

InFocus

**2025 - A YEAR OF INNOVATION AND TRANSFORMATION.
SECTOR OUTLOOK REPORT BY SPECTEC CRUISE.**



JANUARY 2025





Message from Our CEO

The year 2024 proved to be exceptional for the cruise industry, characterized by significant milestones and accomplishments. With record-breaking performance and a stunning lineup of new ships, it is truly inspiring to observe a thriving and dynamic market poised for continued expansion in 2025.

Much like 2024, at the heart of the industry's projected growth in 2025 will be innovation, whether that be in ship design, technology or guest experiences. And with such rapid growth, it's important the industry continues to lead the way in safe operational practices and sustainability advancements.

Malcolm Youngson
CEO



With this report, we take a brief look back at the success of the industry in 2024, before exploring key areas driving industry growth and the critical factors to successful and sustainable growth in 2025.



2024 InFocus



35 million

PASSENGERS CRUISED



45

DRYDOCK/REFITS
COMPLETE



\$30 billion

REVENUE GENERATED



249k GT

LARGEST SHIP EVER
DELIVERED



12

NEW SHIPS DELIVERED



360

CURRENT TOTAL OCEAN
FLEET COUNT



2024 Industry Highlights



The largest cruise ship ever built, Icon of the Seas became operational and is delighting guests.



Sustainability efforts advanced significantly with the delivery of more LNG or dual-fueled ships. Equally important, was the growing emphasis on responsible tourism.



‘Expedition cruising’, with guests increasingly seeking authentic, off-the-beaten-path experiences that connect them with nature and diverse cultures continued to grow in popularity.



Large, publicly traded operators are coming off record financial performances. Strong performances have been driven by record bookings, focus on cost control activities and capacity growth.



Looking Ahead to 2025

The cruise industry in 2025 is poised for continued growth and innovation, driven by strong consumer demand, expanding global markets and advancements in technology.

With new ships entering service, enhanced guest experiences, and a focus on eco-friendly practices, the industry aims to meet evolving traveller expectations while addressing environmental concerns.

As cruise lines adapt to changing trends and leverage opportunities in emerging destinations, 2025 promises to be a pivotal year for shaping the future of cruising.



New Ships that are scheduled for delivery



Some stunning new ships will be delivered in 2025, adding an additional 40 thousand berths. Some notable additions include:

>> **Disney**

Will take delivery of 2 ships -
Destiny and Adventure.

>> **Royal Caribbean Group**

Star of the Seas –
(sister to Icon), TUI Mein Schiff
Relax and Celebrity Xcel.

>> **Norwegian Cruise Line Holding**

Norwegian Aqua and Oceania
Allura.

>> **Virgin Voyages**

Will add their 4th Ship to the fleet
Brilliant Lady.

>> **Windstar**

Will receive delivery of the first of 2
newbuild ships.

>> **Princess Cruises**

Star Princess will be delivered in the
second half of the year.

>> **MSC Cruise**

MSC World America, the lines
largest ship in the US.

>> **Sister of Icon is Incoming**

Star of the Seas, sister to Icon of
the Seas will be delivered in Q2 of
2025. Constructed at Meyer Turku
in Finland she will enter into service
in August. If Icon is anything to
go by we are in for a treat. Star
of the Seas will homeport in Port
Canaveral, has a gross tonnage of
250,800 and a double occupancy
guest capacity of 5,610.

New Entrants

2025 will see the entrance of new cruise brands. Notably, Four-Season Yachts will have their first ship delivered later in the year.

In addition, 2025 will see the first full year in operation for Aroya, the first ship from Cruise Saudi.



Smarter Ships



In 2025, smart cruise ships are redefining the guest experience through the integration of cutting-edge technology and innovative themes. These vessels feature advanced IoT systems, artificial intelligence, and sustainable design, offering passengers a seamless blend of luxury and personalization.

Popular themes include eco-friendly voyages powered by renewable energy sources, immersive virtual reality zones for unique destination previews, and wellness-focused itineraries incorporating AI-guided fitness and health programs.

Smart cabins adapt to individual preferences, optimizing lighting, temperature, and entertainment. These features, coupled with autonomous navigation systems and AI-driven operations, ensure efficient, safe, and environmentally responsible travel, elevating the cruising industry into a new era of innovation and customer-centric experiences.



Further adoption of AI technologies

Artificial intelligence (AI) will further leave its mark on the cruise industry in 2025 to revolutionize operations and enhance passenger experiences. AI-powered systems streamline booking processes, offering personalized itineraries and real-time recommendations based on guest preferences.

Onboard, AI optimizes resource management, ensuring efficient energy use and waste reduction to meet sustainability goals.

Advanced analytics enable predictive maintenance, minimizing downtime and enhancing safety. Guest experiences are elevated through virtual assistants that provide instant support and tailored services, while AI-driven entertainment systems create immersive and interactive environments.

From smart navigation systems to AI-enhanced dining and wellness programs, the adoption of AI positions cruise lines as leaders in innovation, efficiency, and customer satisfaction.



Innovation and Transformation



In 2025, the cruise industry stands at the crossroads of innovation and transformation, driven by advancements in technology, sustainable practices, and evolving traveler preferences. From the adoption of AI and smart systems to the rise of niche market entrants, the sector is redefining the modern cruising experience. Enhanced personalization, eco-conscious initiatives, and diverse offerings ensure that cruise travel remains a dynamic and attractive option for global explorers.

As the industry navigates challenges and opportunities, it continues to embody resilience and creativity, charting a course toward a future of unparalleled growth and guest satisfaction.



2025 promises to be a phenomenal year of growth for cruise, and **SpecTec Cruise** are committed and ready to support our customers in delivering against their objectives.

Visit **www.specteccruise.com** for more sector insights