

State of the Cruise Industry Report 2025





About Cruise Lines International Association

Cruise Lines International Association (CLIA) provides a unified voice for the industry as the leading authority of the global cruise community. Together with its members and partners, CLIA supports:

- Policies and practices that foster a safe, healthy and sustainable cruise operations;
- Tourism strategies that maximise the socio-economic benefits of cruise travel; and
- Technologies and innovations to support the pursuit of pathways to net-zero by 2050.

About the Industry

Plenty of room for growth:

Cruise is currently only 2.7% of the international travel and tourism sector.¹

Strong and resilient:

With consistent and steady growth over the past 50 years, the cruise industry has proven to be more resilient than other sectors through downturns.

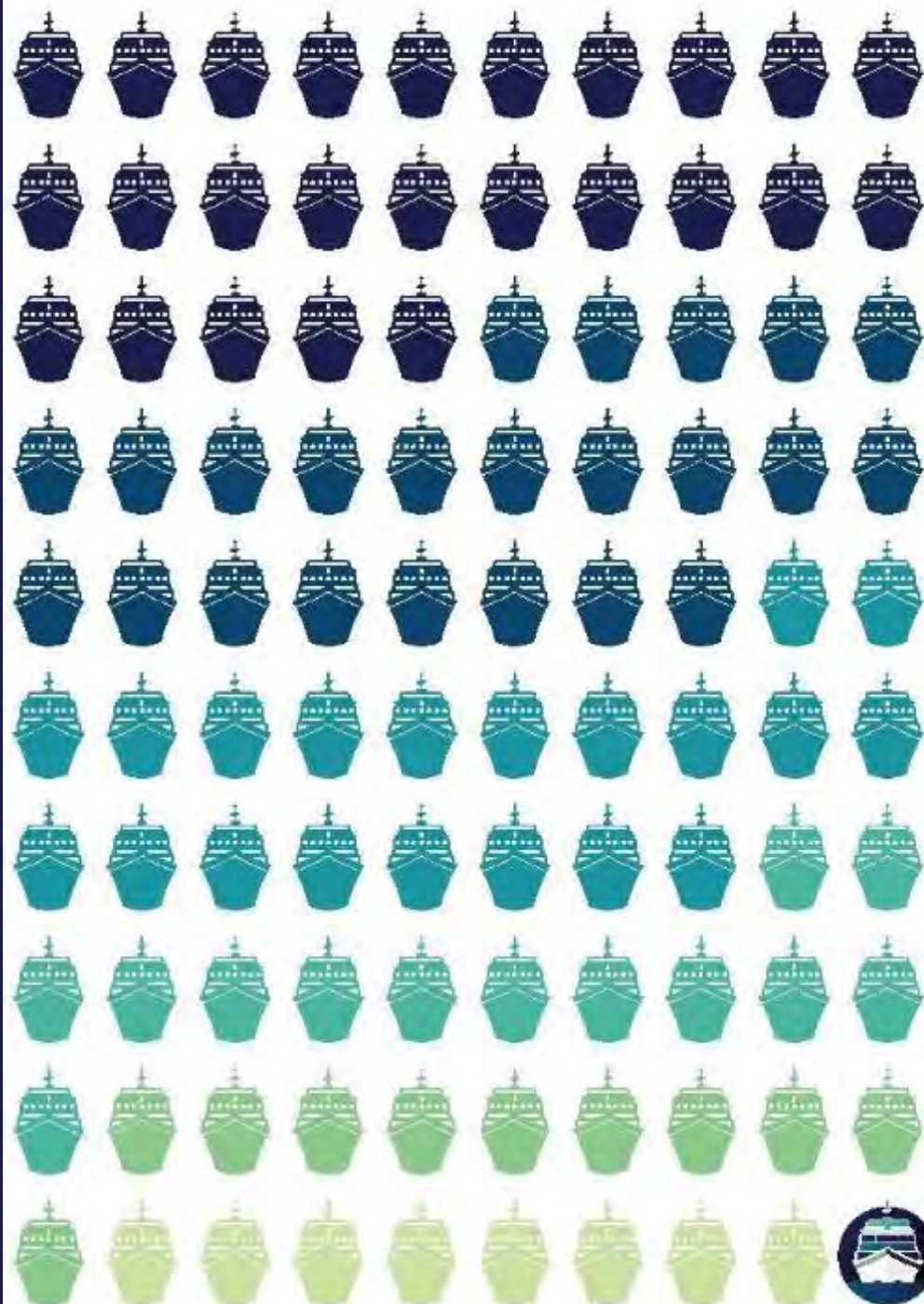
Responsible and sustainable:

Cruise is one of the safest ways to travel—and is becoming one of the most responsible and best ways to see the world—with cruise lines advancing an ambitious sustainability agenda. Learn more in the “Charting the Future of Sustainable Cruise Travel” section of this report.

¹ Sources for international travel and tourism

CLIA One resource Passenger Data 2024: 34.6 million

UN Tourism International Arrivals Data 2024: 1.3 billion



25% general cargo ships

23% bulk carriers

20% ferry/ro-ro passenger ships

13% oil and LNG tankers

10% container ships

8% chemical tankers

<1% **cruise ships**
(300 total)

Cruise ships
comprise
< 1%
of the world's
commercial fleet

CRUISE BY THE NUMBERS

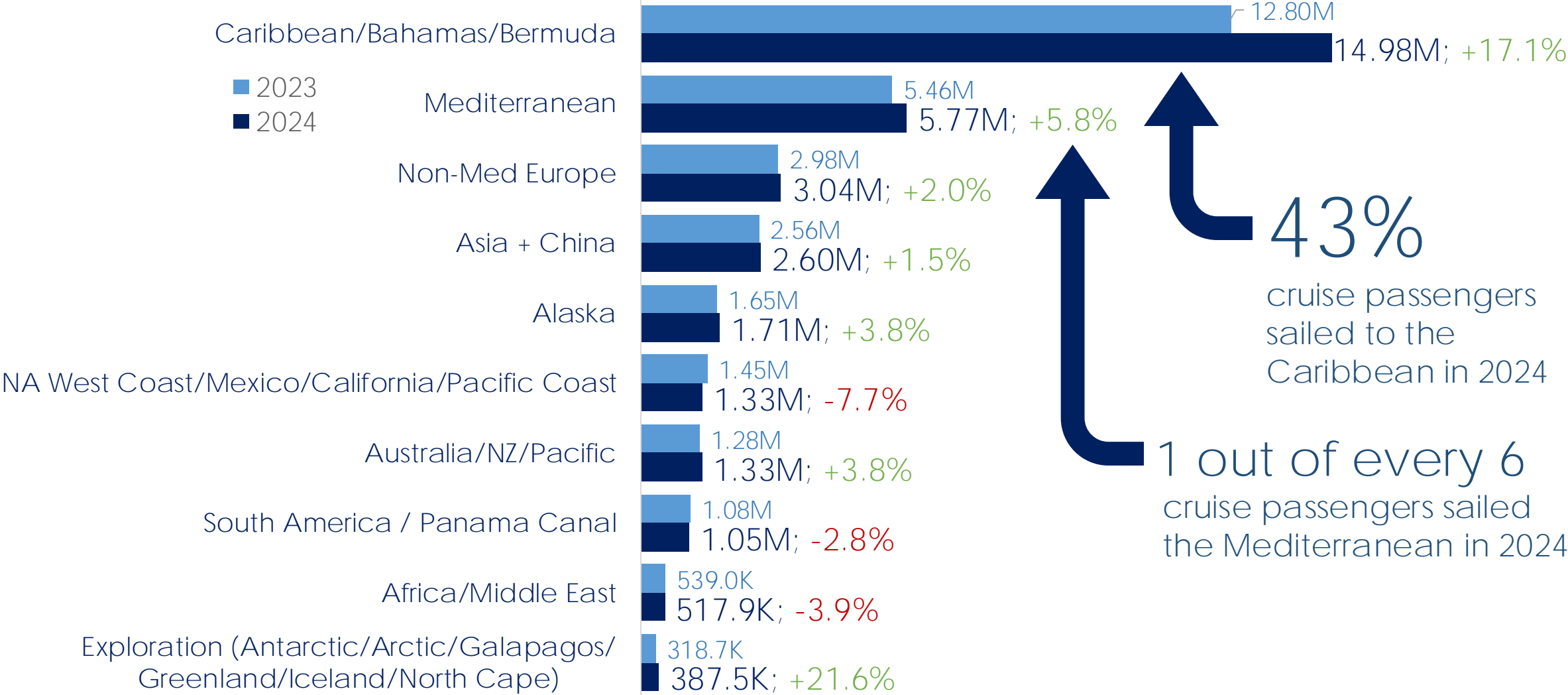


34.6 million
ocean-going cruisers
globally in 2024

2024 Passenger Volume

Source Region	2024	2023	% Change (2023 to 2024)	2019	% Change (2019 to 2023)
Global	34.64 million	31.69 million	+ 9.3%	29.67 million	+ 6.8%
North America	20.53 million	18.10 million	+13.4%	15.41 million	+17.5%
Europe	8.44 million	8.21 million	+ 2.8%	7.71 million	+ 6.5%
Asia & Oceania	4.03 million	3.67 million	+9.80%	5.09 million	- 20.8%
South America	1.17 million	997 thousand	+ 7.8%	1.04 million	+ 3.8%

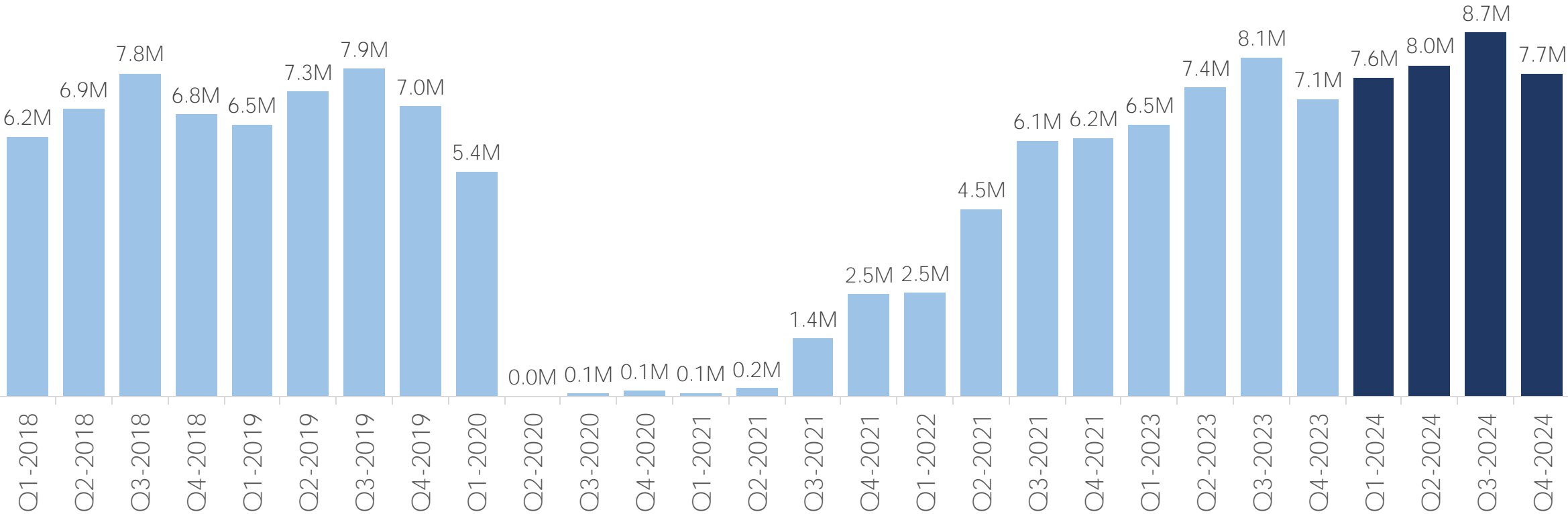
Top 10 Destination Regions in 2024 (compared to 2023)



The third-quarter is historically the strongest sailing period

Number of Passengers Sailing by Quarter
(2018 through 2024)

CLIA-member oceangoing cruise lines



The resilience of the cruise industry over the past 40 years

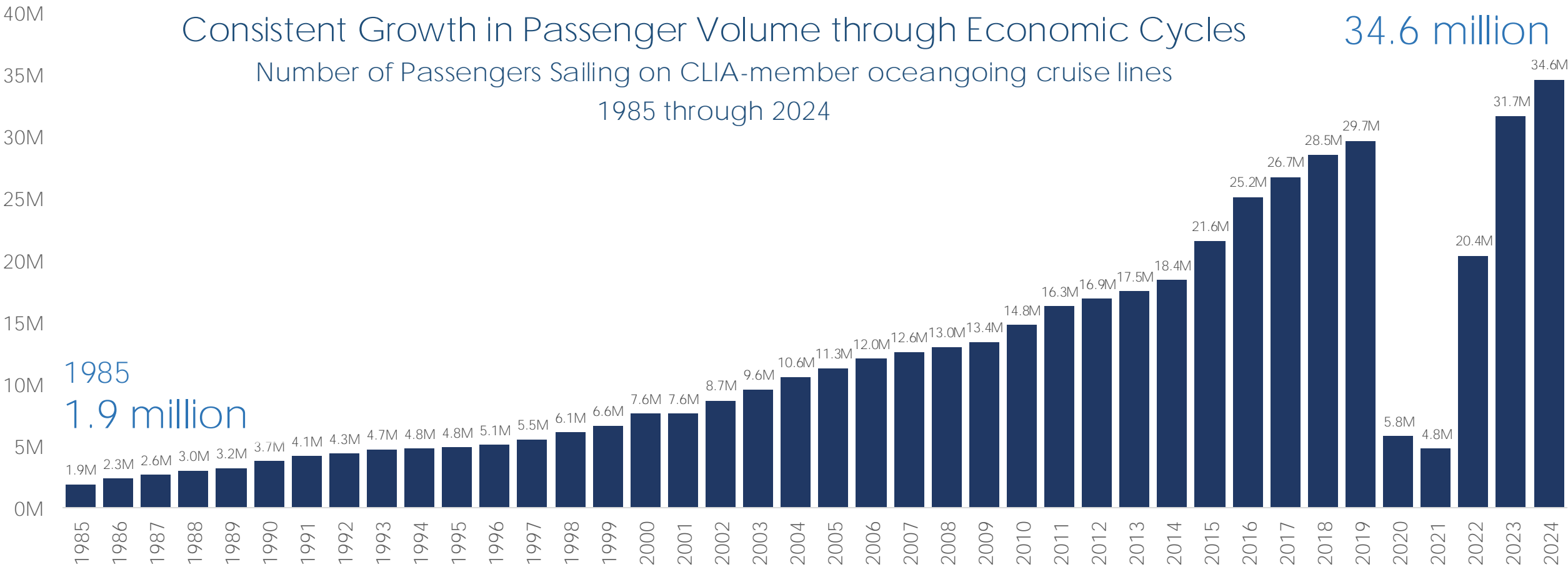
Consistent Growth in Passenger Volume through Economic Cycles

Number of Passengers Sailing on CLIA-member oceangoing cruise lines

1985 through 2024

2024

34.6 million



Sources & Notes:
1985-2014 from CLIA Legacy North America Cruise Passenger Database, Pre-One reSource DB. CLIA-member cruise lines only (ocean-going vessels; does not include river cruise vessels)
2015 was a transition year wherein a new, refined data collection template was issued globally. Higher compliance and more precise reporting account for the relatively high YOY bump from 2014. CLIA members only. No River
Data for 1985-2015 does not include: Age buckets, Duration buckets, Destinations. All non-North American source passenger data is lumped into "Foreign"
2016 through 2023 data from CLIA One reSource, which is a global, standardized passenger DB, offering source countries (and source States for USA, Canada, and Australia), destination regions, durations, and ages of guests.
One reSource also contains global non-CLIA ocean-going passenger data on an annually-aggregated basis, thus accounting for another relatively high YOY bump from 2015 to 2016

CRUISE OUTLOOK AND FORECAST



Intent to cruise continues to be strong among Forever Cruisers and Potential New Cruisers

82% of those who have cruised will cruise again (and getting stronger)

68% of international travelers are considering taking their first cruise

1 out of 3 international travelers have taken a cruise

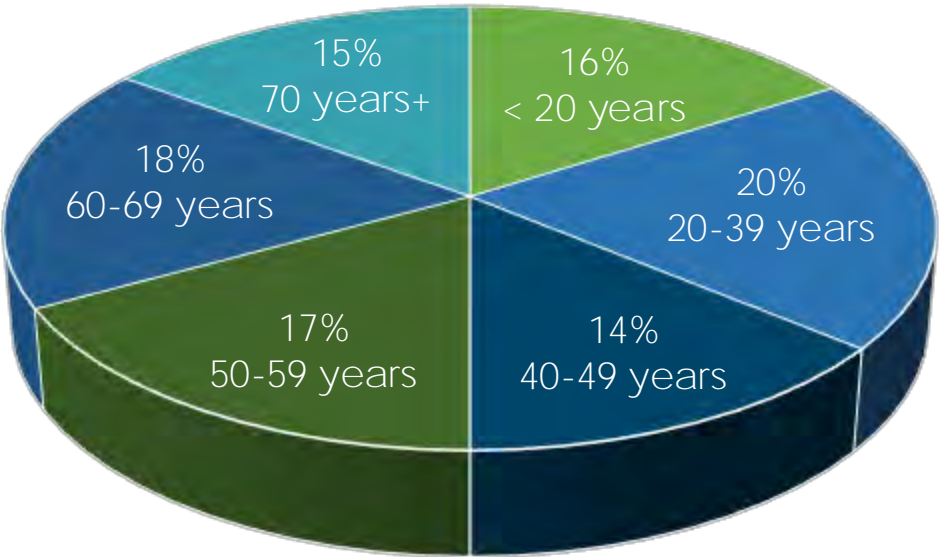


The future of cruise is the younger generation

Intent to cruise continues to outpace levels in 2019

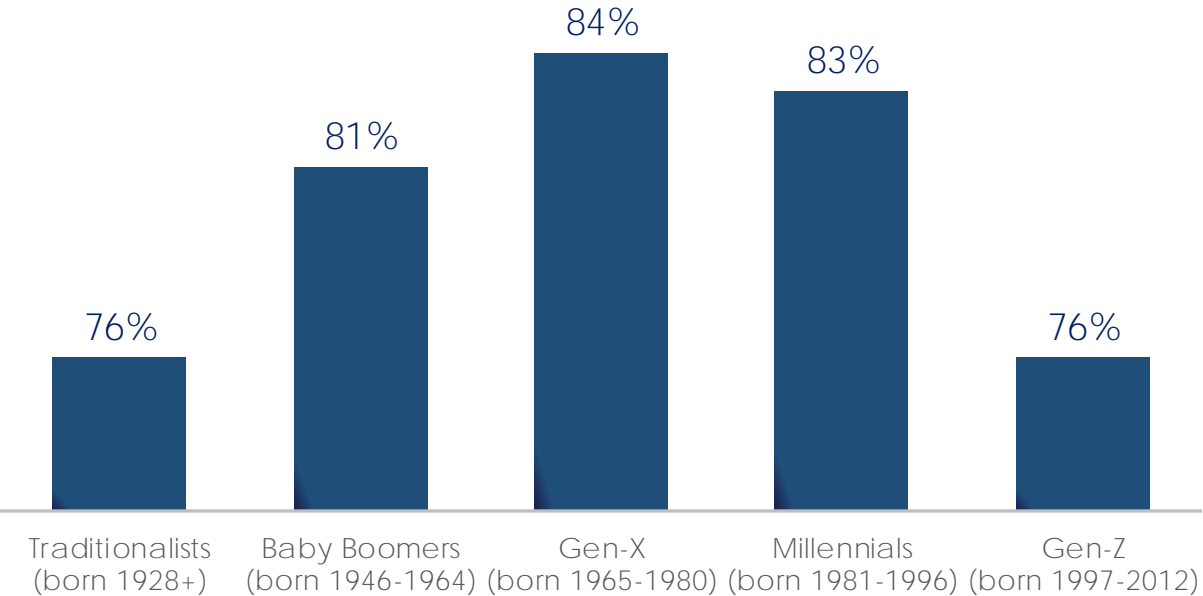
46.5 Average age of a cruise traveler
(36% are under the age of 40)

Approximately 67% of cruise travelers are Gen-X or younger



Gen-X and Millennials are the most enthusiastic about taking a cruise holiday

% of Cruise Travelers by Generation who Plan to Cruise Again

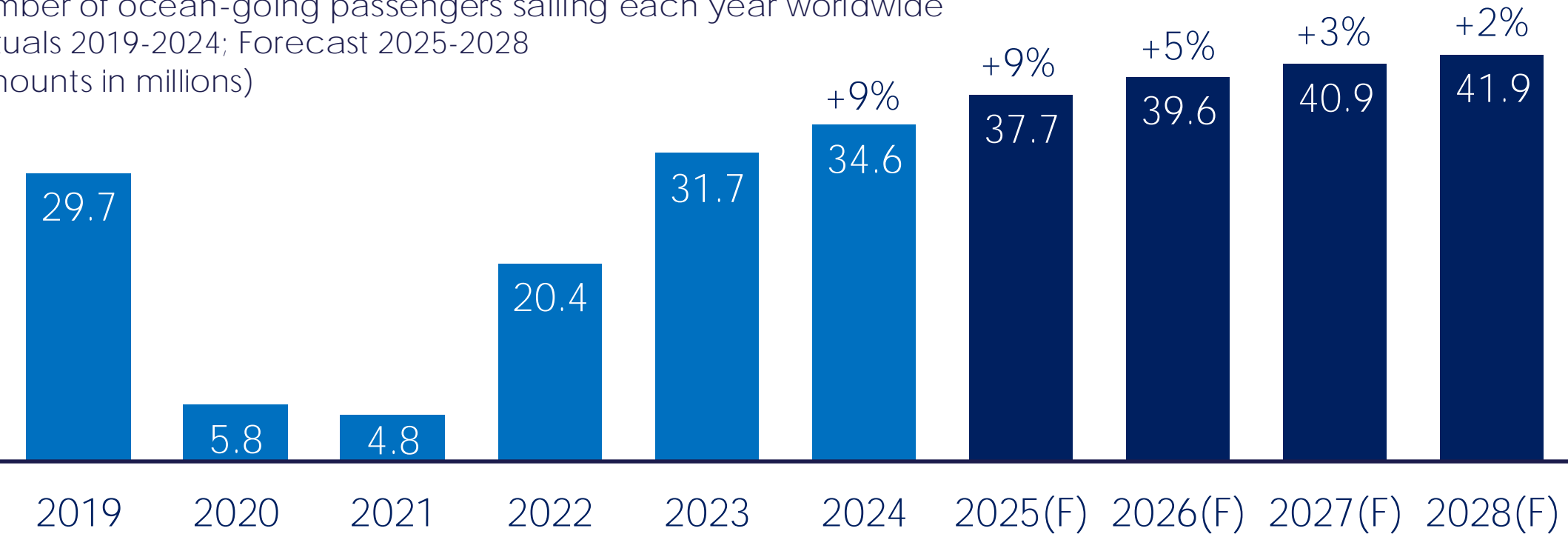


Age Data Source: CLIA OneResource Passenger Data, 2024

Intent to Cruise Source: CLIA Cruise Traveler Sentiment, Perception, and Intent Survey (December 2024); cruise travelers who have cruised in the past two years

42 million passengers are forecast to sail in 2028

Number of ocean-going passengers sailing each year worldwide
Actuals 2019-2024; Forecast 2025-2028
(amounts in millions)

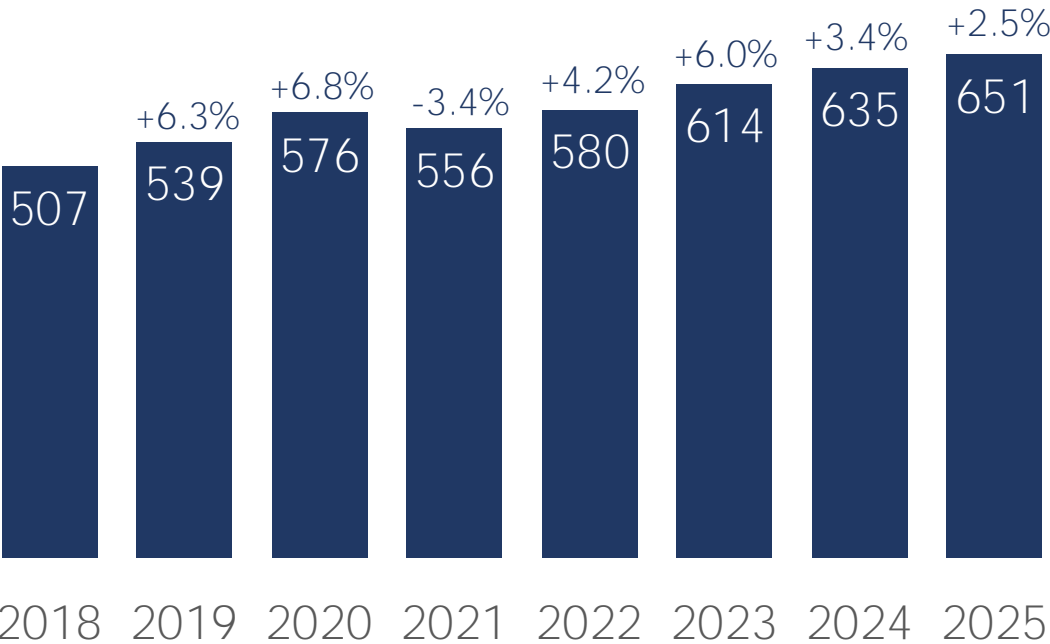


Very strong short-term forecast on the basis of new high-capacity ships deployed in popular destinations, with slightly shorter average durations for those high-capacity ships, during 2024 & 2025.

Forecast slows as current understanding of additions to global fleet capacity show tapering off in the future

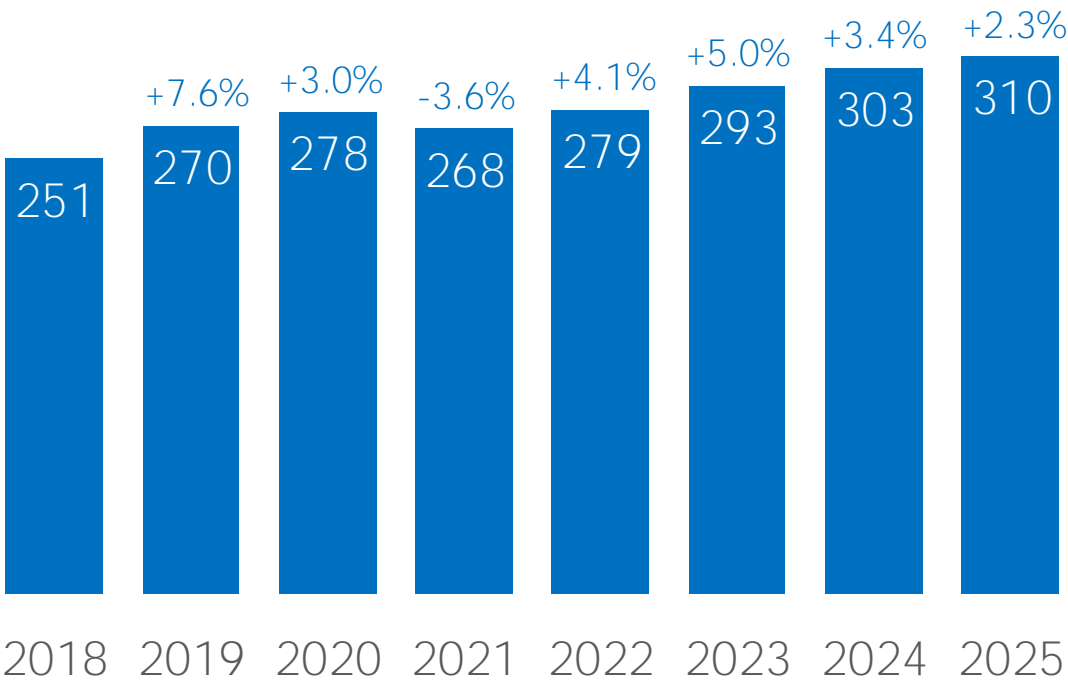
Strong and consistent growth of the global cruise line fleet

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



CLIA-member cruise line fleet capacity accounts for ~92% of global ocean-going lower berths in 2025. For the first time, CLIA global capacity exceeds 650k

CLIA-member ocean cruise fleet size
based on number of ships



For the first time, the CLIA-member cruise line fleet exceeded 300 ocean-going vessels in 2024, growing to 310 in 2025

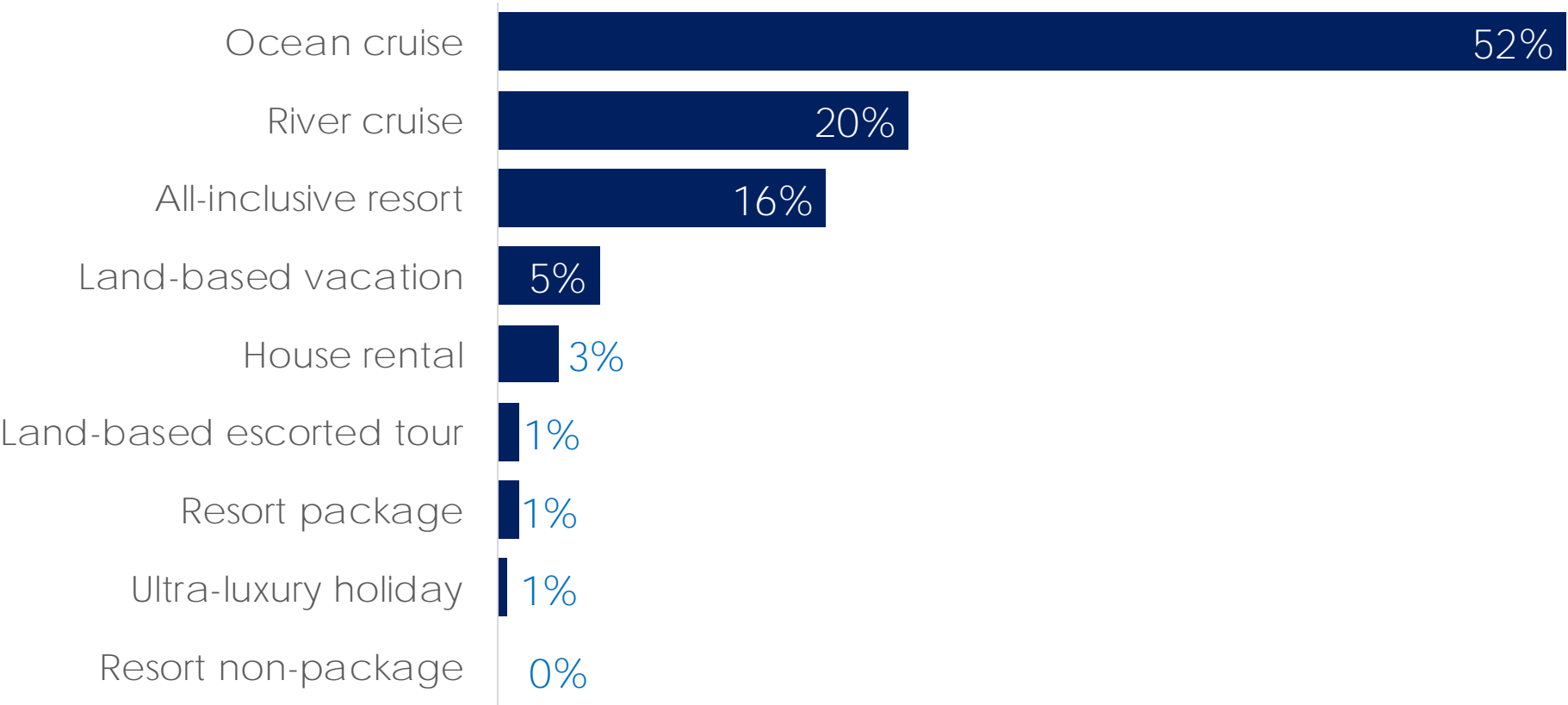
Cruise travel drives higher satisfaction compared to other holiday choices

On a scale of 1 to 5, what vacation type leads to high satisfaction for your clients?
(5=Highest, 1=Lowest)



Travel agents say cruise holidays are experiencing higher growth than any other travel segment

In your view, which travel segments are increasing the most?



TRENDS



CRUISE TRENDS

The ability to visit multiple destinations + value for the money are the top reasons cruisers love to cruise.

12%

In 2024 12% of cruise travelers only considered cruise for the holiday



CRUISE TRENDS

Welcome Aboard: Cruise is drawing an increasing number of first-time cruisers.

31%

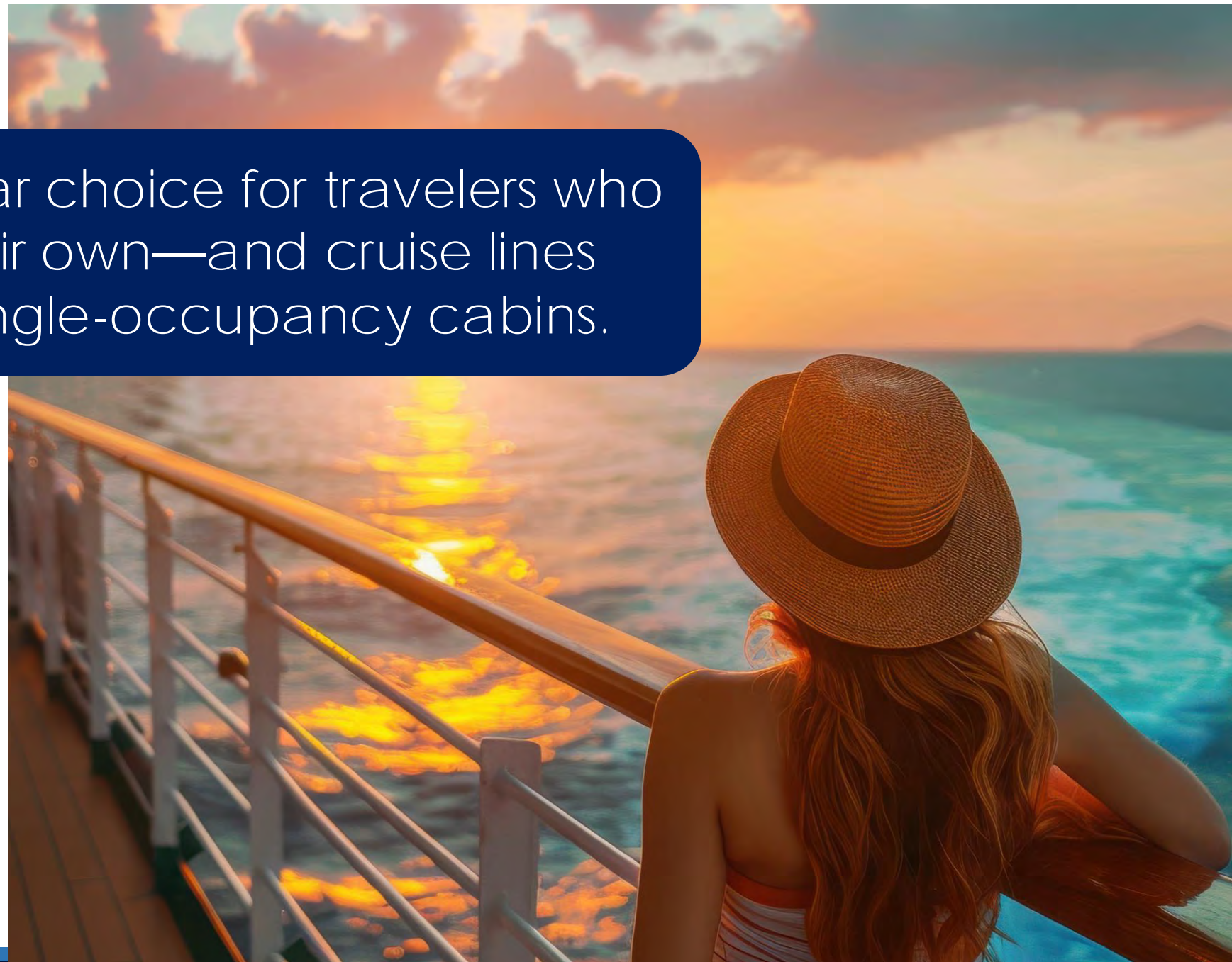
of cruisers over the past two years are new-to-cruise—up from 27% in 2023 and 24% in 2019

CRUISE TRENDS

Cruises are a popular choice for travelers who wish to travel on their own—and cruise lines are offering more single-occupancy cabins.

12%

In 2024, 12% of cruise travelers chose to sail solo (up from 6% in 2023)



CRUISE TRENDS

Cruises continue to be a top choice for multi-generational travelers.

28%

of cruise travelers
cruise with
three to five
generations

CRUISE TRENDS

Baby Boomers love to cruise

Nearly one third are sailing with friends and family representing three to five generations

- Boomers are the wealthiest retiring generation in history, and they love to travel.
- Grandparents are using the wealth they have built up over the years and investing it in experiences with those they love.
- Includes solo travel, travel with “just the two of us” and multi-generational travel.

6%

of solo cruise
travelers are
Boomers

31%

are sailing
with 3 to 5
generations

63%

are sailing
with 1 other
person

Boomers are spending
\$157 billion annually
on travel



CRUISE TRENDS

Once is not enough: An increasing number of cruise travelers choose to sail more than once a year.

25%

of repeat cruise travelers sail two or more times a year

14% of cruise travelers cruise twice a year (12% in 2023).

11% of cruise travelers take three to five cruises a year (10% in 2023).



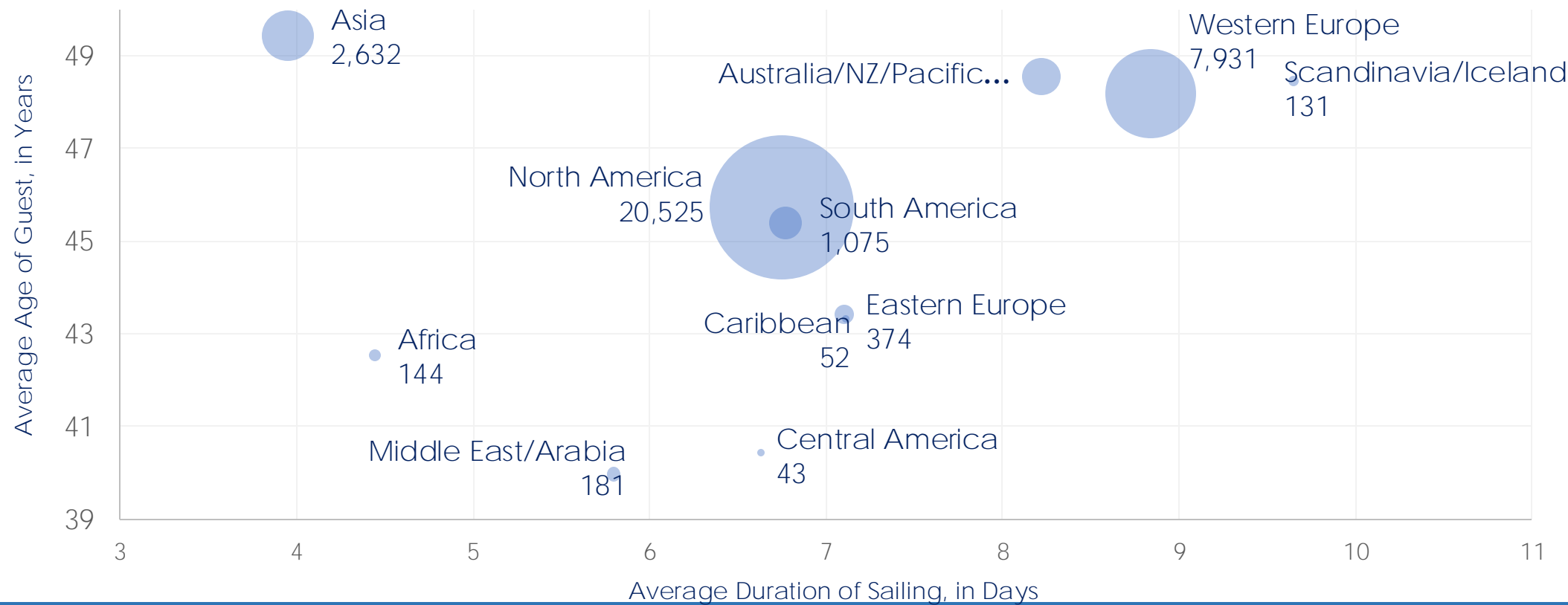
Cruise travelers intend to select a longer voyage than they sailed last year.

49%

Nearly half of all cruise travelers intend to take a longer cruise this year than the cruise they sailed last year

Average length of a cruise is 7.1 days

- Travelers sailing from Europe and Australasia take longer cruises.
- Travelers sailing from Asia and younger guests sailing from the Middle East and Arabian Peninsula take the shortest cruises



And they are booking their cruise further in advance to make sure they get the sailing they want.

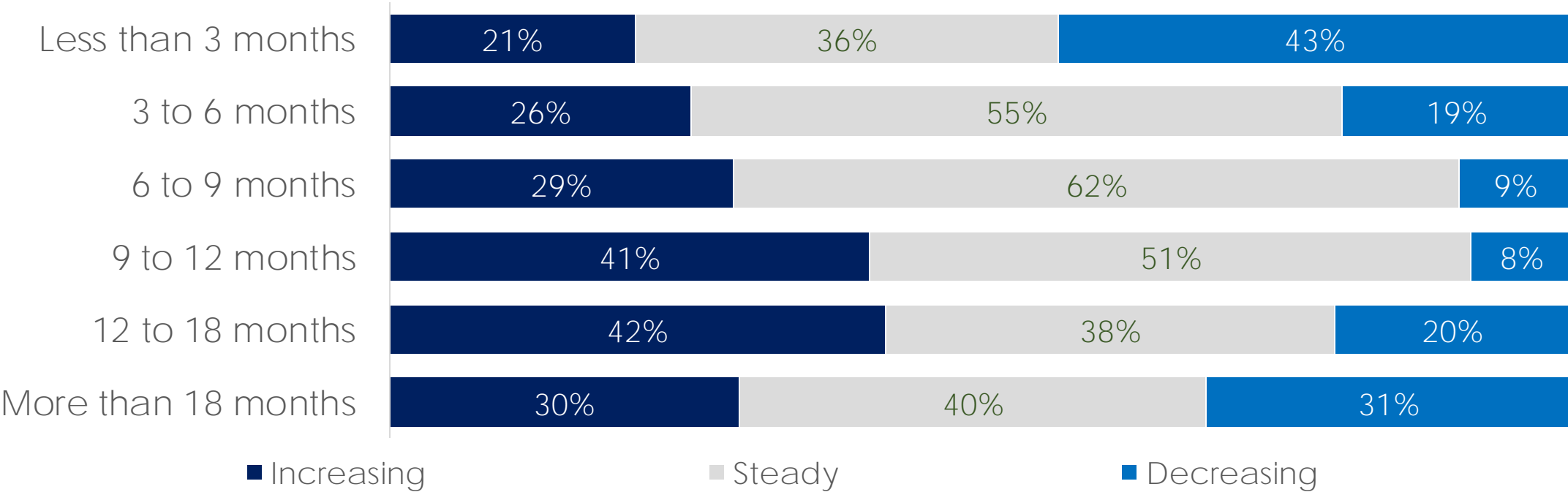
11%

of cruise travelers book their sailings one year or more before the sailing date



Travel agents in North America say their clients are booking cruises further in advance than they did last year

Responses to the Question:
How far in advance are your clients booking cruises compared to one year ago?



Expedition and exploration continue to attract cruise travelers especially younger travelers seeking extraordinary experiences.

150%

Growth in global capacity for expedition and exploration ships from 2019 to 2029

From 2023 to 2024, the number of passengers sailing on expedition/exploration cruises increased 22%.

The first purpose-built exploration ship was built just 10 years ago. Today, there are about 40 ships sailing that are specifically built for expedition and exploration.

The luxury cruise travel market has tripled since 2010 based on number of ships offering luxury experiences.

3x

That's nearly three-fold growth in the number of ships (and total lower berths of the combined fleet) than there were 14 years ago



An aerial photograph of two large, modern luxury cruise ships sailing on a deep blue ocean. The ship in the foreground is a dark-hulled vessel with multiple white decks and a prominent white funnel. The ship in the background is a white-hulled vessel with a similar design. The text is overlaid on the right side of the image.

The luxury cruise fleet has
more than tripled
since 2010

28 ships
in 2010

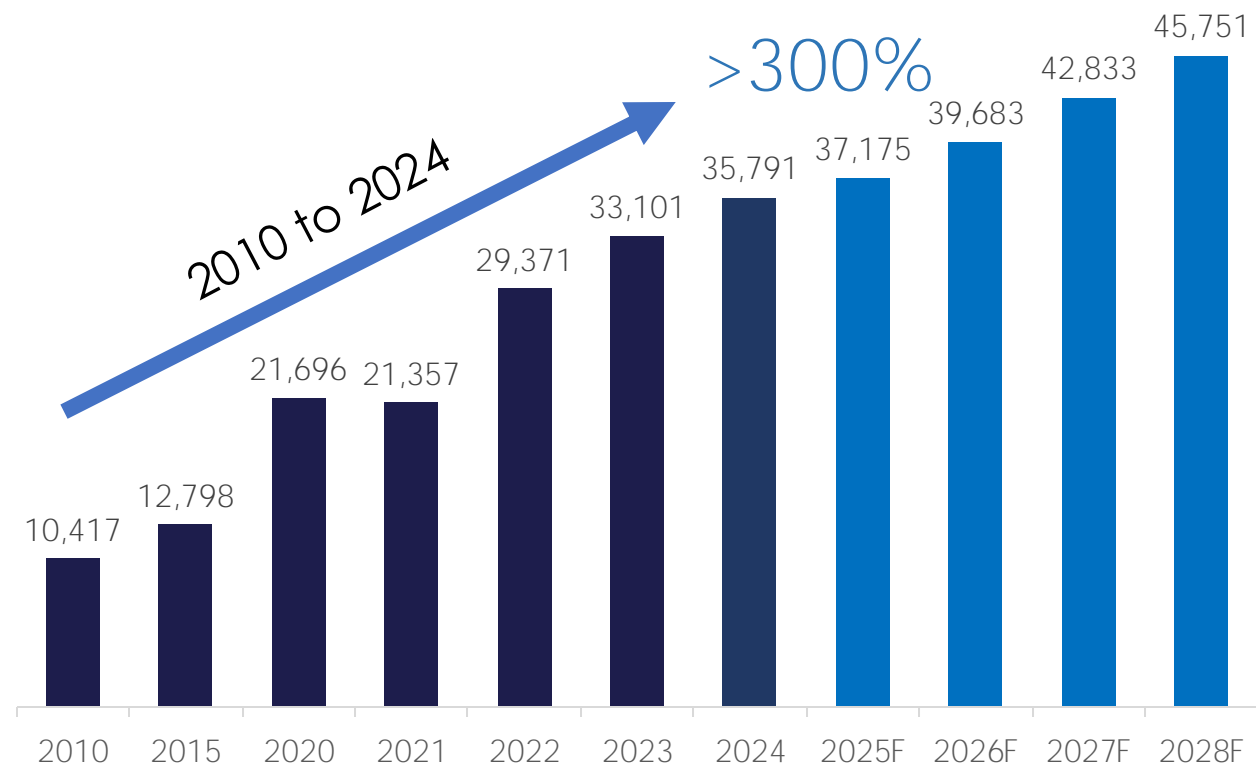
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The luxury cruise fleet has
more than tripled
since 2010

97 ships
in 2024

The luxury vessel fleet has more than tripled since 2010

Number of Lower Berths, Luxury Segment
2014 to 2028 (projected)

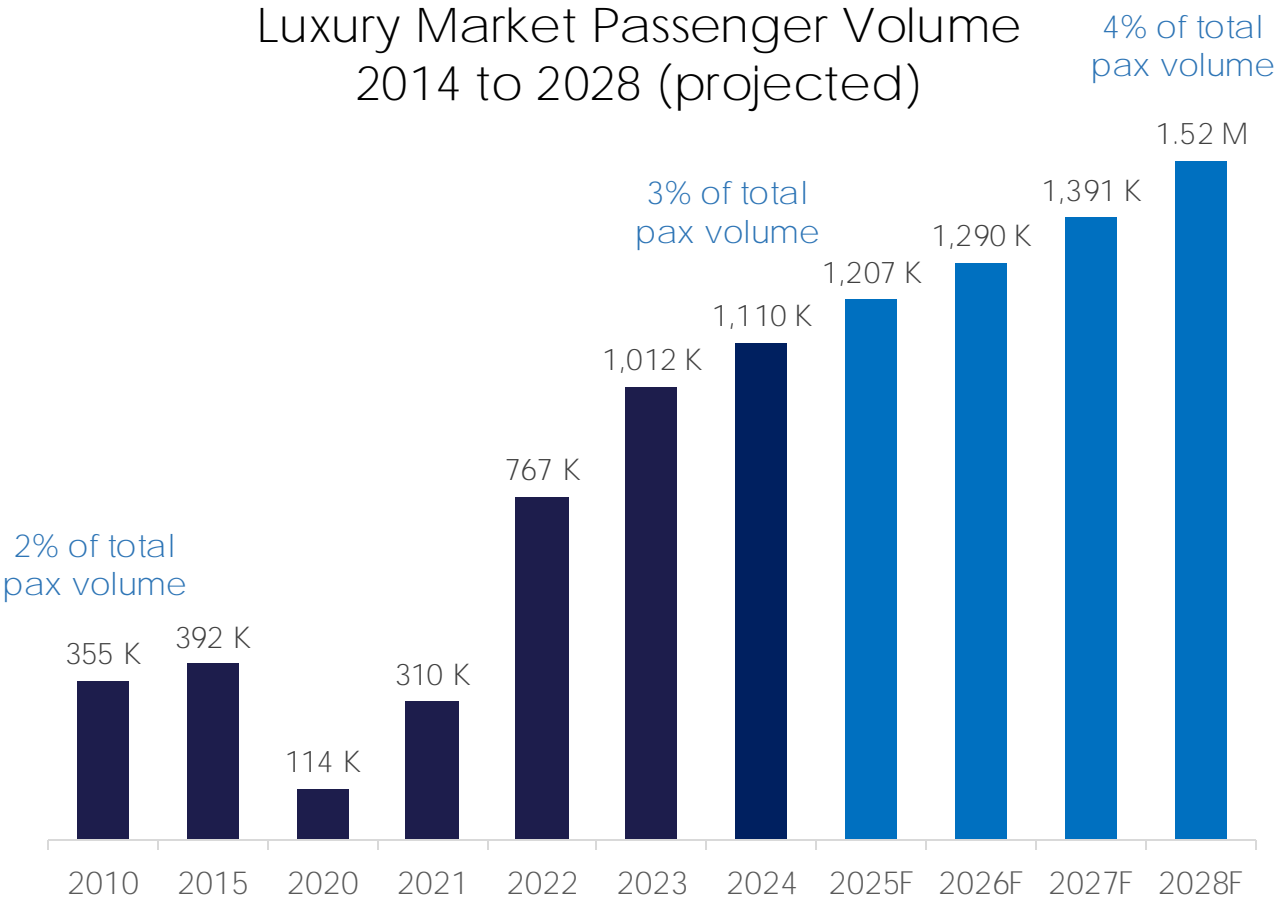


Source: CLIA Orderbook and global ocean-going fleet analysis; historical data from Cruise Industry News

CRUISE TRENDS

By 2028, 1.5 million cruise travelers are forecast to choose a luxury cruise experience

Luxury Market Passenger Volume
2014 to 2028 (projected)

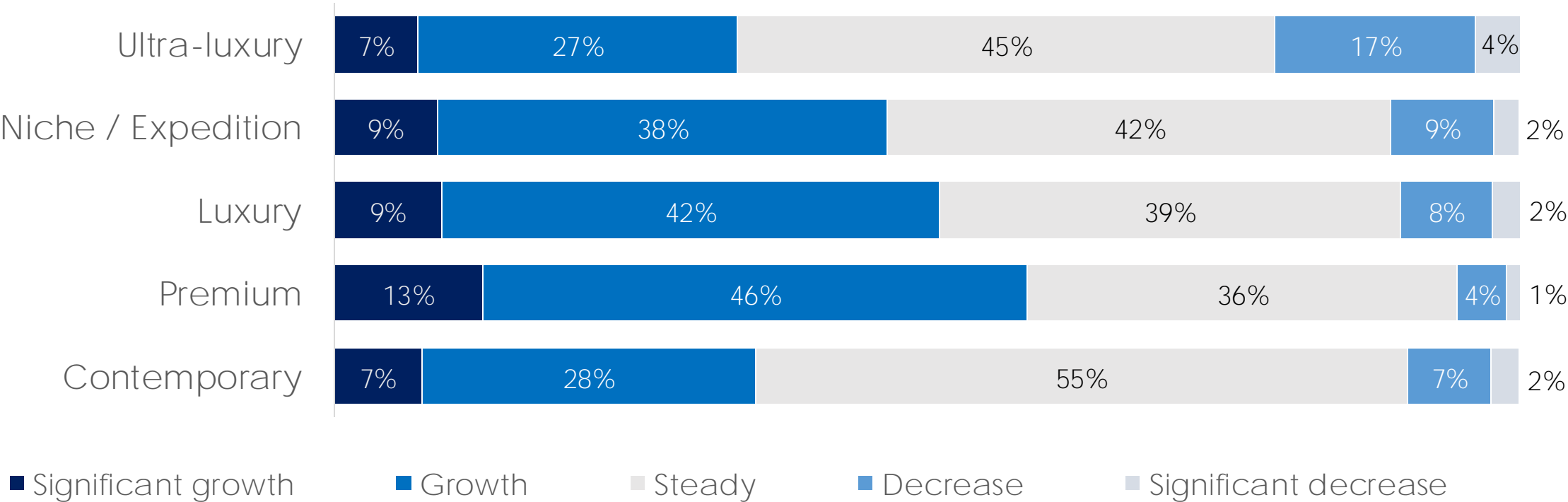



Source: CLIA Orderbook and global ocean-going fleet analysis; historical data from Cruise Industry News



Travel agents see the highest growth in cruise bookings from the premium, luxury, and expedition segments

In your view, what is the current booking growth level of the following cruise segments compared to one year ago?





Travel agents have a meaningful influence on traveler decisions to cruise; the main driver is the agent's knowledge and experience.

79%

Cruise travelers say travel agents have a meaningful impact on their decision to cruise

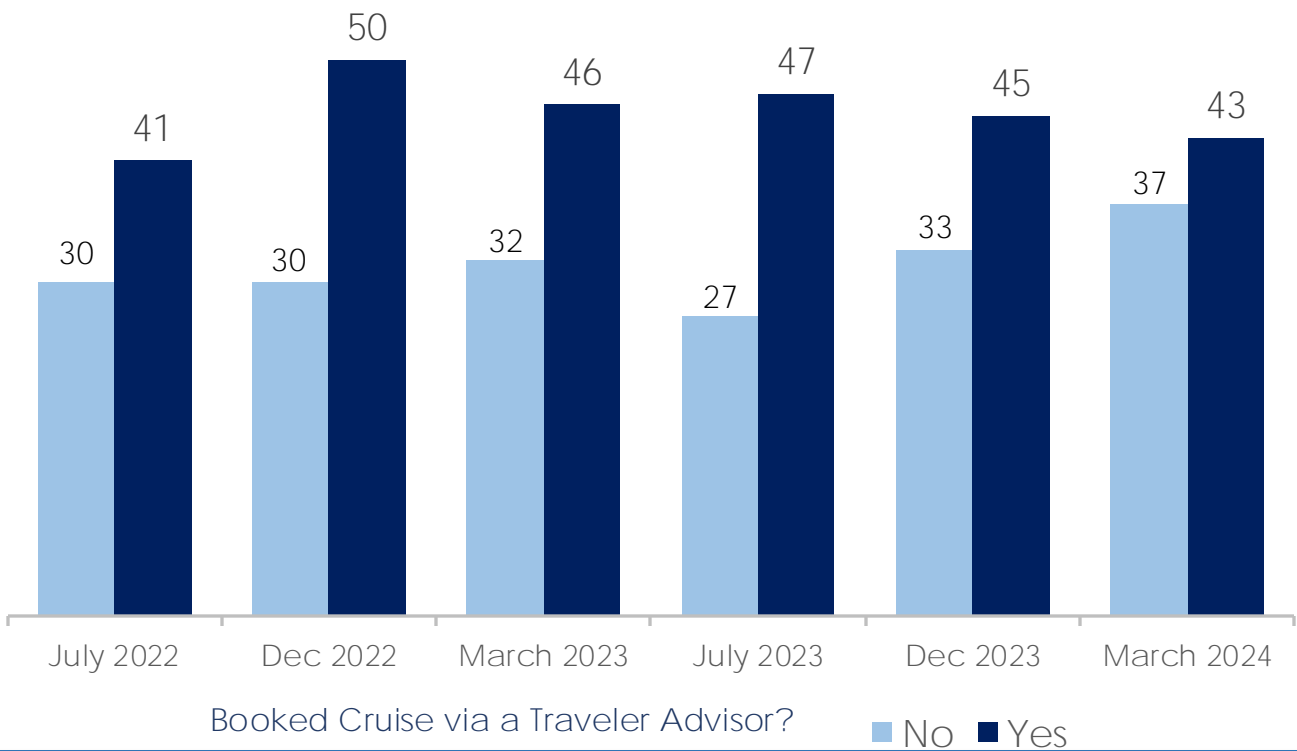
CRUISE TRENDS

Net promoter scores consistently higher when cruise travelers book their holiday with a professional travel agent

Travel Agents are a Critical Link:

Connecting Cruise Travelers to the Right Ship, Itinerary and Experience

Net Promoter Scores (NPS) scores are consistently higher among travelers who book their cruise via a professional travel advisor



Net Promoter Scores | Benchmark Scale

CRUISE TRENDS

Friends and family have the highest influence on a decision to cruise.

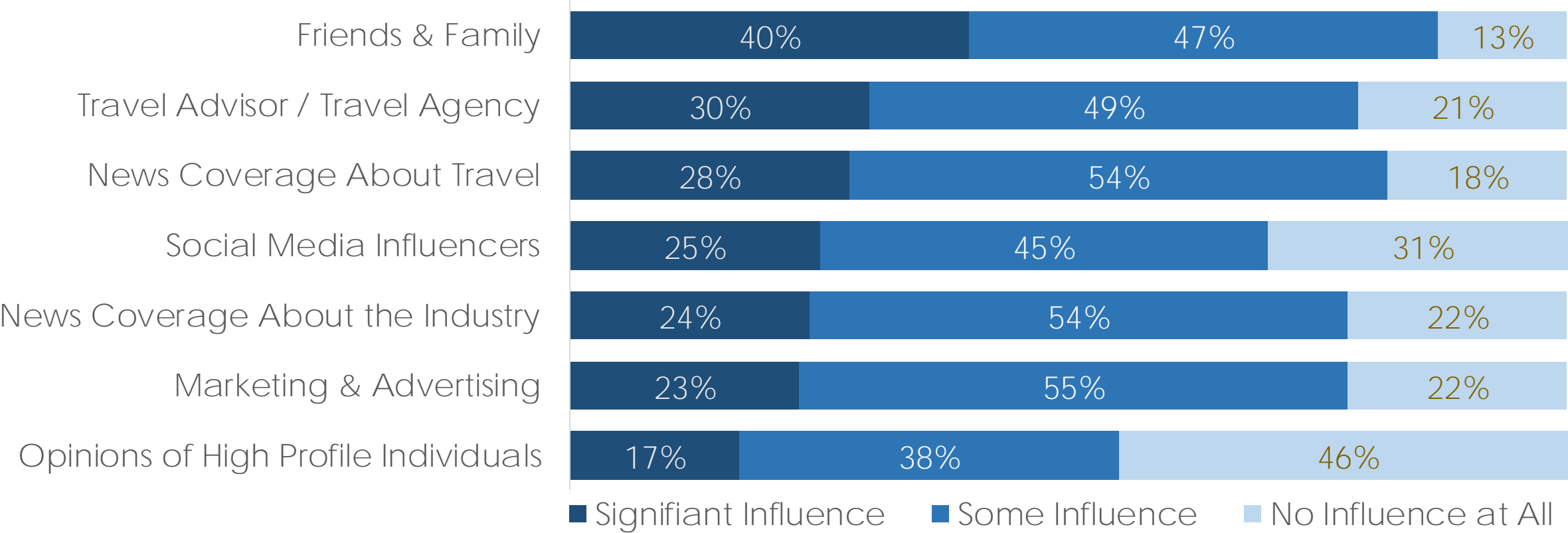
87%

Higher than any other factor, including high-influence people or groups



CRUISE TRENDS

To cruise or not to cruise: Friends and family and travel agents are the highest influencing factors



CHARTING THE FUTURE OF SUSTAINABLE CRUISE TRAVEL



Cruise lines are following a path to decarbonisation with advancements in technology, infrastructure, and operations

- Technology: New engines and propulsion technology
- Infrastructure: New fuels supply and shoreside electricity capacity
- Operations: Digitalization, reduced waste and energy loads, optimized routing and itinerary planning

TECHNOLOGY



INFRASTRUCTURE



OPERATIONS



3 PILLARS OF ACTION

Charting the course to a more sustainable future

Reducing emissions
at berth
and at sea



Investing in
environmental
technologies on board



Partnering with
cities and ports on
responsible tourism



CHARTING THE FUTURE OF SUSTAINABLE CRUISE TRAVEL

Ports with at least one berth with Onshore Power Supply (OPS)





Cruise lines are investing in propulsion technologies with conversion capabilities

- The cruise industry is investing billions in new ships and engines that allow for fuel flexibility to use low to zero-GHG fuels, once available at scale, with little to no engine modification.
- These fuels and energy sources include green methanol, bioLNG and synthetic LNG, hydrogen fuel cells, photovoltaic/solar (in use on five ships today), battery storage, wind (in use on three ships today)

THE CRUISE INDUSTRY IS DOING ITS PART TO SAIL TO A MORE SUSTAINABLE FUTURE

Multiple pilot programs and partnerships are active, and ships are being built for the future of sustainable travel

Shoreside electricity significantly reduces emissions in in port



Cruise lines are innovators and early adopters of new technologies—and investing billions of dollars to build the future of sustainable travel into today's ships

"The time a vessel is plugged in at port is crucial to stockpile other low emission fuels for sailing times"

The availability of renewable fuels is key to decarbonisation



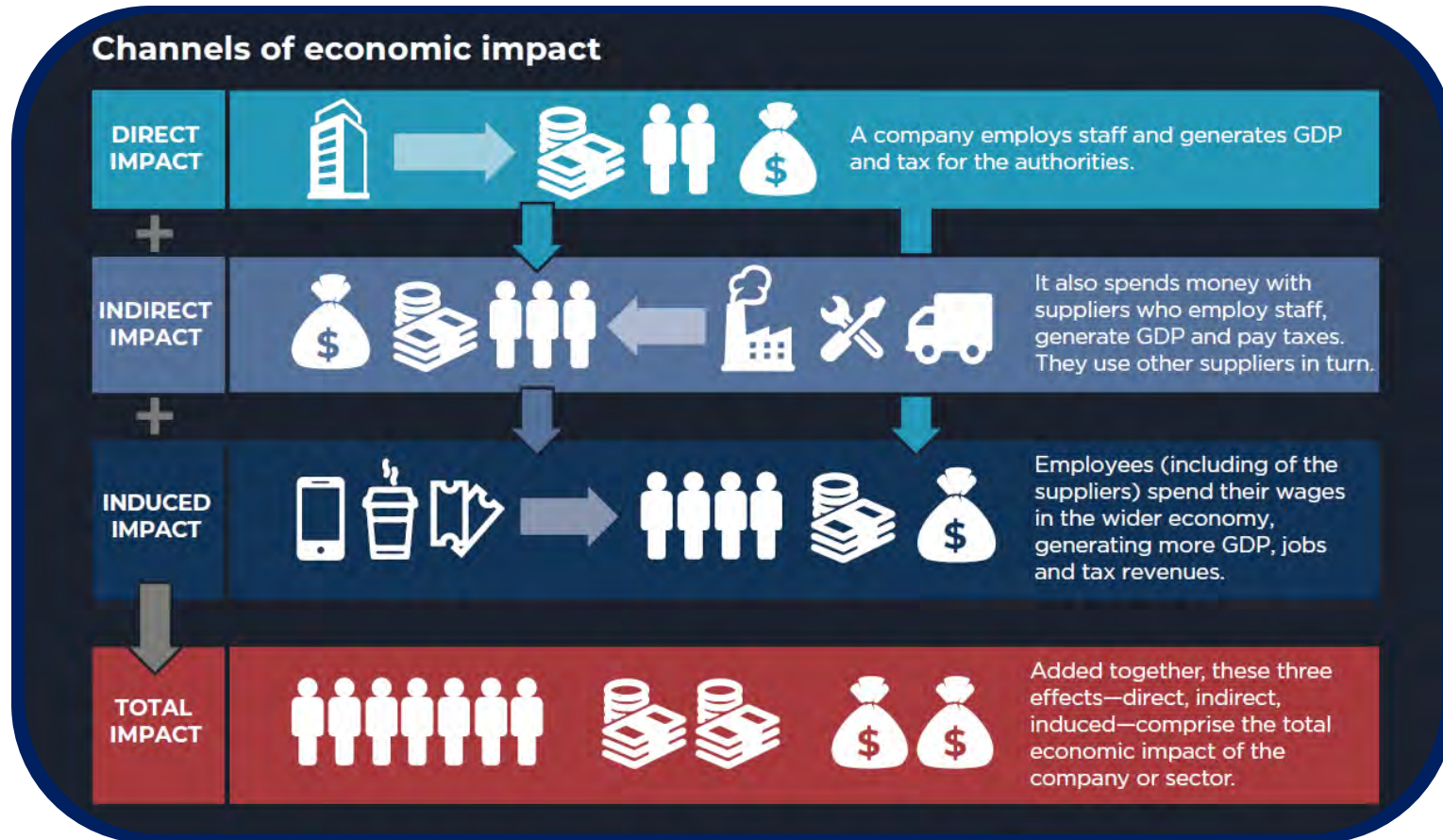
Governments need to support research and other efforts to accelerate development of renewable fuels so they are safe, viable, and available at scale.

THE PRESENT AND FUTURE VALUE OF CRUISE TOURISM



THE PRESENT AND FUTURE VALUE OF CRUISE TOURISM

More than 75% of jobs supported by cruise activity generated by the industry's onshore activities, particularly at ports.



2023 Global Economic Impact



\$168.6 billion

Total economic impact



31.7 million

Global source Passengers
(Ocean-Going)



1.6 million

Jobs supported



1 job supported
for every 20 cruisers



\$56.9 billion

in wages

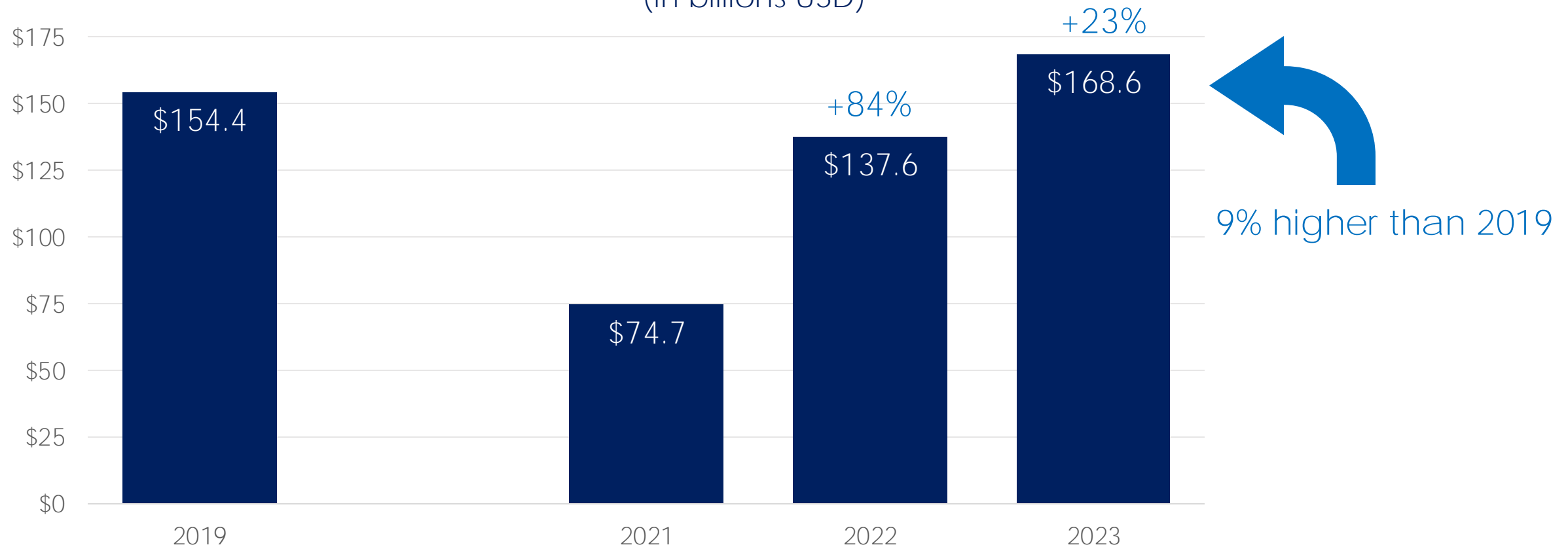


\$85.6 billion

Contributed to global GDP

Global economic impact from cruise in 2023 is the highest on record

Total Economic Output, Impacts to Economies of the World from Cruise
(in billions USD)



2023 U.S. Economic Impact (USD\$)



\$65.4 billion
Total economic impact



290,000
Jobs supported



16.9 million
Source passengers
(oceangoing)



\$25.3 billion
in wages

2023 Europe Economic Impact (EUR €)



€55.3 billion
Total economic impact



440,000
Jobs supported



8.2 million
Source passengers
(oceangoing)



€16.8 billion
in wages

Note: Includes economic impact for the United Kingdom

2023 Canada Economic Impact (CA\$)



\$5.2 billion

Total economic impact



24,000

Jobs supported



1.03 million

Source passengers
(oceangoing)

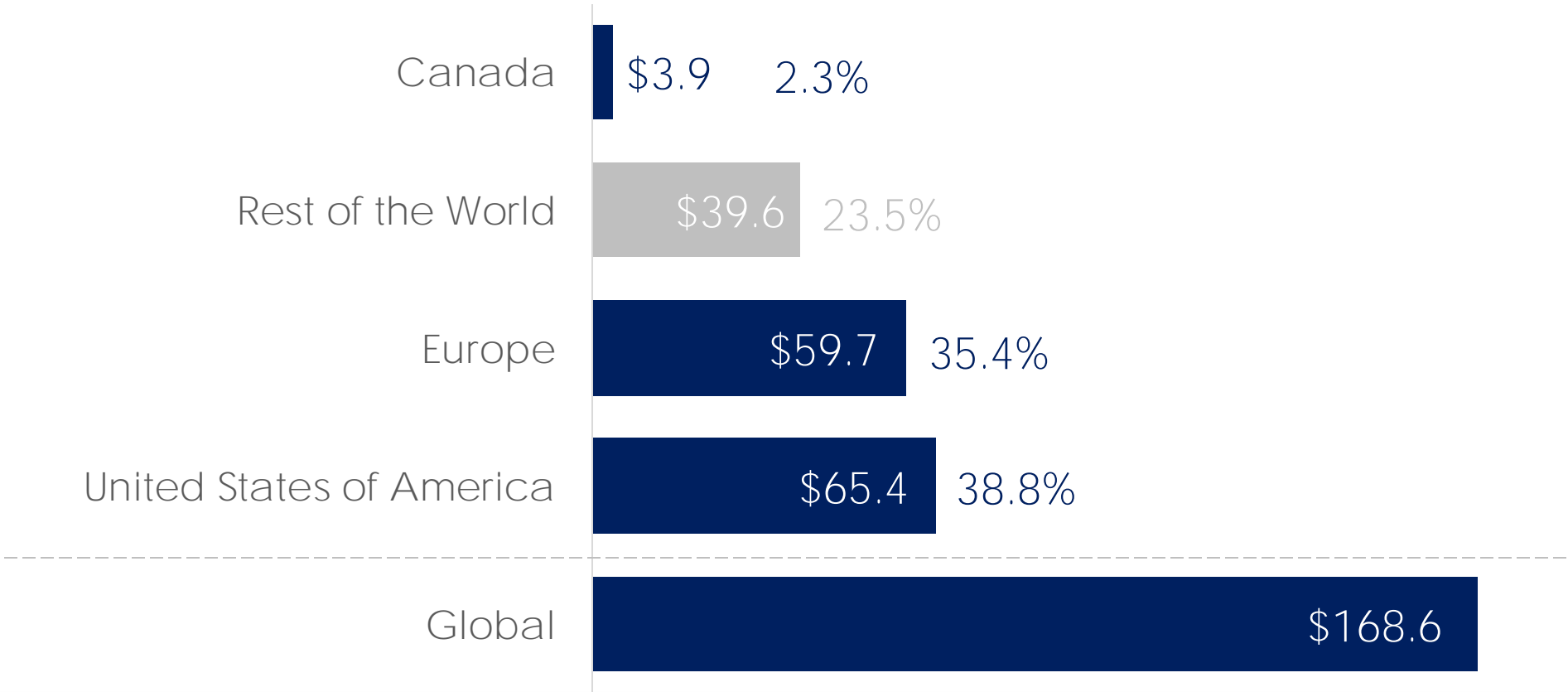


\$1.3 billion

in wages

North America + Europe = 77% of Global Economic Impact in 2023

Total Economic Output, Impacts to Major Regions of the World from Cruise
2023 (in billions USD); percent share of total



2023-2024 Australia Economic Impact (A\$)



\$8.43 billion
Total economic impact



26,369
Jobs supported



4.3 million
Passenger visit days
(oceangoing)



\$2.83 billion
in wages

2023-2024 New Zealand Economic Impact (NZ\$)



\$1.4 billion

Total economic impact



9,729

Jobs supported



1.5 million

Passenger visit days
(oceangoing)



\$425.9 million
in wages

2023-2024 Brazil Economic Impact (R\$)



\$5.2 billion

Total economic impact



80,311

Jobs supported



844,462

Passengers visited Brazil
(oceangoing)

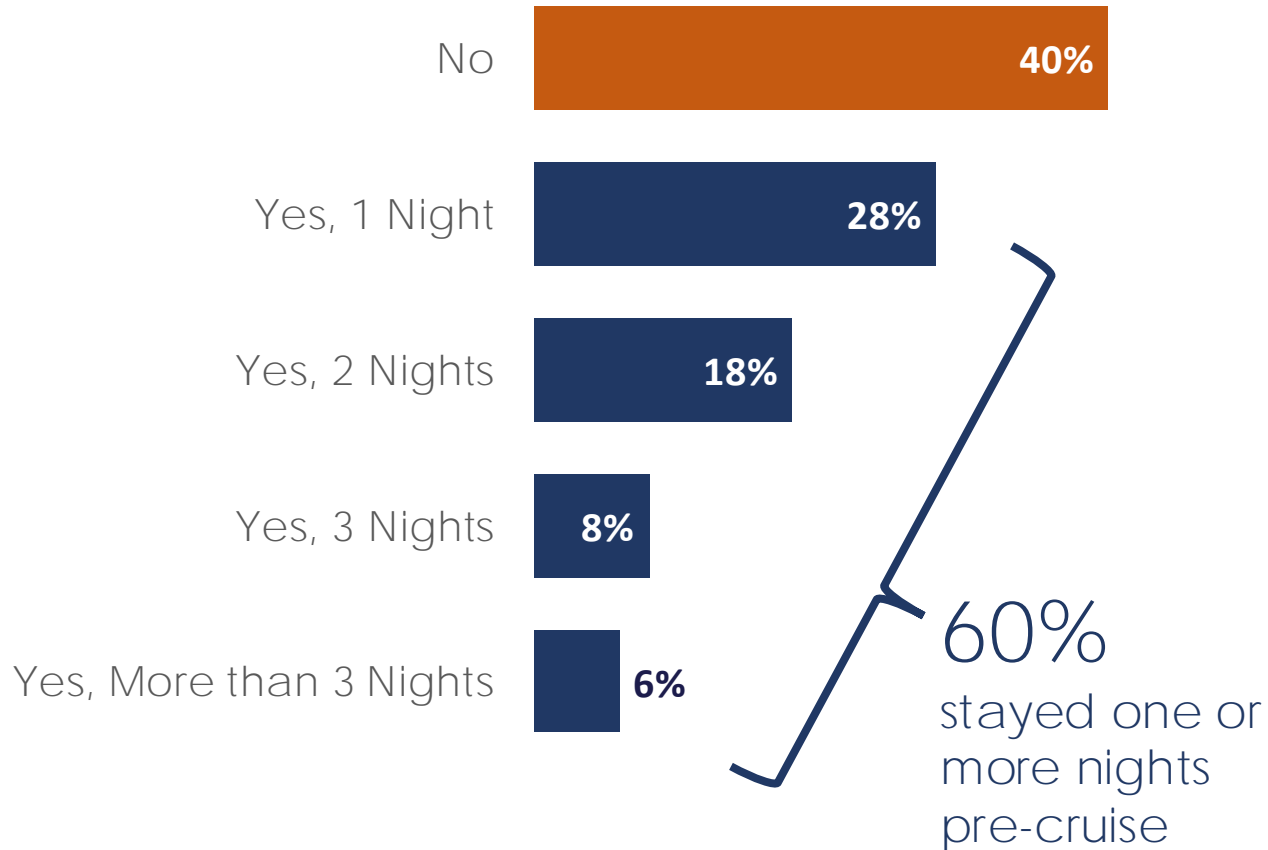


\$60.3 million

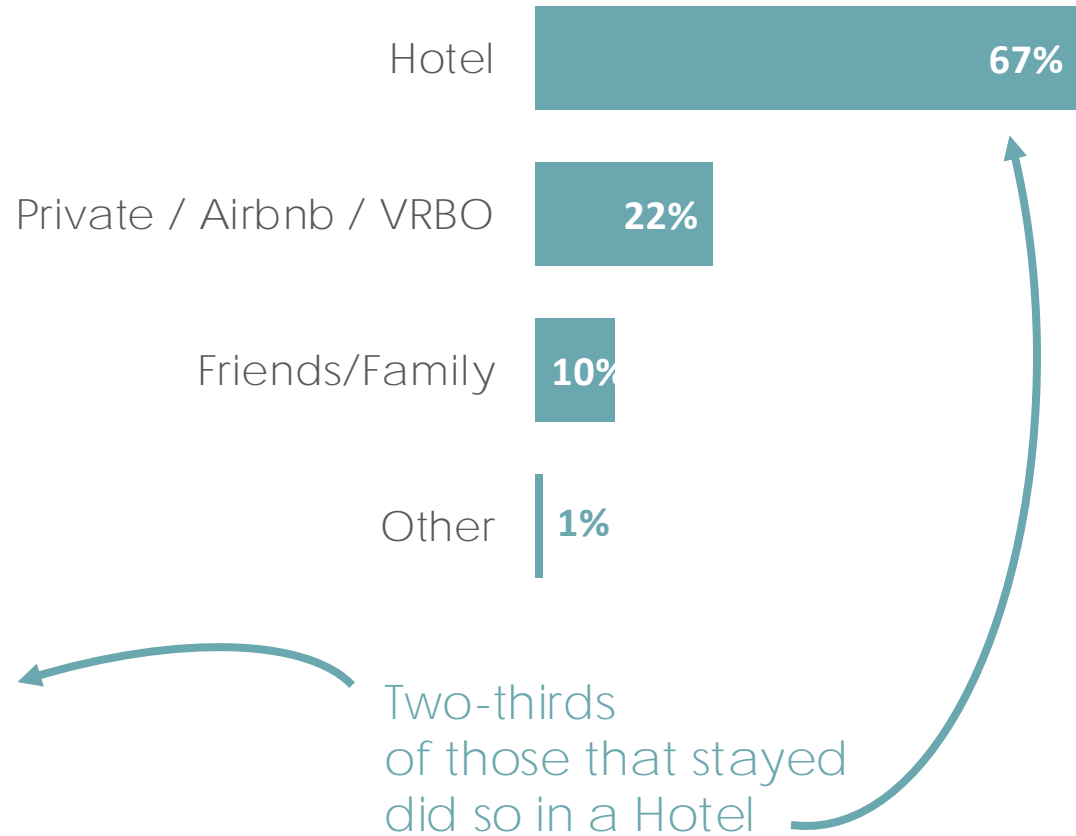
in wages

Cruise Passengers Impact the Local Economy, Even Before Cruising

Did you stay overnight in the port city prior to embarking on your cruise in the last 12 months?

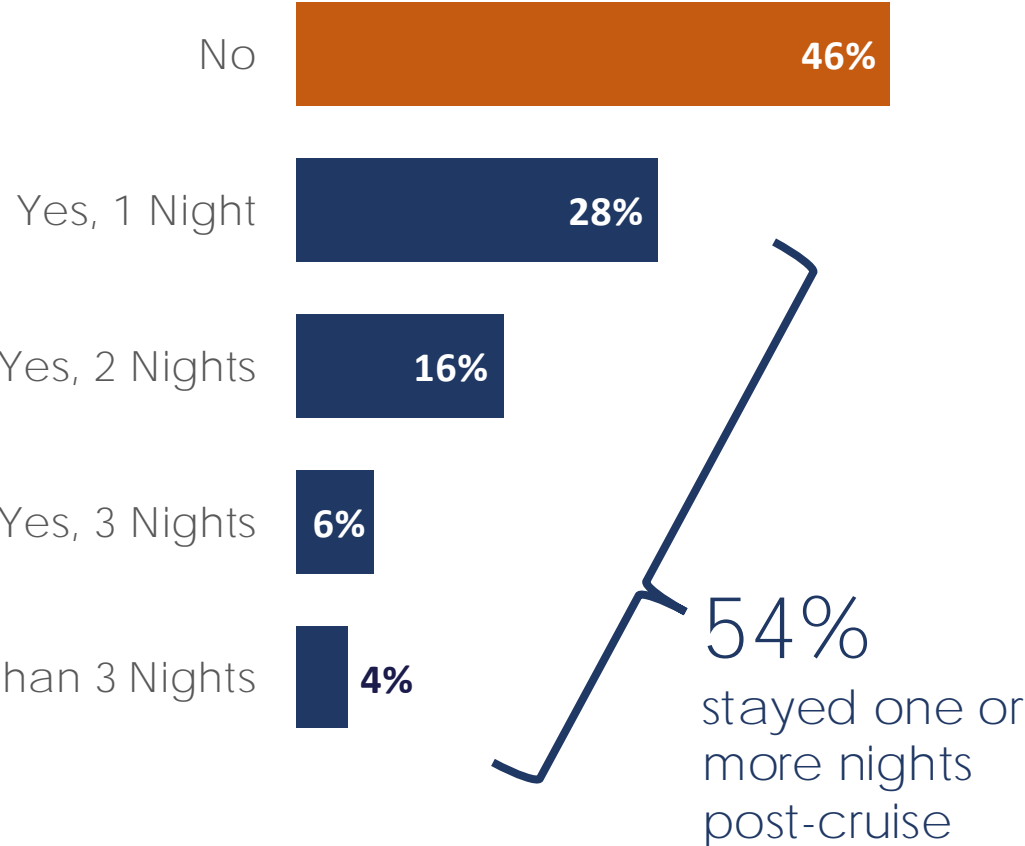


Where did you stay prior to embarking on your cruise in the last 12 months?

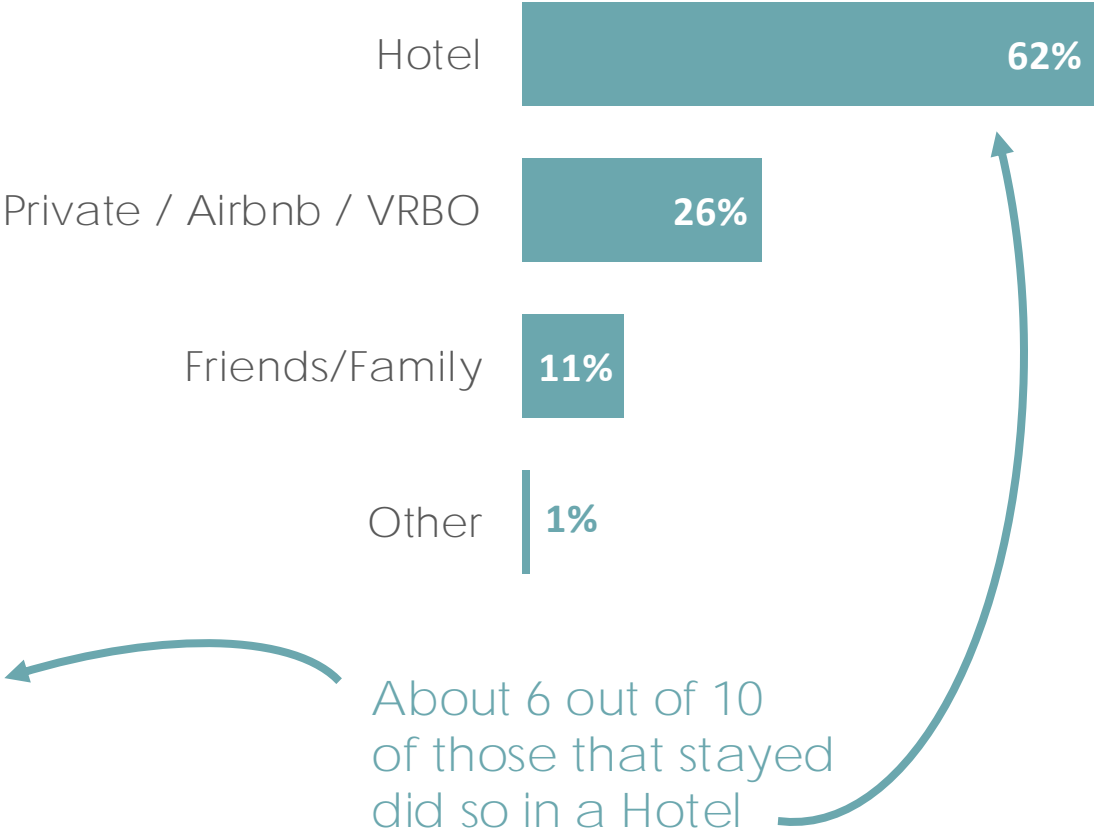


... and Cruise Passengers Impact the Local Economy, After they Cruise

Did you stay overnight in the port city after disembarking from your cruise in the last 12 months?



Where did you stay after your cruise in the last 12 months?

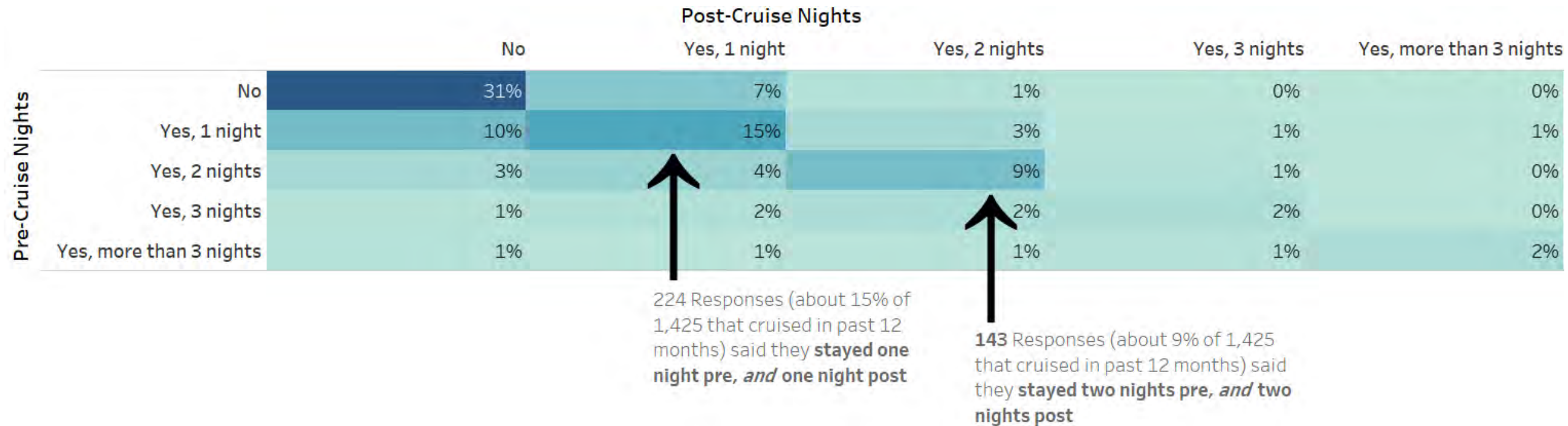


69% Stay At Least One Room-Night for their Cruise

15% stayed one night Pre-cruise, *and* one night Post-cruise

9% stayed two nights Pre-cruise *and* two nights Post-cruise

4% stayed three or more nights Pre-cruise, *and* three or more nights Post-cruise



Did you stay overnight in port city pre/post cruise?
 Cruised in Last 12 Months
 December 2024 n=1425

CRUISERS LOVE TO CRUISE



AND THERE'S A SHIP TO MEET THE NEEDS OF
JUST ABOUT EVERY KIND OF TRAVELER

THE GLOBAL CRUISE SHIP FLEET

Most ships sailing today and scheduled to sail in the future are small- to mid-size ships

>70%

of ships in the
global fleet are
small- and
mid-size ships

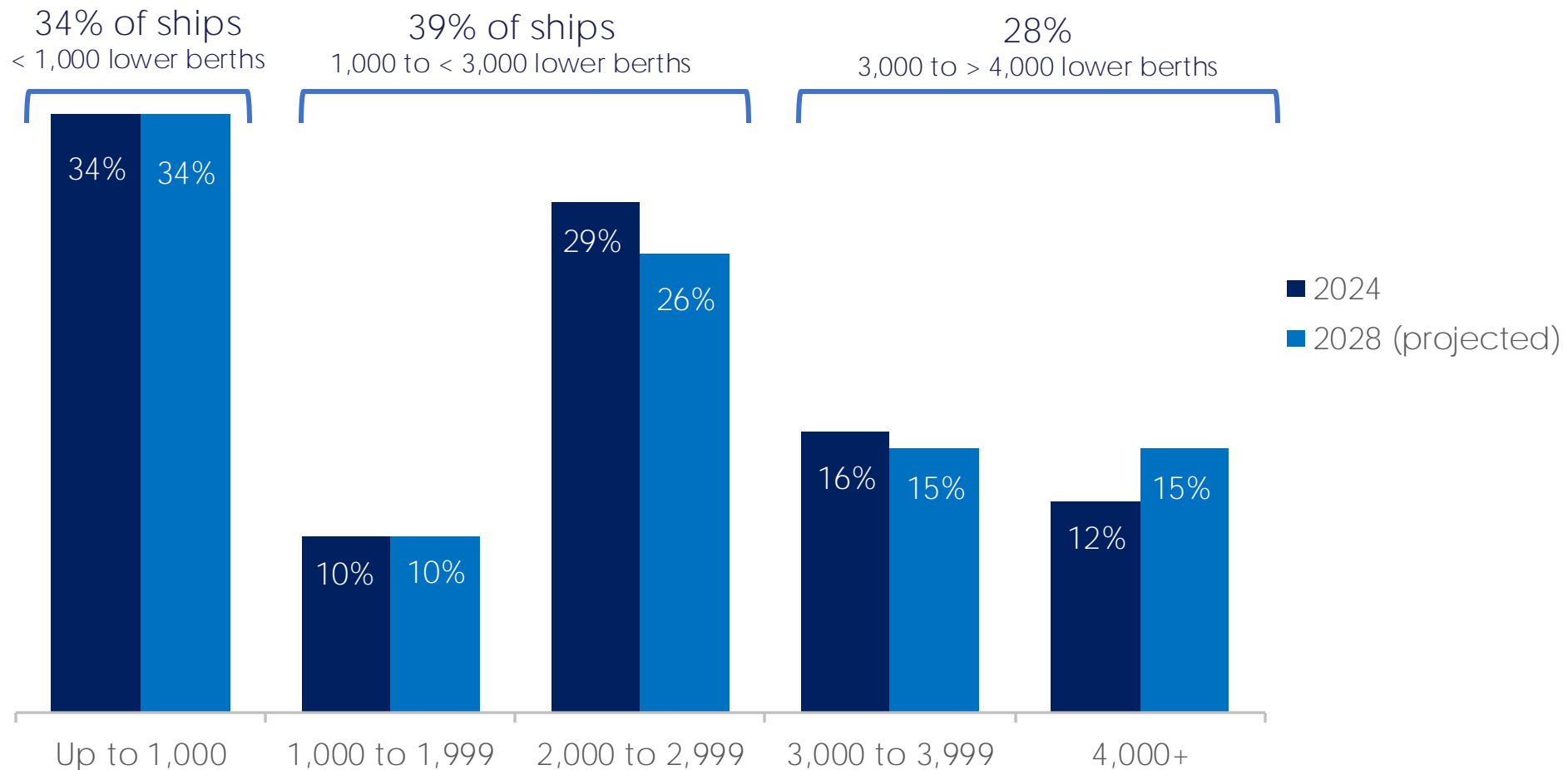


>70% of cruise ships sailing today and
Scheduled to sail in 2036 are small- and mid-size ships

< 30% of cruise ships sailing today and
scheduled to sail in 2036 are large ships

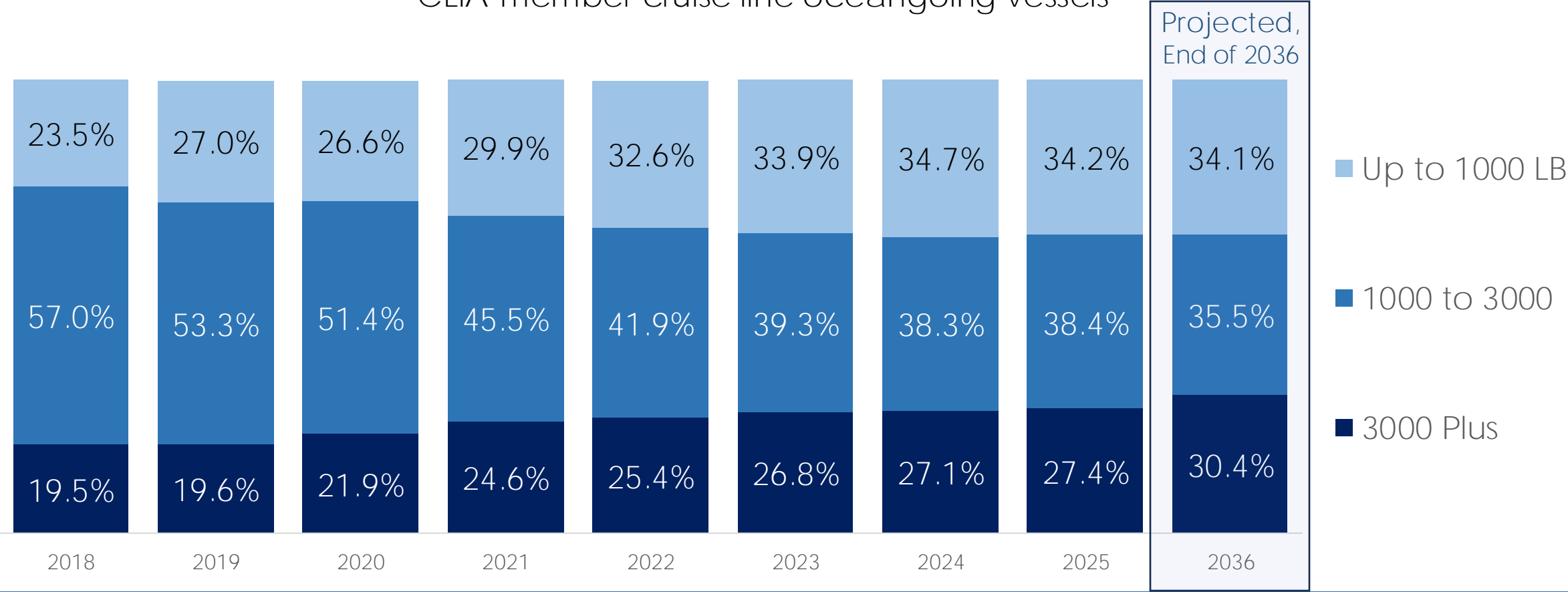
The current and future fleet includes a balance of ship sizes

Percentage of CLIA-member cruise line ships by ship size (2023 through 2028)
(based on passenger capacity; percentages shown in brackets are based on today's fleet)



Balance of ship sizes projected through 2036

Share of ships by vessel count by number of lower berths 2018 through 2025, plus 2036 projected
CLIA-member cruise line oceangoing vessels



CLIA MEMBER OCEAN-GOING CLASS OF 2025

+11

Ships

+35k

Lower Berths

+5%

LB Capacity

\$10.2

Billion Invested

FULL CLIA MEMBER OCEAN-GOING ORDERBOOK 2025 - 2036

+56

Ships

+168k

Lower Berths

+27%

LB Capacity

\$56.7

Billion Invested

CLIA CLASS OF 2025: VESSELS BY DELIVERY DATE



BRAND	SHIP NAME	COST	GT	LOWER BERTHS	SHIPYARD	EXPECTED DELIVERY
TUI Cruises	Mein Schiff Relax	\$850 M	161 K	4,000	Fincantieri	Feb
Norwegian Cruise Line	Norwegian Aqua	\$1 B	156.3 K	3,571	Fincantieri	Mar
MSC Cruises	World America	\$1.2 B	205.7 K	5,400	Chantiers	Mar
Oceania	Allura	\$660 M	67 K	1,200	Fincantieri	Jul
Royal Caribbean	Star of the Seas	\$1.6 B	250.8 K	5,610	Meyer Turku	Aug
Aurora Expeditions	Douglas Mawson	\$65 M	8 K	186	CMIH	Aug
Princess	Star Princess	\$1 B	175 K	4,300	Fincantieri	Sep
Disney	Disney Destiny	\$900 M	140 K	2,500	Meyer Werft	Nov
Celebrity	Celebrity Xcel	\$1 B	1406 K	3,260	Chantiers	Nov
Windstar Cruises	Star Seeker	\$130 M	10 K	224	West Sea	Dec
Disney	Disney Adventure	\$1.8 B	208 K	4,700	MV Werften	Dec



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