



2017 ANNUAL REPORT

26.6M

CRUISE PASSENGERS

19

NEW SHIPS SAILING

\$126 B

2016 TOTAL ECONOMIC IMPACT

\$41.1B

TOTAL WAGES EARNED

1.02M+

JOBS IN THE INDUSTRY



50+

CRUISE LINES

25,000

TRAVEL PROFESSIONALS

34,500

MEDIA HITS FOR CLIA

340+

EXECUTIVE PARTNERS

**ONE INDUSTRY.
ONE VOICE.**

3,309

TRAVEL AGENTS
ENROLLED IN CERTIFICATION
PROGRAMS WORLDWIDE

**7 REGIONS
GLOBALLY**



NORTH AMERICA

AUSTRALASIA

BRAZIL

EUROPE

UK & IRELAND

ASIA

CANADA

5

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GIVING BACK

CLIA GLOBAL

FOSTERS OUR MEMBERS'

SUCCESS BY

ADVOCATING,

EDUCATING AND

PROMOTING THE

COMMON INTERESTS

OF THE CRUISE INDUSTRY

WITH ONE VOICE.



WELCOME





ABOUT CLIA

For over 40 years, Cruise Lines International Association (CLIA) has been the unified voice and leading authority of the global cruise community. We support policies and practices that foster a safe, secure, healthy and sustainable cruise ship environment for the more than 26.6 million passengers who cruise annually.

Through our 15 offices across the globe, we represent the industry in North and South America, Europe, Asia and Australasia. Our community is comprised of the world's most prestigious ocean, river and specialty cruise lines; highly trained and certified travel agents; and the top suppliers and partners for the industry, including ports & destinations, ship development, suppliers and business services.

A LETTER FROM CLIA PRESIDENT & CEO

2017 was quite a year for the cruise industry. We welcomed more than 26.6 million passengers aboard a cruise vacation, contributed \$126 billion to the world economy and launched 19 new ships. But perhaps 2017 is best marked by the numbers we didn't see – the overwhelming savings due to our efforts on the U.S. tax bill and other legislation; additional savings because of engagement on the new IMO design standards; and, the zero new regulations impacting new ship builds. CLIA continues to be the One Voice of the industry and impacts areas of the business that matter most.

CLIA's Cruise Lines, Travel Agents and Executive Partners have been with us all year as we advocate, promote and educate for and about the cruise industry. Here are just a few examples of the great work we have done together. More than three dozen cruise line executives helped define an industry roadmap to achieve success at our first Cuba Cruise Symposium in November. Travel agents completed 350% more online courses than in the prior year making them better able to serve our cruisers. Executive Partners contributed to our ongoing industry dialogue around sustainability and other issues that face the industry while making meaningful business connections.

As we chart our course for 2018, CLIA's One Voice is more important than ever. We must come together to protect our environment and ensure that the ports and destinations we visit thrive sustainably. It is not only our responsibility, but imperative to our business. And it will take all of us working together to achieve these goals.

We are looking forward to the year ahead together.

Sincerely,



Cindy D'Aoust
President & CEO





ADVOCATE





Top 5 Cruise Industry Priorities at the IMO

- ⊕ Enhanced Survivability of Cruise Ships
- 💧 0.5% Fuel Oil Sulfur Cap
- 🌊 Greenhouse Gas Emissions Reduction
- 🔒 Shipboard Cyber Risk Management
- 🛑 Life-Saving Appliance Safety Maintenance and Testing



CLIA, together with **U.S. Wildlife Trafficking Alliance** brought together companies including JetBlue Airways, Royal Caribbean Ltd., Carnival Corporation, and others, to help raise awareness about wildlife trafficking and educate travelers about how to make smart purchasing choices that don't harm endangered populations.



**U.S. Wildlife
Trafficking Alliance**





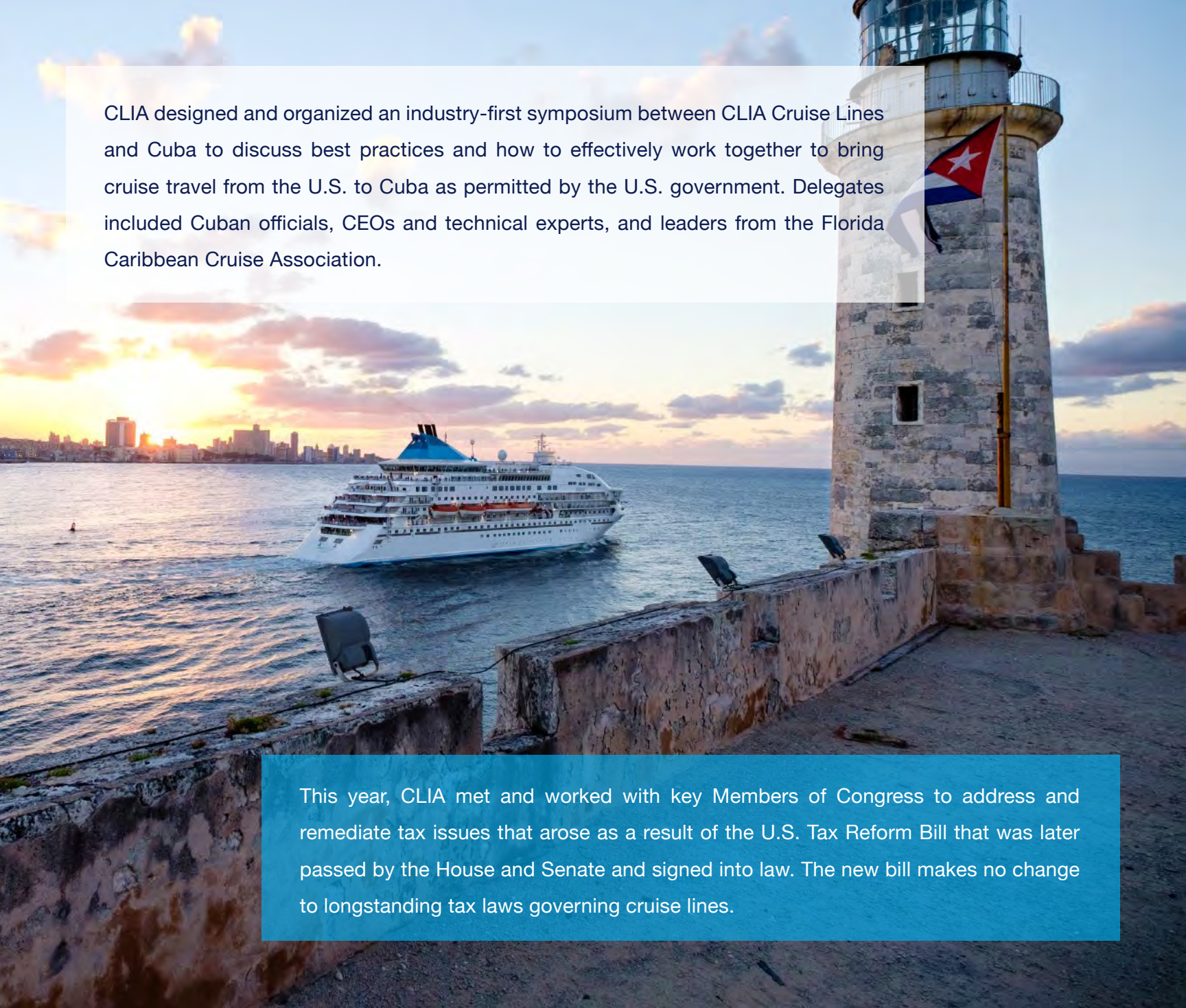
The annual **Congressional Cruise Caucus** offered a governmental affairs focused agenda related to the global cruise industry. CLIA worked with ASTA (American Society of Travel Agents) to align our legislative fly-ins. This cooperation afforded us opportunities of engagement with audiences that may not have been available in previous years.







CLIA strengthened its industry partnership with U.S. government agencies, including the **Federal Emergency Management Agency, Department of State, National Oceanic and Atmospheric Administration, national Transportation Safety Board**, and the **Environmental Protection Agency**. Through ongoing discussions and committee meetings, CLIA was able to educate stakeholders on matters of mutual interest to maritime safety and protection of the marine environment.



CLIA designed and organized an industry-first symposium between CLIA Cruise Lines and Cuba to discuss best practices and how to effectively work together to bring cruise travel from the U.S. to Cuba as permitted by the U.S. government. Delegates included Cuban officials, CEOs and technical experts, and leaders from the Florida Caribbean Cruise Association.

This year, CLIA met and worked with key Members of Congress to address and remediate tax issues that arose as a result of the U.S. Tax Reform Bill that was later passed by the House and Senate and signed into law. The new bill makes no change to longstanding tax laws governing cruise lines.



PROMOTE



Association for Rescue at Sea (AFRAS) recognized Norwegian Cruise Line and Royal Caribbean International with its **Cruise Ship Humanitarian Assistance Award** for their leadership and teamwork for safely executing two successful rescue operations.



The cruise industry generated \$2.2 billion in total economic impact in British Columbia in 2016. To drive further growth in this region, CLIA spoke to stakeholders in Vancouver to address capacity issues and the strategic priorities that will enable Vancouver's cruise industry to grow.

“

The study confirms that the international cruise industry is a major contributor to the Canadian economy, with ships generating millions of passenger visits and billions in spending every year. As cruising expands globally and passengers show more and more interest in Canada as a destination, Canada's ports and tourism operators will need to keep pace to ensure Canada can realize the growth opportunity this industry presents.

GREG WIRTZ
President & CEO
CLIA North West & Canada

”



PLAN A CRUISE

MONTH

October was Plan a Cruise Month at CLIA, a month dedicated to **promoting the cruise industry to the public and encouraging them to book a cruise** through a CLIA-certified travel agent. CLIA hosted its first-ever West Coast Media Marketplace where CLIA Cruise Lines met with media from all over the country to highlight the tremendous variety of cruises available to today's global traveler.



The media event was a great opportunity to network with a variety of media. Having the chance for one-on-one conversations with several dozen journalists and the ability to provide Princess news was invaluable. Also, the post-event cocktail reception allowed us to continue discussions in a more informal, friendly setting. We made some great contacts at the event and think it was of real benefit for Princess!

– Princess Cruise Lines





CLIA SUMMIT AT SEA 2017

The second annual **CLIA Summit at Sea** took place aboard Cunard Line's majestic **Queen Elizabeth**. Over **175 senior cruise industry delegates** from around the world participated including cruise lines, port authorities, destinations, manufacturers, shipyards, operators and legal and medical services. The group's itinerary included a visit to Carnival Maritime's Fleet Ops Centre, an Airbus Factory tour, Presidents Panel, afternoon tea with David Dingle, as well as workshops on technology, safety, shorex, environmental policy, connecting source markets and procurement.

BOARDING PASS

QUEEN ELIZABETH

**CLIA SUMMIT AT SEA
ITINERARY**

- **AIRBUS FACTORY TOUR**
 HAMBURG, GERMANY
- **CARNIVAL MARITIME'S FLEET OPS CENTER TOUR**
 HAMBURG, GERMANY
- ★ **EMBARKATION**
 MAY 10, 2017
 HAMBURG, GERMANY
- ★ **DISEMBARKATION**
 MAY 12, 2017
 SOUTHAMPTON, UK

IN ASSOCIATION WITH

CUNARD®



DISCUSS FEEDBACK

- Being intentional & explicit of positive feedback
- Public feedback & leading
- Being open to & receiving feedback



CLIA, once again, brought the industry together and delivered another outstanding networking opportunity to members at the first-ever Executive Partner Conference in London. More than 200 delegates including 46 Cruise Line decision-makers attended and participated in the highly-rated event which also included business sessions covering a wide range of current topics relevant to the industry in the region.

83% SAID THAT LEARNINGS AND CONNECTIONS
MADE HAD A POSITIVE IMPACT ON BUSINESS



**Professional and first-class access to cruise executives.
Excellent networking. Top cruise event of the cruise calendar.**

**- Michael Morrison
Port of Kirkwall (Orkney, Scotland)**





**DID YOU KNOW ALMOST
70% OF CRUISE TRAVELERS
TAKE ADVANTAGE OF THE
EXPERTISE OF A
TRAVEL AGENT
TO BOOK A
CRUISE VACATION?**



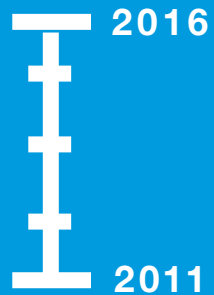


EDUCATE

CLIA released the annual **State of the Cruise Industry Outlook** report showing that cruise travel is on the rise overall with over 27 million passengers projected to set sail in 2018. The report also shows a continued positive trajectory of the industry with an estimated 26.6 million passengers cruising in 2017 compared to 24.7 million in 2016, an increase of almost 21 percent over five years from 2011-2016.



5
YEARS



21%
PASSENGER





Queen Mary 2

CUNARD



CLIA released the **Leadership in Environmental Performance** study, which provides wide-ranging analysis of the cruise industry's environmental practices and performance. The in-depth analysis found that with both air emissions and wastewater treatment practices, **CLIA Cruise Lines are leaders in the global commercial maritime sector in the development of innovative technologies** to advance environmental stewardship and the development of industry policies and best practices that further positive environmental performance.



CLIA took advantage of the Alaska cruise season by hosting special tours, while ships were in port, in a proactive effort to **educate regulators, lawmakers, and the public** about the industry's commitment to the environment and the economic benefits the industry brings to the state.

CLIA released the **Asia Cruise Trends 2017 Report** which found an increased interest in cruise vacation in the Asian market. The report's findings provide industry insight on trends to watch in Asia including Asian destinations and ports, more ships being deployed in this region and passenger capacity estimated at **4.24 million travelers**.



CLIA Career Seascape

YOUR DESTINATION FOR PROFESSIONAL DEVELOPMENT

2017 Brings Unprecedented Engagement, Education and Certification of Travel Agents

Travel agents are an important part of the cruise industry and CLIA continues to increase the engagement, education and certification of these professionals. In 2017, the CLIA Career Seascape program saw an unprecedented increase in travel agent certifications resulting in more professionals connecting and guiding travelers to find the best cruise vacation.

Online Courses/Quizzes

2016: 6,328

2017: **22,128**

350%



Certification Enrollments

2016: 778

2017: **1,494**

192%



Certification Graduates

2016: 230

2017: **400**

174%



27 MILLION
PASSENGERS ARE
PROJECTED TO
SET SAIL IN
2018

- 2017 CRUISE INDUSTRY OUTLOOK

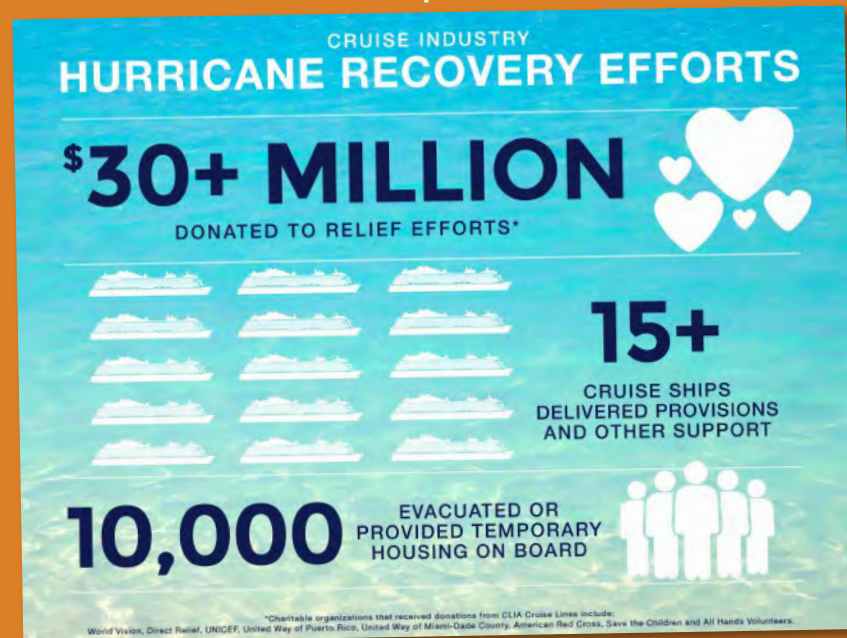


GIVING BACK





CLIA Cruise Lines continue to play an important role in offering disaster relief funds and actual safety and rescue operations in areas affected by hurricanes Harvey and Irma. Our lines led safety and relief efforts with more than 100 itinerary changes and cancellations to keep passengers and crew members safe, **transporting more than 2,500 people** from affected areas, delivering **medical supplies, 10,000 pounds of ice, 18,500 gallons of milk and 13,000 pounds of supplies for animals;** and by making more than **\$30 million in monetary donations.**





— CRUISE INDUSTRY —
CHARITABLE FOUNDATION

CLIA donated **\$25,000** to Cruise
Industry Charitable Foundation
to help rebuild a playground in
Juneau, Alaska.

CLIA continued a ten-year tradition of sponsoring the **Variety Children's Charity Boat for Hope**, which gives children with special needs and their families a chance to spend the day out on the water with local skippers.





For more than a decade, Tourism Cares has united the travel, tourism and hospitality industries in an effort to give back to destinations in need of care.

This past fall, CLIA volunteered in giving back activities at Tourism Cares for Providence and Tourism Cares for Toronto.

In 2018, CLIA will enhance the collaboration with Tourism Cares, offering opportunities for our agents to actively volunteer and “give back.” CLIA looks to engage various industry leaders to dedicate their time, along with ours, and encourage or sponsor agents to participate. CLIA will have the opportunity to select key cities that are important to the cruise industry in order to demonstrate the positive work that can be done.



AFRICA MERCY

www.mercyships.org



Mercy Ships, the **Charity of Choice** for CLIA is a global organization of hospital ships staffed by an all-volunteer crew, delivering free, world-class healthcare services and capacity-building to countries in the lower third of the UN Human Development Index. In 2017, the Mercy Ships *Africa Mercy* was deployed to both **Benin, West Africa** and **Cameroon, Central Africa**. Thanks to the support of CLIA and many of its members, the all-volunteer crew were able to provide 2,792 free life-changing surgeries and provide capacity-building training to over 1,800 health care providers.

2,792

FREE LIFE CHANGING SURGERIES

1,800+

HEALTH CARE PROVIDERS TRAINED







2017 GLOBAL CRUISE LINES



2017 REGIONAL CRUISE LINES



2017 DIAMOND ELITE EXECUTIVE PARTNERS



FINCANTIERI



stx France



2017 DIAMOND EXECUTIVE PARTNERS

amadeus

AON
Empower Results®

Bristow

CAREY
INTERNATIONAL

Getaway to Finland
CRUISE PORT KOTKA
Northern Europe



First Data



greater FORT LAUDERDALE
HELLO SUNNY
sunny.org

HONG KONG
TOURISM BOARD



TECHNOLOGY
SERVICES

INTERCRUISES
SHORESIDE & PORT SERVICES™

L Lloyd's Register
Marine

Lufthansa
Industry Solutions

Marriott
INTERNATIONAL

Metro
cruise

MHG
INSURANCE BROKERS

nauticor
Clean shipping powered by Linde

ORACLE
HOSPITALITY

PORT
CANAVERAL

PORT EVERGLADES
BROWARD COUNTY, FLORIDA

PORT MAMI

PORT OF SKAGEN
NORTH NORWEGIAN COAST

PORT ST. MAARTEN
GROUP OF COMPANIES

RINA

SMS
INTERNATIONAL
SHORE OPERATIONS

SIMWAVE
Maritime Intelligence & Analytics

Singapore
TOURISM
BOARD

The Marshall Islands Registry

Trieste Terminal
PASSEGGERI

TOURISM
AUSTRALIA

VENEZIA TERMINAL PASSEGGERI S.p.A.

VERSONIX

VIKAND
TECHNOLOGY SOLUTIONS

WÄRTSILÄ

THANK YOU TO OUR SPONSORS

Port Canaveral is a world-class gateway for Central Florida, now the tenth largest consumer market in the U.S. with economic growth well above the national average. We are a popular homeport and port of call for some of the world's largest, most sophisticated cruise ships afloat. With over 4.5 million cruise passengers in 2017, and nearly 5 million expected in 2018, Port Canaveral is the second-busiest cruise port in the world and Florida's third largest by operating revenues. We recently completed \$85 million in cruise terminal upgrades, and launched a \$150 million project to build a new state-of-the-art terminal. By 2019, we will be the first U.S. port capable of serving LNG-powered cruise vessels. Investing in our capabilities and capacity, along with our assured financial growth and stability, ensures we meet our cruise partners' needs today and remain well positioned to support their demands of tomorrow. Congratulations and thank you CLIA for all your good work. We are proud to be your Diamond Executive Partner.

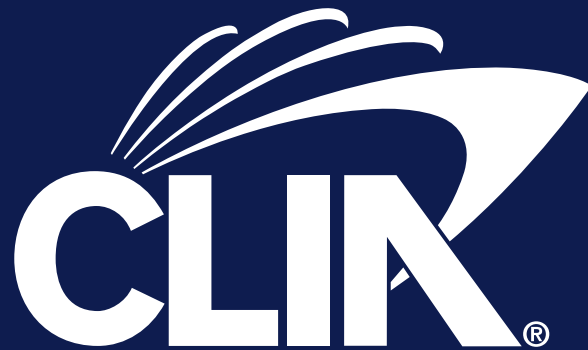


Port Everglades, located in Broward County, Florida, is consistently ranked as one of the three busiest cruise ports in the world with more than 3.8 million passengers in fiscal year 2017 (Oct. 1, 2016 through September 30, 2017). Ten cruise lines, one ferry service and nearly 40 cruise ships sail from the South Florida seaport including: Balearia's Bahamas Express (ferry), Carnival Cruise Line, Celebrity Cruises, Costa Cruises, Crystal Cruises, Cunard Line, Holland America Line, Pearl Seas Cruises, Princess Cruises, Royal Caribbean International, and Silversea Cruises. The Port's wide-ranging fleet of cruise ships provides guests with an array of cruise vacation choices from the Fort Lauderdale, Hollywood and Dania Beach area. View details on the latest cruise offerings at porteverglades.net or contact us by emailing PortEverglades@broward.org.



PortMiami is located in the heart of one of the most beautiful cities in the world offering a breathtaking view of downtown Miami's skyline and the sparkling waters of Biscayne Bay. The Port delivers to its cruise passengers a tropical vacation experience like no other port in the world. As one of South Florida's major economic engines, PortMiami is recognized as the Cruise Capital of the World and is proud to home-port 22 cruise lines and 54 of the industry's most innovative cruise ships. PortMiami is poised for yet another exceptionally strong cruise season as it welcomes a host of new cruise brands and new build ships that rank among the most innovative vessels on the seas today. PortMiami's cruise facilities are the most modern in the world, providing easy passenger boarding and departure. By continuously investing in cruise facility improvements, PortMiami maintains its position as market leader and is prepared for the newest generation of cruise vessels. Currently on the drawing board are plans to expand the cruise footprint, including new cruise terminal construction and modernization of current facilities solidifying the Port's position as the Cruise Capital of the World. For a complete listing of cruise lines, their schedules, and all other important information about cruising from PortMiami please visit www.portmiami.biz





cruising.org
f t in @CLIAGlobal