

# CRUISE SUMMIT

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## Future of Cruise

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## Session 1: Industry Insights



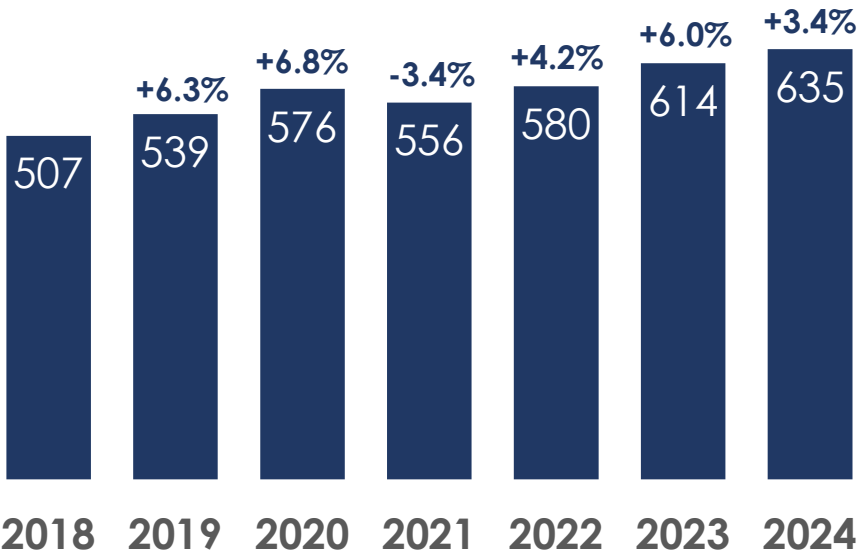
# Andy Harmer

## Managing Director



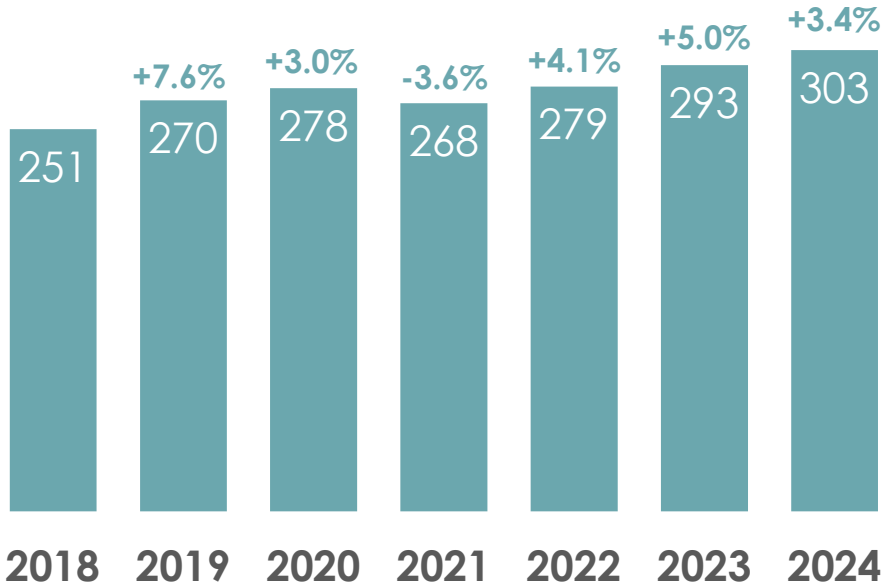
# Return to Managed Growth; Over 300 Ships in 2024

CLIA-member fleet size based on **number of lower berths** (amounts in thousands)



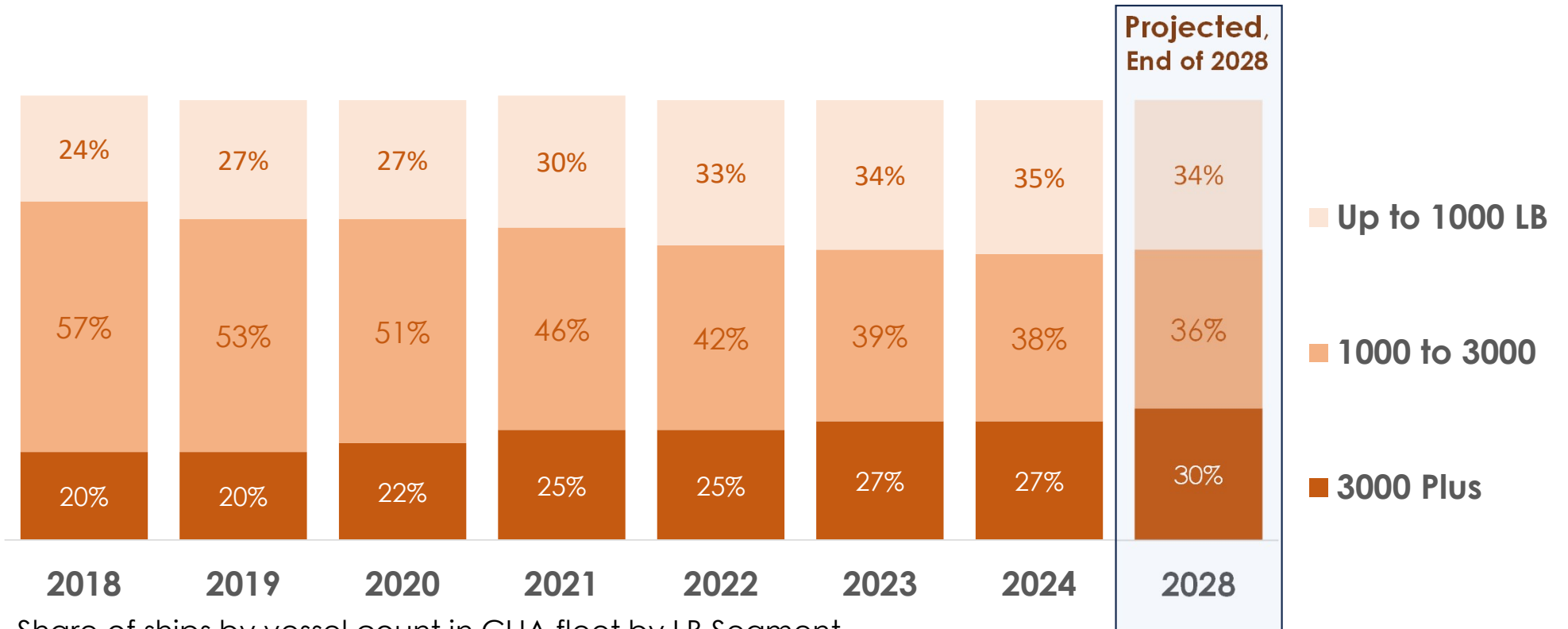
CLIA-member cruise line fleet capacity accounts for ~95% of global ocean-going lower berths

CLIA-member fleet size based on **number of ships**



For the first time, the CLIA-member cruise line fleet exceeds 300 ocean-going vessels in 2024

# Fleet Composition: A Story of Thirds



Share of ships by vessel count in CLIA fleet by LB Segment

## CLIA CLASS OF 2024

**+8**

**Ships**

**+22.8k**

**Lower Berths**

**+3.6%**

**LB Capacity**

## FULL CLIA ORDERBOOK 2024 - 2028

**+34**

**Ships**

**+110k**

**Lower Berths**

**+16.5%**

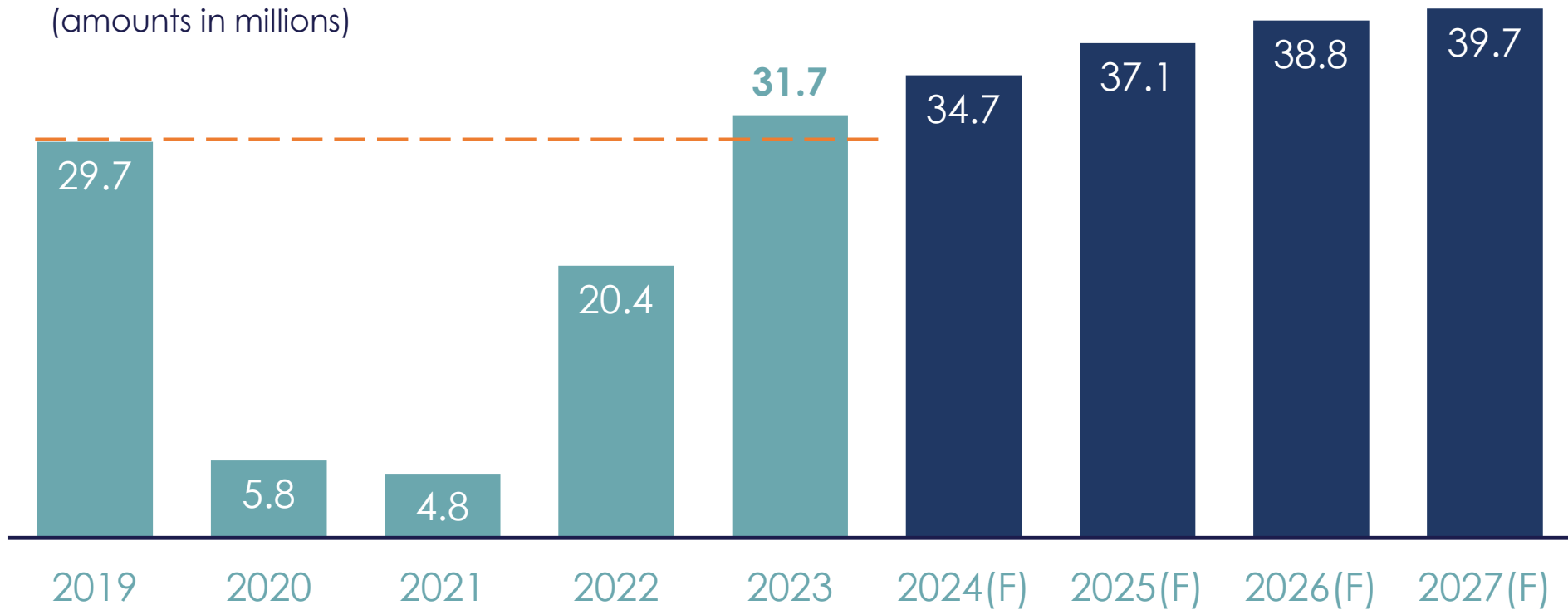
**LB Capacity**

# 2023: THE NEW LAST TYPICAL YEAR

## Number of ocean-going passengers sailing each year worldwide

Actuals 2019-2022; Forecast 2023-2027

(amounts in millions)



Source: 2019-2023 CLIA One reSource Passenger Data; Forecast Information via Tourism Economics

## UK & Ireland Stats

- 2.3 million UK & Ireland Guests in 2023
- Increase of **37%** on 2022
- **14.5%** increase on 2019





# UK & Ireland Destinations

- THE BIG FOUR

Destination and increase year on year

■ Mediterranean	35%		24%
■ Northern Europe	29%		38%
■ Caribbean	12%		51%
■ Canaries	10%		39%
■ OTHER	14%		

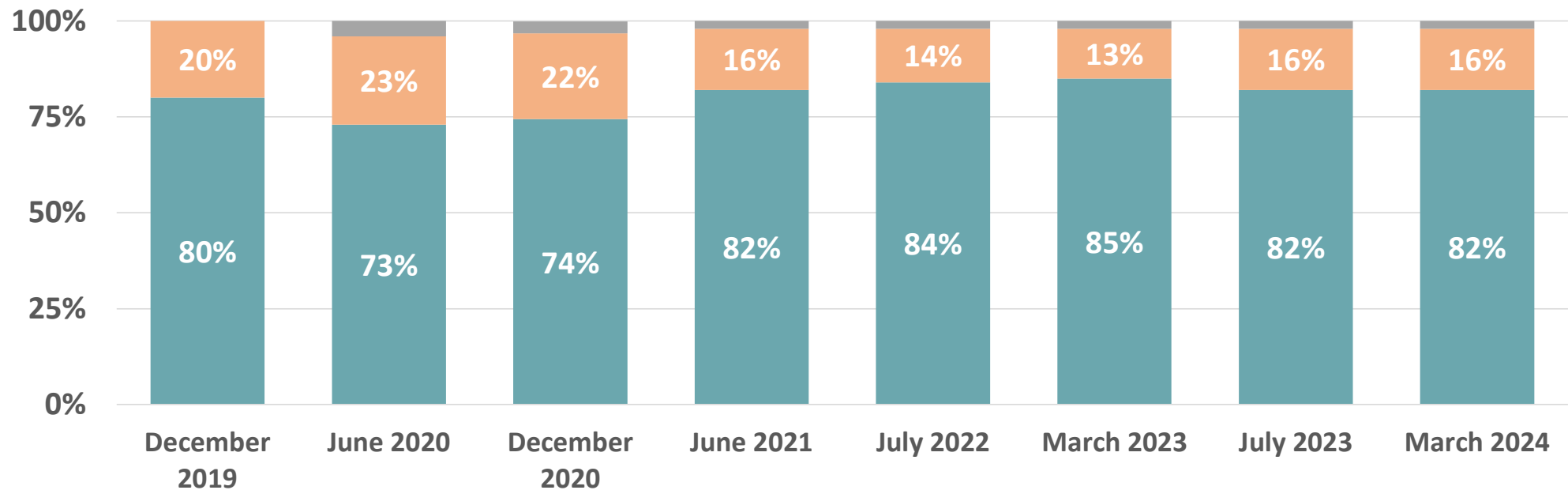


## UK & Ireland Stats

- Lower average age: **55.1 years old** – down from 56.1 last year
- Average cruise length: **10.1 days** – up from 9.8 last year
- Average party size: **38%** 2 people | **5%** solo
- Multigenerational travel: **28%** (3 or more generations)
- Pre- and Post-stays: **65%** before and **52%** after

# Cruisers Love to Cruise: 82% Will Cruise Again

Peaked at 85% in March 2023 wave, leveled at 82% for past three waves  
Higher than Pre-Pandemic



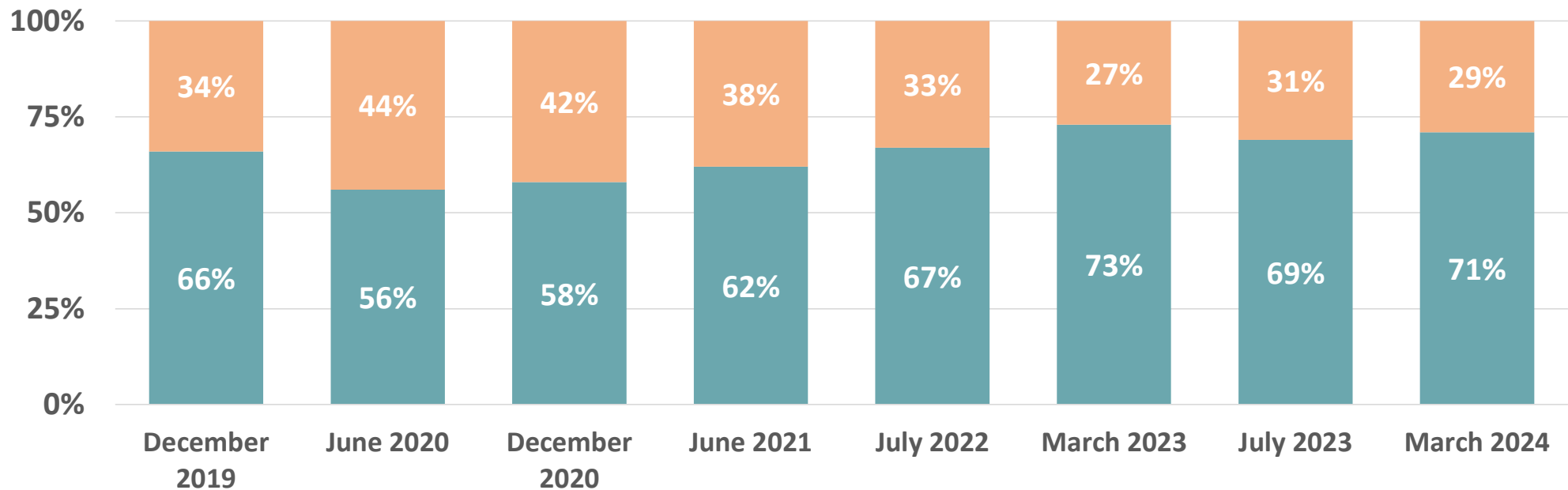
What best describes the likelihood you will cruise in the next few years? ***I have cruised before...***

- I Have Cruised Before but I am No Longer Able to Cruise
- I Have Cruised Before but I am Not Interested in Cruising Again
- I Have Cruised Before and I Will Cruise Again

**March 2024, n=2515**

# Near-Peak Openness: 71% Open to First Cruise

Peaked at 73% in March 2023 wave, consistently in ~70% range past 3 waves  
Higher than Pre-Pandemic



What best describes the likelihood you will cruise in the next few years?  
**I have never cruised...**

- I have never cruised but am open to it
- I have never cruised and never will

March 2024, n=2003

**76%** of British cruise passengers who sailed in the past 12 months said they were **'much more'** or **'more'** aware of environmental and sustainable tourism.

We are at a step change in  
the uptake of **new**  
**environmental technologies**  
and **alternative fuels**.

# Diversifying energy solutions

**34 ships** are or will be powered by **LNG**

**7** New builds able to run on carbon zero fuel

**75%** able to use alternative fuels

**120** CLIA ships have shore power connectivity

**171** have efficiency tracking technology

# Working with the Next Government

**Accelerate alternative fuels & support port infrastructure**

**Borders – ETA, ETIAS**

**Partnership on tourism strategy**

**Engage on skills - building green skills for the future**



82% | 71% | 76%

