



CLIA
2023
EUROPE
MARKET
REPORT



Europe as a source market produced 8.2m passengers in 2023, a 6.5% increase from 2019's 7.7m. The largest source market within Europe was Germany with 2.5m passengers, or about 31% of the European total. UK+Ireland occupied 2nd place with about 28% share of European source passengers, at 2.28m. Italy rounded out the top three with 1.18m pax, or about 14% of Europe's source passengers.

The average sailing duration for European source passengers has almost returned to 2019 range, at 8.7 days. The source market sailing the longest durations was the UK+Ireland at 10 days, very slightly down from 10.2 days in 2019. Overall, the average sailing age for Europeans was 47.9, a decline from 2019's 49.7.

The primary destination to which Europeans sailed was the Mediterranean with 3.75m. This is up from 2019's 3.24m, an increase of almost 16%. This is followed by Northern Europe destinations, accounting for about 1.9m pax, up from 1.4m in 2019. Thus, largely, Europeans sail Europe.

Regional Overview: Europe 2019 to 2023 (2020 Omitted)

Passenger Volume (K)

2019	2021	2022	2023
7,707	1,748 (-77% ▼)	5,726 (228% ▲)	8,205 (43% ▲)

Average Duration, in Days

2019	2021	2022	2023
8.8	7.3	8.5	8.7

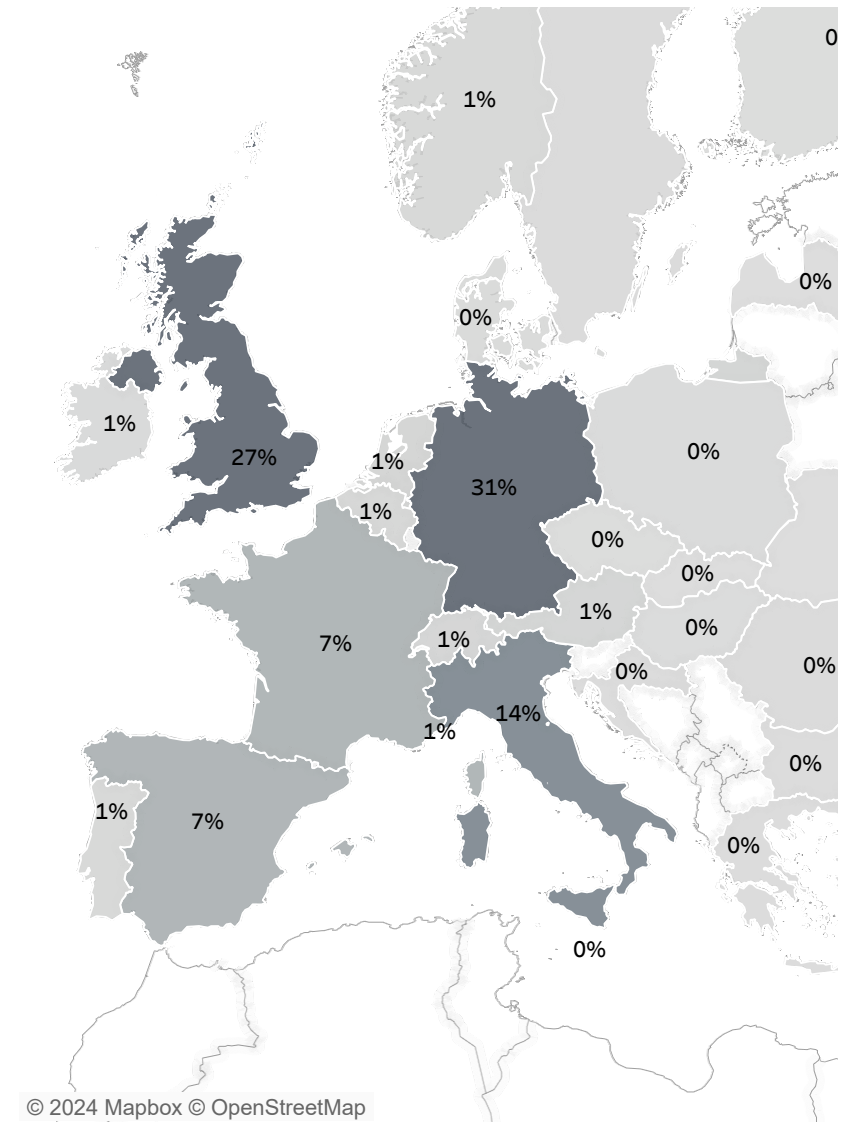
Average Age

2019	2021	2022	2023
49.7	48.0	48.3	47.9

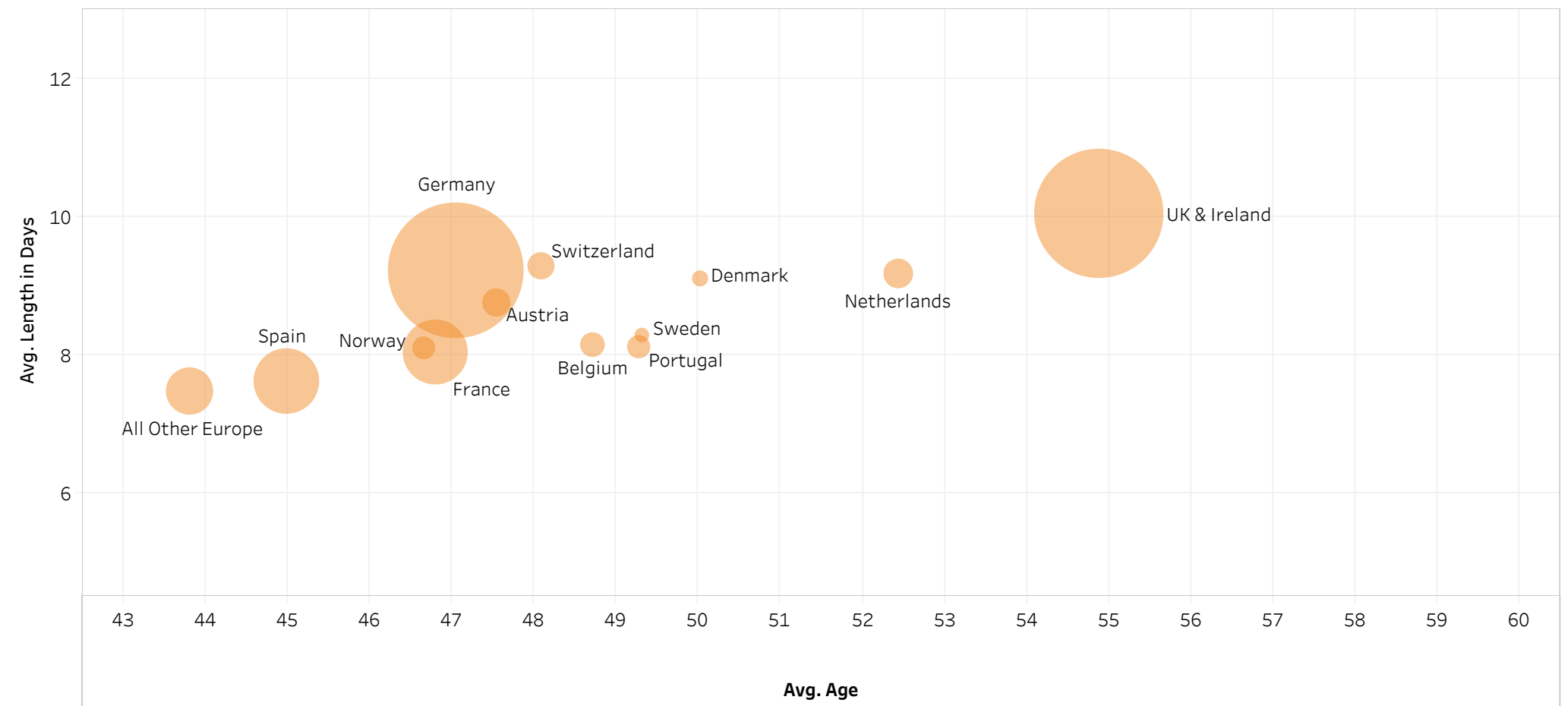
Passenger Volume (K) for Top Countries

	2019	2021	2022	2023
Germany	2,587	576 (-78% ▼)	1,876 (226% ▲)	2,513 (34% ▲)
UK & Ireland	1,992	479 (-76% ▼)	1,663 (247% ▲)	2,281 (37% ▲)
Italy	950	340 (-64% ▼)	791 (133% ▲)	1,176 (49% ▲)
Spain	553	74 (-87% ▼)	414 (459% ▲)	587 (42% ▲)
France	545	116 (-79% ▼)	325 (180% ▲)	576 (77% ▲)
All Other Europe	231	43 (-81% ▼)	179 (317% ▲)	305 (71% ▲)
Netherlands	123	13 (-89% ▼)	82 (530% ▲)	120 (46% ▲)
Austria	136	15 (-89% ▼)	55 (276% ▲)	109 (98% ▲)
Switzerland	140	20 (-86% ▼)	70 (246% ▲)	101 (46% ▲)
Belgium	66	10 (-85% ▼)	55 (445% ▲)	83 (52% ▲)
Portugal	69	12 (-83% ▼)	45 (275% ▲)	74 (66% ▲)
Norway	98	35 (-65% ▼)	60 (72% ▲)	72 (20% ▲)
Denmark	45	4 (-91% ▼)	30 (604% ▲)	35 (20% ▲)
Sweden	59	5 (-91% ▼)	32 (518% ▲)	29 (-8% ▼)

Share of Source Passengers, 2023 Geographic Share

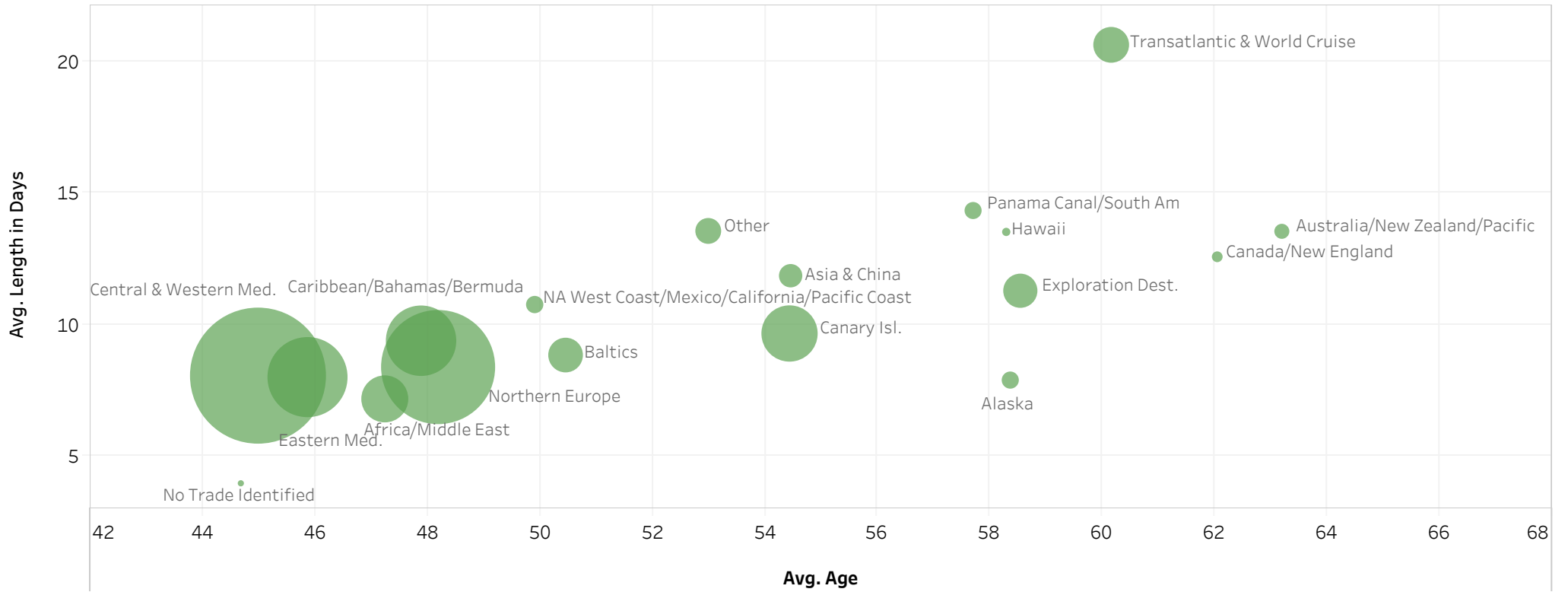


Average Age and Cruise Length for Top Source Markets, 2023

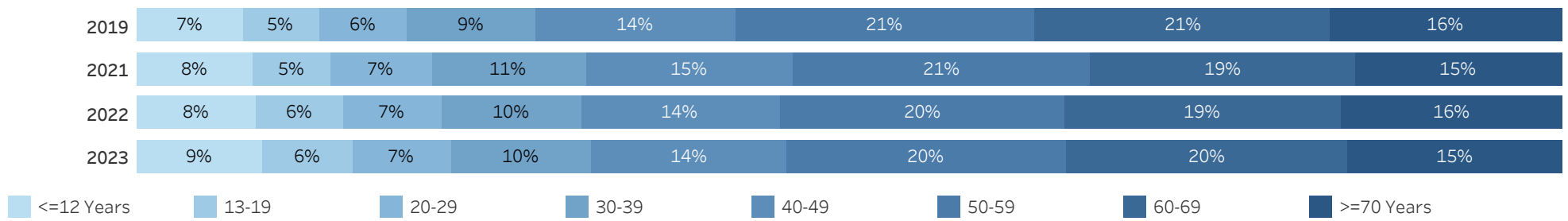


Regional Overview: Europe (Continued)

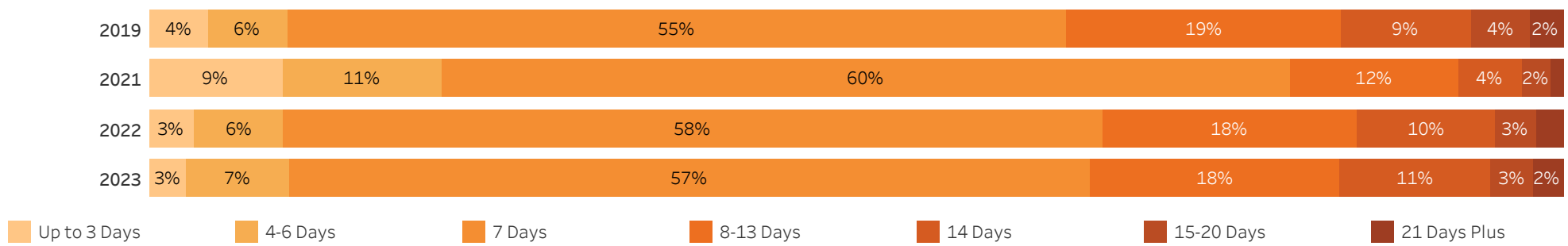
Average Age and Cruise Length by Destination / Trade Route, 2023



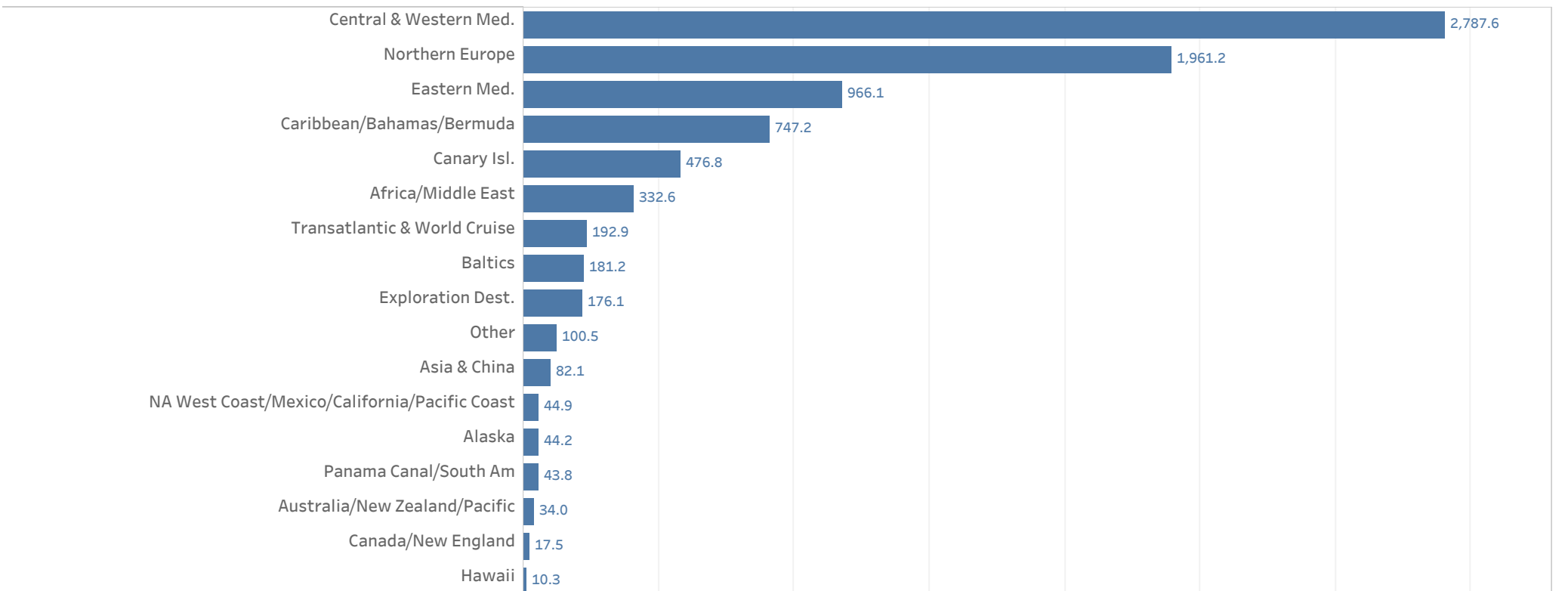
Average Passenger Age Groups



Average Cruise Duration



Volume of Passengers (in K) to Destinations, 2023
At least 4K Passengers per Destination

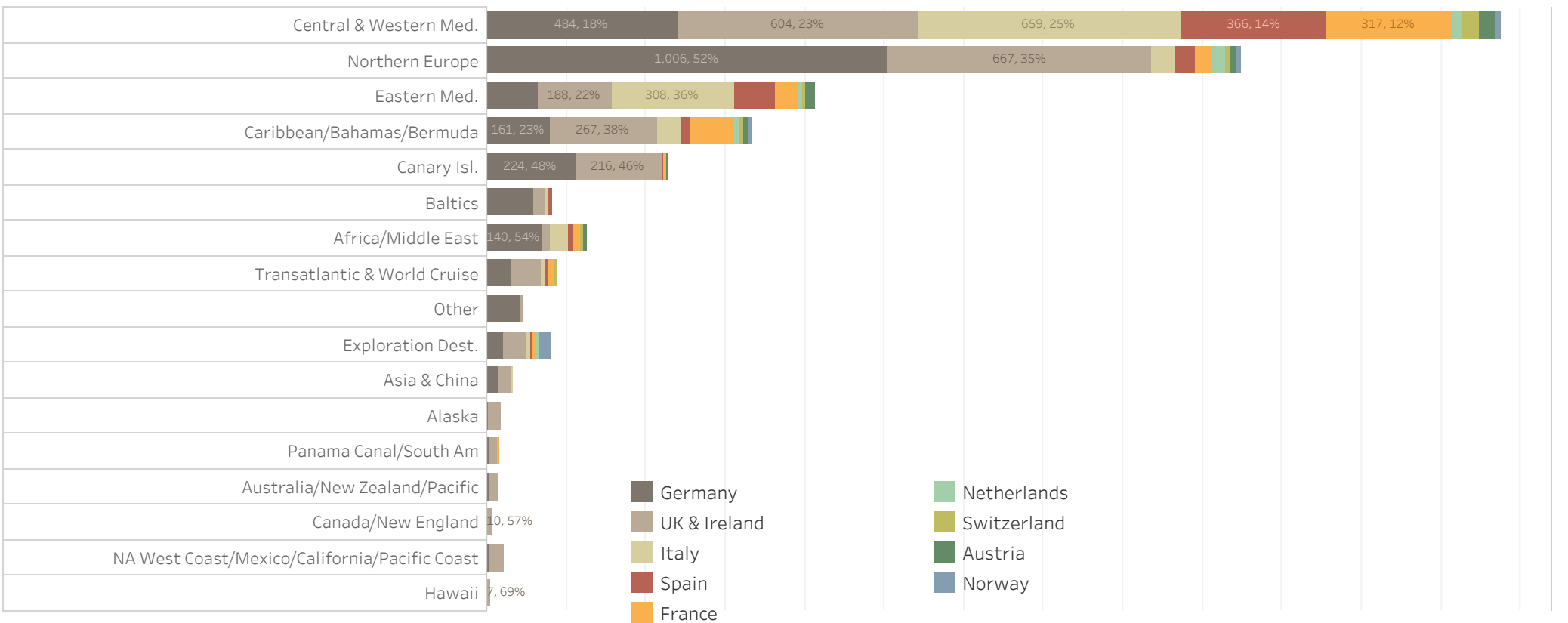


Regional Overview: Europe (Continued)

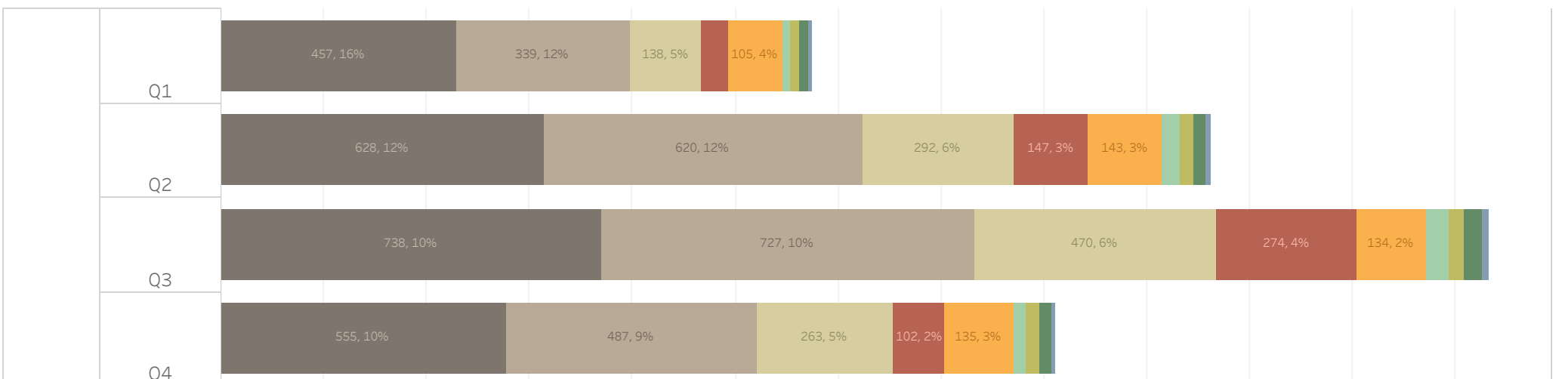
Passenger Volume by Trade (K)

	2019	2021	2022	2023
Central & Western Med.	2,367	631 (-73% ▼)	2,041 (224% ▲)	2,788 (37% ▲)
Northern Europe	1,416	449 (-68% ▼)	1,419 (216% ▲)	1,961 (38% ▲)
Eastern Med.	874	260 (-70% ▼)	838 (222% ▲)	966 (15% ▲)
Caribbean/Bahamas/Bermuda	904	52 (-94% ▼)	410 (684% ▲)	747 (82% ▲)
Canary Isl.	473	132 (-72% ▼)	329 (149% ▲)	477 (45% ▲)
Africa/Middle East	319	27 (-92% ▼)	151 (461% ▲)	333 (121% ▲)
Transatlantic & World Cruise	222	17 (-92% ▼)	110 (531% ▲)	193 (76% ▲)
Baltics	421	139 (-67% ▼)	160 (15% ▲)	181 (14% ▲)
Exploration Dest.	113	17 (-85% ▼)	68 (309% ▲)	176 (159% ▲)
Other	168	19 (-89% ▼)	100 (436% ▲)	101 (1% ▲)
Asia & China	201	(-100% ▼)	14	82 (489% ▲)
NA West Coast/Mexico/California/Pacific Coast	16	(-100% ▼)	9	45 (401% ▲)
Alaska	45	(-100% ▼)	35	44 (25% ▲)
Panama Canal/South Am	64	(-100% ▼)	12	44 (275% ▲)
Australia/New Zealand/Pacific	51	(-100% ▼)	11	34 (223% ▲)
Canada/New England	42	(-100% ▼)	10	17 (68% ▲)
Hawaii	10	(-100% ▼)	7	10 (52% ▲)
No Trade Identified			4	6 (35% ▲)

Passenger Volume (K) by Trade & Top Source Countries



Passenger Volume (K) by Quarter & Top Source Countries in, 2023



Source Market: Germany

Passenger Volume (K)

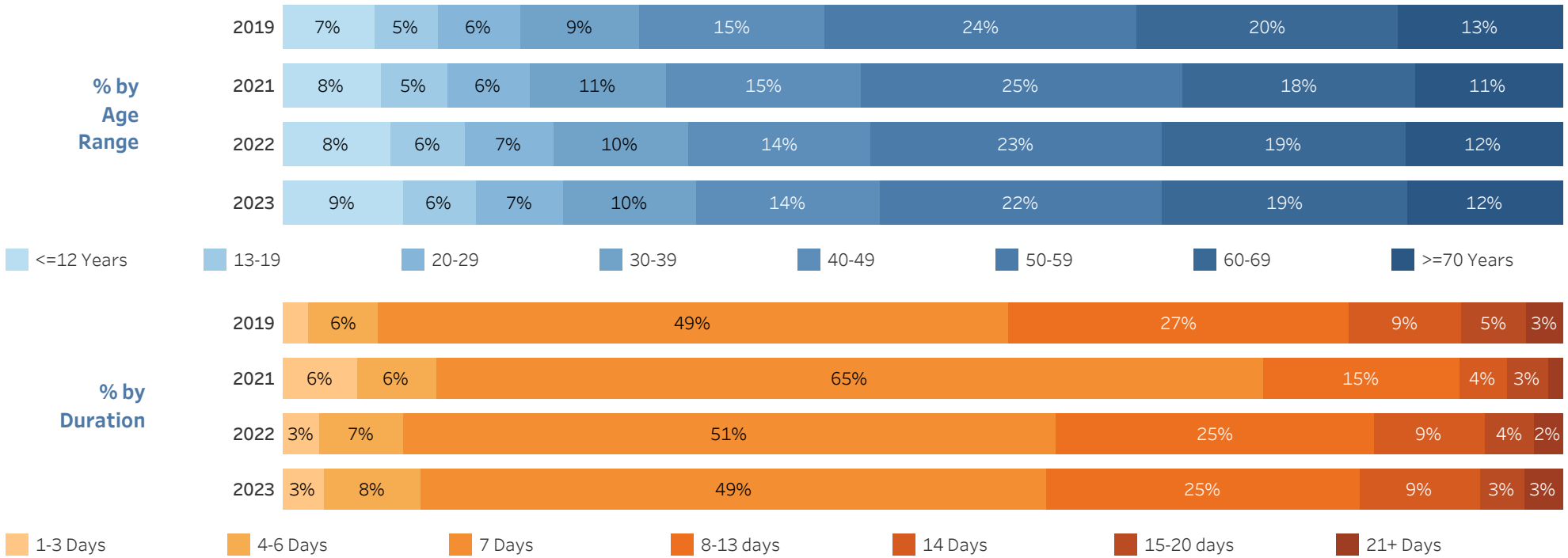
2019	2021	2022	2023
2,587	576 (-77.7% ▼)	1,876 (225.8% ▲)	2,513 (34.0% ▲)

Average Duration, in Days

2019	2021	2022	2023
9.1	7.5	8.6	8.9

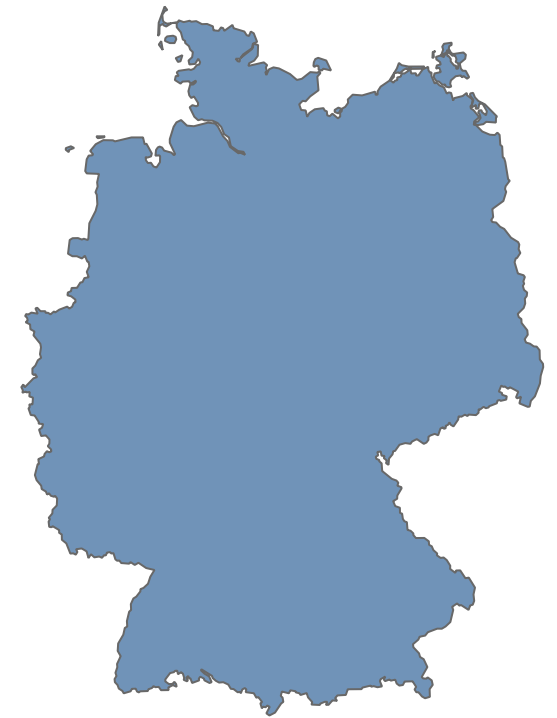
Average Age

2019	2021	2022	2023
49.1	47.9	47.5	47.0



Passenger Percentages by Trade Route / Destination

	2019	2021	2022	2023
Northern Europe	24.0%	22.7%	39.4%	40.1%
Central & Western Med.	23.7%	22.9%	20.4%	19.2%
Canary Isl.	9.7%	15.9%	8.5%	8.9%
Caribbean/Bahamas/Bermuda	7.7%	2.6%	5.0%	6.4%
Africa/Mid-East	5.8%	2.4%	3.6%	5.6%
Eastern Med.	5.8%	13.6%	11.3%	5.1%
Baltics	9.0%	15.7%	4.7%	4.7%
Other	5.1%	1.7%	4.3%	3.3%
Transatlantic/World Cr.	3.0%	1.3%	1.4%	2.5%
Exploration Dest	1.1%	1.1%	0.7%	1.7%
Asia/China	2.4%		0.2%	1.2%
Panama Canal/South Am	0.6%			0.4%
NA West Coast/Mexico/California/Pacific Coast	0.1%			0.3%
Australasia	0.5%			0.3%
Alaska	0.2%		0.2%	0.2%
Canada/New England	1.1%			0.1%



Passenger Volume & YOY Change by Age Group

	Passenger in K				Variance			
	2019	2021	2022	2023	2019	2021	2022	2023
<=12 Years	167	40	145	224	-76%	264%	55%	
13-19	116	27	100	135	-77%	266%	36%	
20-29	151	33	119	162	-78%	256%	37%	
30-39	217	56	179	247	-74%	223%	38%	
40-49	339	80	246	340	-77%	209%	38%	
50-59	569	130	389	524	-77%	199%	35%	
60-69	478	95	328	456	-80%	245%	39%	
>=70 Years	300	59	209	286	-80%	252%	36%	

Passenger Volume & YOY Change by Duration

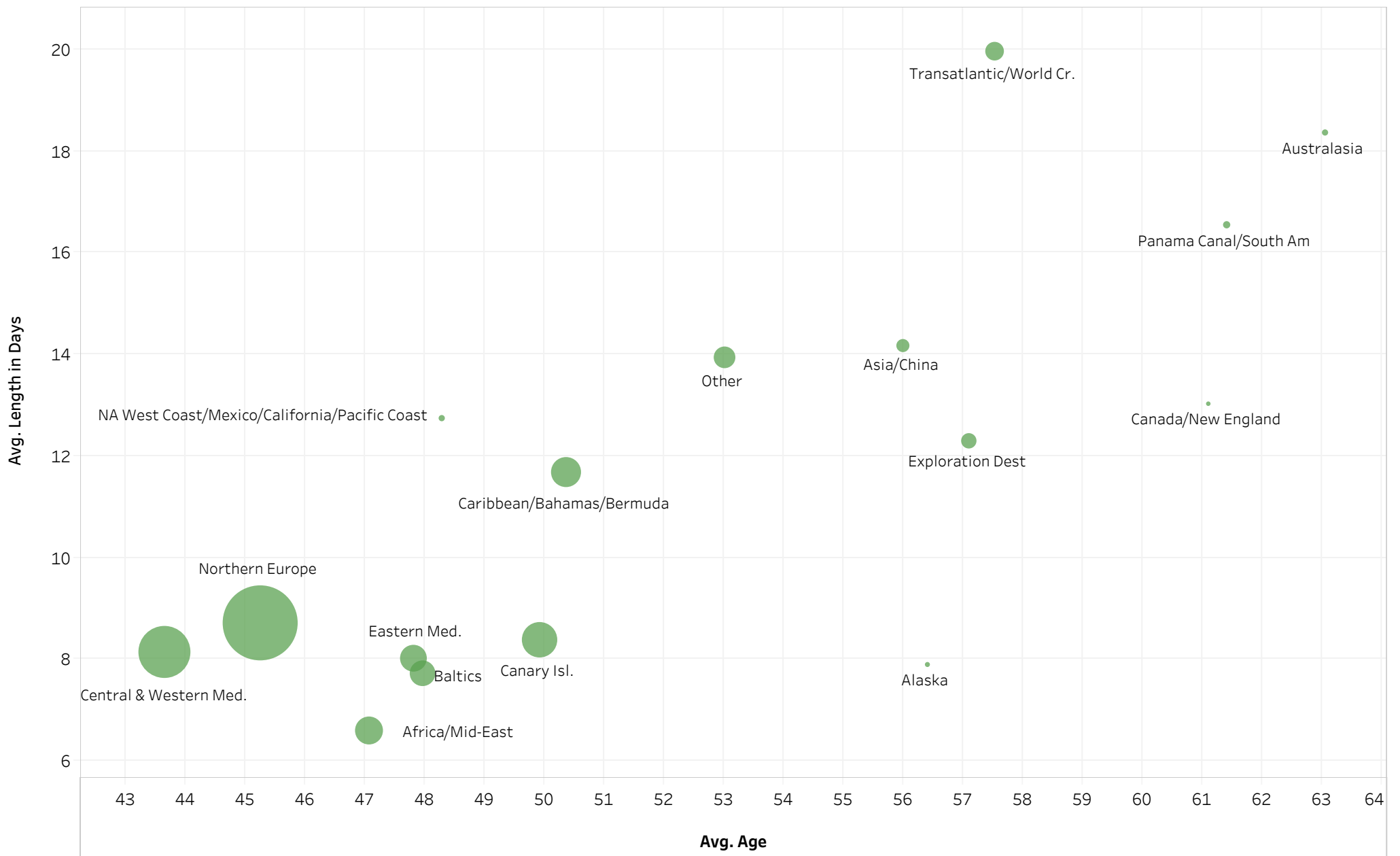
	Passenger in K				Variance			
	2019	2021	2022	2023	2019	2021	2022	2023
1-3 Days	50	34	53	81	-33%	57%	53%	
4-6 Days	143	36	124	191	-75%	247%	54%	
7 Days	1,274	372	956	1,229	-71%	157%	29%	
8-13 Days	690	89	467	616	-87%	427%	32%	
14 Days	227	21	163	235	-91%	682%	44%	
15-20 Days	130	19	71	88	-86%	285%	23%	
21+ Days	73	6	41	73	-91%	547%	80%	

Source Market: **Germany** (Continued)

Passenger Volume & YOY Change by Trade Route / Destination

	Passenger in K				Variance			
	2019	2021	2022	2023	2019	2021	2022	2023
Northern Europe	620	130	739	1,006	-79%	466%	36%	
Central & Western Med.	612	132	383	484	-79%	191%	26%	
Canary Isl.	252	92	160	224	-64%	74%	40%	
Caribbean/Bahamas/Bermuda	198	15	94	161	-92%	515%	72%	
Africa/Mid-East	150	14	67	140	-91%	378%	109%	
Eastern Med.	150	78	211	128	-48%	170%	-39%	
Baltics	234	90	87	117	-61%	-3%	34%	
Other	132	10	81	84	-93%	748%	4%	
Transatlantic/World Cr.	77	8	27	62	-90%	253%	129%	
Exploration Dest	28	6	13	42	-77%	95%	234%	
Asia/China	63		5	31	-100%		579%	
Panama Canal/South Am	16			9	-100%			
NA West Coast/Mexico/California/Pacific Coast	4			7	-100%			
Australasia	14			7	-100%			
Alaska	5		3	5	-100%			37%
Canada/New England	28			4	-100%			

Germany, Average Age and Cruise Length by Trade Route, 2023



Data Points with Values Below 2,000 Passengers are not Displayed in the above Visuals and Tables.

Some Data Points in the following dimensions were not captured, and were ignored from the corresponding tables and visuals: Age Group, Duration Group, and Trade Name; these exclusions account for, on average, 1% of each display.

Source Market: Ireland & United Kingdom

Passenger Volume (K)

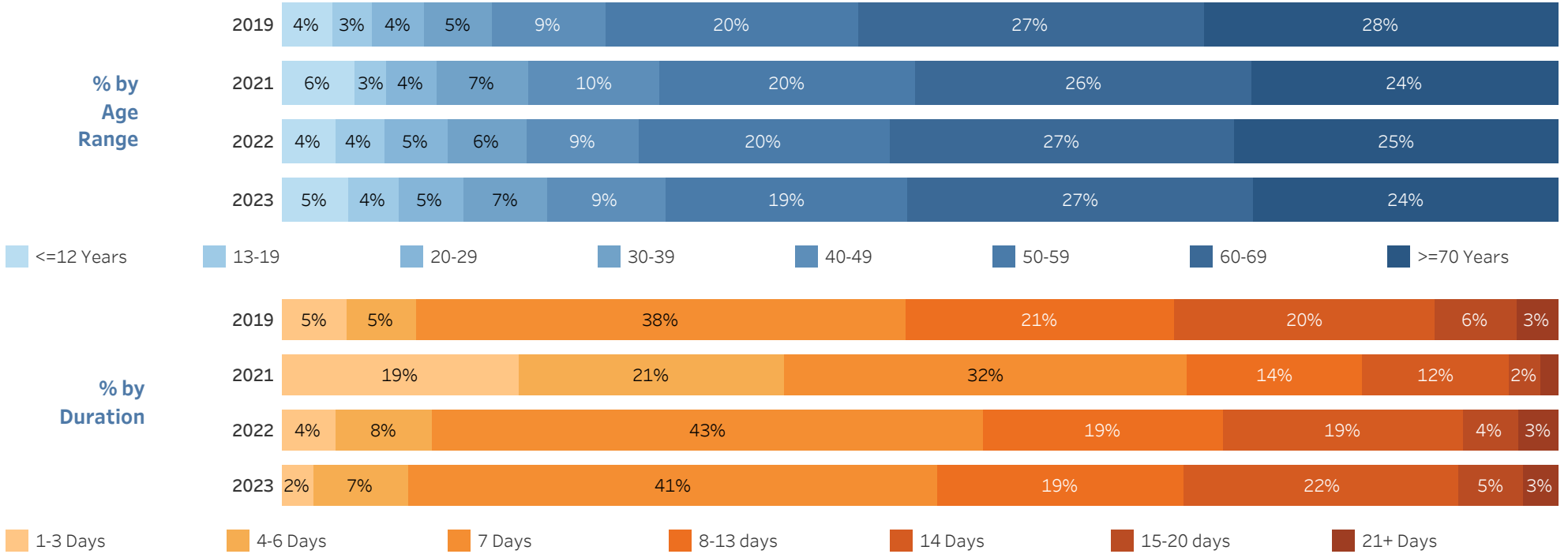
2019	2021	2022	2023
1,992	479 (-76.0% ▼)	1,663 (247.5% ▲)	2,281 (37.2% ▲)

Average Duration, in Days

2019	2021	2022	2023
10.2	7.2	9.7	10.0

Average Age

2019	2021	2022	2023
57.2	55.2	55.8	54.9



Passenger Percentages by Trade Route / Destination

	2019	2021	2022	2023
Northern Europe	23.5%	57.4%	29.0%	29.3%
Central & Western Med.	25.0%	13.4%	27.5%	26.5%
Caribbean/Bahamas/Bermuda	15.4%	4.9%	10.6%	11.7%
Canary Isl.	7.6%	7.7%	9.3%	9.5%
Eastern Med.	7.2%	3.9%	10.9%	8.2%
Transatlantic/World Cr.	3.9%	0.9%	3.0%	3.3%
Exploration Dest	2.3%	1.2%	2.2%	2.4%
NA West Coast/Mexico/California/Pacific Coast	0.4%		0.4%	1.5%
Baltics	3.8%	8.4%	2.0%	1.4%
Alaska	1.5%		1.5%	1.4%
Asia/China	3.8%		0.3%	1.3%
Australasia	1.2%		0.4%	0.9%
Africa/Mid-East	2.0%		1.0%	0.8%
Panama Canal/South Am	1.2%		0.3%	0.7%
Canada/New England	0.5%		0.4%	0.4%
Other	0.3%	1.7%	0.8%	0.3%
Hawaii	0.3%		0.3%	0.3%



Passenger Volume & YOY Change by Age Group

	Passenger in K				Variance			
	2019	2021	2022	2023	2019	2021	2022	2023
<=12 Years	59	23	57	96	-60%	144%	69%	
13-19	47	10	50	75	-78%	380%	49%	
20-29	61	16	66	93	-73%	306%	41%	
30-39	81	30	83	124	-63%	179%	49%	
40-49	133	42	119	171	-68%	180%	44%	
50-59	298	83	262	353	-72%	215%	35%	
60-69	406	109	362	505	-73%	232%	40%	
>=70 Years	416	99	339	445	-76%	243%	31%	

Passenger Volume & YOY Change by Duration

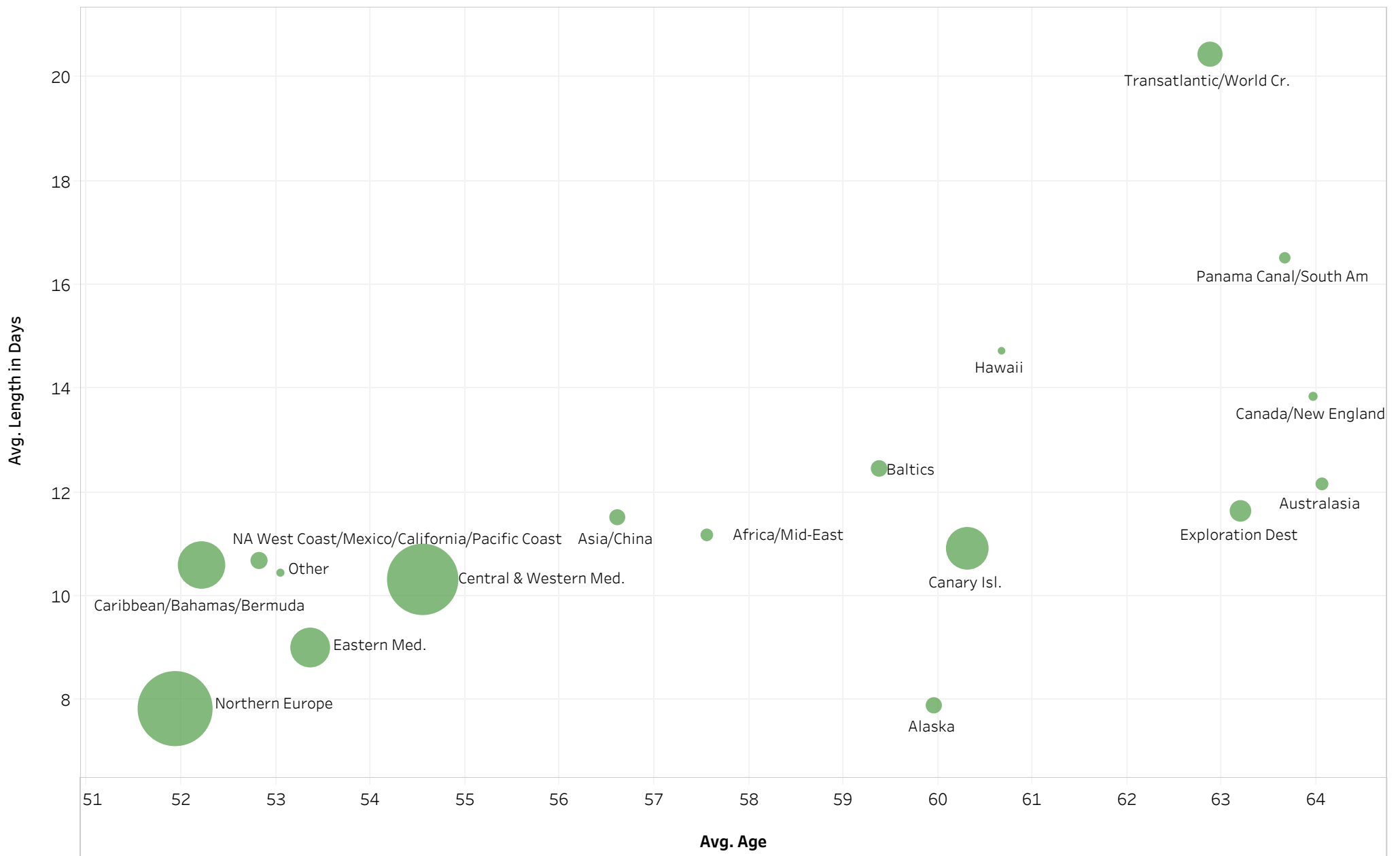
	Passenger in K				Variance			
	2019	2021	2022	2023	2019	2021	2022	2023
1-3 Days	101	89	70	56	-12%	-21%	-20%	
4-6 Days	107	99	125	169	-7%	26%	35%	
7 Days	764	151	717	944	-80%	373%	32%	
8-13 Days	418	66	313	440	-84%	378%	40%	
14 Days	407	55	313	493	-86%	466%	58%	
15-20 Days	127	12	71	115	-91%	510%	64%	
21+ Days	63	6	51	60	-90%	713%	17%	

Source Market: Ireland & United Kingdom (Continued)

Passenger Volume & YOY Change by Trade Route / Destination

	Passenger in K				Variance			
	2019	2021	2022	2023	2019	2021	2022	2023
Northern Europe	468	275	483	667		-41%	76%	38%
Central & Western Med.	498	64	457	604		-87%	612%	32%
Caribbean/Bahamas/Bermuda	306	24	177	267		-92%	652%	51%
Canary Isl.	152	37	155	216		-76%	323%	39%
Eastern Med.	143	19	182	188		-87%	864%	3%
Transatlantic/World Cr.	79	4	50	75		-95%	1089%	51%
Exploration Dest	47	6	36	55		-87%	506%	53%
NA West Coast/Mexico/California/Pacific Coast	8		6	35		-100%		464%
Baltics	76	40	33	33		-47%	-17%	-2%
Alaska	29		25	31		-100%		23%
Asia/China	76		6	30		-100%		449%
Australasia	24		6	20		-100%		219%
Africa/Mid-East	40		17	19		-100%		10%
Panama Canal/South Am	23		5	16		-100%		229%
Canada/New England	10		7	10		-100%		38%
Other	6	8	14	8		35%	65%	-42%
Hawaii	6		5	7		-100%		50%

Ireland & United Kingdom, Average Age and Cruise Length by Trade Route, 2023



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Source Market: Italy

Passenger Volume (K)

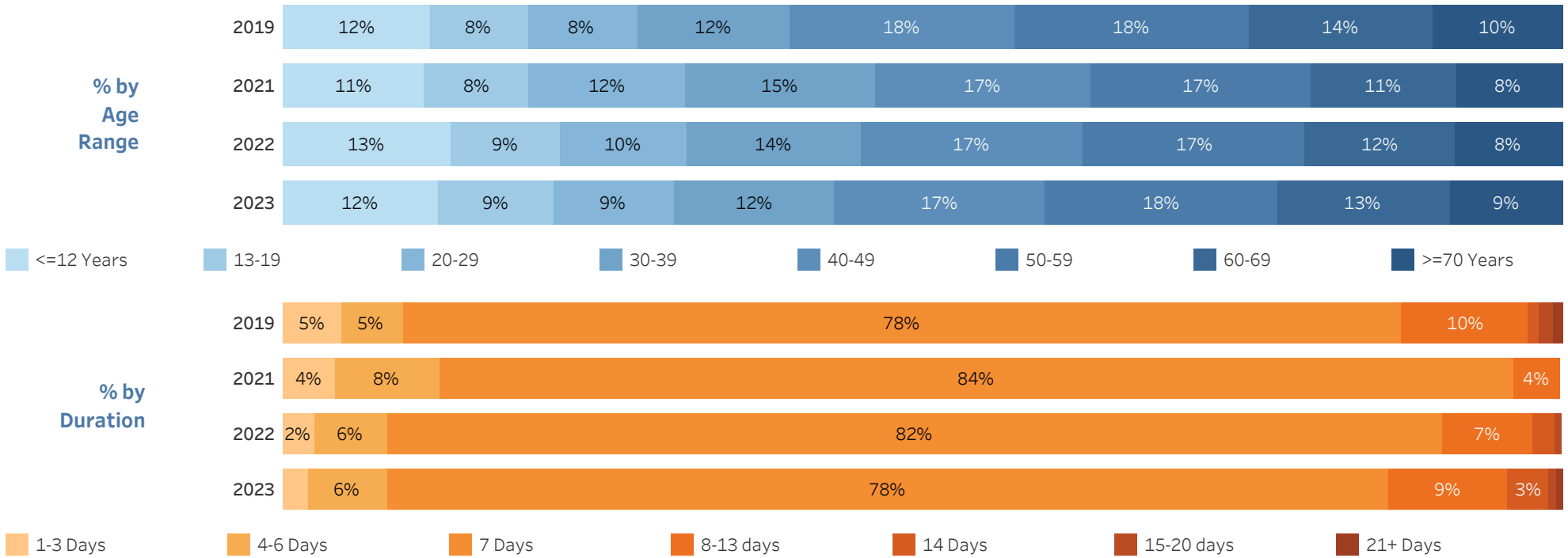
2019	2021	2022	2023
950	340 (-64.2% ▼)	791 (132.9% ▲)	1,176 (48.7% ▲)

Average Duration, in Days

2019	2021	2022	2023
7.3	6.9	7.2	7.5

Average Age

2019	2021	2022	2023
43.2	41.0	40.7	41.7



Passenger Percentages by Trade Route / Destination

	2019	2021	2022	2023
Central & Western Med.	49.5%	65.7%	61.6%	56.0%
Eastern Med.	25.5%	31.9%	27.6%	26.2%
Caribbean/Bahamas/Bermuda	7.8%		2.8%	5.4%
Northern Europe	5.2%		4.4%	4.9%
Africa/Mid-East	3.3%	0.8%	2.0%	3.9%
Exploration Dest	0.5%			1.0%
Transatlantic/World Cr.	1.3%		0.7%	0.8%
Baltics	2.7%	0.9%	0.4%	0.6%
Asia/China	1.2%			0.5%
Canary Isl.	1.4%			0.3%
Other	1.1%			



Passenger Volume & YOY Change by Age Group

	Passenger in K				Variance			
	2019	2021	2022	2023	2019	2021	2022	2023
<=12 Years	108	36	102	141	-67%	185%	37%	
13-19	71	27	67	104	-62%	148%	56%	
20-29	78	40	77	108	-49%	92%	40%	
30-39	111	49	106	144	-56%	118%	36%	
40-49	164	55	135	191	-66%	145%	41%	
50-59	171	57	136	210	-67%	140%	54%	
60-69	133	37	92	155	-72%	146%	69%	
>=70 Years	94	27	65	102	-71%	141%	57%	

Passenger Volume & YOY Change by Duration

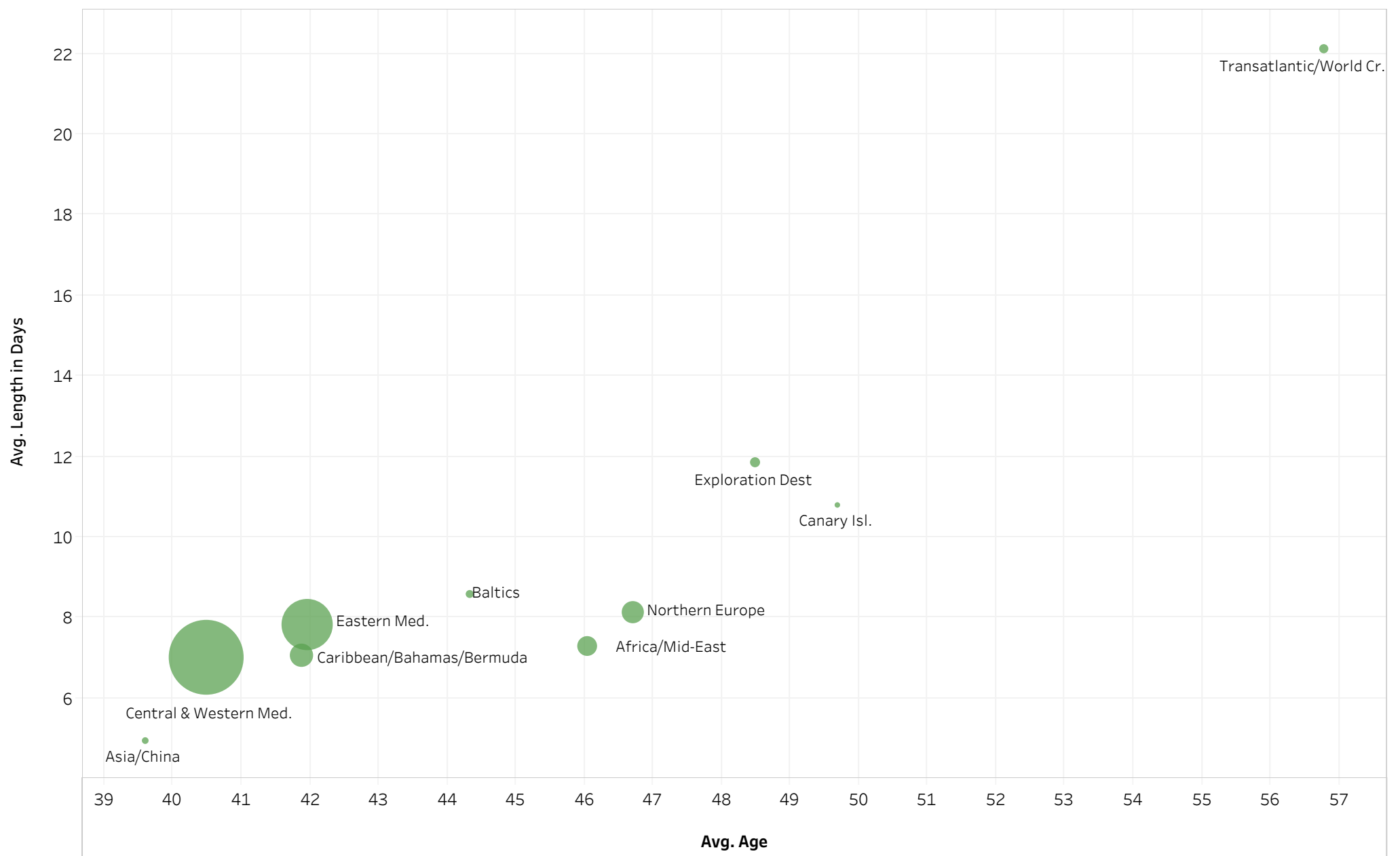
	Passenger in K				Variance			
	2019	2021	2022	2023	2019	2021	2022	2023
1-3 Days	44	14	20	23	-69%	42%	16%	
4-6 Days	45	28	45	73	-38%	61%	63%	
7 Days	741	285	652	921	-62%	129%	41%	
8-13 Days	95	12	56	109	-87%	368%	93%	
14 Days	8		14	39	-100%		184%	
15-20 days	11		4	6	-100%		61%	
21+ Days	6			6	-100%			

Source Market: **Italy** (Continued)

Passenger Volume & YOY Change by Trade Route / Destination

	Passenger in K				Variance			
	2019	2021	2022	2023	2019	2021	2022	2023
Central & Western Med.	470	223	487	659	-53%	118%	35%	
Eastern Med.	243	108	219	308	-55%	102%	41%	
Caribbean/Bahamas/Bermuda	74		22	64	-100%		183%	
Northern Europe	50		35	58	-100%		66%	
Africa/Mid-East	32	3	15	46	-92%	505%	198%	
Exploration Dest	5			12	-100%			
Transatlantic/World Cr.	12		5	10	-100%			87%
Baltics	26	3	3	7	-89%	11%	128%	
Asia/China	11			5	-100%			
Canary Isl.	14			4	-100%			
Other	11				-100%			

Italy, Average Age and Cruise Length by Trade Route, 2023



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Source Market: Spain

Passenger Volume (K)

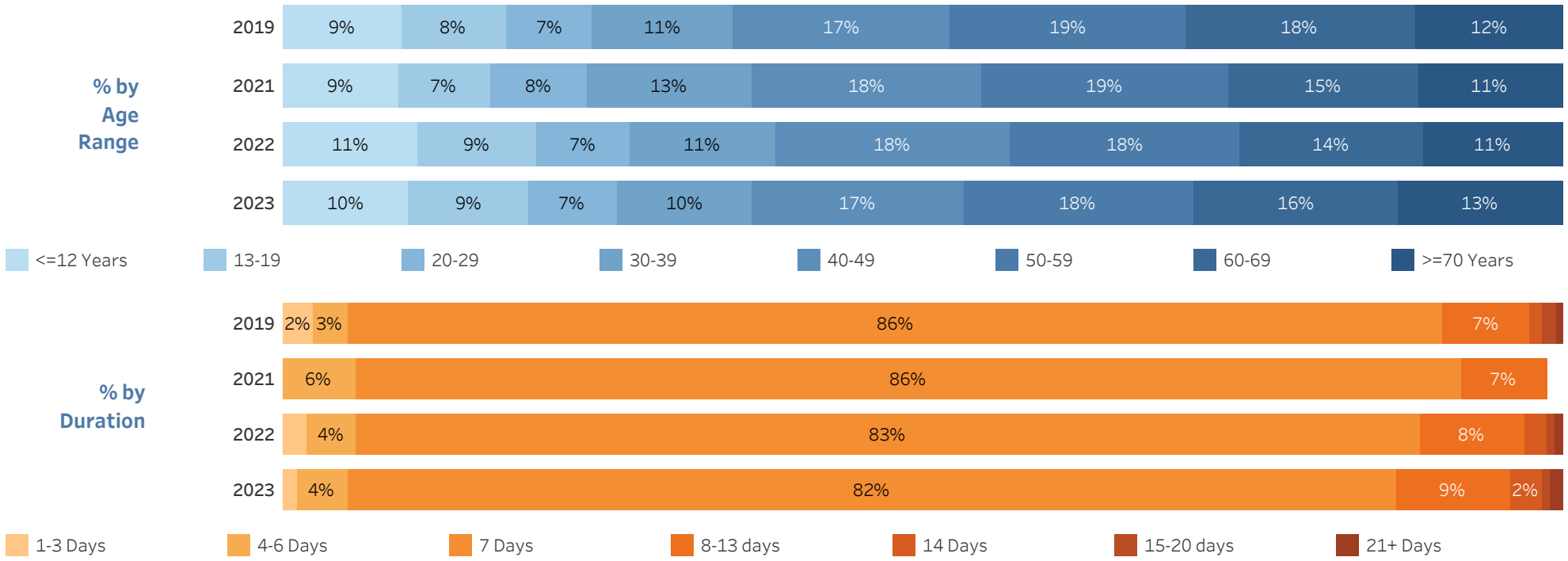
2019	2021	2022	2023
553	74 (-86.6% ▼)	414 (458.9% ▲)	587 (41.9% ▲)

Average Duration, in Days

2019	2021	2022	2023
7.4	7.2	7.3	7.5

Average Age

2019	2021	2022	2023
45.6	45.0	43.6	45.0



Passenger Percentages by Trade Route / Destination

	2019	2021	2022	2023
Central & Western Med.	50.6%	78.7%	69.1%	62.3%
Eastern Med.	18.7%	14.5%	15.3%	17.1%
Northern Europe	10.2%		7.0%	8.8%
Caribbean/Bahamas/Bermuda	5.1%		3.6%	3.9%
Africa/Mid-East	3.3%		1.3%	2.4%
Transatlantic/World Cr.	1.4%		1.2%	1.4%
Exploration Dest	0.6%			1.1%
Canary Isl.	2.8%		0.5%	1.0%
Baltics	5.3%		0.8%	0.9%
Panama Canal/South Am				0.4%
Asia/China	0.7%			



Passenger Volume & YOY Change by Age Group

	Passenger in K				Variance			
	2019	2021	2022	2023	2019	2021	2022	2023
<=12 Years	51	7	43	56	-87%	545%	30%	
13-19	44	5	38	54	-88%	621%	45%	
20-29	37	6	29	40	-85%	426%	35%	
30-39	60	9	46	60	-84%	389%	31%	
40-49	92	13	74	95	-86%	462%	29%	
50-59	101	14	73	103	-86%	416%	41%	
60-69	97	11	58	92	-89%	432%	59%	
>=70 Years	63	8	44	73	-87%	435%	67%	

Passenger Volume & YOY Change by Duration

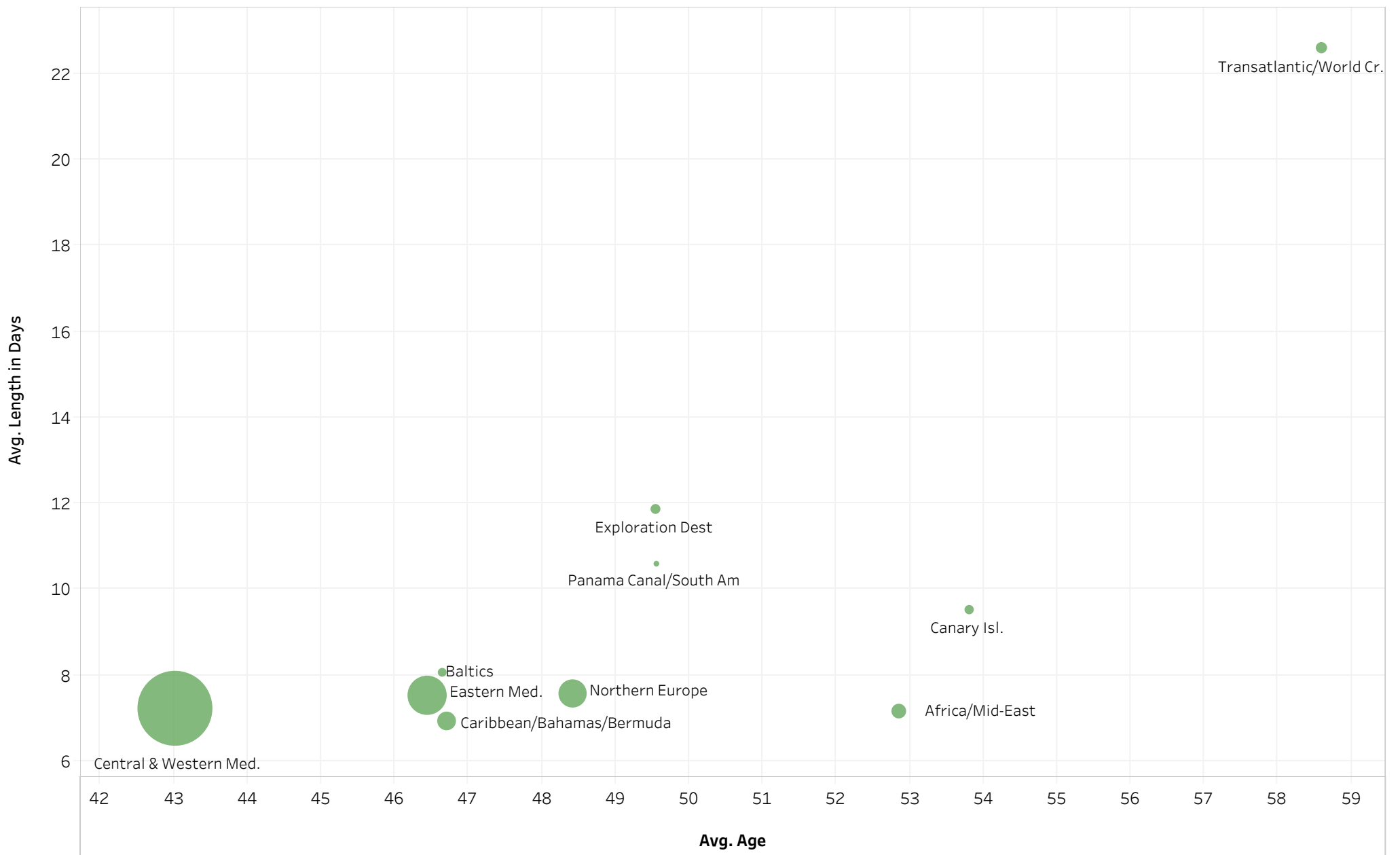
	Passenger in K				Variance			
	2019	2021	2022	2023	2019	2021	2022	2023
1-3 Days	13		8	7	-100%		-15%	
4-6 Days	15	4	16	23	-72%	274%	47%	
7 Days	474	64	344	481	-87%	439%	40%	
8-13 Days	38	5	34	52	-87%	576%	56%	
14 Days	5		7	14	-100%		92%	
15-20 days	6		3	4	-100%		49%	
21+ Days	3		2	5	-100%		149%	

Source Market: Spain (Continued)

Passenger Volume & YOY Change by Trade Route / Destination

	Passenger in K				Variance			
	2019	2021	2022	2023	2019	2021	2022	2023
Central & Western Med.	280	58	286	366	-79%	390%		28%
Eastern Med.	104	11	63	100	-90%	490%		58%
Northern Europe	57		29	52	-100%			79%
Caribbean/Bahamas/Bermuda	28		15	23	-100%			52%
Africa/Mid-East	18		5	14	-100%			160%
Transatlantic/World Cr.	8		5	8	-100%			60%
Exploration Dest	4			6	-100%			
Canary Isl.	15		2	6	-100%			180%
Baltics	29		3	5	-100%			50%
Panama Canal/South Am				2				
Asia/China	4				-100%			

Spain, Average Age and Cruise Length by Trade Route, 2023



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Source Market: France

Passenger Volume (K)

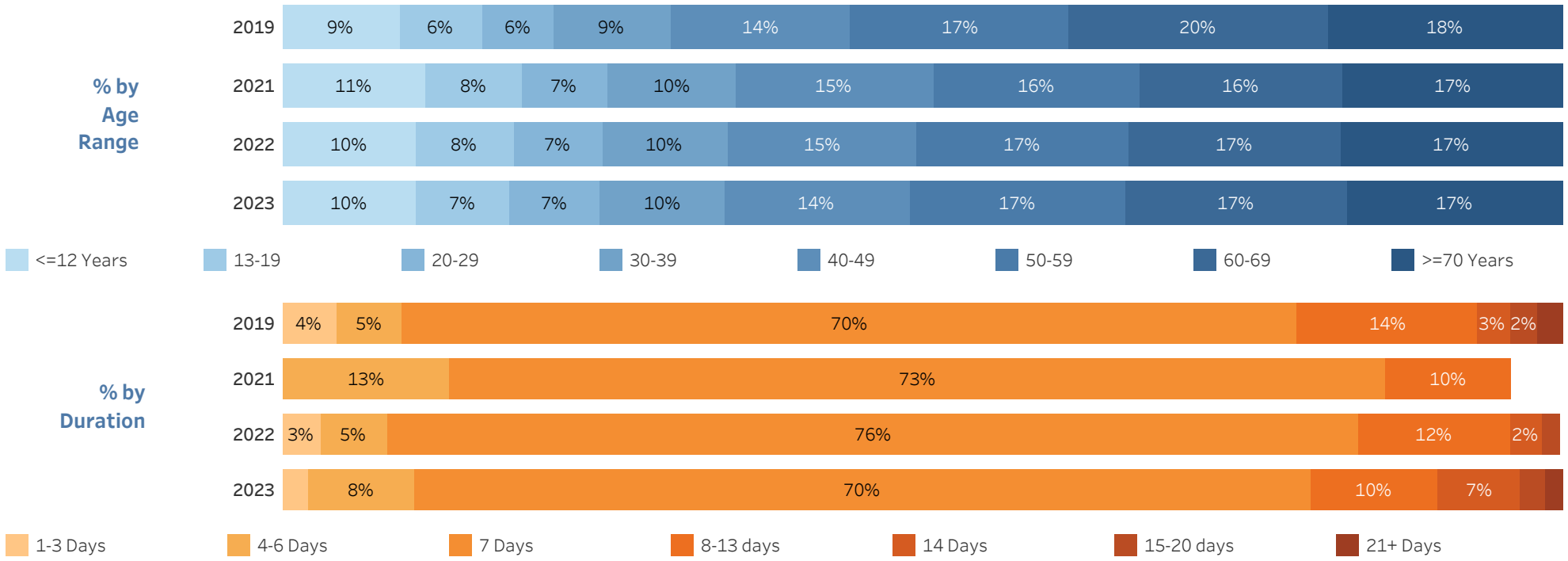
2019	2021	2022	2023
545	116 (-78.7% ▼)	325 (180.2% ▲)	576 (77.3% ▲)

Average Duration, in Days

2019	2021	2022	2023
8.0	7.4	7.5	7.8

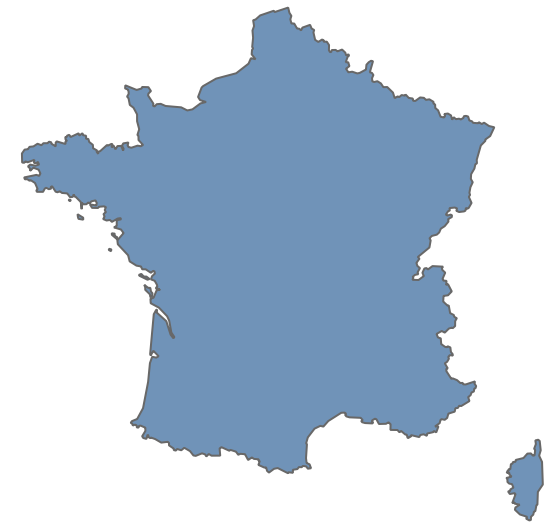
Average Age

2019	2021	2022	2023
49.0	46.2	46.7	46.8



Passenger Percentages by Trade Route / Destination

	2019	2021	2022	2023
Central & Western Med.	40.0%	75.2%	62.3%	55.1%
Caribbean/Bahamas/Bermuda	22.3%	4.1%	11.4%	18.2%
Eastern Med.	14.4%	10.4%	11.3%	10.0%
Northern Europe	6.5%	2.6%	5.6%	6.8%
Transatlantic/World Cr.	3.6%		1.9%	2.5%
Africa/Mid-East	3.5%		3.0%	2.1%
Exploration Dest	1.8%		1.2%	1.8%
Canary Isl.	1.1%			1.0%
Panama Canal/South Am	1.2%			0.7%
Baltics	2.2%		0.8%	0.6%
Australasia	0.6%			0.5%
Asia/China	2.0%			
Other	0.7%			



Passenger Volume & YOY Change by Age Group

	Passenger in K				Variance			
	2019	2021	2022	2023	2019	2021	2022	2023
<=12 Years	46	12	31	53	-75%	166%	72%	
13-19	32	8	23	37	-75%	181%	66%	
20-29	28	7	21	36	-76%	199%	73%	
30-39	46	11	29	50	-77%	171%	75%	
40-49	70	16	44	74	-77%	171%	68%	
50-59	86	17	49	86	-80%	189%	76%	
60-69	102	17	49	88	-84%	197%	79%	
>=70 Years	92	18	51	86	-80%	184%	68%	

Passenger Volume & YOY Change by Duration

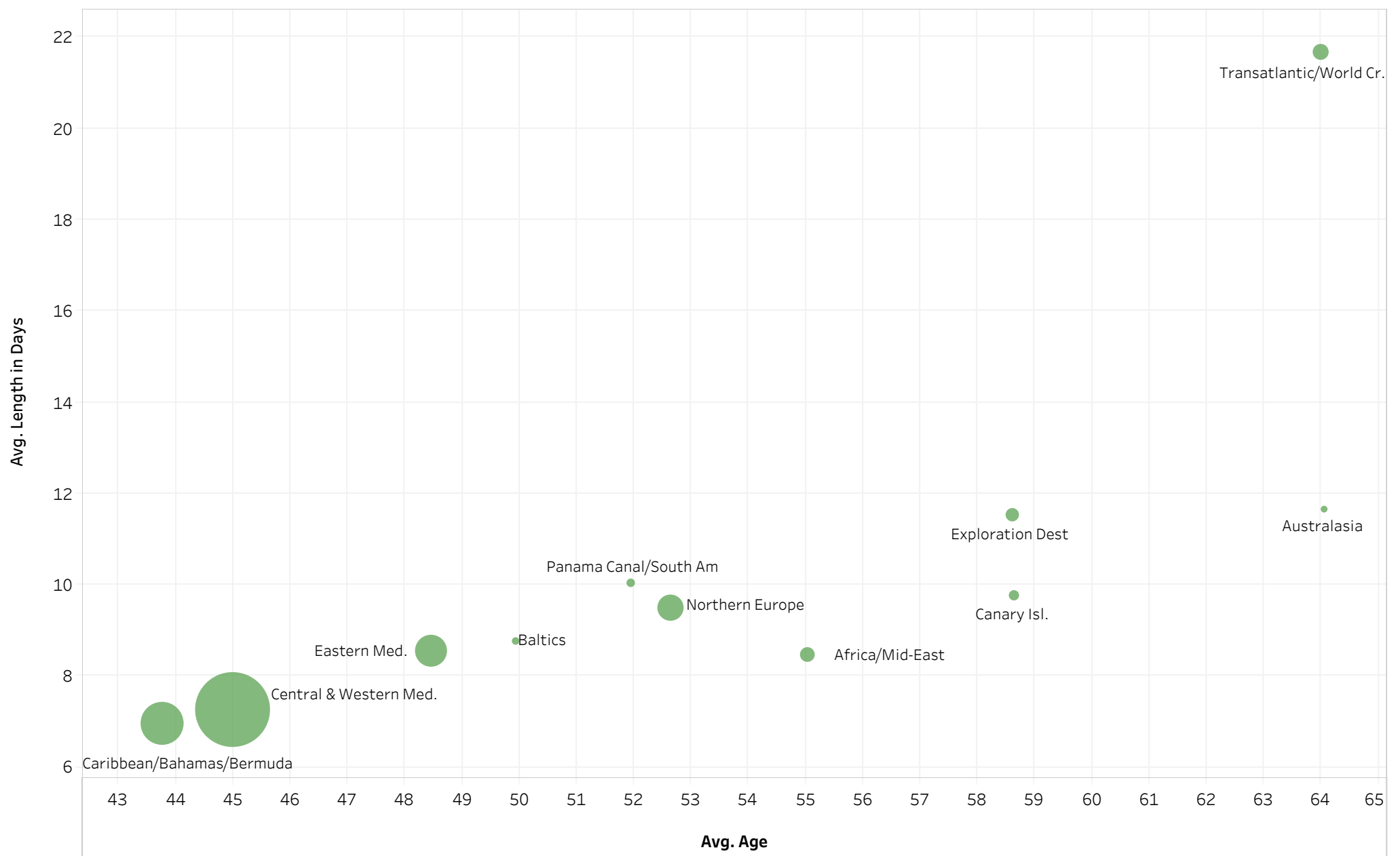
	Passenger in K				Variance			
	2019	2021	2022	2023	2019	2021	2022	2023
1-3 Days	23		10	11	-100%			16%
4-6 Days	27	15	17	48	-45%	12%	183%	
7 Days	381	85	247	404	-78%	191%	64%	
8-13 Days	77	11	39	57	-85%	243%	47%	
14 Days	14		8	38	-100%		372%	
15-20 Days	12		4	11	-100%		144%	
21+ Days	10			8	-100%			

Source Market: **France** (Continued)

Passenger Volume & YOY Change by Trade Route / Destination

	Passenger in K				Variance			
	2019	2021	2022	2023	2019	2021	2022	2023
Central & Western Med.	218	87	202	317	-60%	132%		57%
Caribbean/Bahamas/Bermuda	121	5	37	105	-96%	686%		182%
Eastern Med.	78	12	37	58	-85%	206%		57%
Northern Europe	35	3	18	39	-92%	508%		115%
Transatlantic/World Cr.	20		6	14	-100%			129%
Africa/Mid-East	19		10	12	-100%			25%
Exploration Dest	10		4	10	-100%			168%
Canary Isl.	6			6	-100%			
Panama Canal/South Am	6			4	-100%			
Baltics	12		3	3	-100%			21%
Australasia	3			3	-100%			
Other	4				-100%			
Asia/China	11				-100%			

France, Average Age and Cruise Length by Trade Route, 2023



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Source Market: Netherlands

Passenger Volume (K)

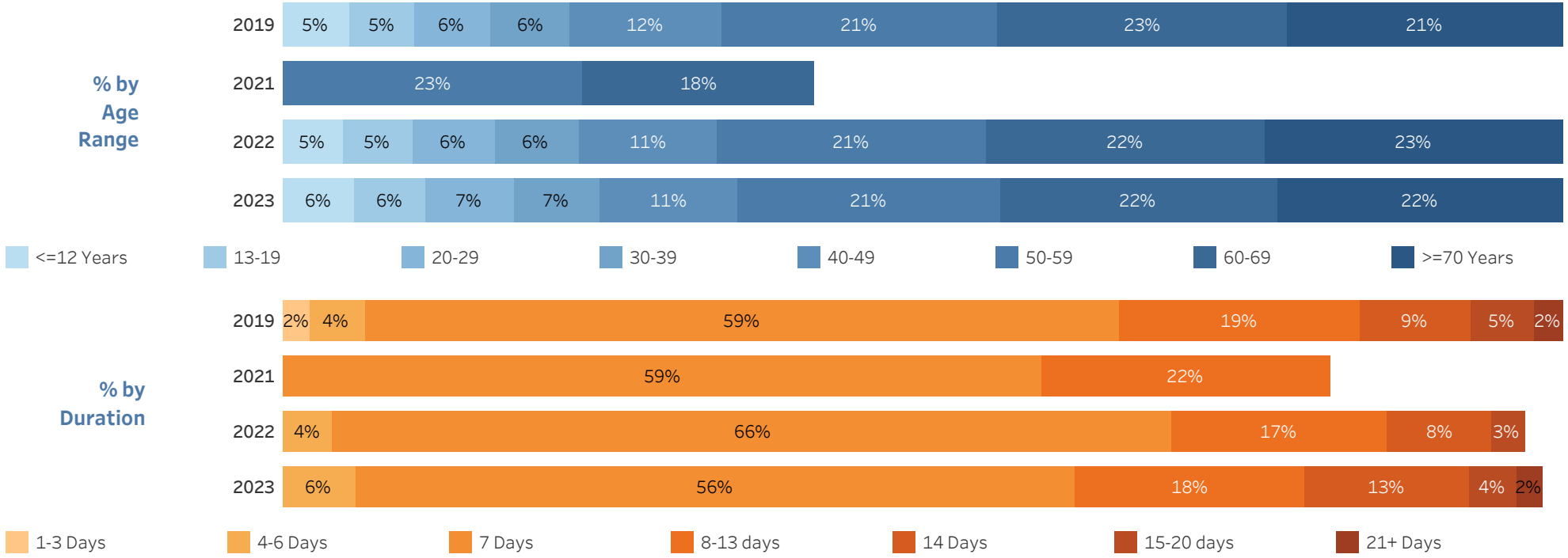
2019	2021	2022	2023
123	13 (-89.3% ▼)	82 (529.5% ▲)	120 (46.0% ▲)

Average Duration, in Days

2019	2021	2022	2023
9.1	7.9	8.6	9.2

Average Age

2019	2021	2022	2023
53.0	50.2	53.3	52.3



Passenger Percentages by Trade Route / Destination

	2019	2021	2022	2023
Northern Europe	21.1%	17.0%	37.7%	29.6%
Central & Western Med.	20.1%	44.5%	20.5%	22.8%
Caribbean/Bahamas/Bermuda	21.0%		11.1%	14.3%
Eastern Med.	6.6%		9.5%	8.8%
Exploration Dest	4.9%		4.3%	5.8%
Africa/Mid-East	5.7%		3.2%	5.0%
Canary Isl.	4.9%			3.2%
Baltics	4.3%		4.8%	2.6%
Transatlantic/World Cr.	2.0%		2.7%	1.9%
Asia/China	3.2%			1.7%
Panama Canal/South Am	2.1%			
Alaska	1.7%			



Passenger Volume & YOY Change by Age Group

	Passenger in K				Variance			
	2019	2021	2022	2023	2019	2021	2022	2023
<=12 Years	6		4	6	-100%			79%
13-19	6		4	6	-100%			56%
20-29	7		5	8	-100%			60%
30-39	7		5	8	-100%			56%
40-49	13		8	12	-100%			51%
50-59	24	3	16	24	-89%	508%		47%
60-69	26	2	17	25	-92%	708%		49%
>=70 Years	24		18	26	-100%			45%

Passenger Volume & YOY Change by Duration

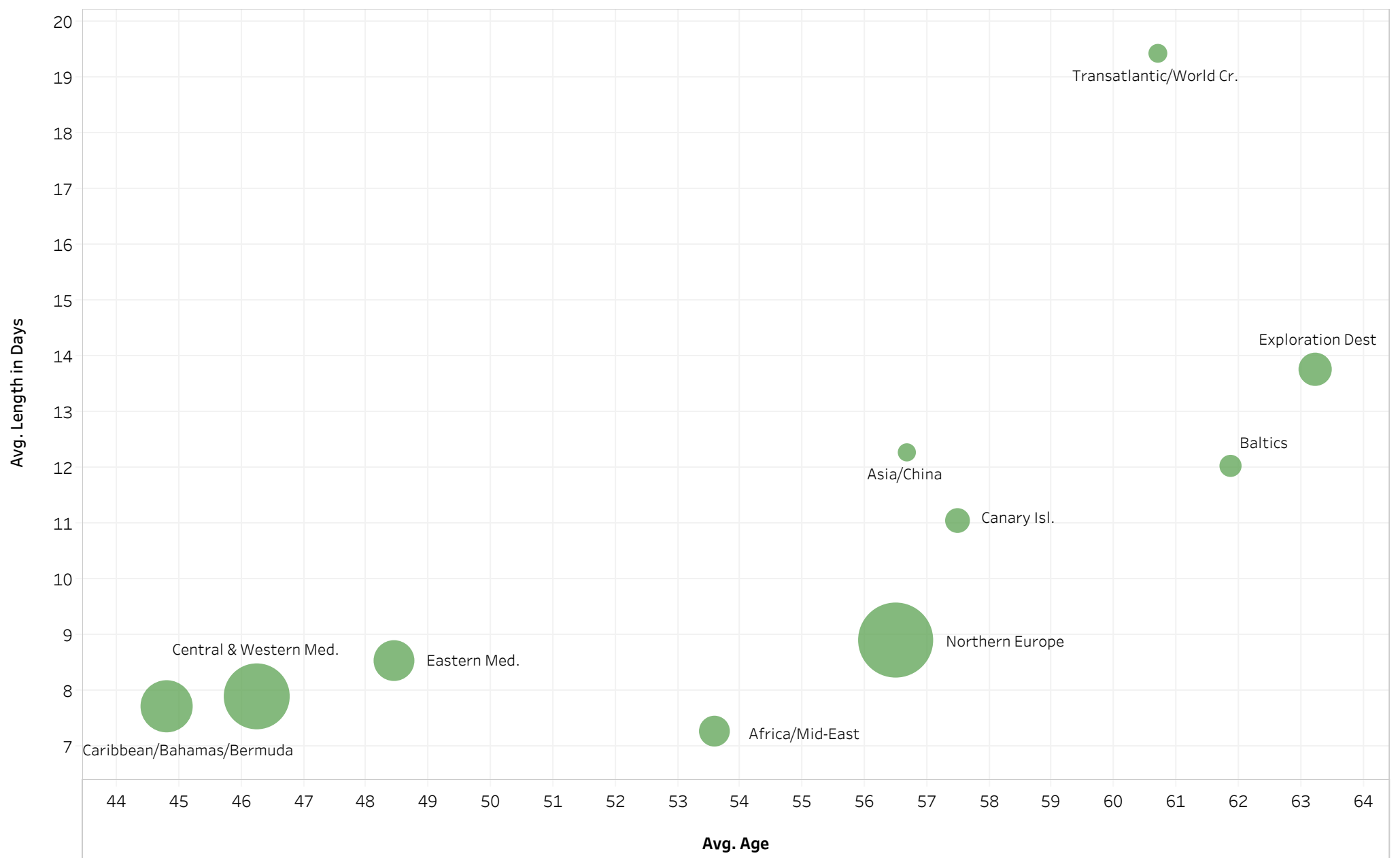
	Passenger in K				Variance			
	2019	2021	2022	2023	2019	2021	2022	2023
1-3 Days	3				-100%			
4-6 Days	5		3	7	-100%			117%
7 Days	72	8	54	67	-89%	600%		24%
8-13 Days	23	3	14	21	-87%	370%		56%
14 Days	11		7	15	-100%			125%
15-20 Days	6		2	4	-100%			114%
21+ Days	3			2	-100%			

Source Market: Netherlands (Continued)

Passenger Volume & YOY Change by Trade Route / Destination

	Passenger in K				Variance			
	2019	2021	2022	2023	2019	2021	2022	2023
Northern Europe	26	2	31	36	-91%	1295%		14%
Central & Western Med.	25	6	17	27	-76%	190%		63%
Caribbean/Bahamas/Bermuda	26		9	17	-100%			88%
Eastern Med.	8		8	11	-100%			34%
Exploration Dest	6		4	7	-100%			95%
Africa/Mid-East	7		3	6	-100%			127%
Canary Isl.	6			4	-100%			
Baltics	5		4	3	-100%			-21%
Transatlantic/World Cr.	2		2	2	-100%			0%
Asia/China	4			2	-100%			
Panama Canal/South Am	3				-100%			
Alaska	2				-100%			

Netherlands, Average Age and Cruise Length by Trade Route, 2023



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Source Market: Austria

Passenger Volume (K)

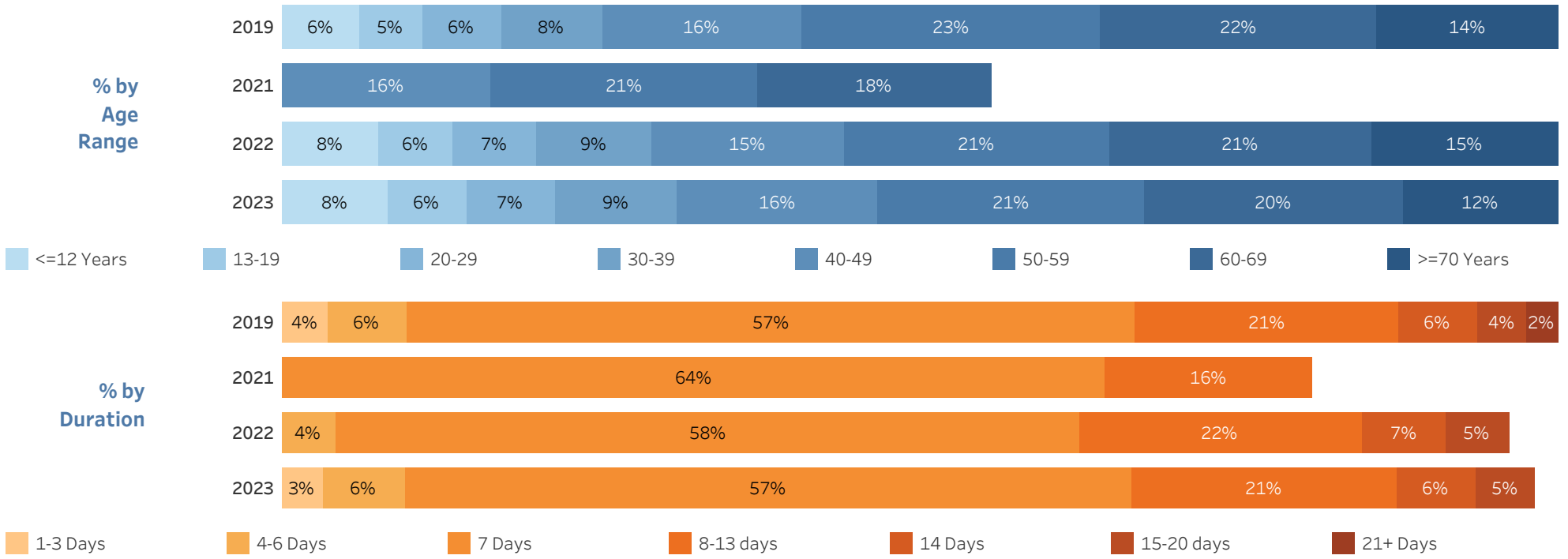
2019	2021	2022	2023
136	15 (-89.2% ▼)	55 (276.4% ▲)	109 (97.7% ▲)

Average Duration, in Days

2019	2021	2022	2023
8.5	7.4	8.5	8.5

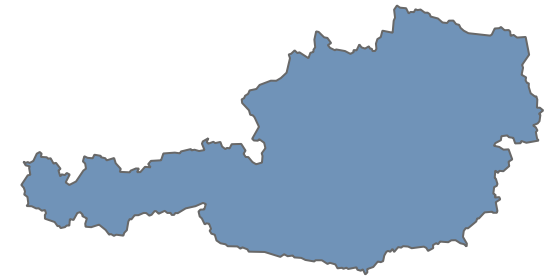
Average Age

2019	2021	2022	2023
50.2	47.6	48.9	47.5



Passenger Percentages by Trade Route / Destination

	2019	2021	2022	2023
Central & Western Med.	28.1%	40.6%	36.8%	36.7%
Eastern Med.	19.7%	30.6%	23.2%	21.1%
Northern Europe	12.6%		14.5%	11.3%
Caribbean/Bahamas/Bermuda	10.1%		6.9%	8.4%
Africa/Mid-East	6.7%		5.2%	6.9%
Canary Isl.	6.0%		4.6%	4.4%
Transatlantic/World Cr.	3.0%			3.0%
Exploration Dest	1.5%			2.5%
Baltics	4.8%			
Asia/China	2.9%			
Other	2.3%			



Passenger Volume & YOY Change by Age Group

	Passenger in K				Variance			
	2019	2021	2022	2023	2019	2021	2022	2023
<=12 Years	8		4	8	-100%			129%
13-19	6		3	6	-100%			118%
20-29	8		3	7	-100%			122%
30-39	10		4	10	-100%			118%
40-49	19	2	7	16	-89%	255%		116%
50-59	29	3	10	21	-91%	281%		109%
60-69	27	2	10	21	-91%	329%		106%
>=70 Years	18		7	12	-100%			72%

Passenger Volume & YOY Change by Duration

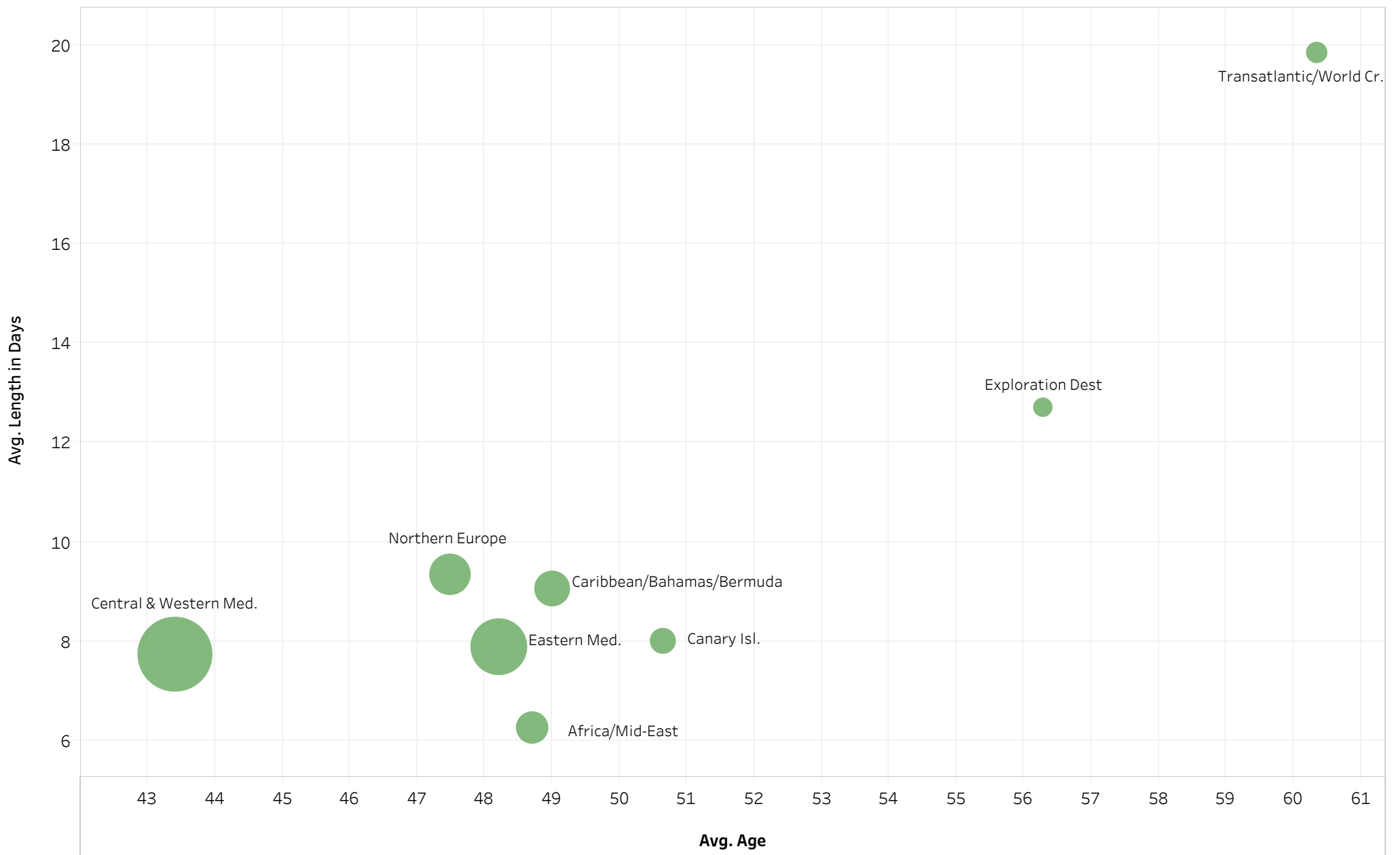
	Passenger in K				Variance			
	2019	2021	2022	2023	2019	2021	2022	2023
1-3 Days	5			3	-100%			
4-6 Days	8		2	7	-100%			206%
7 Days	78	9	32	62	-88%	241%		93%
8-13 Days	28	2	12	23	-92%	412%		86%
14 Days	8		4	7	-100%			86%
15-20 Days	5		3	5	-100%			85%
21+ Days	3				-100%			

Source Market: **Austria** (Continued)

Passenger Volume & YOY Change by Trade Route / Destination

	Passenger in K				Variance			
	2019	2021	2022	2023	2019	2021	2022	2023
Central & Western Med.	38	6	20	40	-84%	241%		97%
Eastern Med.	27	5	13	23	-83%	185%		80%
Northern Europe	17		8	12	-100%			53%
Caribbean/Bahamas/Bermuda	14		4	9	-100%			140%
Africa/Mid-East	9		3	8	-100%			161%
Canary Isl.	8		3	5	-100%			90%
Transatlantic/World Cr.	4			3	-100%			
Exploration Dest	2			3	-100%			
Other	3				-100%			
Baltics	7				-100%			
Asia/China	4				-100%			

Austria, Average Age and Cruise Length by Trade Route, 2023



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Source Market: Switzerland

Passenger Volume (K)

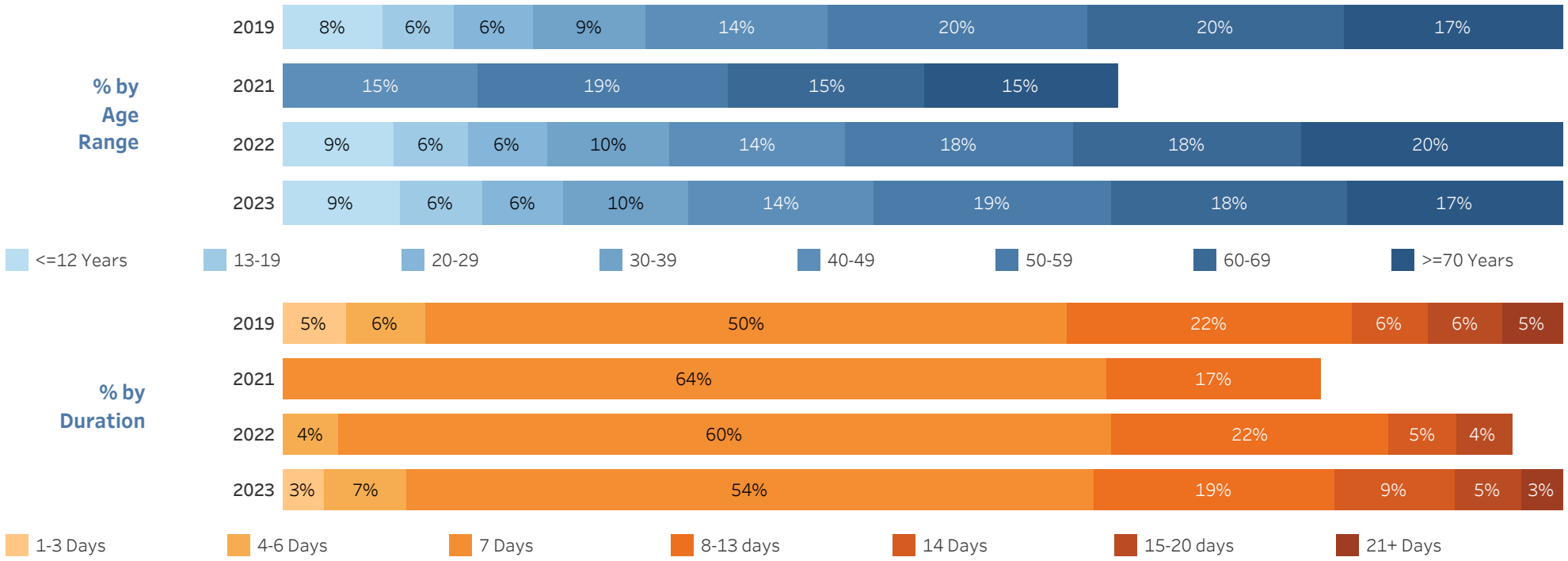
2019	2021	2022	2023
140	20 (-85.6% ▼)	70 (245.7% ▲)	101 (45.7% ▲)

Average Duration, in Days

2019	2021	2022	2023
9.4	7.8	8.7	9.2

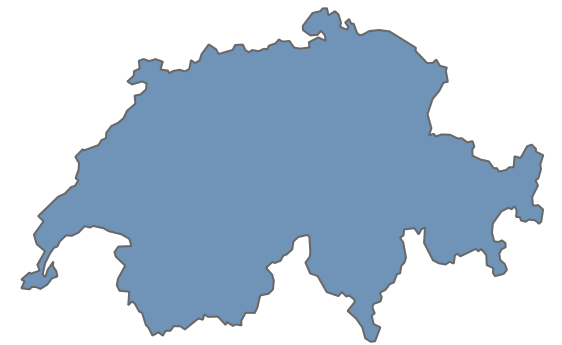
Average Age

2019	2021	2022	2023
49.5	46.5	49.4	48.1



Passenger Percentages by Trade Route / Destination

	2019	2021	2022	2023
Central & Western Med.	27.1%	52.1%	44.9%	39.7%
Northern Europe	17.3%		12.6%	12.9%
Caribbean/Bahamas/Bermuda	9.8%		6.8%	10.9%
Eastern Med.	13.0%	17.3%	19.5%	10.5%
Africa/Mid-East	6.6%		3.4%	5.5%
Transatlantic/World Cr.	4.9%		3.2%	4.8%
Exploration Dest	2.9%			3.5%
Canary Isl.	4.1%			3.0%
Baltics	4.2%			
Asia/China	3.4%			
Panama Canal/South Am	2.0%			
Other	2.0%			



Passenger Volume & YOY Change by Age Group

	Passenger in K				Variance			
	2019	2021	2022	2023	2019	2021	2022	2023
<=12 Years	9		5	9	-100%			72%
13-19	7		3	6	-100%			82%
20-29	7		4	6	-100%			67%
30-39	11		6	9	-100%			66%
40-49	17	2	8	14	-86%	224%		71%
50-59	25	3	10	18	-87%	228%		70%
60-69	24	3	10	18	-90%	314%		69%
>=70 Years	21	2	12	16	-88%	386%		35%

Passenger Volume & YOY Change by Duration

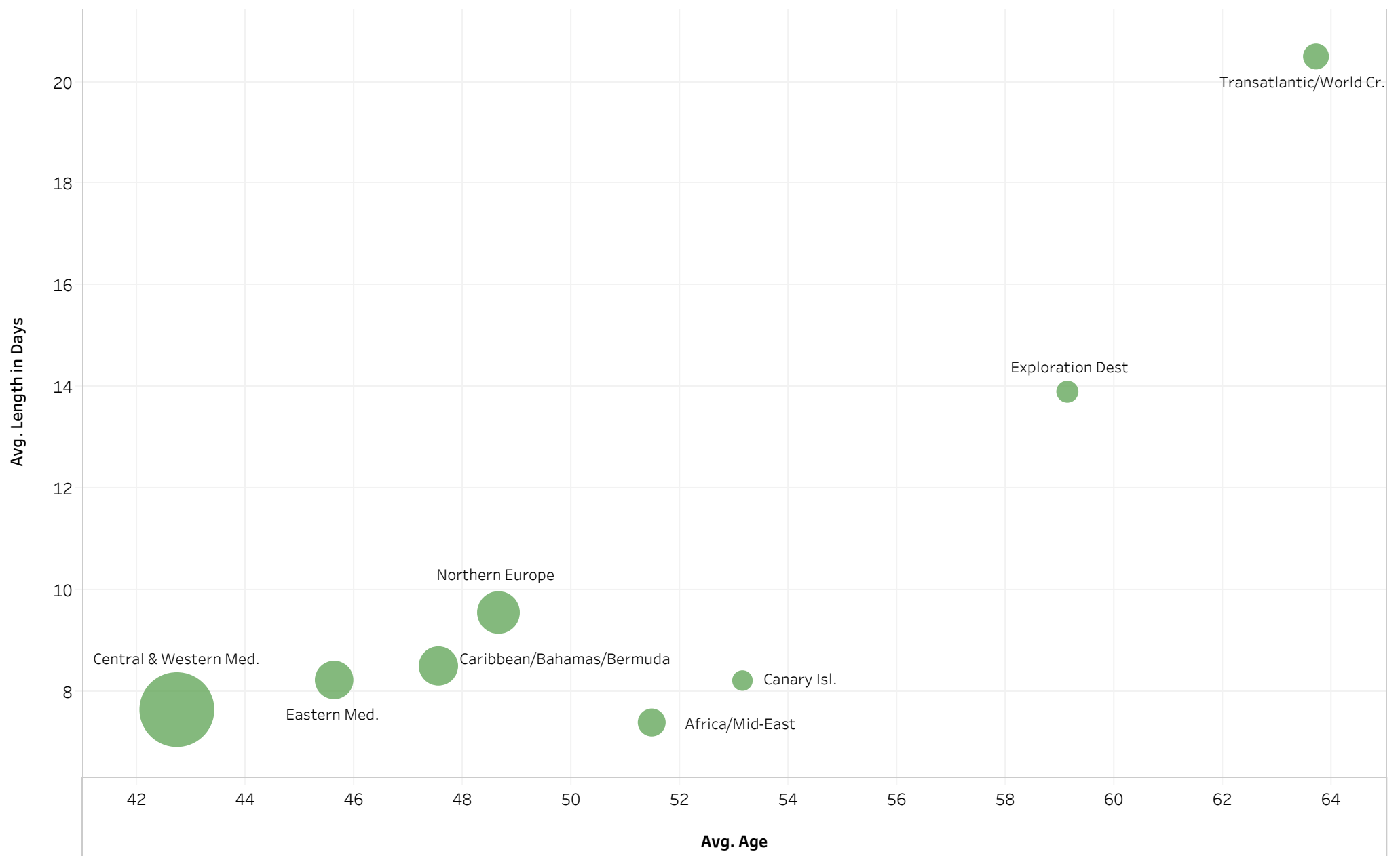
	Passenger in K				Variance			
	2019	2021	2022	2023	2019	2021	2022	2023
1-3 Days	7			3	-100%			
4-6 Days	9		3	7	-100%			122%
7 Days	70	13	42	54	-82%	224%		29%
8-13 Days	31	3	15	19	-89%	350%		27%
14 Days	8		4	10	-100%			154%
15-20 Days	8		3	5	-100%			79%
21+ Days	7			3	-100%			

Source Market: **Switzerland** (Continued)

Passenger Volume & YOY Change by Trade Route / Destination

	Passenger in K				Variance			
	2019	2021	2022	2023	2019	2021	2022	2023
Central & Western Med.	38	10	31	40	-72%	198%		29%
Northern Europe	24		9	13	-100%			49%
Caribbean/Bahamas/Bermuda	14		5	11	-100%			134%
Eastern Med.	18	3	14	11	-81%	289%		-22%
Africa/Mid-East	9		2	6	-100%			135%
Transatlantic/World Cr.	7		2	5	-100%			116%
Exploration Dest	4			4	-100%			
Canary Isl.	6			3	-100%			
Panama Canal/South Am	3				-100%			
Other	3				-100%			
Baltics	6				-100%			
Asia/China	5				-100%			

Switzerland, Average Age and Cruise Length by Trade Route, 2023



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Source Market: Belgium

Passenger Volume (K)

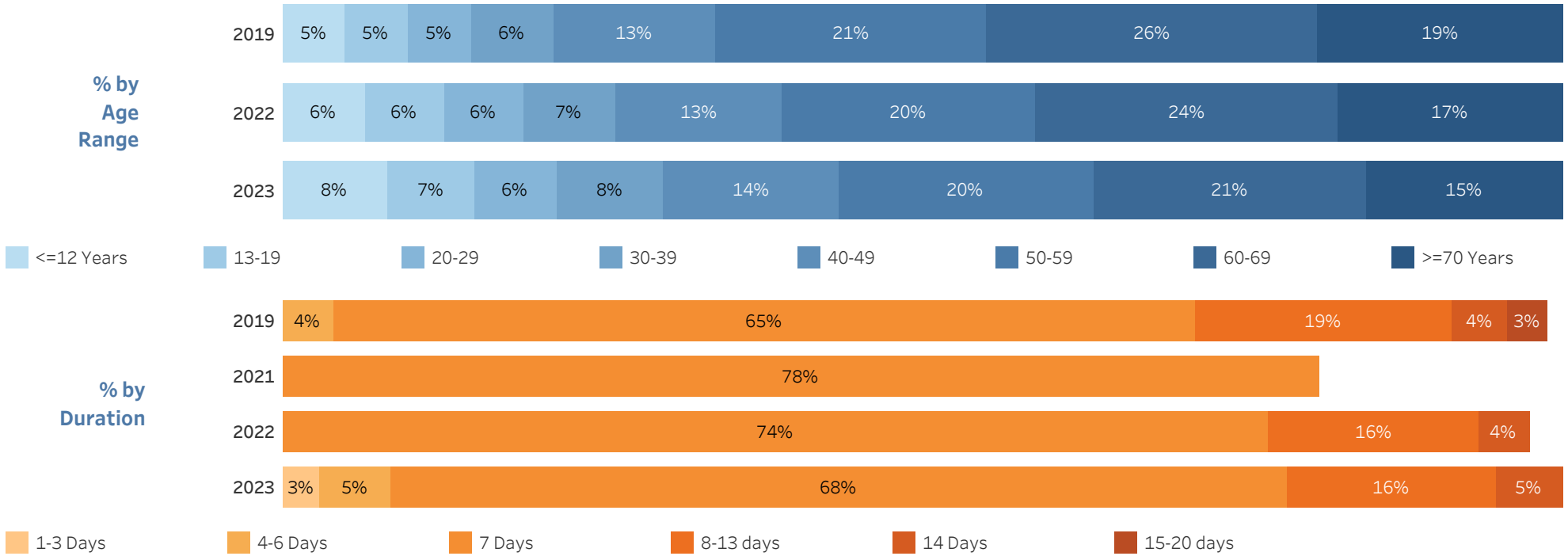
2019	2021	2022	2023
66	10 (-84.6% ▼)	55 (445.0% ▲)	83 (51.5% ▲)

Average Duration, in Days

2019	2021	2022	2023
8.5	7.6	8.0	8.0

Average Age

2019	2021	2022	2023
53.3	50.0	50.9	48.7



Passenger Percentages by Trade Route / Destination

	2019	2021	2022	2023
Central & Western Med.	25.1%	56.7%	38.2%	36.0%
Northern Europe	19.9%		20.5%	18.7%
Caribbean/Bahamas/Bermuda	13.3%		8.5%	14.8%
Eastern Med.	14.3%		13.5%	12.9%
Africa/Mid-East	6.7%		8.5%	6.2%
Exploration Dest				2.9%
Baltics	7.0%			



Passenger Volume & YOY Change by Age Group

	Passenger in K			Variance		
	2019	2022	2023	2019	2022	2023
<=12 Years	3	3	6		13%	90%
13-19	3	3	5		4%	63%
20-29	3	3	5		6%	53%
30-39	4	4	7		-6%	72%
40-49	8	7	11		-13%	57%
50-59	13	10	16		-21%	49%
60-69	16	13	17		-23%	33%
>=70 Years	12	9	12		-23%	30%

Passenger Volume & YOY Change by Duration

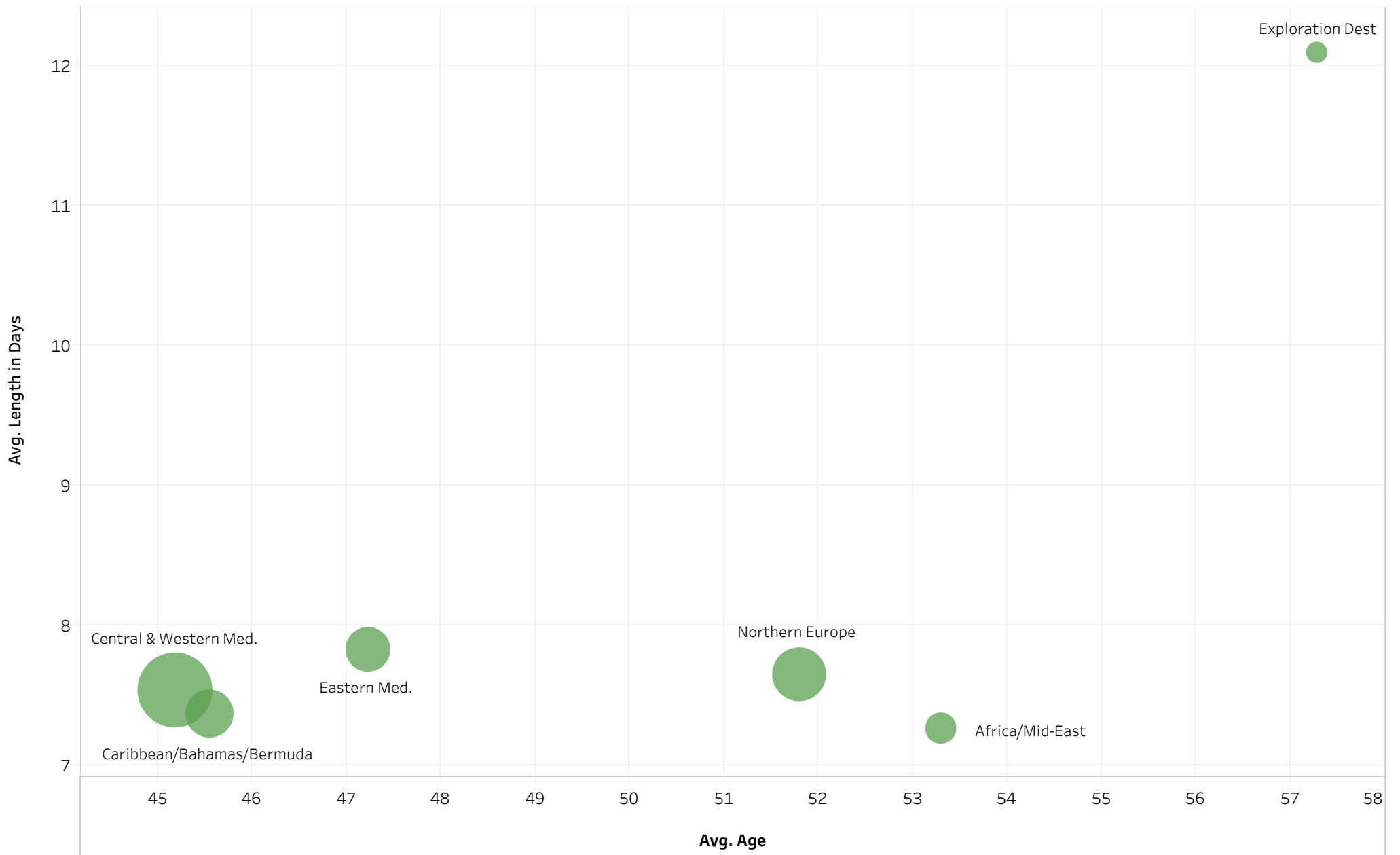
	Passenger in K				Variance			
	2019	2021	2022	2023	2019	2021	2022	2023
1-3 Days				2				
4-6 Days	3			4		-100%		
7 Days	43	8	41	56		-81%	419%	38%
8-13 Days	13		9	13		-100%		51%
14 Days	3		2	4		-100%		98%
15-20 days	2					-100%		

Source Market: **Belgium** (Continued)

Passenger Volume & YOY Change by Trade Route / Destination

	Passenger in K				Variance			
	2019	2021	2022	2023	2019	2021	2022	2023
Central & Western Med.	16	6	21	30	-65%	267%	43%	
Northern Europe	13		11	16	-100%			38%
Caribbean/Bahamas/Bermuda	9		5	12	-100%			164%
Eastern Med.	9		7	11	-100%			45%
Africa/Mid-East	4		5	5	-100%			12%
Exploration Dest				2				
Baltics	5				-100%			

Belgium, Average Age and Cruise Length by Trade Route, 2023



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Source Market: Portugal

Passenger Volume (K)

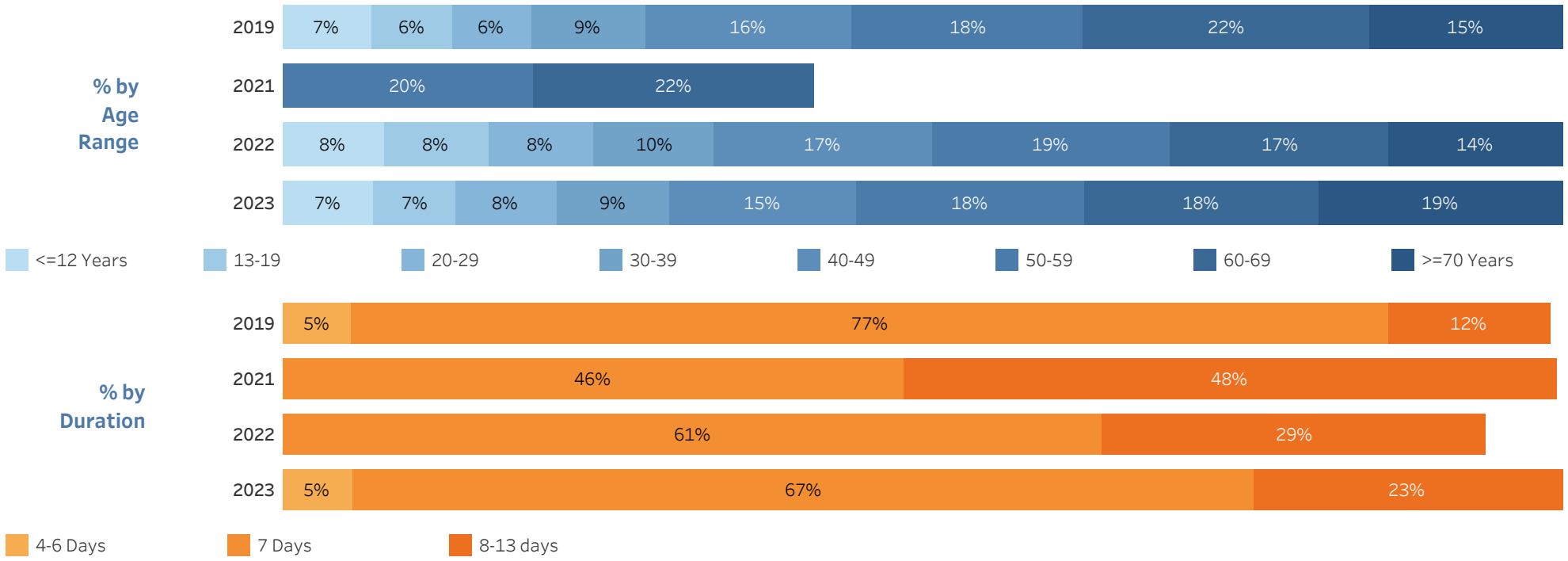
2019	2021	2022	2023
69	12 (-82.7% ▼)	45 (275.0% ▲)	74 (66.2% ▲)

Average Duration, in Days

2019	2021	2022	2023
7.5	8.8	8.2	8.1

Average Age

2019	2021	2022	2023
49.3	50.4	46.4	49.3



Passenger Percentages by Trade Route / Destination

	2019	2021	2022	2023
Central & Western Med.	35.1%	69.0%	51.6%	41.5%
Eastern Med.	24.0%	17.0%	19.0%	23.2%
Northern Europe	7.5%		8.7%	13.2%
Caribbean/Bahamas/Bermuda	13.8%		10.5%	9.7%
Africa/Mid-East	3.2%			3.2%
Canary Isl.	5.8%			
Baltics	4.3%			



Passenger Volume & YOY Change by Age Group

	Passenger in K				Variance			
	2019	2021	2022	2023	2019	2021	2022	2023
<=12 Years	5		3	5	-100%			50%
13-19	4		4	5	-100%			36%
20-29	4		4	6	-100%			63%
30-39	6		4	7	-100%			59%
40-49	11		7	11	-100%			45%
50-59	12	2	8	13	-81%	250%		63%
60-69	15	3	7	14	-83%	187%		81%
>=70 Years	10		6	14	-100%			139%

Passenger Volume & YOY Change by Duration

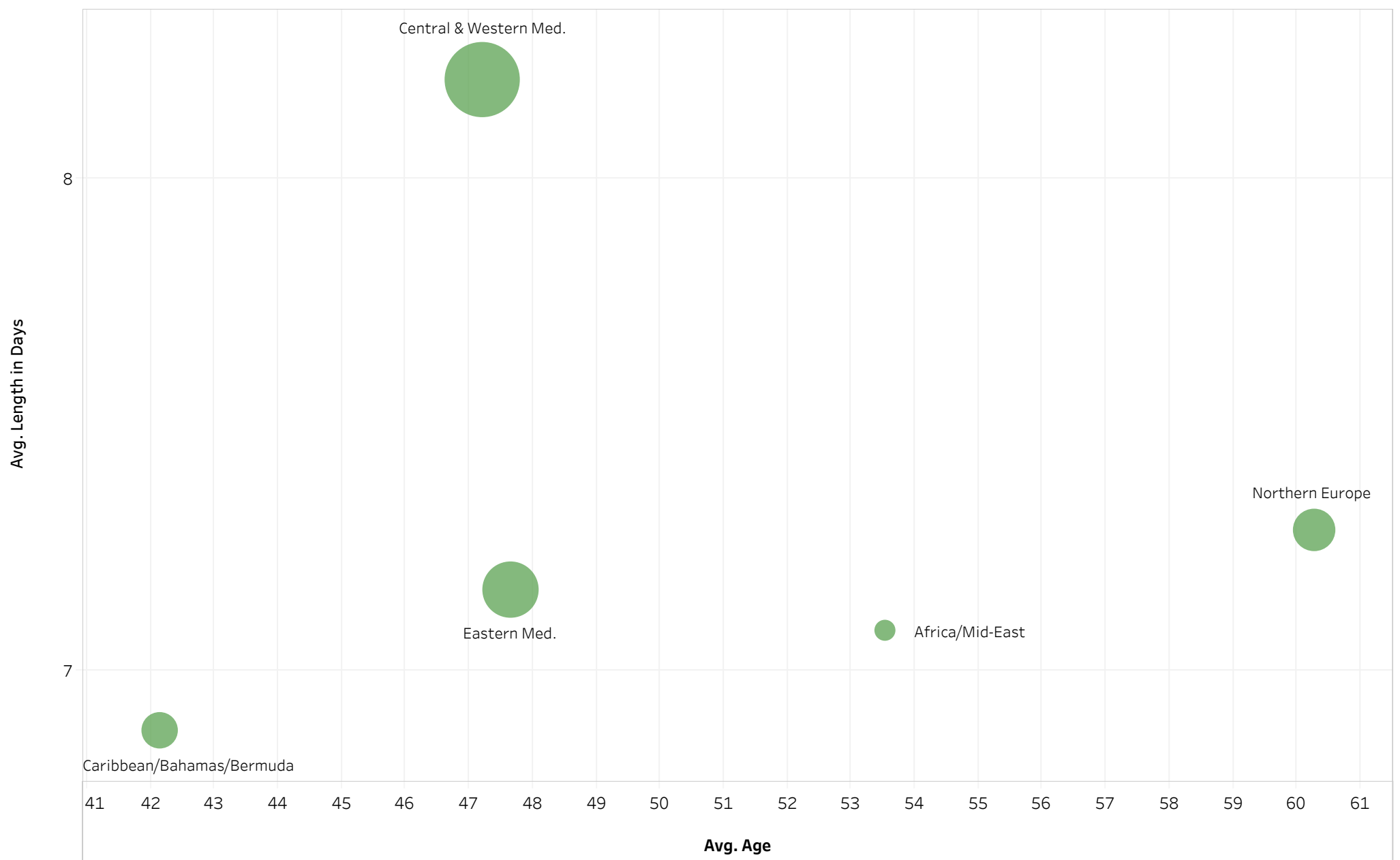
	Passenger in K				Variance			
	2019	2021	2022	2023	2019	2021	2022	2023
4-6 Days	3			4	-100%			
7 Days	53	5	27	50	-90%	395%		83%
8-13 Days	8	6	13	17	-30%	121%		33%

Source Market: Portugal (Continued)

Passenger Volume & YOY Change by Trade Route / Destination

	Passenger in K				Variance			
	2019	2021	2022	2023	2019	2021	2022	2023
Central & Western Med.	24	8	23	31	-66%	180%		34%
Eastern Med.	16	2	8	17	-88%	320%		103%
Northern Europe	5		4	10	-100%			153%
Caribbean/Bahamas/Bermuda	9		5	7	-100%			54%
Africa/Mid-East	2			2	-100%			
Canary Isl.	4				-100%			
Baltics	3				-100%			

Portugal, Average Age and Cruise Length by Trade Route, 2023



Data Points with Values Below 2,000 Passengers are not Displayed in the above Visuals and Tables.
Some Data Points in the following dimensions were not captured, and were ignored from the corresponding tables and visuals: Age Group, Duration Group, and Trade Name; these exclusions account for, on average, 1% of each display.

About CLIA

Cruise Lines International Association (CLIA) is the preeminent cruise association providing a unified voice for the industry as the leading authority of the global cruise community. The association has representation in North and South America, Europe, Asia, and Australasia. CLIA represents member lines which comprise 95% of global cruise passenger capacity, including the world's most prestigious ocean, river, and specialty cruise lines, as well as business services providers and the largest network of travel professionals who specialize in cruise travel.



Data collection of non-CLIA Passengers by:

