CRUISE LINES INTERNATIONAL ASSOCIATION, INC.

# ***THE OVERVIEW***

## 2011 CLIA Cruise Market Overview

**Statistical Cruise Industry Data Through 2010**

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## EXECUTIVE SUMMARY

**The cruise industry is the most exciting growth category in the entire leisure market.** Since 1980, the industry has had an average annual passenger growth rate of 7.6% per annum.

**The cruise industry is young.** From 1980 - 2010, over 191 million passengers have taken a cruise (2+ days). Of this number, 67% of the total passengers have been generated in the past 10 years. 39 percent of total passengers have been generated in the past five years alone.

**The cruise market potential is strong.** Over the next three years, over 50 million North Americans indicate an interest to cruise. To date, approximately 24% of the U.S. population has ever cruised. By maintaining historical occupancy levels, the cruise industry will welcome 16 million guests in 2011.

**The cruise product is incredibly diversified with literally a cruise vacation for everyone.** Over the past 10 years, the industry has responded to extensive market and consumer research that has guided the addition of new destinations, new ship design concepts, new on-board/on-shore activities, new themes and new cruise lengths to reflect the changing vacation patterns of today's market.

**The cruise industry's product delivers unparalleled customer satisfaction.** Whether a frequent or first-time cruiser, the cruise experience consistently exceeds expectations on a wide range of important vacation attributes. On a comparative basis versus other vacation categories, cruising consistently receives top marks. The on-going challenge for our industry is to convert cruise prospects into new cruisers.

**Cruising is an important vehicle for sampling destination areas to which passengers may return.** 82% of cruise passengers agree that a cruise vacation is good way to sample destinations that they may wish to visit again on a land-based vacation. Nearly 40% of cruise vacationers state that they returned to vacation at a destination first visited by cruise.. Cruisers are not exclusively cruisers; rather they are frequent vacationers who cruise as part of their vacation mix.

**The North American cruise market is strong across all 50 states and Canada.** Today's arrays of airlift options and streamlined port processing have opened up cruising as a vacation alternative to more and more individuals. The addition of new North American embarkation ports provides cruise vacationers more options and opportunities to drive versus fly.

**CLIA Member Lines capacity utilization/deployment.** From a capacity standpoint, utilization is consistently over 100%. In 2010 the CLIA industry occupancy rate was 103.2%. For 2011 the Caribbean and Bahamas represents the number one destination with 41.3% of capacity deployment. The Mediterranean, Europe, Alaska, and Mexico follow the Caribbean in popularity.

**CLIA has become one of the largest and most influential travel industry associations.** Today, it has 25 member lines and thousands of travel agency and individual agent members across North America. It's the largest association in terms of North American travel agency member representation.

**The cruise industry has a very close working relationship with the travel agency community.** A vast majority of cruise passengers use the services of a travel agent to book their cruise vacations. Cruises are profitable to sell and generate a high repeat rate. The most successful and productive agencies are those that place a premium on selling cruises and training their personnel. CLIA provides a wide portfolio of travel agency training programs considered among the best in the travel industry including live classroom seminars, seminars at industry conferences and events, online training, DVD training and textbooks. The "Gold Standard" of CLIA training is the Certified Cruise Counsellor program where agents can earn the designation of Accredited (ACC), Master (MCC), Elite (ECC) and Elite Scholar (ECCS) designations. Travel agents earn these CLIA Certification designations via a structured program of mandatory and elective training, ship inspections, actual cruise experience and required cabin sales targets. A CLIA Certified Cruise Counsellor is the travelers' best resource for cruise vacation planning. Two-thirds of all travelers consider professional designation/accreditation as a cruise expert to be extremely/very important – but, as expected, is even more important to cruisers (75%) than non-cruiser/vacationers (56%) – particularly luxury (81%) cruisers.

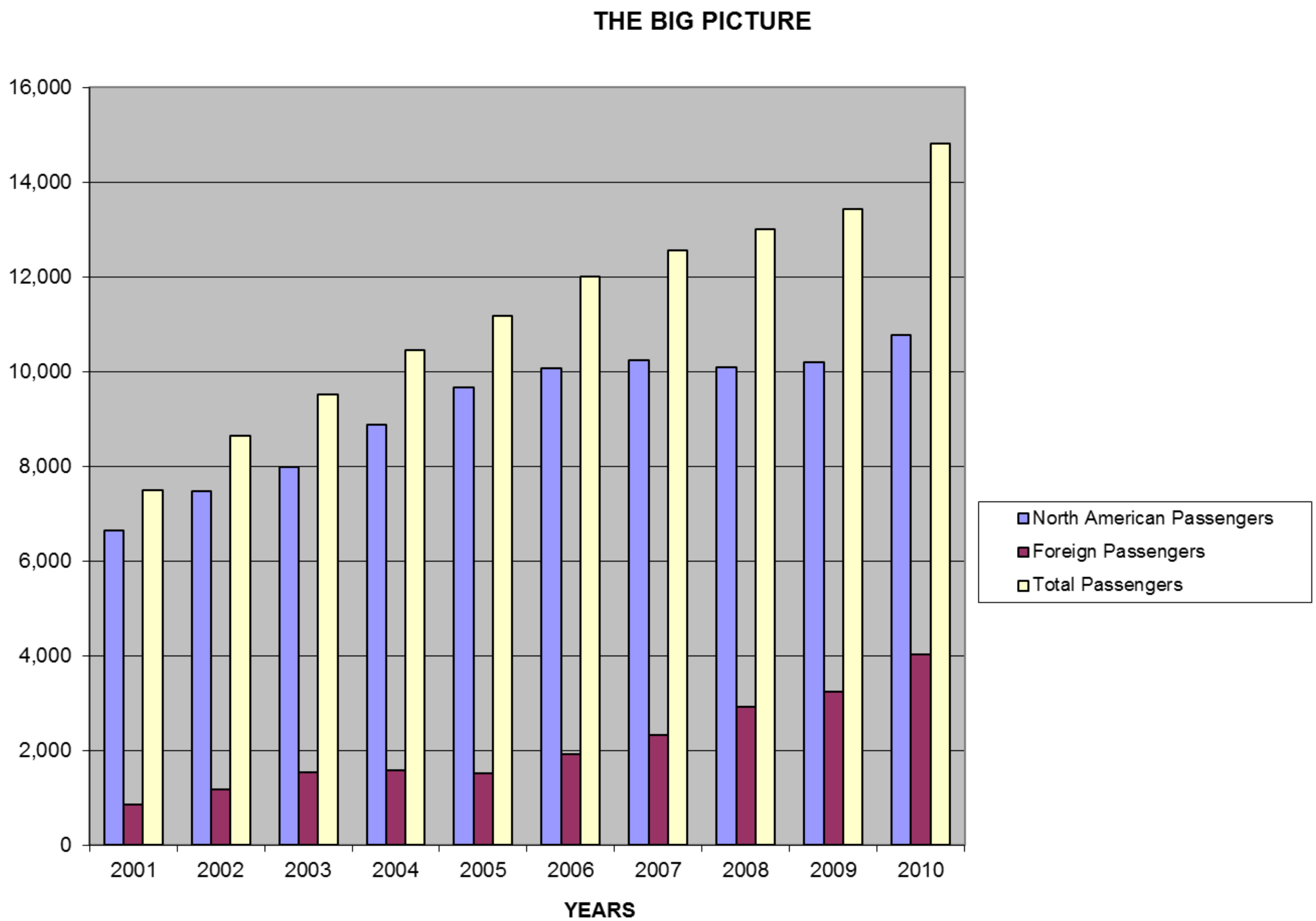
**NOTE**: In this report, North American market designates only U.S. and Canada.

## A. RECENT MARKET/GROWTH STATISTICS

### 1. OVERALL PASSENGER GROWTH-NORTH AMERICAN CRUISE MARKET

The cruise industry is the most exciting vacation category in the United States and Canada. Its average rate of growth has been far greater than any other category.

**THE BIG PICTURE (000's)**




**The above graph illustrates the increasing globalization (Foreign Passengers carried) within the cruise industry.**

## A. RECENT MARKET/GROWTH STATISTICS
**(Continued)**

**RECENT GROWTH TRENDS**

| | Annual Passenger Growth | | |
|---|---|---|---|
| | Actual (000's) | | |
| | **North America** | **Foreign** | **Worldwide** |
| 1990 | 3,496 | 278 | 3,774 |
| 1991 | 3,834 | 334 | 4,168 |
| 1992 | 4,023 | 362 | 4,385 |
| 1993 | 4,318 | 410 | 4,728 |
| 1994 | 4,314 | 486 | 4,800 |
| 1995 | 4,223 | 498 | 4,721 |
| 1996 | 4,477 | 493 | 4,970 |
| 1997 | 4,864 | 516 | 5,380 |
| 1998 | 5,243 | 625 | 5,868 |
| 1999 | 5,690 | 647 | 6,337 |
| 2000 | 6,546 | 668 | 7,214 |
| 2001 | 6,637 | 862 | 7,499 |
| 2002 | 7,472 | 1,176 | 8,648 |
| 2003 | 7,990 | 1,536 | 9,526 |
| 2004 | 8,870 | 1,590 | 10,460 |
| 2005 | 9,671 | 1,509 | 11,180 |
| 2006 | 10,078 | 1,928 | 12,006 |
| 2007 | 10,247 | 2,316 | 12,563 |
| 2008 | 10,093 | 2,912 | 13,005 |
| 2009 | 10,198 | 3,244 | 13,442 |
| 2010 | 10,781 | 4,038 | 14,819 |
| Average Growth Rate 1990-2010 | | | 7.6% |

**SOURCE**: CLIA 2010 Year End Passenger Carryings Report as reported by CLIA member cruise lines only.

## A. RECENT MARKET/GROWTH STATISTICS
**(Continued)**

### 2. GROWTH BY LENGTH OF CRUISE (Total passengers carried)

**PASSENGERS:**

| | Passengers (000's) | | |
|---|---|---|---|
| | 1990 | 2010 | % Growth |
| 2-5 Days | 1,434 | 4,030 | 181.0 |
| 6-8 Days | 1,966 | 7,895 | 301.6 |
| 9-17 Days | 358 | 2,662 | 643.6 |
| 18+ Days | 16 | 231 | 1343.8 |
| TOTAL | 3,774 | 14,819 | 292.7 |

**SHARE:**

| | Category Shares | | |
|---|---|---|---|
| | 1990 | 2010 | % Point Change |
| 2-5 Days | 38.0% | 27.2 | -10.8 |
| 6-8 Days | 52.1 | 53.2 | 1.1 |
| 9-17 Days | 9.5 | 18.0 | 8.5 |
| 18+ Days | 0.4 | 1.6 | 1.2 |
| TOTAL | 100.0% | 100.0% | 0.0 |

**SOURCE:** CLIA Year End Passenger Carryings Reports

## 3. AVERAGE LENGTH OF CRUISE

The average length of cruises was 7.3 days in 2010.

| | Average Length of Cruise (Days) | % of Total North American Passengers in 2-5 Day Category |
|---|---|---|
| 1981 | 6.7 | 29.6% |
| 1982 | 6.9 | 25.3 |
| 1983 | 6.9 | 21.6 |
| 1984 | 6.9 | 22.3 |
| 1985 | 6.8 | 26.3 |
| 1986 | 6.4 | 35.1 |
| 1987 | 6.4 | 32.8 |
| 1988 | 6.4 | 32.9 |
| 1989 | 6.4 | 33.8 |
| 1990 | 6.2 | 38.3 |
| 1991 | 6.1 | 37.4 |
| 1992 | 6.2 | 35.2 |
| 1993 | 6.4 | 36.7 |
| 1994 | 6.3 | 38.0 |
| 1995 | 6.5 | 33.7 |
| 1996 | 6.4 | 35.9 |
| 1997 | 6.5 | 33.6 |
| 1998 | 6.7 | 34.7 |
| 1999 | 6.6 | 35.8 |
| 2000 | 6.5 | 36.9 |
| 2001 | 6.4 | 37.2 |
| 2002 | 6.9 | 35.5 |
| 2003 | 6.9 | 32.9 |
| 2004 | 6.9 | 31.4 |
| 2005 | 6.9 | 34.0 |
| 2006 | 6.9 | 32.9 |
| 2007 | 7.1 | 34.6 |
| 2008 | 7.2 | 35.6 |
| 2009 | 7.2 | 36.0 |
| 2010 | 7.3 | 33.1 |

**SOURCE:** CLIA year-end Passenger Carryings Report.

## B. CRUISE MARKET POTENTIAL

The cruise vacation industry is positioned well for continued growth with relatively modest market penetration (24.0% of all Americans have cruised) as well as strong cruise interest and demand (Over 50 million Americans expressed interest in cruising within the next three years.

These market statistics as well as cruiser demographics, cruise characteristics and satisfaction, travel agency relevance, cruise interest & potential plans, cruiser histories and trip characteristics can be found in the CLIA 2011 Cruise Market Profile Study. The CLIA Cruise Market Profile Study is a biennial research project designed to track cruise awareness, perceptions, attitudes and future intent. Findings of this 2011 study are available (After August 9, 2011) on CLIA's website at http://www.cruising.org/pressroom-research/market-research

## C. SOURCE OF BUSINESS-PASSENGERS

### 3. REGIONAL PASSENGER CONTRIBUTION 1990 VS. 2010 (USA)

The South Atlantic and Pacific regions continue to be the largest source of passengers.

| | **Regional Shares – 1990 vs. 2010** | | |
|---|---|---|---|
| | 1990 | 2010 | Point change |
| New England (CT, ME, MA, NH, VT, RI) | 5.78% | 7.94% | 2.16 |
| Mid-Atlantic (NJ, NY, PA) | 16.21% | 8.48% | -7.73 |
| East North Central (IL, IN, MI, OH, WI) | 14.03% | 6.08% | -7.95 |
| West North Central (IA, KS, MN, MO, NE, SD) | 4.50% | 2.60% | -1.90 |
| South Atlantic (DE, DC, FL, GA, MD, NC, SC, VA, WV) | 24.16% | 36.88% | 12.72 |
| East South Central (AL, KY, MS, TN) | 2.86% | 2.62% | -0.24 |
| West South Central (AR, LA, OK, TX) | 5.42% | 13.06% | 7.64 |
| Mountain (AZ, CO, ID, MT, NV, NM, UT, WY) | 3.86% | 9.03% | 5.17 |
| Pacific (AK, CA, HI, OR, WA) | 23.18% | 13.31% | -9.87 |
| TOTAL | 100.0% | 100.0% | 0.00 |

**SOURCE:** 2010-Year End CLIA Passenger Carryings Reports.

C. SOURCE OF BUSINESS-PASSENGERS
(Continued)

## 4. REGIONAL CONTRIBUTION BY CRUISE LENGTH (USA)

Shorter cruises skew towards the South Atlantic Region while longer cruises skew to the Pacific Coast Region.

| | 2010 Regional Contribution (%) By Cruise Length | | | | |
|---|---|---|---|---|---|
| | **2-5 Days** | **6-8 Days** | **9-17 Days** | **18+ Days** | **Total Days** |
| New England (CT, ME, MA, NH, VT, RI) | 7.64 | 8.37 | 7.26 | 5.37 | 7.94 |
| Mid-Atlantic (NJ, NY, PA) | 6.29 | 9.58 | 9.97 | 8.21 | 8.48 |
| East North Central (IL, IN, MI, OH, WI) | 6.40 | 6.29 | 4.49 | 5.23 | 6.08 |
| West North Central (IA, KS, MN, MO, NE, ND, SD) | 2.34 | 2.94 | 1.99 | 2.28 | 2.60 |
| South Atlantic (DE, DC, FL, GA, MD, NC, SC, VA, WV) | 43.76 | 33.63 | 32.31 | 23.70 | 36.88 |
| East South Central (AL, KY, MS, TN) | 4.32 | 1.92 | 0.98 | 1.22 | 2.62 |
| West South Central (AR, LA, OK, TX) | 14.01 | 13.07 | 10.73 | 10.24 | 13.06 |
| Mountain (AZ, CO, ID, MT, NV, NM, UT, WY) | 7.41 | 10.30 | 8.34 | 9.34 | 9.03 |
| Pacific (AK, CA, HI, OR, WA) | 7.83 | 13.90 | 23.93 | 34.41 | 13.31 |
| TOTAL | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

**SOURCE:** 2010-Year End CLIA Passenger Carryings Report

## C. SOURCE OF BUSINESS-PASSENGERS
**(Continued)**
### 3: NORTH AMERICA BY STATE / PROVINCE

| STATE/PROV | 2010 TOTAL PASSENGERS | % OF NORTH AMERICA | 2009 TOTAL PASSENGERS | CHANGE AMOUNT | CHANGE PERCENT | 2008 TOTAL PASSENGERS |
|---|---|---|---|---|---|---|
| Alabama | 93,294 | 0.87% | 95,983 | -2,689 | -2.80% | 88,133 |
| Alaska | 8,900 | 0.08% | 19,357 | -10,457 | -54.02% | 25,137 |
| Arizona | 544,068 | 5.05% | 495,515 | 48,553 | 9.80% | 298,606 |
| Arkansas | 40,762 | 0.38% | 39,719 | 1,043 | 2.63% | 36,971 |
| California | 1,066,040 | 9.89% | 1,111,881 | -45,841 | -4.12% | 1,202,708 |
| Colorado | 55,714 | 0.52% | 59,119 | -3,405 | -5.76% | 71,251 |
| Connecticut | 70,232 | 0.65% | 70,277 | -45 | -0.06% | 90,072 |
| Delaware | 19,467 | 0.18% | 18,525 | 942 | 5.09% | 21,670 |
| Dist. Of Columbia | 6,504 | 0.06% | 6,536 | -32 | -0.49% | 6,971 |
| Florida | 2,882,657 | 26.74% | 2,530,702 | 351,955 | 13.91% | 2,300,244 |
| Georgia | 217,692 | 2.02% | 183,606 | 34,086 | 18.56% | 273,120 |
| Hawaii | 13,360 | 0.12% | 13,515 | -155 | -1.15% | 18,137 |
| Idaho | 11,972 | 0.11% | 12,263 | -291 | -2.37% | 17,701 |
| Illinois | 224,030 | 2.08% | 240,667 | -16,637 | -6.91% | 298,804 |
| Indiana | 74,199 | 0.69% | 71,286 | 2,913 | 4.09% | 81,440 |
| Iowa | 26,982 | 0.25% | 27,529 | -547 | -1.99% | 32,022 |
| Kansas | 36,885 | 0.34% | 34,946 | 1,939 | 5.55% | 40,103 |
| Kentucky | 40,332 | 0.37% | 36,420 | 3,912 | 10.74% | 41,529 |
| Louisiana | 115,134 | 1.07% | 106,296 | 8,838 | 8.31% | 112,031 |
| Maine | 12,953 | 0.12% | 12,561 | 392 | 3.12% | 14,853 |
| Maryland | 136,599 | 1.27% | 122,165 | 14,434 | 11.82% | 140,501 |
| Massachusetts | 605,469 | 5.62% | 586,915 | 18,554 | 3.16% | 478,355 |
| Michigan | 108,652 | 1.01% | 106,750 | 1,902 | 1.78% | 133,431 |
| Minnesota | 72,251 | 0.67% | 83,496 | -11,245 | -13.47% | 87,260 |
| Mississippi | 37,955 | 0.35% | 32,489 | 5,466 | 16.82% | 34,898 |
| Missouri | 96,392 | 0.89% | 92,954 | 3,438 | 3.70% | 98,301 |
| Montana | 6,362 | 0.06% | 6,944 | -582 | -8.38% | 9,722 |
| Nebraska | 16,850 | 0.16% | 17,105 | -255 | -1.49% | 19,267 |
| Nevada | 196,310 | 1.82% | 192,311 | 3,999 | 2.08% | 117,448 |
| New Hampshire | 68,453 | 0.63% | 54,504 | 13,949 | 25.59% | 46,779 |
| New Jersey | 252,024 | 2.34% | 227,985 | 24,039 | 10.54% | 289,205 |
| New Mexico | 27,828 | 0.26% | 26,751 | 1,077 | 4.03% | 29,001 |
| New York | 388,209 | 3.60% | 382,348 | 5,861 | 1.53% | 435,956 |
| North Carolina | 189,012 | 1.75% | 174,834 | 14,178 | 8.11% | 199,109 |
| North Dakota | 4,341 | 0.04% | 4,526 | -185 | -4.09% | 5,224 |
| Ohio | 155,462 | 1.44% | 141,005 | 14,457 | 10.25% | 163,057 |
| Oklahoma | 45,987 | 0.43% | 41,168 | 4,819 | 11.71% | 44,208 |
| Oregon | 44,163 | 0.41% | 46,463 | -2,300 | -4.95% | 55,344 |
| Pennsylvania | 208,793 | 1.94% | 193,335 | 15,458 | 8.00% | 329,307 |
| Rhode Island | 34,609 | 0.32% | 31,340 | 3,269 | 10.43% | 33,933 |
| South Carolina | 106,089 | 0.98% | 88,918 | 17,171 | 19.31% | 102,845 |
| South Dakota | 6,571 | 0.06% | 5,937 | 634 | 10.68% | 7,166 |
| Tennessee | 91,169 | 0.85% | 80,426 | 10,743 | 13.36% | 91,237 |

## C. SOURCE OF BUSINESS-PASSENGERS
**(Continued)**
### 3: NORTH AMERICA BY STATE / PROVINCE

| STATE/PROV | 2010 TOTAL PASSENGERS | % OF NORTH AMERICA | 2009 TOTAL PASSENGERS | CHANGE AMOUNT | CHANGE PERCENT | 2008 TOTAL PASSENGERS |
|---|---|---|---|---|---|---|
| Texas | 1,106,074 | 10.26% | 1,056,913 | 49,161 | 4.65% | 787,577 |
| Utah | 58,849 | 0.55% | 57,760 | 1,089 | 1.89% | 71,223 |
| Vermont | 3,981 | 0.04% | 4,279 | -298 | -6.96% | 5,975 |
| Virginia | 119,538 | 1.11% | 111,930 | 7,608 | 6.80% | 140,771 |
| Washington | 201,042 | 1.86% | 203,181 | -2,139 | -1.05% | 185,972 |
| West Virginia | 15,680 | 0.15% | 13,486 | 2,194 | 16.27% | 14,477 |
| Wisconsin | 46,509 | 0.43% | 50,885 | -4,376 | -8.60% | 59,854 |
| Wyoming | 3,280 | 0.03% | 3,220 | 60 | 1.86% | 4,823 |
| TOTAL US | 10,015,680 | 92.90% | 9,429,026 | 586,654 | 6.22% | 9,293,729 |
| Puerto Rico | 74,455 | 0.69% | 70,665 | 3,790 | 5.36% | 88,771 |
| Alberta | 56,092 | 0.52% | 59,775 | -3,683 | -6.16% | 66,311 |
| British Columbia | 178,863 | 1.66% | 206,373 | -27,510 | -13.33% | 208,551 |
| Manitoba | 14,926 | 0.14% | 14,772 | 154 | 1.04% | 14,396 |
| New Brunswick | 6,705 | 0.06% | 6,477 | 228 | 3.52% | 6,714 |
| Newfoundland | 5,761 | 0.05% | 4,955 | 806 | 16.27% | 5,472 |
| Nova Scotia | 7,661 | 0.07% | 7,144 | 517 | 7.24% | 8,267 |
| Ontario | 284,047 | 2.63% | 270,019 | 14,028 | 5.20% | 273,646 |
| Prince Edward Island | 1,056 | 0.01% | 1,414 | -358 | -25.32% | 1,270 |
| Quebec | 129,889 | 1.20% | 119,984 | 9,905 | 8.26% | 118,082 |
| Saskatchewan | 5,657 | 0.05% | 6,832 | -1,175 | -17.20% | 7,378 |
| North West Terr. | 123 | 0.00% | 135 | -12 | -8.89% | 292 |
| Yukon Territory | 341 | 0.00% | 197 | 144 | 73.10% | 228 |
| TOTAL CANADA | 691,121 | 6.41% | 698,077 | -6,956 | -1.00% | 710,607 |
| TOTAL NORTH AMERICA | 10,781,256 | 100.00% | 10,197,768 | 583,488 | 5.72% | 10,093,107 |
| Foreign | 4,037,455 | | 3,243,912 | 793,543 | 24.46% | 2,912,398 |
| TOTAL WORLD | 14,818,711 | | 13,441,680 | 1,377,031 | 10.24% | 13,005,505 |

C. SOURCE OF BUSINESS-PASSENGERS
(Continued)
4: NORTH AMERICA - RANK BY STATE / PROVINCE

| | STATE/PROV | TOTAL PAX | % 0F TOTAL | 1-5 DAY PAX AMOUNT | 1-5 DAY % 0F TOTAL | 6-8 DAY PAX AMOUNT | 6-8 DAY % 0F TOTAL | 9-17 DAY PAX AMOUNT | 9-17 DAY % 0F TOTAL | 18+ DAY PAX AMOUNT | 18+ DAY % 0F TOTAL |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | Florida | 2,882,657 | 26.7% | 1,156,303 | 32.4% | 1,358,185 | 24.3% | 351,685 | 23.4% | 16,484 | 14.0% |
| 2 | Texas | 1,106,074 | 10.3% | 389,356 | 10.9% | 574,792 | 10.3% | 133,044 | 8.8% | 8,882 | 7.5% |
| 3 | California | 1,066,040 | 9.9% | 228,477 | 6.4% | 540,196 | 9.7% | 271,427 | 18.0% | 25,940 | 22.0% |
| 4 | Massachusetts | 605,469 | 5.6% | 232,021 | 6.5% | 314,624 | 5.6% | 55,692 | 3.7% | 3,132 | 2.7% |
| 5 | Arizona | 544,068 | 5.0% | 134,348 | 3.8% | 334,229 | 6.0% | 70,620 | 4.7% | 4,871 | 4.1% |
| 6 | New York | 388,209 | 3.6% | 97,490 | 2.7% | 230,102 | 4.1% | 56,705 | 3.8% | 3,912 | 3.3% |
| 7 | Ontario | 284,047 | 2.6% | 33,993 | 1.0% | 173,136 | 3.1% | 69,170 | 4.6% | 7,748 | 6.6% |
| 8 | New Jersey | 252,024 | 2.3% | 68,283 | 1.9% | 139,613 | 2.5% | 41,951 | 2.8% | 2,177 | 1.8% |
| 9 | Illinois | 224,030 | 2.1% | 89,686 | 2.5% | 111,893 | 2.0% | 20,378 | 1.4% | 2,073 | 1.8% |
| 10 | Georgia | 217,692 | 2.0% | 131,805 | 3.7% | 72,628 | 1.3% | 12,028 | 0.8% | 1,231 | 1.0% |
| 11 | Pennsylvania | 208,793 | 1.9% | 52,918 | 1.5% | 120,488 | 2.2% | 33,753 | 2.2% | 1,634 | 1.4% |
| 12 | Washington | 201,042 | 1.9% | 36,515 | 1.0% | 127,639 | 2.3% | 32,558 | 2.2% | 4,330 | 3.7% |
| 13 | Nevada | 196,310 | 1.8% | 89,202 | 2.5% | 90,617 | 1.6% | 15,185 | 1.0% | 1,306 | 1.1% |
| 14 | North Carolina | 189,012 | 1.8% | 94,832 | 2.7% | 79,492 | 1.4% | 13,586 | 0.9% | 1,102 | 0.9% |
| 15 | British Columbia | 178,863 | 1.7% | 32,292 | 0.9% | 91,604 | 1.6% | 43,941 | 2.9% | 11,026 | 9.3% |
| 16 | Ohio | 155,462 | 1.4% | 53,904 | 1.5% | 84,266 | 1.5% | 16,062 | 1.1% | 1,230 | 1.0% |
| 17 | Maryland | 136,599 | 1.3% | 32,862 | 0.9% | 81,661 | 1.5% | 20,704 | 1.4% | 1,372 | 1.2% |
| 18 | Quebec | 129,889 | 1.2% | 10,581 | 0.3% | 85,700 | 1.5% | 31,798 | 2.1% | 1,810 | 1.5% |
| 19 | Virginia | 119,538 | 1.1% | 37,698 | 1.1% | 64,613 | 1.2% | 16,213 | 1.1% | 1,014 | 0.9% |
| 20 | Louisiana | 115,134 | 1.1% | 61,151 | 1.7% | 50,532 | 0.9% | 3,203 | 0.2% | 248 | 0.2% |
| 21 | Michigan | 108,652 | 1.0% | 35,965 | 1.0% | 60,406 | 1.1% | 11,452 | 0.8% | 829 | 0.7% |
| 22 | South Carolina | 106,089 | 1.0% | 55,520 | 1.6% | 41,183 | 0.7% | 8,638 | 0.6% | 748 | 0.6% |
| 23 | Missouri | 96,392 | 0.9% | 36,732 | 1.0% | 50,568 | 0.9% | 8,551 | 0.6% | 541 | 0.5% |
| 24 | Alabama | 93,294 | 0.9% | 60,645 | 1.7% | 28,122 | 0.5% | 4,132 | 0.3% | 395 | 0.3% |
| 25 | Tennessee | 91,169 | 0.8% | 45,007 | 1.3% | 40,502 | 0.7% | 5,197 | 0.3% | 463 | 0.4% |
| 26 | Puerto Rico | 74,455 | 0.7% | 3,926 | 0.1% | 66,783 | 1.2% | 3,693 | 0.2% | 53 | 0.0% |
| 27 | Indiana | 74,199 | 0.7% | 30,967 | 0.9% | 36,795 | 0.7% | 6,076 | 0.4% | 361 | 0.3% |
| 28 | Minnesota | 72,251 | 0.7% | 16,935 | 0.5% | 45,943 | 0.8% | 8,438 | 0.6% | 935 | 0.8% |
| 29 | Connecticut | 70,232 | 0.7% | 15,754 | 0.4% | 41,752 | 0.7% | 11,858 | 0.8% | 868 | 0.7% |
| 30 | New Hampshire | 68,453 | 0.6% | 8,188 | 0.2% | 38,230 | 0.7% | 21,401 | 1.4% | 634 | 0.5% |
| 31 | Utah | 58,849 | 0.5% | 13,179 | 0.4% | 38,127 | 0.7% | 7,011 | 0.5% | 532 | 0.5% |
| 32 | Alberta | 56,092 | 0.5% | 5,593 | 0.2% | 30,968 | 0.6% | 17,216 | 1.1% | 2,315 | 2.0% |
| 33 | Colorado | 55,714 | 0.5% | 10,630 | 0.3% | 33,772 | 0.6% | 10,177 | 0.7% | 1,135 | 1.0% |
| 34 | Wisconsin | 46,509 | 0.4% | 11,927 | 0.3% | 28,535 | 0.5% | 5,627 | 0.4% | 420 | 0.4% |
| 35 | Oklahoma | 45,987 | 0.4% | 17,140 | 0.5% | 25,679 | 0.5% | 2,902 | 0.2% | 266 | 0.2% |
| 36 | Oregon | 44,163 | 0.4% | 4,398 | 0.1% | 29,322 | 0.5% | 9,151 | 0.6% | 1,292 | 1.1% |
| 37 | Arkansas | 40,762 | 0.4% | 19,450 | 0.5% | 17,760 | 0.3% | 3,320 | 0.2% | 232 | 0.2% |
| 38 | Kentucky | 40,332 | 0.4% | 19,483 | 0.5% | 17,876 | 0.3% | 2,767 | 0.2% | 206 | 0.2% |
| 39 | Mississippi | 37,955 | 0.4% | 25,057 | 0.7% | 11,934 | 0.2% | 884 | 0.1% | 80 | 0.1% |
| 40 | Kansas | 36,885 | 0.3% | 11,059 | 0.3% | 21,744 | 0.4% | 3,843 | 0.3% | 239 | 0.2% |
| 41 | Rhode Island | 34,609 | 0.3% | 6,453 | 0.2% | 22,610 | 0.4% | 5,300 | 0.4% | 246 | 0.2% |
| 42 | New Mexico | 27,828 | 0.3% | 6,364 | 0.2% | 15,954 | 0.3% | 4,888 | 0.3% | 622 | 0.5% |
| 43 | Iowa | 26,982 | 0.3% | 9,057 | 0.3% | 15,249 | 0.3% | 2,502 | 0.2% | 174 | 0.1% |

### C. SOURCE OF BUSINESS-PASSENGERS
### (Continued)
### 4: NORTH AMERICA - RANK BY STATE / PROVINCE

| | STATE/PROV | TOTAL PAX | % 0F TOTAL | 1-5 DAY PAX AMOUNT | 1-5 DAY % 0F TOTAL | 6-8 DAY PAX AMOUNT | 6-8 DAY % 0F TOTAL | 9-17 DAY PAX AMOUNT | 9-17 DAY % 0F TOTAL | 18+ DAY PAX AMOUNT | 18+ DAY % 0F TOTAL |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 44 | Delaware | 19,467 | 0.2% | 4,316 | 0.1% | 11,067 | 0.2% | 3,937 | 0.3% | 147 | 0.1% |
| 45 | Nebraska | 16,850 | 0.2% | 4,791 | 0.1% | 10,069 | 0.2% | 1,850 | 0.1% | 140 | 0.1% |
| 46 | West Virginia | 15,680 | 0.1% | 5,501 | 0.2% | 8,944 | 0.2% | 1,131 | 0.1% | 104 | 0.1% |
| 47 | Manitoba | 14,926 | 0.1% | 1,303 | 0.0% | 8,532 | 0.2% | 4,608 | 0.3% | 483 | 0.4% |
| 48 | Hawaii | 13,360 | 0.1% | 714 | 0.0% | 8,428 | 0.2% | 3,559 | 0.2% | 659 | 0.6% |
| 49 | Maine | 12,953 | 0.1% | 2,267 | 0.1% | 8,963 | 0.2% | 1,628 | 0.1% | 95 | 0.1% |
| 50 | Idaho | 11,972 | 0.1% | 2,137 | 0.1% | 8,174 | 0.1% | 1,503 | 0.1% | 158 | 0.1% |
| 51 | Alaska | 8,900 | 0.1% | 2,030 | 0.1% | 5,808 | 0.1% | 937 | 0.1% | 125 | 0.1% |
| 52 | Nova Scotia | 7,661 | 0.1% | 757 | 0.0% | 4,724 | 0.1% | 2,028 | 0.1% | 152 | 0.1% |
| 53 | New Brunswick | 6,705 | 0.1% | 914 | 0.0% | 4,135 | 0.1% | 1,566 | 0.1% | 90 | 0.1% |
| 54 | South Dakota | 6,571 | 0.1% | 1,657 | 0.0% | 4,095 | 0.1% | 745 | 0.0% | 74 | 0.1% |
| 55 | Dist. Of Columbia | 6,504 | 0.1% | 1,896 | 0.1% | 3,606 | 0.1% | 918 | 0.1% | 84 | 0.1% |
| 56 | Montana | 6,362 | 0.1% | 1,002 | 0.0% | 4,261 | 0.1% | 993 | 0.1% | 106 | 0.1% |
| 57 | Newfoundland | 5,761 | 0.1% | 677 | 0.0% | 3,768 | 0.1% | 1,256 | 0.1% | 60 | 0.1% |
| 58 | Saskatchewan | 5,657 | 0.1% | 450 | 0.0% | 3,334 | 0.1% | 1,659 | 0.1% | 214 | 0.2% |
| 59 | North Dakota | 4,341 | 0.0% | 1,031 | 0.0% | 2,786 | 0.0% | 485 | 0.0% | 39 | 0.0% |
| 60 | Vermont | 3,981 | 0.0% | 894 | 0.0% | 2,466 | 0.0% | 543 | 0.0% | 78 | 0.1% |
| 61 | Wyoming | 3,280 | 0.0% | 754 | 0.0% | 2,101 | 0.0% | 370 | 0.0% | 55 | 0.0% |
| 62 | Prince Edward Island | 1,056 | 0.0% | 129 | 0.0% | 625 | 0.0% | 277 | 0.0% | 25 | 0.0% |
| 63 | Yukon Territory | 341 | 0.0% | 25 | 0.0% | 176 | 0.0% | 116 | 0.0% | 24 | 0.0% |
| 64 | North West Terr. | 123 | 0.0% | 11 | 0.0% | 82 | 0.0% | 28 | 0.0% | 2 | 0.0% |
| | **TOTAL NORTH AMERICA** | **10,781,256** | **100.0%** | **3,566,402** | **100.0%** | **5,591,968** | **100.0%** | **1,504,864** | **100.0%** | **118,022** | **100.0%** |

## D. CRUISE CAPACITY

### 1. CLIA MEMBER LINE NORTH AMERICAN PASSENGER CAPACITY - 2010

### INDIVIDUAL LINE DETAIL AT YEAR-END 2010

| CRUISE MEMBER LINES | NO. OF LOWERS | NO. OF SHIPS |
|---|---|---|
| AMA WATERWAYS | 1,236 | 9 |
| AMERICAN CRUISE LINE | 526 | 6 |
| AVALON WATERWAYS | 1,546 | 10 |
| AZAMARA | 1,420 | 2 |
| CARNIVAL CRUISE LINES | 54,602 | 22 |
| CELEBRITY CRUISES | 20,068 | 10 |
| COSTA CRUISE LINES | 30,785 | 15 |
| CRYSTAL CRUISES | 1,992 | 2 |
| CUNARD LINE, LTD. | 6,712 | 3 |
| DISNEY CRUISE LINE | 3,508 | 2 |
| HOLLAND AMERICA LINE | 23,493 | 15 |
| HURTIGRUTEN | 5,923 | 13 |
| MSC CRUISES USA | 24,358 | 11 |
| NORWEGIAN CRUISE LINE | 26,346 | 11 |
| OCEANIA CRUISES, INC. | 2,052 | 3 |
| PAUL GAUGUIN CRUISES | 332 | 1 |
| PEARL SEAS CRUISES | 210 | 1 |
| PRINCESS CRUISES | 37,220 | 17 |
| REGENT SEVEN SEAS CRUISES | 1,892 | 3 |
| ROYAL CARIBBEAN INTERNATIONAL | 61,888 | 22 |
| SEABOURN CRUISE LINE | 1,524 | 5 |
| SEADREAM YACHT CLUB | 220 | 2 |
| SILVERSEA CRUISES | 2,028 | 6 |
| UNIWORLD | 1,422 | 11 |
| WINDSTAR CRUISES | 608 | 3 |
| **TOTAL** | **311,911** | **205** |

**SOURCE:** 2010 Year End CLIA 5-Year Capacity Analysis

## D. CRUISE CAPACITY
**(Continued)**

### 2. 2011-2015 CAPACITY CHANGES.

Based on public information, a total of 26 new ships are contracted or planned to be added to the North American fleet from 2011 through the end of 2015.

The following summarizes all the information as of the date of publication.

**2011**

| | ADD / DEL / ADJUST | DELIVERY DATE | SHIP NAME | LOWERS | CONTRACT / PLANNED | NEW / USED |
|---|---|---|---|---|---|---|
| AMA WATERWAYS | ADD | MAY | AMAKATARINA | 212 | C | U |
| AMA WATERWAYS | ADD | SEP | AMALOTUS | 124 | C | N |
| AVALON | ADD | MAY | PANORAMA | 162 | C | N |
| CARNIVAL CRUISE LINES | ADD | 2011 | CARNIVAL MAGIC | 3,690 | C | N |
| CELEBRITY CRUISES | ADD | Q4 | SILHOUETTE | 2,850 | C | N |
| CELEBRITY CRUISES | DEL | Q1 | MERCURY | -1,870 | C | U |
| COSTA CRUISES | ADD | JUNE | COSTA FAVOLOSA | 3,012 | C | N |
| DISNEY CRUISE LINE | ADD | Q1 | DISNEY DREAM | 2,500 | C | N |
| LOUIS CRUISES | ADD | Q1 | FLEET | 2,422 | C | U |
| MSC CRUISES | ADD | Q1 | MSC MERAVIGLIA | 2,550 | C | N |
| OCEANIA | ADD | Q1 | MARINA | 1,250 | C | N |
| PRINCESS | DEL | MAR | ROYAL PRINCESS | -710 | C | U |
| SEABOURN CRUISE LINE | ADD | 2011 | QUEST | 450 | C | N |
| UNIWORLD | ADJUST | JAN | RIVER TOSCA | -2 | C | U |
| UNIWORLD | ADD | Q1 | RIVER ANTOINETTE | 160 | C | N |
| UNIWORLD | DEL | Q1 | DOURO QUEEN | -126 | C | U |
| UNIWORLD | ADD | Q1 | DOURO SPIRIT | 128 | C | N |
| UNIWORLD | ADD | Q1 | RIVER VICTORIA | 206 | C | N |
| UNIWORLD | ADJUST | Q1 | RIVER BEATRICE | 2 | C | U |
| UNIWORLD | ADJUST | Q1 | RIVER EMPRESS | -2 | C | U |
| UNIWORLD | ADJUST | Q1 | RIVER DUCHESS | -2 | C | U |
| UNIWORLD | ADJUST | Q1 | RIVER BARONESS | -10 | C | U |
| UNIWORLD | ADJUST | Q1 | RIVER AMBASSADOR | -10 | C | U |
| | | | **CLIA TOTAL** | **16,986** | | |

**2012**

| | ADD / DEL / ADJUST | DELIVERY DATE | SHIP NAME | LOWERS | CONTRACT / PLANNED | NEW / USED |
|---|---|---|---|---|---|---|
| AMA WATERWAYS | ADD | APR | AMACERTO | 164 | C | N |
| AMERICAN CRUISE LINES | ADD | AUG | QUEEN OF MISSISSIPPI | 140 | C | N |
| CARNIVAL CRUISE LINES | ADD | Q1 | CARNIVAL BREEZE | 3,690 | C | N |
| CELEBRITY CRUISES | ADD | Q4 | REFLECTION | 2,850 | C | N |
| COSTA CRUISES | ADD | MAR | COSTA FASCINOSA | 3,012 | C | N |
| DISNEY CRUISE LINE | ADD | Q3 | DISNEY FANTASY | 2,500 | C | N |
| MSC CRUISES | ADD | Q1 | MSC DIVINA | 2,550 | C | N |
| OCEANIA | ADD | Q2 | RIVIERA | 1,250 | C | N |
| OCEANIA | DEL | Q2 | INSIGNIA | -684 | C | U |
| | | | **CLIA TOTAL** | **15,472** | | |

## D. CRUISE CAPACITY
## (Continued)

### 2010-2014 CAPACITY CHANGES, Cont'd.

**2013**

| | ADD / DEL / ADJUST | DELIVERY DATE | SHIP NAME | LOWERS | CONTRACT / PLANNED | NEW / USED |
|---|---|---|---|---|---|---|
| AMERICAN CRUISE LINES | A | TBD | TBD | 140 | P | N |
| NCL | A | Q1 | TBD | 4,000 | C | N |
| PRINCESS | ADD | SPRING | TBA | 3,600 | C | N |
| - | | | **CLIA TOTAL** | **7,740** | | - |

**2014**

| | ADD / DEL / ADJUST | DELIVERY DATE | SHIP NAME | LOWERS | CONTRACT / PLANNED | NEW / USED |
|---|---|---|---|---|---|---|
| NCL | A | Q1 | TBD | 4,000 | C | N |
| OCEANIA | A | Q2 | INSIGNIA | 684 | C | U |
| PRINCESS | ADD | SPRING | TBA | 3,600 | C | N |
| - | | | **CLIA TOTAL** | **8,284** | | - |

**2015**

| | ADD / DEL / ADJUST | DELIVERY DATE | SHIP NAME | LOWERS | CONTRACT / PLANNED | NEW / USED |
|---|---|---|---|---|---|---|
| AMERICAN CRUISE LINES | A | TBD | TBD | 140 | P | N |
| - | | | **CLIA TOTAL** | **140** | | - |

## D. CRUISE CAPACITY
**(Continued)**

**3. COMPOSITE CAPACITY CHANGES 1981-2015 AND CAPACITY UTILIZATION-2010**

In order to keep capacity in line with North American demand, average capacity rose at a rate of 7.67% from 1981 to 2010. Based on current known information, contracted capacity will be increased at an average rate of 2.90% the next five years.

| | Total North American Industry | | |
|---|---|---|---|
| | **Lower Berths** | **% Change** | **Capacity Utilization** |
| 1981 | 41,073 | | |
| 1982 | 47,266 | +15.08 | |
| 1983 | 47,834 | +1.20 | |
| 1984 | 52,392 | +9.53 | |
| 1985 | 56,771 | +8.36 | |
| 1986 | 60,446 | +6.47 | |
| 1987 | 66,810 | +10.53 | |
| 1988 | 72,268 | +8.17 | |
| 1989 | 72,369 | +0.14 | |
| 1990 | 83,533 | +15.43 | |
| 1991 | 86,631 | +3.71 | |
| 1992 | 97,539 | +12.59 | |
| 1993 | 103,988 | +6.61 | |
| 1994 | 103,296 | -0.670 | |
| 1995 | 105,161 | +1.81 | |
| 1996 | 110,230 | +4.82 | |
| 1997 | 118,013 | +7.06 | |
| 1998 | 138,373 | +17.25 | |
| 1999 | 148,750 | +7.50 | |
| 2000 | 166,201 | +11.73 | |
| 2001 | 175,855 | +5.81 | |
| 2002 | 197,553 | +12.34 | 98.6% |
| 2003 | 212,004 | +7.31 | 103.3% |
| 2004 | 225,714 | +6.47 | 103.3% |
| 2005 | 231,091 | +2.38 | 103.3% |
| 2006 | 248,774 | +7.65 | 103.9% |
| 2007 | 267,145 | +7.38 | 105.7% |
| 2008 | 280,093 | +4.85% | 104.2% |
| 2009 | 294,788 | +5.25% | 103.9% |
| 2010 | 316,414 | +7.34% | 103.2% |
| Average Annual Change (1981-2010) | | +7.67 | |

| | Total North American Industry | | | |
|---|---|---|---|---|
| | Contracted | | Contracted & Planned | |
| | **Lower Berths** | **Percent Change** | **Lower Berths** | **Percent Change** |
| 2011 | 333,400 | 5.37% | 333,400 | 5.37% |
| 2012 | 348,872 | 4.64% | 348,872 | 4.64% |
| 2013 | 356,472 | 2.18% | 356,612 | 2.22% |
| 2014 | 364,756 | 2.32% | 364,896 | 2.32% |
| 2015 | 364,756 | 0.00% | 365,036 | 0.04% |
| Average Annual Change (2011– 2015) | | 2.90% | | 2.92% |
| | | | | |

**SOURCE:** CLIA Five-Year Capacity Report and Passenger Carrying Report.

## D. CRUISE CAPACITY
**(Continued)**

### 4. GEOGRAPHICAL DESTINATION/APPLICATION - 2011
**(000'S)**

| DESTINATION | 2001 TOTAL BED-DAYS | 2002 TOTAL BED-DAYS | 2003 TOTAL BED-DAYS | 2004 TOTAL BED-DAYS | 2005 TOTAL BED-DAYS | 2006 TOTAL BED-DAYS | 2007 TOTAL BED-DAYS | 2008 TOTAL BED-DAYS | 2009 TOTAL BED-DAYS | 2010 TOTAL BED-DAYS |
|---|---|---|---|---|---|---|---|---|---|---|
| CARIBBEAN | 21,833 | 26,741 | 28,999 | 31,211 | 31,450 | 31,956 | 32,162 | 30,786 | 30,940 | 36,272 |
| MEDITERRANEAN | 7,547 | 6,497 | 8,153 | 9,704 | 9,735 | 10,504 | 14,748 | 16,271 | 17,536 | 18,538 |
| ALASKA | 4,699 | 5,053 | 5,265 | 5,914 | 6,417 | 6,356 | 6,927 | 6,968 | 6,864 | 5,959 |
| BAHAMAS | 4,699 | 2,876 | 3,306 | 3,657 | 4,398 | 6,073 | 4,634 | 3,477 | 4,699 | 6,795 |
| TRANS CANAL | 2,396 | 2,093 | 2,784 | 2,931 | 2,719 | 2,804 | 2,663 | 2,679 | 3,458 | 3,140 |
| MEXICO WEST | 1,167 | 3,387 | 3,391 | 4,827 | 5,760 | 5,214 | 5,948 | 6,451 | 5,529 | 4,947 |
| EUROPE | 4,837 | 6,923 | 7,722 | 7,560 | 5,522 | 6,800 | 6,798 | 7,592 | 8,739 | 9,029 |
| BERMUDA | 1,270 | 1,227 | 1,476 | 1,324 | 1,329 | 1,388 | 1,285 | 1,266 | 1,263 | 1,502 |
| TRANSATLANTIC | 1,129 | 1,006 | 1,146 | 1,425 | 1,748 | 1,467 | 2,209 | 2,830 | 2,560 | 2,691 |
| HAWAII | 1,557 | 1,903 | 1,953 | 2,629 | 2,907 | 2,885 | 3,826 | 3,031 | 1,858 | 1,770 |
| SOUTH PACIFIC | 1,158 | 835 | 1,099 | 683 | 657 | 1,449 | 1,013 | 1,986 | 2,429 | 2,319 |
| SOUTH EAST ASIA | 430 | 346 | 123 | 20 | 58 | 611 | 431 | 557 | 724 | 1,145 |
| AFRICA | 401 | 260 | 189 | 17 | 68 | 43 | 25 | 59 | 176 | 160 |
| CANADA\NEW ENGLAND | 1,139 | 1,151 | 1,105 | 1,489 | 1,174 | 1,233 | 1,627 | 1,911 | 1,870 | 1,917 |
| FAR EAST (ORIENT) | 215 | 360 | 219 | 404 | 644 | 127 | 923 | 527 | 1,303 | 1,313 |
| MISSISSIPPI | 404 | 0 | 0 | 0 | 0 | 0 | 169 | 137 | 0 | 0 |
| WORLD | 613 | 582 | 375 | 463 | 461 | 340 | 804 | 1,063 | 1,361 | 1,379 |
| SOUTH AMERICA | 1,423 | 1,395 | 1,654 | 1,089 | 1,417 | 1,446 | 2,129 | 2,676 | 3,370 | 2,348 |
| U.S. COASTAL WEST | 1,945 | 216 | 377 | 644 | 433 | 161 | 229 | 225 | 271 | 229 |
| INDIAN OCEAN | 227 | 94 | 23 | 11 | 38 | 10 | 70 | 229 | 365 | 380 |
| UNCLASSIFIED | 240 | 234 | 290 | 990 | 61 | 196 | 158 | 449 | 565 | 1,509 |
| TRANS PACIFIC | 67 | 143 | 79 | 12 | 50 | 99 | 323 | 389 | 116 | 215 |
| U.S. COASTAL EAST | 80 | 147 | 838 | 60 | 34 | 81 | 153 | 83 | 35 | 205 |
| ANTARCTICA | 49 | 73 | 109 | 219 | 151 | 197 | 260 | 285 | 217 | 236 |
| PARTY CRUISES | 56 | 43 | 11 | 15 | 0 | 14 | 193 | 63 | 26 | 111 |
| ZBROBEDDAYS | 59,581 | 63,585 | 70,686 | 77,298 | 77,231 | 81,454 | 89,707 | 91,990 | 96,274 | 104,109 |

**NOTE:** Current destination classifications were established in 1994. Prior to 1985, Bermuda was included in Bahamas/Caribbean: Mississippi and Coastal East were not reported. Prior to 1992, Indian Ocean and Africa were part of unclassified. In 1993 Mexico East was changed to Western Caribbean.

**SOURCE:** CLIA Brochure/Destination Analysis

## E. CLIA AS AN ASSOCIATION

### 1. CLIA CRUISE INDUSTRY REPRESENTATION-2011

CLIA is an association that represents 26 cruise lines that market the majority of customers originating from the United States and Canada.

| MEMBER LINES |
|---|
| AMA Waterways |
| American Cruise Line |
| Avalon Waterways |
| Azamara Cruise Line, Inc. |
| Carnival Cruise Lines |
| Celebrity Cruises, Inc. |
| Costa Cruise Lines |
| Crystal Cruises |
| Cunard Line |
| Disney Cruise Line |
| Holland America Line |
| Hurtigruten, Inc |
| Louis Cruises |
| MSC Cruises USA |
| Norwegian Cruise Line |
| Oceania Cruises, Inc. |
| Paul Gauguin Cruises |
| Pearl Seas Cruises |
| Princess Cruises |
| Regent Seven Seas Cruises |
| Royal Caribbean International |
| Seabourn Cruise Line |
| Seadream Yacht Club |
| Silversea Cruises Ltd. |
| Uniworld River Cruises |
| Windstar Cruises |

## F. OTHER KEY SOURCES OF INFORMATION ON THE CRUISE INDUSTRY

### 1. BOOKS AND PAMPHLETS

**CLIA's Cruise Manual** published by Cruise Lines International Association, 910 SE 17th Street, Fort Lauderdale, FL 33316 (754) 224-2200; CD-DVD, $30 for CLIA affiliates. The manual is published mainly for the travel agency community as a reference source on CLIA's Member Cruise Lines. This annually updated, clearly organized, comprehensive volume reflects suggestions made by travel agents. In-depth information on cruise ship and their companies includes new, improved data on: dining aboard CLIA vessels, suggestions for on-board tipping and gratuities, summary of credit card policies of individual Member Lines, and lots more. Obtained by sending check or money order directly to Cruise Lines International Association (add $5.00 for postage and handling) or call to order with Visa, MasterCard or American Express.

**CLIA's Cruising: Guide to the Cruise Line Industry:** is CLIA's cruise industry textbook designed for travel industry professionals and students of travel. This 10-chapter textbook approaches the topic of cruise vacations from the prospective of a working travel professional. Travel agents enrolled in the CLIA Cruise Counsellor Certification training program can earn 30 training credits by completing the textbook's corresponding exam. Cruising: A Guide to The Cruise Line Industry retails for $59.95 U.S and C$68.95 in Canada. CLIA affiliates save 25% off list prices. To order your discounted copy **in the U.S.** call 1-800-347-7707 and mention the CLIA promotion code **10CLIADISC.** To order your discounted copy **in Canada** call 1-800-268-2222 and mention the CLIA promotion code **BICL0410. Offer is valid through December 31, 2010.**

**Cruise Industry News Annual** - published yearly by Cruise Industry News, 441 Lexington Avenue, Suite 809, New York, NY 10017; (212) 986-1025; 400 pages, $750. This annual provides an objective overview and forecasts of the worldwide cruise industry, including supply and demand scenarios, and analysis of each market segment and sailing region. The book also provides expert discussions of relevant subjects and issues as well as analysis of the earnings reports of the leading cruise lines. In addition, the Cruise Industry News Annual profiles all cruise lines around the world and their ships, plus cruise ports, and shipyards. It also features directory listings of the entire cruise lines, ports, shipyards, and supply and service companies. Published since 1988, the Cruise Industry News Annual is mainly subscribed to by industry executives, financial analysts, port and tourism officials, and others on a decision-making level.

**Cruises-Selecting, Selling and Booking** by Juls Zvoncheck. Both a training manual and guide to major cruise lines, includes useful appendices. Available on Amazon.com

**Cruising: Q&A** Published by Cruise Lines International Association, 910 SE 17th Street, Fort Lauderdale, FL 33316 (754) 224-2200; pocket size, 25 pages, free. Pamphlet answering most frequently asked questions about cruise vacations, with charts showing worldwide cruise destinations, ship line services for children, active adults, honeymooners, shipboard shopping, singles and shipboard cuisine. Obtained by sending a stamped, self-addressed envelope 75 cents postage) to CLIA.

**The Complete Cruise Handbook** by Anne Vipond. Published by Ocean Cruise Guides Ltd P.O. Box 2041 Pt. Roberts WA 98281 Phone (604) 948-0594, Fax (604) 948-2779. Email info@oceancruiseguides.com. A comprehensive introduction to cruising for first-timers. How to pick the cruise and ship that's right for you.

**Caribbean by Cruise Ship** by Anne Vipond. Published by Ocean Cruise Guides Ltd., P.O. Box 2041 Pt. Roberts WA 98281 Phone (604) 948-0594, Fax (604) 948-2779. Email info@oceancruiseguides.com. The complete guide to the Caribbean cruise experience. Over 80 maps and 300 photos.

**Cruise Business Review:** Cruise Media, Ltd. Claughton Island Assoc., 9 Woods Way, Redding, CT 06896. International magazine focusing on the cruise business.

**Dictionary of the Cruise Industry:** (Gioria Israel and Laurence Miller) Seatrade Cruise Academy, Seatrade Communications Ltd., Seatrade House, 42 North Station Road, Colchester C01 1RD United Kingdom +44 1206 545121 or www.seatrade-global.com. $25 or Euro30.00. Comprehensive dictionary of nautical and business terminology of the cruise industry.

**Seatrade Cruise Review:** Seatrade Organization, Seatrade House, 42 North Station Rd., Colchester C01 1RB United Kingdom. +44 1206 545121 or www.seatrade-global.com Quarterly magazine reporting on the business of cruising worldwide.

**The Total Traveler by Ship**: Northstar Travel Media LLC, 500 Plaza Drive, Secaucus, NJ 07094. Directory of ships, cruise lines and ports of call. (201) 902-2000

**Alaska By Cruise Ship** By Anne Vipond. Published by Ocean Cruise Guides Ltd., P.O. Box 2041 Pt. Roberts WA 98281 Phone (604) 948-0594, Fax (604) 948-2779. Email info@oceancruiseguides.com . The complete guide to the Alaska cruise experience. Includes over 70 maps and over 300 photos.

**Mediterranean By Cruise Ship** By Anne Vipond. Published by Ocean Cruise Guides Ltd., P.O. Box 2041 Pt. Roberts WA 98281 Phone (604) 948-0594, Fax (604) 948-2779. Email info@oceancruiseguides.com . The complete guide to all Mediterranean cruises. Over 100 maps and over 400 photos.

**The Essential Little Cruise Book**; Author, Jim West. This compact collection of cruise wisdom has everything you need to know for a perfect vacation at sea. Jim West has logged many nautical miles as a cruise director and doles out the answers to cruise questions with wit and style. How can you get the best cabin in your price range? The best table in the dining room? The best service from the crew? It's like having your own personal cruise consultant. The Essential Little Cruise Book will help you make the most of your time at sea. Available at local bookstores or by calling, toll free, Cruise Concepts at (888) 867-8600. 117 West St. Paul Street, Springville, IL 61362 or amazon.com.

## F. OTHER KEY SOURCES OF INFORMATION ON THE CRUISE INDUSTRY
**(Continued)**

### 2. PERIODICALS/CONSUMER

**Cruise Industry News Quarterly Magazine**, published four times a year by Cruise Industry News, 441 Lexington Avenue, Suite 1209, New York, NY 10017; (212) 986-1025; $75 per year. The magazine's editorial focus covers all aspects of cruise operations; shipbuilding, new ships, cruise companies, ship reviews, on-board services, food and beverage, and ports and destinations. Published since 1991, it's worldwide readership includes cruise line executives, shipboard officers and crew, shipyards, ports, service and supply companies, and travel agents.

**Cruise Travel,** 990 Grover Street, Evanston, IL 60201. Subscription price $23.94. Color magazine with feature articles about ships and cruising; six issues per year. (847) 491-6440. www.cruisetravelmag.com

**International Cruise Market Monitor** Prepared and published by G.P. Wild (International) Limited, 15 Gander Hill, Haywards Heath, West Sussex, RH16 1QU; +44 (0) 1444 413931. An authoritative quarterly publication covering the economic, marketing and operational aspects of the cruise industry worldwide. Sectorial capacity growth, corporate activities, supply and demand are examined critically with a view to providing an independent, analytical and objective appraisal of the industry together with a guide to its future development. Price $650.00 for all four quarterly issues.

**Lloyd's Annual Cruise Review** Prepared by Management and Marketing Consultants G.P. Wild (International) Limited and published by Lloyd's of London Press. An authoritative study, published annually, covering the economic, marketing and operational aspects of the cruise industry world-wide. Sectorial capacity growth, corporate activities, supply and demand are examined critically with a view to providing an independent, analytical and objective appraisal of the industry together with a guide to its financial data and fleet details for future development. Subscriptions Dept., Lloyd's of London Press, Sheepen Place, Colchester, Essex, England CO3 3LP. +011 44 1206 772277.

**The Marine Log Builders Guide** published by Simmons-Boardman Publications Corporation, 1809 Capitol Avenue, Omaha, NE 68102, (800) 895-4389, Fax (402) 346-3670; $92.95 which includes shipping. Extensive listings of maritime vendors, services, associations, and port authorities.

**Official Steamship Guide International,** 298 Village Square #145, Loundon, TN 37774 (865) 458-9703. Two double issues at $105.00. Catalog of cruise ship departures listed by major cruising areas and date. Includes prices and itineraries. www.officialsteamshipguide.com

**Porthole Cruise Magazine,** published by Bill Panoff,. PPI Group, 4517 NW 31 Avenue, Fort Lauderdale, FL 33309. Phone (800) 776-7678. 1 year subscription (6 issues) at $19.95. 2-year subscription (12 issues) at $29.95. Devoted to the cruise industry and is the number one source of cruise information for the travel savvy cruise consumer. This publication provides in depth cruise ship feature reports, product evaluations and general cruise industry news.

### 3. OTHER SOURCES

**Porthole Insider**, published by Bill Panoff. PPI Group, 4517 NW 31 Avenue, Fort Lauderdale, FL 33309. Phone 1 (800) 776-7678. A publication exploring industry issues, includes state of the industry reports on marketing, financial information, and integrates information on all aspects of the cruise industry from an operations standpoint. Directed towards cruise line executives and other industry decision-makers.

**Vacations on Video,** 7662 East Gray Road, Suite 101, Scottsdale, AZ 85260, (480) 483-1551. Source for purchase of travel videos with list that includes 300 videos from 35 major cruise lines as well as other travel suppliers. Contact Vacations on Video for further pricing information.

**Lloyd's Cruise International,** One Singer Street, London EC2A 4LQ, England, +44 (0) 171 250 1500. Covers important aspects of the cruise industry including marketing, passenger services and related equipment, port developments, business developments, regulatory issues and market trends.