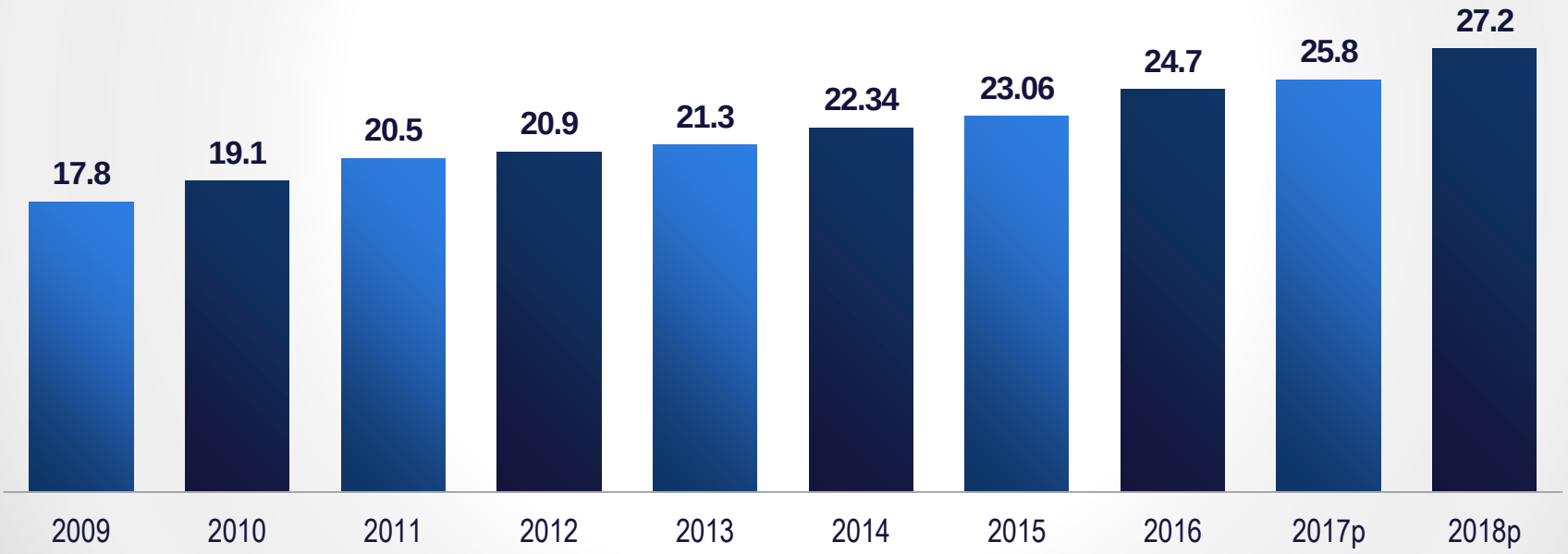
2018 CRUISE INDUSTRY OUTLOOK

2018 PASSENGER SNAPSHOT

2018 = 27.2 Million Passengers Expected to Cruise

CLIA Global Ocean Cruise Passengers (In Millions)



p = projection

NEW SHIPS DEBUTING IN 2018

27 CLIA Cruise Lines

New Ships on Order (as of December 2017)

Ocean

CRUISE LINE	SHIP NAME
Aida Cruises	AidaNova
Carnival Cruise Line	Carnival Horizon
Celebrity Cruises	Celebrity Edge
Holland America Line	ms Nieuw Statendam
MSC Cruises	MSC Seaview
Norwegian Cruise Line	Norwegian Bliss
PONANT Yacht Cruises and Expeditions	Le Laperouse Le Champlain
Royal Caribbean International	Symphony of the Seas
Scenic Luxury Cruises and Tours	Scenic Eclipse
Seabourn	Seabourn Ovation
TUI Cruises	Mein Schiff 1

River

CRUISE LINE	SHIP NAME
AmaWaterways	MS AmalLea
American Cruise Lines	America Song American Constitution
Avalon Waterways	Avalon Saigon
Amadeus by Luftner	MS Amadeus Queen
CroisiEurope	Africa Dream II MS Elbe Princesse I
Crystal Cruises	Crystal Debussy Crystal Ravel
Pandaw River Expeditions	Sabei Pandaw
Riviera Travel River Cruises	MS Robert Burns MS Douro Splendour
Tauck River Cruising	ms Treasures II ms Esprit II
Uniworld Boutique River Cruise Collection	S.S. Beatrice

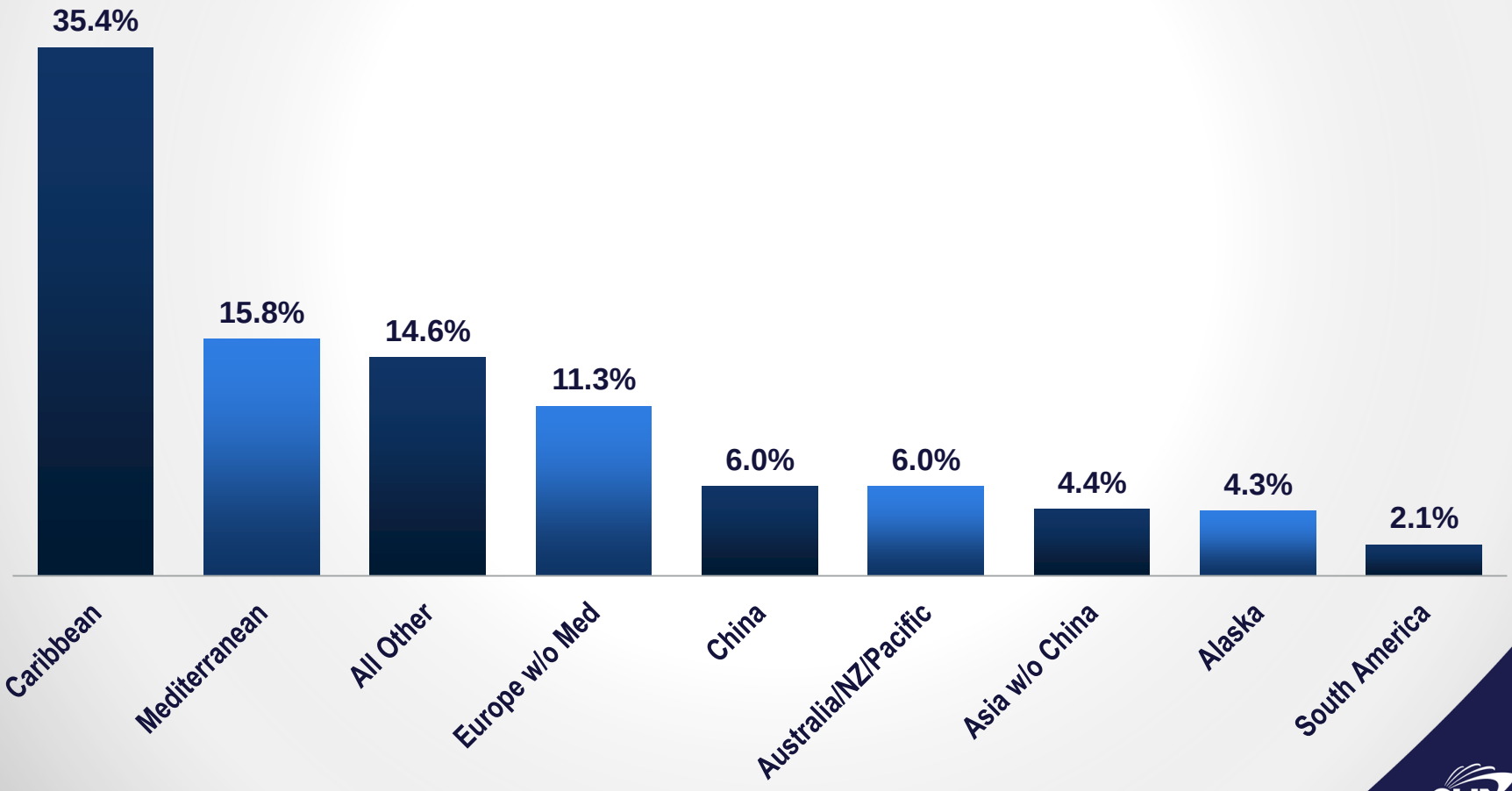
MORE SHIPS, MORE OPTIONS

449 CLIA Cruise Line Cruise Ships in 2017

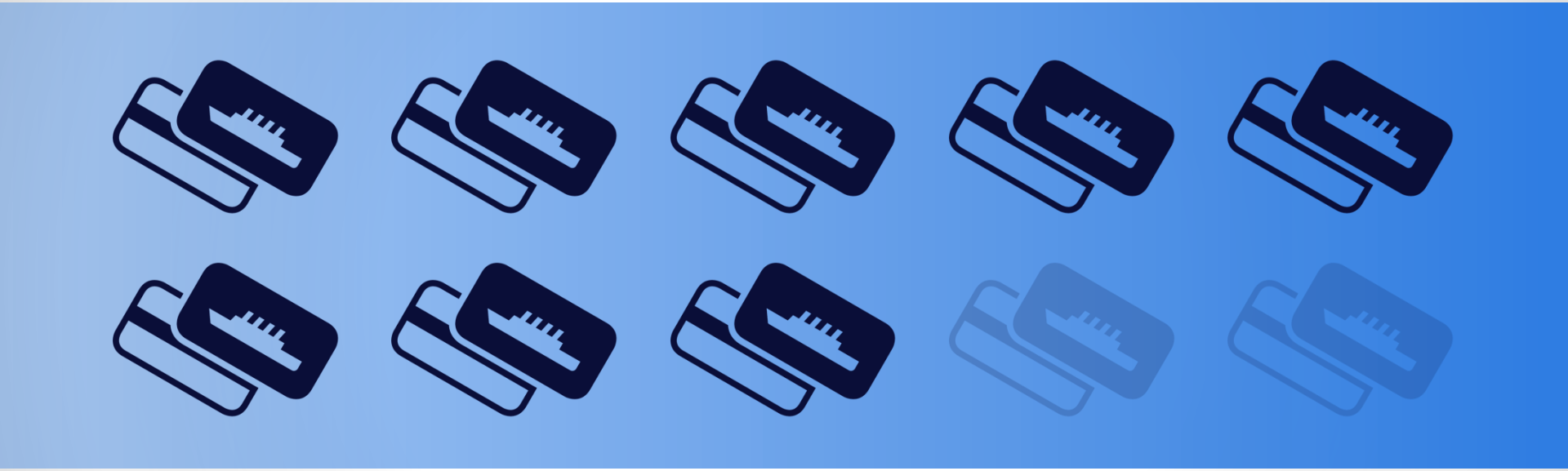
27 New Ocean, River and Specialty CLIA Cruise Line Ships Scheduled to Debut in 2018

DEPLOYMENT

2017 Cruise Line Deployment by Region – % ALBD*



TRANSLATING TO BOOKINGS



Eight Out of Ten

CLIA-Certified Travel Agents Stated They are Expecting an Increase in Sales in 2018 Over Last Year

CRUISE LINES INTERNATIONAL ASSOCIATION, INC.

ECONOMIC IMPACT

2016 GLOBAL ECONOMIC IMPACT

24.7 MILLION
PASSENGERS

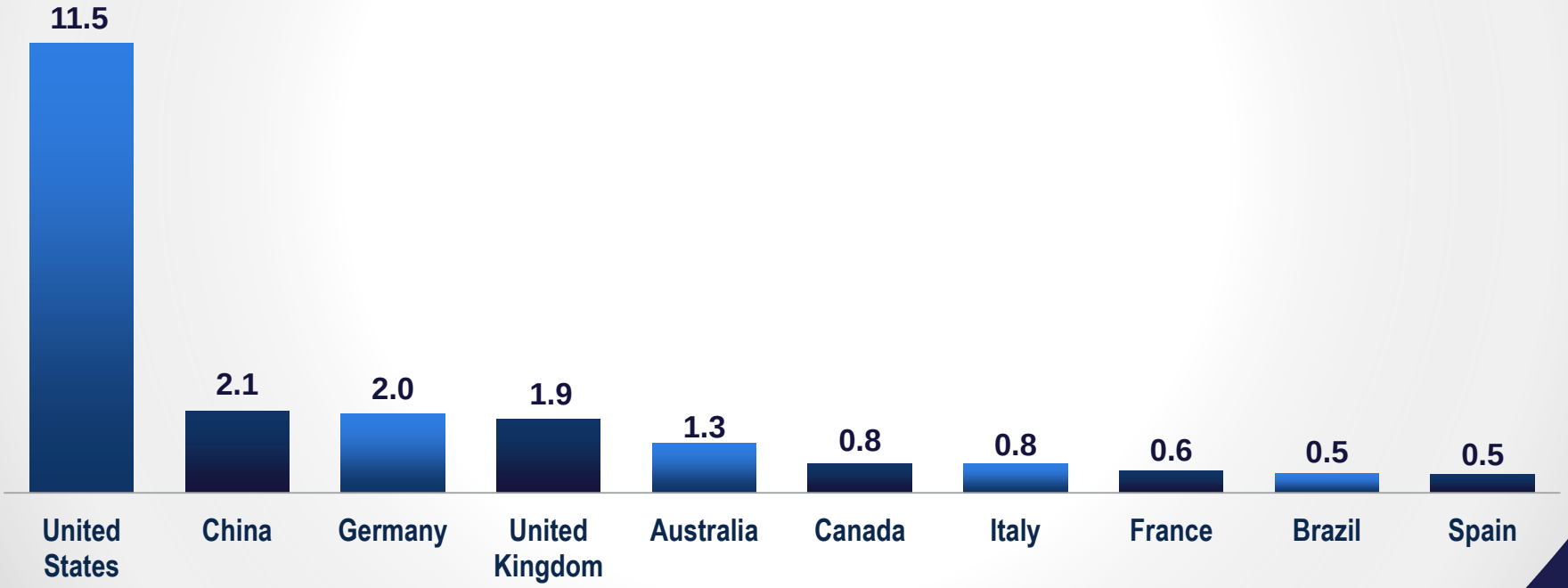
1,021,681 JOBS
FT EQUIVALENT EMPLOYEES

$41.1 BILLION
WAGES + SALARIES

$126 BILLION
TOTAL OUTPUT WORLDWIDE

WHERE ARE PASSENGERS COMING FROM?

Demand for Cruising has INCREASED 20.5% in the Last Five Years (2011-2016 in Millions)



*Represents 2016 total ocean cruise passengers

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2018 CRUISE TREND OUTLOOK

1

ALL BUDGETS WILL CRUISE

33% of cruisers surveyed who have taken a cruise within the past three years, have a household income less than $80K.

2

TRANSFORMATIONAL CRUISE TRAVEL

From cultural immersion and voluntourism to extreme adventures, those returning from a cruise will have shift in perspective and a sense of accomplishment.

3

SUSTAINABILITY AT SEA

The coming year will most likely put an even more in-depth focus on sustainable tourism with sustainable tourism practices and procedures are predicted to be put in place.

4

MILLENNIALS TAKE TO THE RIVER

River and small ship cruising continues to gain traction among travelers, specifically the Millennial set.

5

SKIP- GEN CRUISING

Predicted to be highly popular in 2018 and beyond – grandparents traveling with grandchildren sans their parents.

6

TRAVELERS WARM TO CHILLY DESTINATIONS

The coming year is projected to see an increase in popularity of colder climate destinations.

7

HEALTHY DOSES

Cruise lines are tailoring trips for the growing number of health conscious travelers – from wellness seminars and fitness to food choices.

8

SMART TRAVEL TECHNOLOGY

2018 is predicted to see a rise in traveler-friendly onboard technologies that enhance travel experiences.

9

TAPPING TRAVEL AGENTS

Travel agents continue to see a steady demand from consumers in planning and executing vacations.

THANK YOU

For more information, please visit cruising.org/research or contact:

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