

ONE VOICE: ADVANCING OUR INDUSTRY

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Association as well as a year of significant accomplishment. We both assumed new leadership roles in the organization (as Global Chairman and Acting CEO respectively), and the transition was seamless thanks to CLIA's outstanding leadership team, staff and the strong ongoing support from our volunteer leaders and membership.

The theme of this year's annual report is "One Voice: Advancing Our Industry Together," and as you will read in the following pages, by speaking with one voice, CLIA led the cruise industry through a year of tremendous success, and laid the groundwork for future growth.

Many of CLIA's 2015 accomplishments are highlighted in the "Year in Review" with additional detail provided in the subsequent sections. Together, we built business partnerships, educated the public and promoted best practices, advocated for our industry, inspired and built a global travel agent community, created demand for cruise travel, helped communities around the world and increased the visibility for the cruise industry through media coverage. All of this was made possible through the collective efforts of the industry speaking as one voice.

CLIA continues to fulfill its mission to be the unified global organization helping its members succeed by advocating, educating and promoting for the common interests of the cruise community, and today has 15 offices around the world forcefully advocating for our members on five continents. With 62 cruise line members, representing more than 95 percent of cruise line capacity, 275 executive partners and 20,000 travel agency and 30,000 travel agent members, we represent the interests of the entire global industry.

Thank you to all our members for your support during 2015. In particular, we would like to call out the sponsors of this annual report – PortMiami, Port Everglades and Port Canaveral.

We greatly appreciate your commitment to the global cruise community and look to continued success in 2016 as we move our industry forward together.

adam M. Holdstein

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TSGETHER

WE BUILD BUSINESS PARTNERSHIPS

CLIA launched a redesigned and enhanced international Executive Partner Membership Program in January 2015 providing members with a competitive advantage in the global cruise industry. This included four distinct member communities:

- · Port and Destination
- Travel and Tourism Providers
- Technical and Supply Chain Providers
- Professional Services Providers

Within these communities, new tailored educational and networking events were created, including the CLIA Port & Destination Summit in Hamburg and the CLIA Executive Partner Summit in Miami.



80 NEW EXECUTION DOINED IN

80 NEW EXECUTIVE PARTNERS JOINED IN 2015

30

MORE THAN 30 COMPANIES SUPPORTING CLIA AT THE DIAMOND LEVEL In addition, the Executive Partner Membership Program welcomed four new Diamond Elite Partners in 2015.



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SEXFrance

In March 2015, a monthly newsletter exclusively for Executive Partners and Cruise Lines was launched – CLIA Executive Partner Cruise News. Offering a variety of articles ranging from relevant industry news and member profiles to industry leader interviews and event updates, the newsletter acts as both an educational resource as well as a platform to showcase Members' offerings to the CLIA cruise community.

New for the Executive Partner program, an Interactive Itinerary Planning Workshop was introduced to promote teamwork, knowledge sharing and a better understanding of the choices, complexities and challenges faced by cruise lines.



TOGETHER

WE EDUCATE THE PUBLIC AND PROMOTE THE BEST PRACTICES

Cruise lines are safer than other forms of leisure travel, according to an updated study by G.P. Wild. This study found that while worldwide cruise ship capacity grew 22.5 percent from 2009-2014, operational incidents declined by 15 percent. CLIA continues to promote cruise safety and collaborated with other global stakeholders to further enhance fire safety, ship stability measures and crew training for assistance to passengers in emergency situations.

CLIA is at the forefront of efforts to educate the media and dispel myths about norovirus. This includes briefing reporters on how rare norovirus outbreaks are and what the industry is doing to further reduce norovirus incidents. CLIA's GI Illness Taskforce, for example, conducted workshops, shared best practices and collaborated with leading researchers both in Europe and North America to bring the already low number of norovirus outbreaks as close to zero as possible.

Norovirus — Don't Call It 'the Cruise Ship Disease'

Dr. Joyce Johnson, DO April 14, 2015





The cruise industry is a leader in environmental stewardship and CLIA helped increase public awareness of cruise industry innovations in environmental technology and sustainability. Collaborating with global stakeholders, CLIA helped enhance international standards related to carbon, sulphur and nitrogen air emissions, the prevention and spread of invasive species, and additional improvements for treatment and handling of wastewater.

"cruise lines are at the forefront of corporate environmental stewardship"



WE ADVOCATE FOR OUR INDUSTRY

At CLIA's annual Congressional Cruise Caucus, Cruise Line CEOs, Executive Partners and Travel Agency Members heard from Congressional and Administration leaders and visited Capitol Hill to discuss issues important to the cruise industry.



Senator Dan Sullivan (AK-R) with Adam Goldstein at 2015 Congressional Cruise Caucus in Washington DC.





In Venice, CLIA advocated for an alternative navigational route for cruise ships to counter cruise restrictions. In June, CLIA held a press conference in Rome to call on the Italian authorities to implement a solution for operating cruise ships inside the Venice Lagoon. A report commissioned by CLIA shows that, over the past two years, the restrictions have cost Venice more than €40 million of direct expenditures by the cruise industry, its passengers and crew. The latest industry figures also show that, while Italy remains the European country benefitting most from cruising, these restrictions have slowed the industry's growth, in both Venice and the entire region.

Following the Alaska Department of Environmental Conservation's implementation of the Alaska Wastewater Discharge Permit, the permit was challenged by several environmental organizations. CLIA Alaska successfully defended all stages of the administrative appeal process and the permit is now in its final form.



In December, CLIA Europe Chair Pierfrancesco Vago led a delegation of Cruise Line Executives for a day of meetings with top-level EU regulators, including the EU Commissioners for Transport and Environment and Maritime Affairs. The CLIA delegation also attended a working lunch with relevant Members of the European Parliament hosted by the Vice Chair of the Transport and Tourism Committee. The meetings resulted in very positive discussions on the challenges and regulatory barriers hindering the further growth of cruise tourism in Europe. They also fostered additional dialogue and cooperation between the EU institutions and the cruise industry.

CLIA continues to work to ensure the swift adoption of proposed EU legislation to reform the EU Visa Code and simplify the current procedures for issuing short-stay visas. Cumbersome visa procedures are causing Europe to lose up to six million potential tourists a year. In March, CLIA held a roundtable on visa facilitation for travelers and seafarers, with the participation of cruise operators, high-level EU decision-makers and tourism stakeholders.



ONE VOICE.

67 CRUISE LINES

275 GLOBAL EXECUTIVE PARTNERS

30,000 GLOBAL TRAVEL AGENTS

20,000 GLOBAL TRAVEL AGENCIES

SERVING

23,000,000

PASSENGERS WORLDWIDE









TØGETHER

WE INSPIRE AND BUILD A GLOBAL TRAVEL AGENT COMMUNITY



Travel professionals continue to be the most important distribution channel in the cruise industry with 75 percent of cruises booked globally through a travel agent. CLIA is focused on serving the interests of this community by providing travel agency and agent members with meaningful, practical and valuable resources to succeed, resulting in a community of 20,000 travel agency and 30,000 travel agent members around the world.

To best serve this important community in North America, CLIA introduced a new individual agent member program, as well as a tiered travel agency member program to meet the needs of both small agencies and large travel agent consortia. More than 9,000 travel agencies and 18,000 individual travel agent members joined the new and enhanced CLIA North America program in 2015, reinforcing CLIA's leadership as the largest travel agent member program globally.

To keep members abreast of the latest developments, a new CLIA newsletter was launched for travel agents as well as CLIA Cruise tv, a video platform featuring information on cruise travel and trends. A highlight of the year was the 11th annual cruise3sixty conference in Fort Lauderdale, Florida, the world's largest cruise-focused travel agent convention, which was both highly educational and engaging.



Travel professionals enjoy a "live" ship inspection at the 2015 cruise3sixty conference in Fort Lauderdale, Florida.

During cruise3sixty, CLIA hosted the first Premium Member Executive Summit. CLIA Diamond Travel Agency and Consortia Members were invited to participate in the day-long event, which included legislative updates, research presentations and an afternoon of intimate roundtable discussions alongside the presidents and senior executives of CLIA Cruise Line and Diamond Travel Agency and Consortia Members.







Spotlight on the UK and Ireland: The CLIA travel agent program is thriving in the British Isles, with membership up by nearly 57 percent, to a record number of 3,450 travel agent members. The health and vitality of this community was demonstrated by the 2,100 travel agents who attended CLIA UK and Ireland events. In addition to the strong attendance, satisfaction was high with 97 percent rating the events excellent or good.



CLIA Australasia revamped its travel agent program, integrating its training into the annual membership dues for the first time. The program also offers a wide range of offerings, including direct benefits from CLIA Member Cruise Lines as well as everyday discounts from scores of major retailers across Australia and New Zealand

TSGETHER

WE CREATE DEMAND FOR CRUISE TRAVEL

CLIA launched National Plan a Cruise Month in October to North American consumers, generating excitement around cruise travel, promoting travel agents as the best way to book cruise vacations and providing travel agents with resources to promote themselves and cruising. The initiative spread the love of cruising through positive content, engaging sweepstakes and consumer offers and deals. Highlights included a cruisea-day drawing for consumers who submitted a photo with their best smile through #cruisesmile on Twitter, Instagram and on the campaign website. The campaign achieved an audience reach of more than 500 million consumers during the month-long effort.



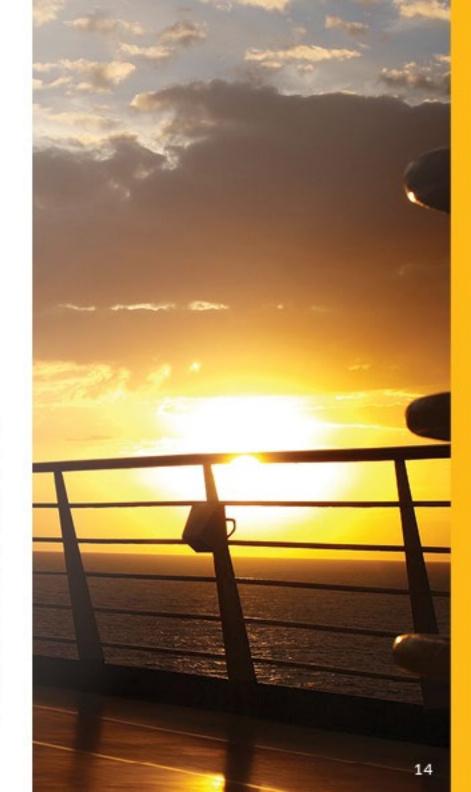




#CRUISESMILE



Many CLIA national associations sponsored successful Cruise Weeks or Months to promote cruising in their local markets. In UK and Ireland, mainstream media coverage was up a third over last year and there were more than 30,000 views of CLIA Cruise Week videos on Facebook and YouTube and 3,100 social media posts. CLIA France National Cruise Week (J'aime la croisière!) registered 1,100 agencies. In the Netherlands, a radio campaign reached about 30 percent of all 30 - 69 year olds, resulting in 90 percent new visitors to its cruise.nl website. Meanwhile, on the other side of the world, CLIA Australasia took this year's Cruise Week to a new platform by promoting it through a new interactive online magazine, which made Cruise Week even more accessible to consumers and travel agents.



TOGETHER

WE HELP COMMUNITIES AROUND THE WORLD

The Cruise Industry Charitable Foundation (CICF) is committed to improving the quality of life in the communities served by the cruise industry. Last year, CICF provided nearly \$1 million in charitable grants to philanthropic organizations across the U.S. that support education, health care, environmental preservation and other important areas of need.





Students from South Dakota and Ohio taking part in the Washington Workshops 2015 Democracy in Action Program at the Korean War Memorial sponsored by CICF.

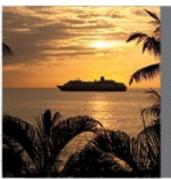


Mercy Ships, which operates a floating hospital serving some of the poorest developing nations in the world, was recognized by CLIA as the 'Charity of Choice.' Mercy Ships conducts a variety of life-changing operations and provides education and training for local health professionals. CLIA works with Mercy Ships to endorse their initiatives to deliver healthcare in developing nations and make CLIA global members aware of the international nonprofit's mission and efforts.



2015 YEAR IN REVIEW

JANUARY



In a study sponsored by CLIA, G.P. Wild reports that cruise ships are one of the safest ways to travel while on vacation and that, even with more people cruising than ever before, the number of operational incidents continues to decline.





CLIA launches a new affordable North American Individual Agent
Member Program featuring exclusive special offers from all global
CLIA Cruise Lines Members, as well as access to exclusive training
and professional development. Special exclusive offers for 2015
CLIA agent members include agent bonus commissions, reduced
rate cruises for agent personal travel and priority trip invitations.

FEBRUARY



CroisiEurope, Europe's largest river cruise line, joins CLIA as a Global member, bringing the number of CLIA Global Cruise Line Members to 27.





The first CLIA Port & Destination Forum is held in London with the attendance of 77 delegates, including 16 cruise line executives. The event includes two key sessions on port development and iting are planning.



CLIA participates in the International Maritime Organization's (IMO) subcommittees on Pollution Prevention and Response, Human Element, Training and Watchkeeping, and Ship Design and Construction. Several new standards are adopted.

The second cruise3sixty Australasia is held in Sydney. CLIA Global Chair Adam M. Goldstein delivers the keynote on the global State of the Cruise Industry.





The CLIA State of the Cruise Industry Press Conference and Marketplace, held in New York City, is attended by more than 55 business, consumer and trade media. This event generated media coverage on the current state of the cruise industry and gives cruise lines the opportunity to showcase their 2015 news with key media.



The cruise industry is the focus at REISEN HAMBURG 2015, the largest travel fair for holidays, cruises, outdoor activities and cycling in northern Germany. CLIA helps organize the event and works with Hamburg Messe und Congress to arrange a fam trip with journalists prior to the event.



CLIA represents the cruise industry at the International Labour Organization, where a working group of experts agreed in principle to important amendments to international labor standards regarding scafaror welfare issues. CLIA hosts the GI Illness Workshop and Technology Conference in Geneva, which explored cutting-edge innovations in both research and technology to minimize the risks introducing and spreading norovirus. Leading scientists, medical practitioners, and regulators participated in this event.

MARCH



Ponant, the French luxury yacht-style cruise line and a world leader in polar cruising, joins CLIA's Global Cruise Line Members, now totaling 28.





CLIA publishes the 2014 Asia Cruise Trends Study which reports robust double-digit growth with historic numbers of cruise ships, passengers and ports in the region.



CLIA hosts two networking events at Cruise Shipping Miami, the cruise industry's

premier global event bringing together buyers and suppliers for a week of networking, sourcing and education.



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Charles A.B. Sylvia, CLIA Vice President of Membership and Trade Relations in North America, launches "Chats with Charlie," a webinar for travel agents and agency professionals to discuss the future of CLIA Travel Agent membership and cruise selling.

CLIA Europe holds a workshop on cruise tourism and visa facilitation.



The European Commission officially launches the Pan-European dialogue between cruise operators, ports and coastal stakeholders in Brussels, with CLIA playing many keyroles.

CLIA participates in the IMO's subcommittee on Ship Systems and Equipment to discuss important safety issues related to fire safety and life safety appliances.



CLIA is well represented at ITB Berlin, the world's largest tourism trade fair. CLIA and DRV (German Travel Association) present research that shows that the cruise market in Germany is still booming and has become Europe's largest source market.



CLIA conducts a press conference to present the findings of the CLIA EU State of the Industry report at 'The Scheepvaartmuseum' (maritime museum) in Amsterdam.



To strengthen communication within the cruise industry, CLIA launches the CLIA Executive Partner Cruise News monthly newsletter.

APRIL



CLIA inducts new members into the Cruise Industry Hall of Fame, honoring Mark and Mimi Comfort, Roderick McLeod and Wayne and Judy Heller during the cruise3sixty conference in Ft. Lauderdale.

CLIA introduces eight new training and professional developmente-learning courses for the North American travel agent community. The courses offer business, niche, geography, sales and professional development content.



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cruise3sixty, the largest cruise-focused travel agent conference in North America, takes place in Fort Lauderdale, Florida, hosting nearly 1,300 travel agents, more than 160 exhibitors and 25 CLIA member cruise lines. CLIA participates in IMO Marine Environment Protection Committee. CLIA helped change international standards related to greenhouse gas emissions, ballast water management, and the completion of the IMO Polar Code. The work on the Polar Code spanned more than five years and provides stringent, but workable, new standards for operating in the Arctic and Antarctic regions.



A monthly resource for cruiseselling travel professionals - the all-new CLIA Travel Agent and Agency Newsletter - launches with news and useful updates.



A new multimedia platform for travel agent and agencies - CLIA Cruise tv - launches and includes video content on cruise travel industry leaders and the latest cruise trends

CLIA takes part in the Organization of American States CSR Conference in Mar Del Plata, Argentina. CLIA had major speaking roles and increased the association's exposure with Latin American regional port officials and others in the region.

MAY



CLIA hosts the Selling Cruise Conference, in Southampton, U.K., which is Europe's largest gathering of travel agents. The CLIA-organized event featured three of the world's newest and most innovative cruise ships. Travel agents were able to see the latest developments in dining, entertainment and service aboard Princess Cruises' Royal Princess, P&O Cruises' Britannia and Royal Caribbean International's Anthem of the Seas.

The Australian Cruise Industry reports that Australia is the world's fastest growing source of cruise passengers, with numbers surging 20.4 percent to reach more than one million cruisers.



The city of Athens hosts the third Posidonia Sea Tourism Forum with CLIA's active participation. Pierfrancesco Vago, CLIA Europe Chair, delivers the keynote address and outlines a vision for the future of the cruise industry in Greece and the Eastern Mediterranean.





JUNE



Attended by more than 80 CLIA Cruise Line and Executive Partner Members, CLIA hosts the inaugural Technical & Regulatory Forumin London to discuss regulatory and technical challenges facing the cruise industry. CLIA Cruise Line, Executive Partner and Diamond Travel Agency Members engage on Capitol Hill in Washington, D.C., at the Congressional Cruise Caucus, Members of congress and policy experts discuss the legislative and regulatory environment of the cruise industry.



CLIA takes part in IMO Maritime Safety Committee, which completed international standards for ships using gas (such as LNG) for fuel. Important progress was also made in the areas of cyber security and resource of persons at sea.

CLIA hosts the second Environmental Day in Berlin, sharing information about the different environmental initiatives the cruise industry is undertaking, particularly on the topics of waste and wastewater management on-board cruise vessels.



The cruise industry has a tremendous impact on the European economy according to CLIA's annual report on the Contribution of Cruise Tourism to the Economies of Europe. The industry's total economic impact on the continent totals 20.2 billion euros and accounts for nearly 350,000 European jobs.

CLIA participates at the Maritime Cyber Research Summit, which addresses maritime cyber vulnerabilities, resilience, threats, impacts and information sharing.



JULY





AUGUST



CLIA sponsors a cruise industry supplement – 2015 Guide to Meetings & Events At Sea. The 22-page educational resource provides an overview on cruising and the advantages of hosting meetings and events at sea. It was distributed globally to more than 33,000 meeting professionals.

CLIA launches cruisExcellence, its North America program of regional training events, providing travel agents with live instructor-led education, virtual ship inspections and supplier trainings.







Cindy D'Aoust, CLIA's Acting CEO, attends Travel Industry Exchange in Orlando and participates on a panel that discusses the current travel agent landscape and the growth of the cruise industry.



SEPTEMBER

CLIA hold its first 'New to Cruise Summit' in England, an event aimed primarily at travel agents who do not yet sell cruise holidays. The Summit provides a mix of training in cruise sales techniques, industry trends, product training and how to capitalize on the resources available to reach new customers.



UK and Ireland Cruise Week is a major success attracting considerable media coverage and social media attention.

CLIA introduces several innovations to Cruise Week in Australasia, including a new interactive online magazine.





CLIA Port & Destination Summit in Hamburg brings together more than 200 delegates from 28 countries, representing port authorities, destinations, shore excursion operators, port agents, and nearly 50 cruise line executives. Attendees engage in open dialogue and networking, feeding into our aim to establish a cohesive community of stakeholders from ports and destinations worldwide. New for the program, an Interactive Itinerary Planning Workshop was introduced to promote teamwork, knowledge sharing and a better understanding of the choices, complexities and challenges faced by the cruise industry.





CLIA successfully launches National Plan a Cruise Month in North America, a multi-dimensional campaign created to help consumers fall in love with cruising through unprecedented cruise vacation offers.





CLIA releases the 2014 Global Economic Impact Analysis Report, reporting that total economic contribution of the cruise industry to the global economy reaches \$119.9 billion.



In the U.S.A., a Congressional resolution is introduced to designate October as "Cruise Travel Professional Month," honoring the travel specialists who create memorable cruise vacations.



CLIA joins United for Wildlife's Taskforce on Transportation and Illegal Wildlife Trade, which is tasked with developing recommendations to break the chain between suppliers and consumers of illegal wildlife products.



CLIA conducts National Cruise Week (J'aime la croisière) in France with more than 1,100 travel agencies participating.



The 2016 Executive Partner Summit, held in Miami, features a private tour of PortMiami and sessions covering both port and destination and technical and regulatory topics.

> CLIA hosts its Annual Dinner in Civitavecchia, Italy, and participates in "Italian Cruise Day."



The MedCruise General Assembly is held in Olbia, Italy. CLIA participates in the discussions and announces a landmark agreement with MedCruise to expand CLIA's travel agent training program to France.



CLIA participates in IMEX America, the largest meeting and events trade show in North America. CLIA offers a four-hour certificate program, in partnership with Meetings Professional International, teaching agents the benefits and process of booking an event at sea and schedules appointments for cruise line members to meet with industry buyers interested in booking group events at sea.





CLIA launches its 2016 Executive Partner Membership Program with new benefits to provide a dynamic and distinctive platform for Executive Partners to connect, engage and increase their influence in the global cruise industry.



NOVEMBER

The fifth CLIA River Cruise Convention takes place in Amsterdam with more than 300 travel agent delegates and visits to seven river cruise vessels.





CLIA presents at the World Ocean Council Sustainable Ocean Summit in Singapore on the industry and its environmental stewardship practices.



CLIA takes part in HELCOM Maritime meeting in Klaipeda, Lithuania, where substantial progress was made with Baltic region governments in finding solutions for new environmental regulations that require substantial infrastructure investments by ports.



CLIA launches a cruise learning program for French travel agents, the first of its kind in France. The program is designed to educate, engage and support the country's travel agencies and bring together France's cruise community with the aim of growing the number of people taking a cruise holiday.

DECEMBER

CLIA releases the 2016 State of the Cruise Industry Outlook, which shows continued growth in cruising. Twenty-four million passengers are expected to sail in 2016, a dramatic increase from 15 million just 10 years ago, or even 1.4 million when CLIA began tracking passengers in 1980.



CLIA holds Safety Culture and Bridge Resource Management Workshops in Miami, which bring together safety thought-leaders from the cruise, commercial aviation, nuclear power industry, tanker, chemical industries and others. Best practices were shared and the participants visited ships from both Carnival Cruise Line and Celebrity Cruises as part of the agenda.



CLIA takes the helm at The Network for the European Private Sector in Tourism, a high-level contact group set up to promote the interests of Europe's tourism sector before the EU institutions.



2015 GLOBAL CRUISE LINE MEMBERS







































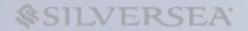


















2015 REGIONAL CRUISE LINE MEMBERS

























































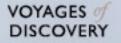














2015 EXECUTIVE PARTNERS

DIAMOND ELITE -



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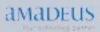








DIAMOND

































































CLIA IS GRATEFUL TO THE FOLLOWING SPONSORS OF THIS ANNUAL REPORT





PORT//IA//I

As a world-leading "Powerhouse Port," Port Everglades provides cruise guests and cruise lines with a first-class experience. From our modern, efficiently operated terminals to our attention to customer service, cruising is a breeze at Port Everglades. We are proud of our long history as an Executive Partner with CLIA, and look forward to hosting Cruise360 and Seatrade Cruise Global conference in Broward County/Greater Fort Lauderdale.

Port Canaveral was voted #1 "Best North American Homeport" by the editors of Cruise Critic for 2015. Less than one hour from Orlando and all the theme parks and attractions of central Florida, trends indicate our cruise business will more than double. That is why we continue to build new cruise terminals. New Cruise Terminal One opened last year and can accommodate the largest cruise ships in the world. Future plans are to keep building and upgrading yearly to meet this demand. Congratulations to CLIA as you continue to push forward the "One Industry, One Voice" to protect and grow the entire cruise industry. Port Canaveral is proud to be a Diamond Executive Partner of CLIA

PortMiami, Cruise Capital of the World, continues to expand as the world's leading cruise port. Last year, PortMiami welcomed nearly 4.9 million multi-day passengers from the most distinguished cruise lines. CLIA's economic impact study shows the powerful impact of the cruise industry on the State of Florida and the opportunity for continued growth worldwide. PortMiami is a proud Diamond Executive Partner of CLIA.



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