



2021 Europe Market Report



The cruise industry has proven its resilience throughout its more than 50-year history—as is evident in the industry’s responsible return to operations beginning in July 2020 in Europe. Since then, more than 10 million people have cruised, and intent to cruise is higher than it was prior to the global health crisis.

The combination of robust health and safety protocols implemented by cruise lines, along with the passion of cruise travelers, has created tremendous momentum for a successful restart in about 100 markets worldwide. Importantly, the cruise industry is supporting both an economic and societal recovery as more and more people are able to reconnect with family and friends during a cruise holiday.

With cruise well on its way to full resumption in 2022, our cruise line members are building on an ambitious environmental agenda, which cruise lines initiated well before the global health crisis and continued during the pandemic, for the long-term sustainability of the industry. CLIA cruise line members are committed to sailing toward a better future, and as part of that effort are pursuing the goal of net zero cruising by 2050.

Regional Overview: Europe 2019-2021

Passenger Volume (K)

2019	2020	2021
7,707	1,347 (-82.5% ▼)	1,748 (29.8% ▲)

Average Duration, in Days

2019	2020	2021
8.8	9.3	7.3

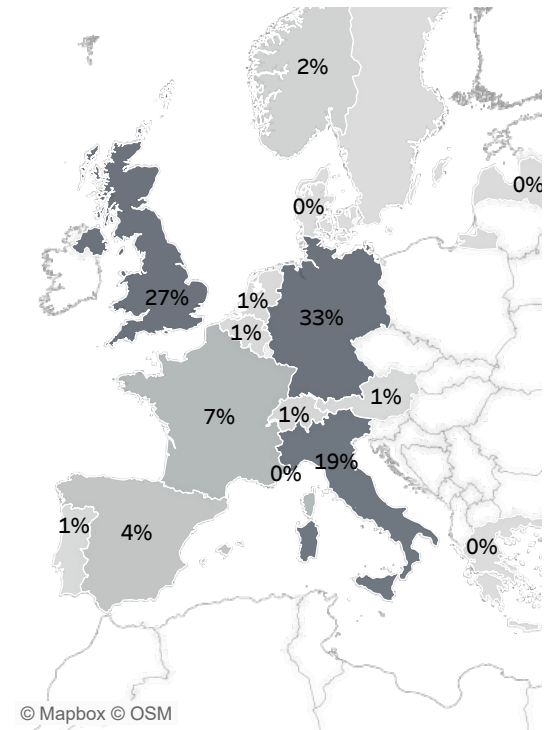
Average Age

2019	2020	2021
49.7	50.5	48.0

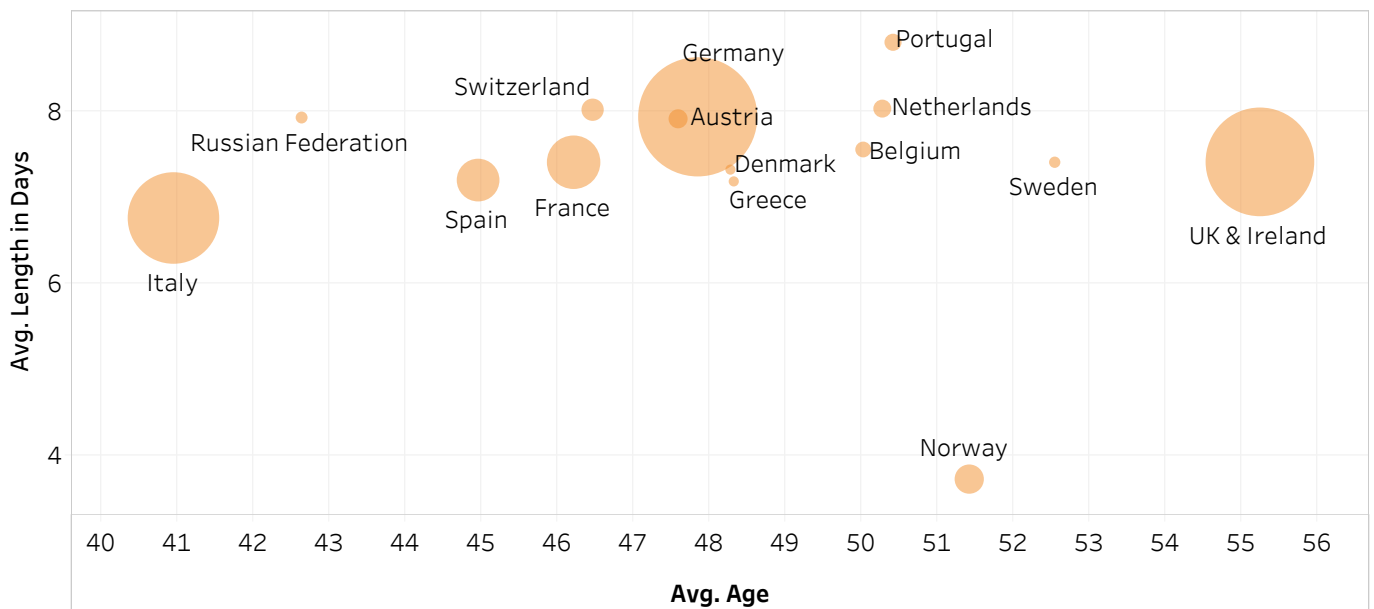
Passenger Volume (K) for Top Countries

	2019	2020	2021
Germany	2,587	531 (-79.5% ▼)	576 (8.4% ▲)
UK & Ireland	1,992	259 (-87.0% ▼)	479 (84.5% ▲)
Italy	950	151 (-84.1% ▼)	340 (124.6% ▲)
France	545	146 (-73.2% ▼)	116 (-20.7% ▼)
Spain	553	45 (-91.9% ▼)	74 (65.4% ▲)
Norway	98	20 (-79.3% ▼)	35 (71.2% ▲)
Switzerland	140	23 (-83.8% ▼)	20 (-11.5% ▼)
Austria	136	25 (-81.9% ▼)	15 (-40.2% ▼)
Netherlands	123	18 (-85.6% ▼)	13 (-26.1% ▼)
Portugal	69	8 (-88.4% ▼)	12 (48.8% ▲)
Belgium	66	10 (-84.8% ▼)	10 (1.4% ▲)
Russian Federation	100	30 (-70.2% ▼)	6 (-80.7% ▼)
Sweden	59	16 (-72.8% ▼)	5 (-67.6% ▼)
Denmark	45	14 (-68.6% ▼)	4 (-70.4% ▼)
Turkey	28	5 (-81.9% ▼)	(-100.0% ▼)

Share of Source Passengers, 2021 Geographic Share

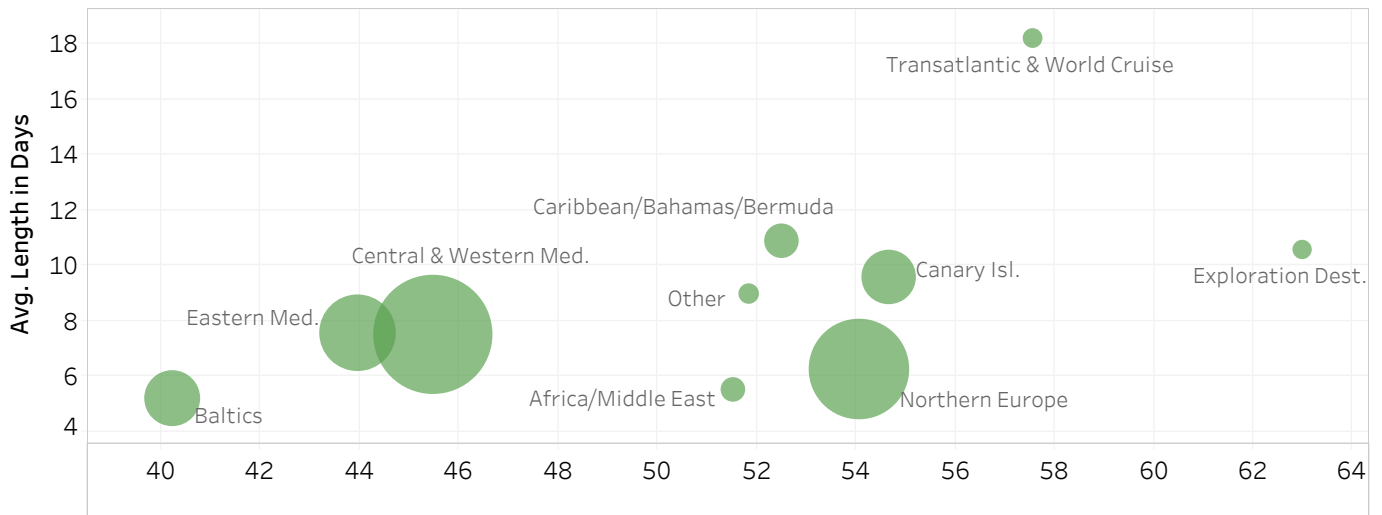


Average Age and Cruise Length for Top Source Markets, 2021

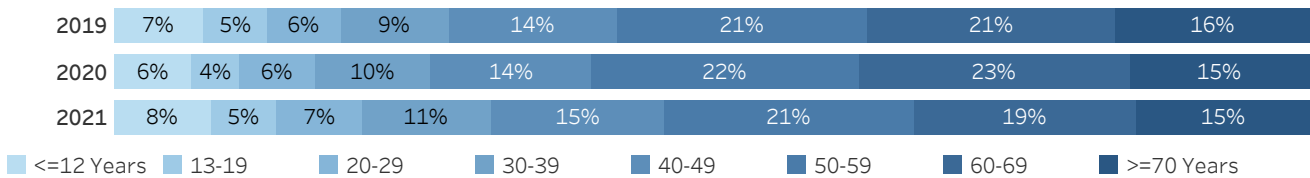


Regional Overview: Europe (Continued)

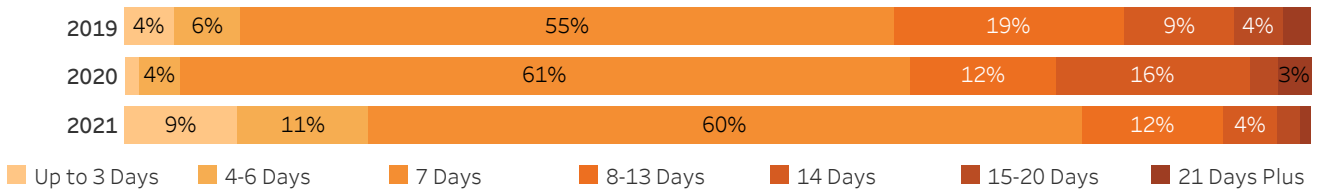
Average Age and Cruise Length by Destination / Trade Route, 2021



Average Passenger Age Groups

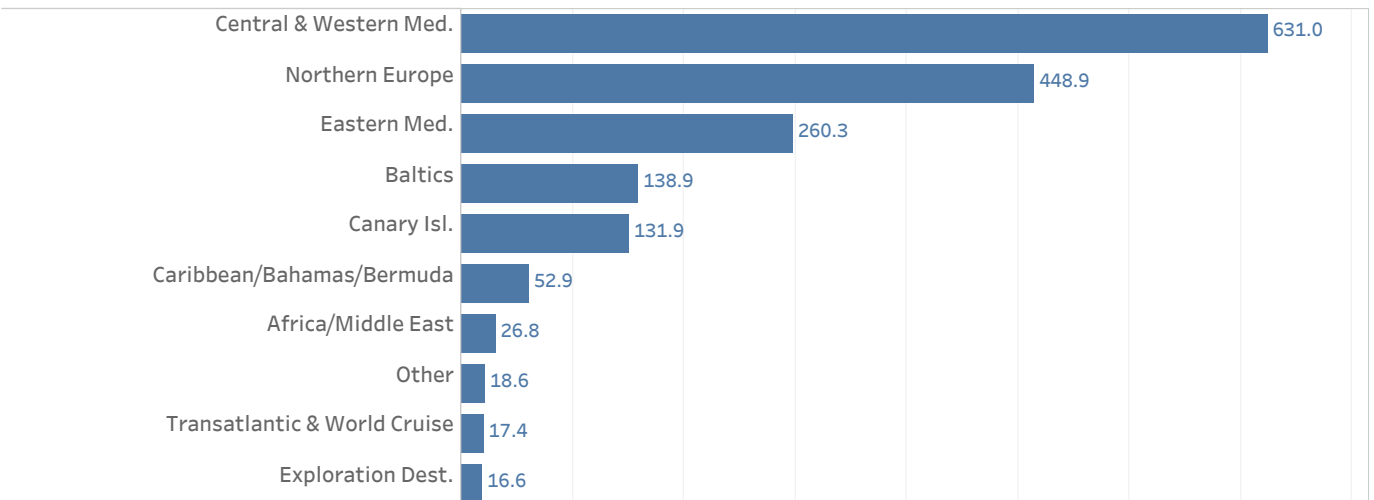


Average Cruise Duration



Volume of Passengers (in K) to Destinations, 2021

At least 4K Passengers per Destination

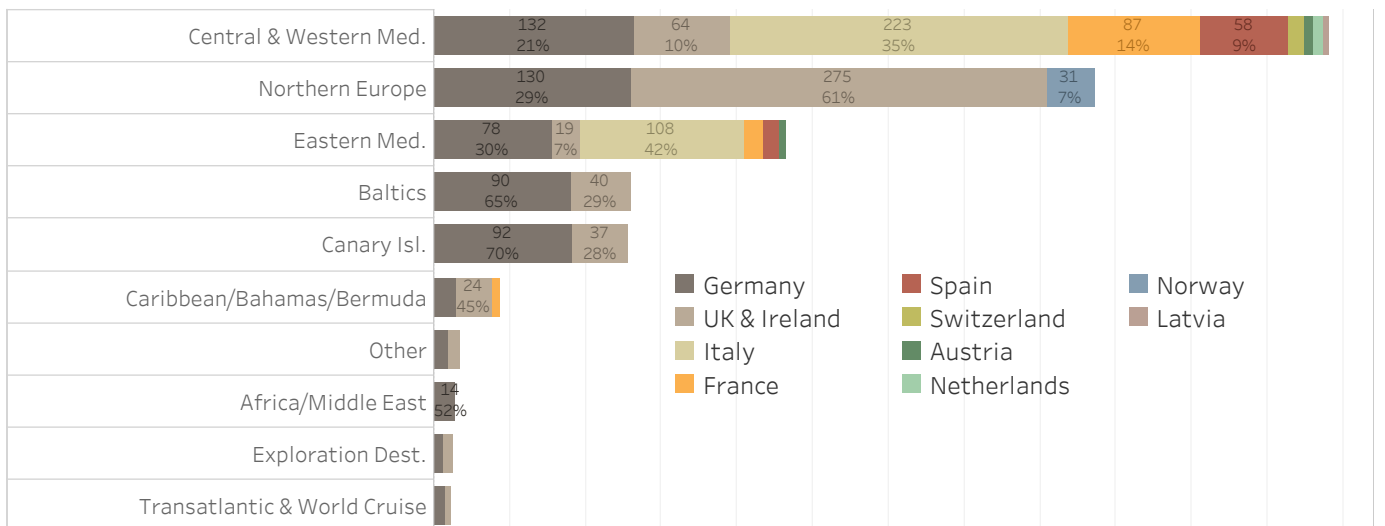


Regional Overview: Europe (Continued)

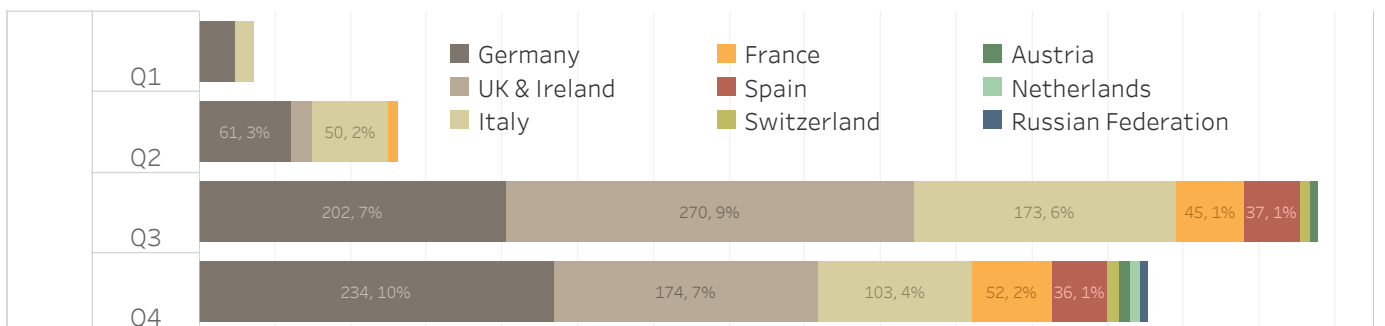
Passenger Volume by Trade (K)

	2019	2020	2021
Central & Western Med.	2,367	194 (-92% ▼)	631 (225% ▲)
Northern Europe	1,416	51 (-96% ▼)	449 (789% ▲)
Eastern Med.	874	27 (-97% ▼)	260 (855% ▲)
Baltics	421	(-100% ▼)	139
Canary Isl.	473	178 (-62% ▼)	132 (-26% ▼)
Caribbean/Bahamas/Bermuda	904	378 (-58% ▼)	53 (-86% ▼)
Africa/Middle East	319	176 (-45% ▼)	27 (-85% ▼)
Other	168	21 (-87% ▼)	19 (-12% ▼)
Transatlantic & World Cruise	222	31 (-86% ▼)	17 (-44% ▼)
Exploration Dest.	113	5 (-95% ▼)	17 (206% ▲)
Panama Canal/South Am	64	29 (-55% ▼)	(-100% ▼)
No Trade Identified		104	(-100% ▼)
NA West Coast/Mexico/California/Pacific ..	16	(-100% ▼)	
Hawaii	10	(-100% ▼)	
Canada/New England	42	(-100% ▼)	
Australia/New Zeland/Pacific	51	19 (-64% ▼)	(-100% ▼)
Asia & China	201	129 (-36% ▼)	(-100% ▼)
Alaska	45	(-100% ▼)	

Passenger Volume (K) by Trade & Top 10 Source Countries



Passenger Volume (K) by Quarter & Top Source Countries in, 2021



Passenger Volume (K) for Other Countries

	2019	2020	2021
Monaco			5.7
Latvia	2.9	(-100.0% ▼)	5.4
Greece	14.9	(-100.0% ▼)	4.2
Romania	16.7	5.1 (-69.3% ▼)	3.9 (-23.7% ▼)
Hungary	19.3	4.3 (-77.5% ▼)	3.4 (-21.4% ▼)
Malta	16.5	(-100.0% ▼)	2.8
Ukraine	13.4	3.8 (-71.6% ▼)	(-100.0% ▼)
Slovenia	4.9	(-100.0% ▼)	
Slovakia	6.4	(-100.0% ▼)	
Luxembourg	6.1	(-100.0% ▼)	
Lithuania	2.3	(-100.0% ▼)	
Iceland	2.4	(-100.0% ▼)	
Finland	13.8	4.5 (-67.5% ▼)	(-100.0% ▼)
Czech Republic	12.2	2.6 (-78.6% ▼)	(-100.0% ▼)
Croatia	14.0	2.9 (-79.4% ▼)	(-100.0% ▼)
Bulgaria	10.4	2.2 (-78.6% ▼)	(-100.0% ▼)

Source Market: Germany

Passenger Volume (K)

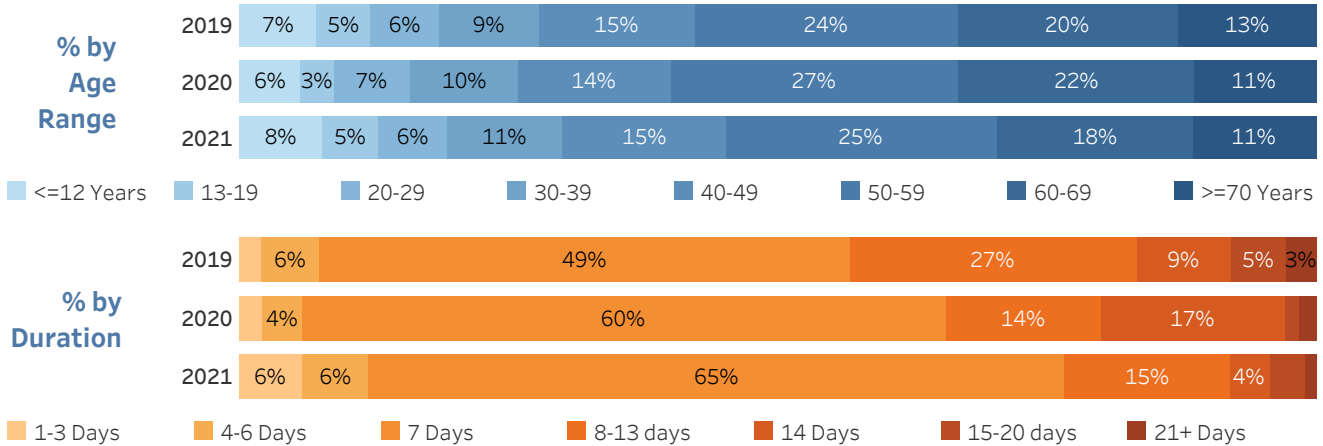
2019	2020	2021
2,587	531 (-79.5% ▼)	576 (8.4% ▲)

Average Duration, in Days

2019	2020	2021
9.1	9.0	7.5

Average Age

2019	2020	2021
49	50	48



Passenger Percentages by Trade Route / Destination

	2019	2020	2021
Central & Western Med.	23.7%	12.9%	22.9%
Northern Europe	24.0%	7.7%	22.7%
Canary Isl.	9.7%	27.2%	15.9%
Baltics	9.0%		15.7%
Eastern Med.	5.8%	1.6%	13.6%
Caribbean/Bahamas/Bermuda	7.7%	17.5%	2.7%
Africa/Mid-East	5.8%	15.3%	2.4%
Other	5.1%	1.3%	1.7%
Transatlantic/World Cr.	3.0%	0.9%	1.3%
Exploration Dest	1.1%		1.1%
No Trade Identified		7.6%	
Asia/China	2.4%	5.9%	
Panama Canal/South Am	0.6%	0.9%	
Australasia	0.5%	0.5%	
Alaska	0.2%		
NA West Coast/Mexico/California/Pacific Coast	0.1%		
Canada/New England	1.1%		



Passenger Volume & YOY Change by Age Group

	Passenger in K			Variance		
	2019	2020	2021	2019	2020	2021
<=12 Years	167	28	40	-83%		43%
13-19	116	15	27	-87%		81%
20-29	151	34	33	-77%		-2%
30-39	217	49	56	-77%		13%
40-49	339	69	80	-80%		16%
50-59	569	130	130	-77%		1%
60-69	478	107	95	-78%		-11%
>=70 Years	300	55	59	-82%		8%

Passenger Volume & YOY Change by Duration

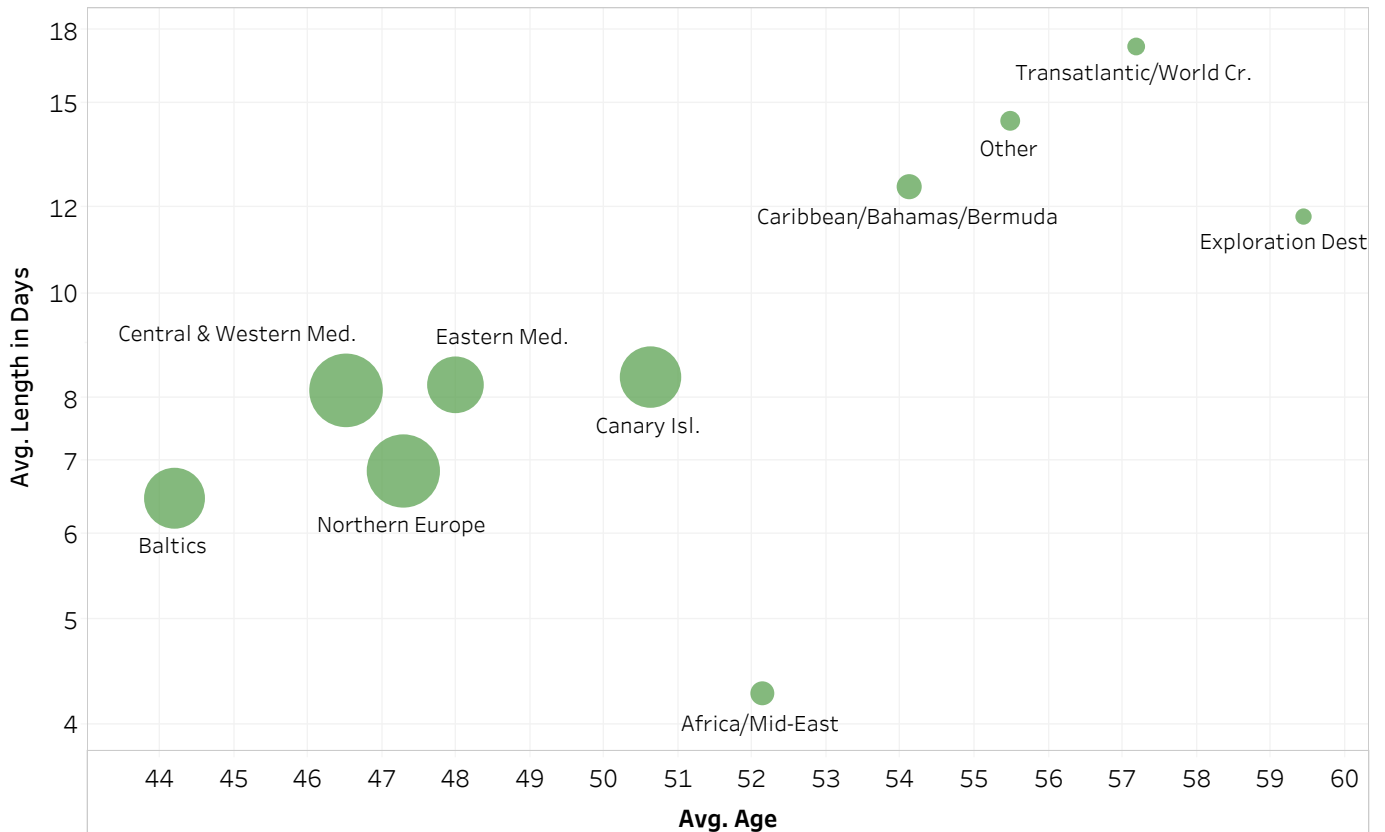
	Passenger in K			Variance		
	2019	2020	2021	2019	2020	2021
1-3 Days	50	10	34	-80%		229%
4-6 Days	143	18	36	-87%		96%
7 Days	1,274	294	372	-77%		27%
8-13 Days	690	71	89	-90%		26%
14 days	227	84	21	-63%		-75%
15-20 Days	130	6	19	-95%		194%
21+ Days	73	8	6	-89%		-20%

Source Market: **Germany** (Continued)

Passenger Volume & YOY Change by Trade Route / Destination

	Passenger in K			2019	2020	Variance 2021
	2019	2020	2021			
Central & Western Med.	612	69	132		-89%	92%
Northern Europe	620	41	130		-93%	219%
Canary Isl.	252	145	92		-43%	-37%
Baltics	234		90		-100%	
Eastern Med.	150	9	78		-94%	807%
Caribbean/Bahamas/Bermuda	198	93	15		-53%	-84%
Africa/Mid-East	150	81	14		-46%	-83%
Other	132	7	10		-95%	38%
Transatlantic/World Cr.	77	5	8		-94%	57%
Exploration Dest	28		6		-100%	
Panama Canal/South Am	16	5			-72%	-100%
No Trade Identified		40				-100%
NA West Coast/Mexico/California/Pacific ..	4				-100%	
Canada/New England	28				-100%	
Australasia	14	3			-82%	-100%
Asia/China	63	31			-50%	-100%
Alaska	5				-100%	

Germany, Average Age and Cruise Length by Trade Route, 2021



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)

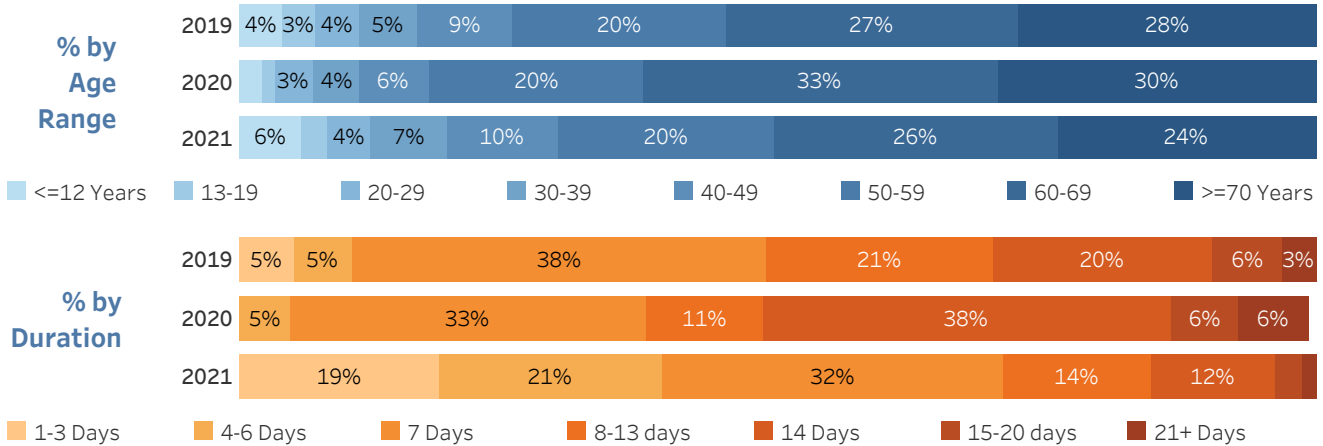
2019	2020	2021
1,992	259 (-87.0% ▼)	479 (84.5% ▲)

Average Duration, in Days

2019	2020	2021
10.2	12.5	7.3

Average Age

2019	2020	2021
57	60	55



Passenger Percentages by Trade Route / Destination

	2019	2020	2021
Central & Western Med.	25.0%	5.2%	13.4%
Northern Europe	23.5%	3.5%	57.4%
Canary Isl.	7.6%	7.8%	7.7%
Baltics	3.8%		8.4%
Eastern Med.	7.2%		3.9%
Caribbean/Bahamas/Bermuda	15.4%	41.6%	5.0%
Africa/Mid-East	2.0%	7.3%	
Other	0.3%	0.8%	1.7%
Transatlantic/World Cr.	3.9%	4.2%	0.9%
Exploration Dest	2.3%		1.2%
No Trade Identified		8.8%	
Asia/China	3.8%	9.7%	
Panama Canal/South Am	1.2%	4.2%	
Australasia	1.2%	4.7%	
Hawaii	0.3%	0.8%	
Alaska	1.5%		
NA West Coast/Mexico/California/Pacific Coast	0.4%		
Canada/New England	0.5%		



Passenger Volume & YOY Change by Age Group

	Passenger in K			Variance		
	2019	2020	2021	2019	2020	2021
<=12 Years	59	4	23	-93%	503%	
13-19	47	2	10	-95%	365%	
20-29	61	6	16	-90%	161%	
30-39	81	8	30	-90%	268%	
40-49	133	12	42	-91%	263%	
50-59	298	37	83	-88%	127%	
60-69	406	60	109	-85%	82%	
>=70 Years	416	54	99	-87%	83%	

Passenger Volume & YOY Change by Duration

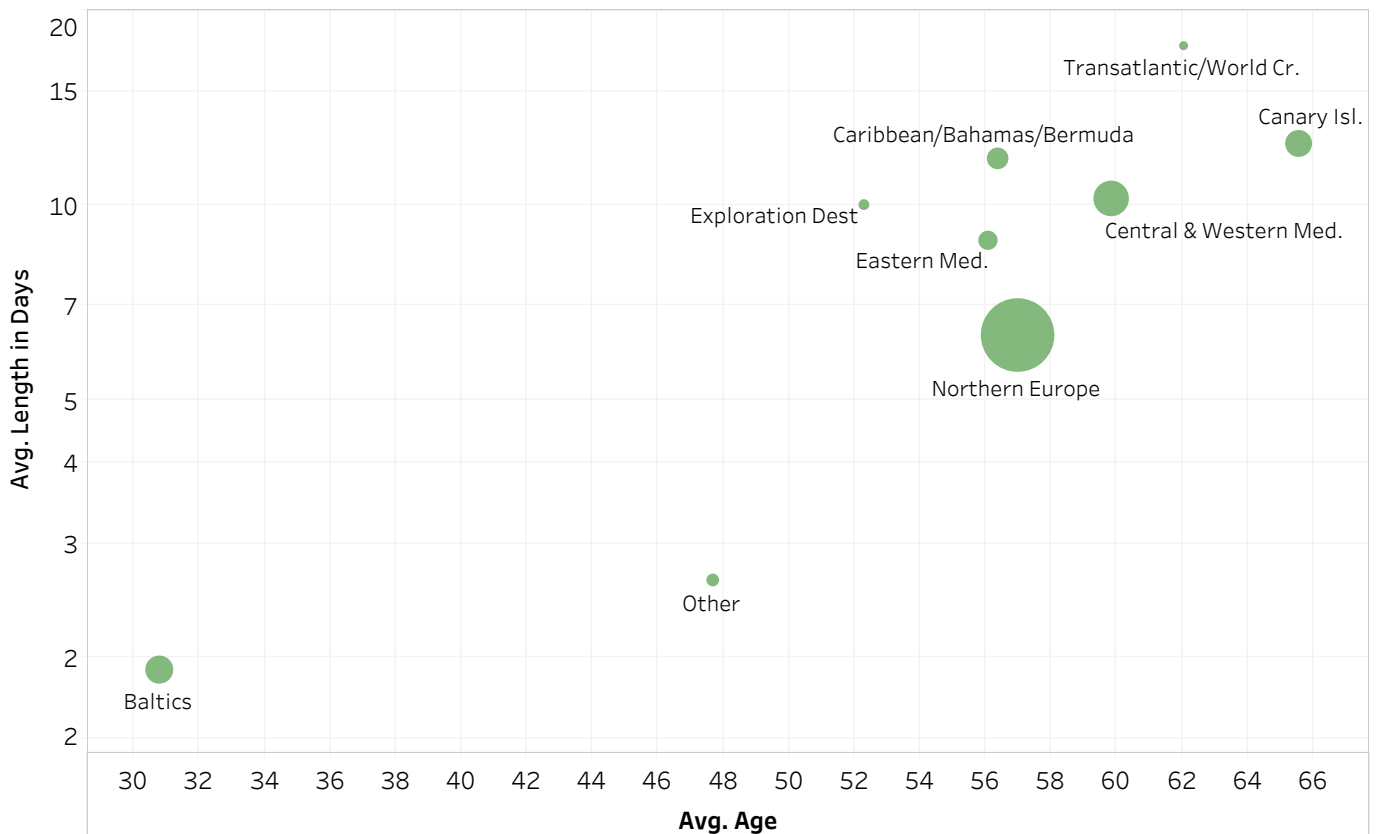
	Passenger in K			Variance		
	2019	2020	2021	2019	2020	2021
1-3 Days	101		89	-100%		
4-6 Days	107	11	99	-89%	778%	
7 Days	764	78	152	-90%	94%	
8-13 Days	418	26	66	-94%	153%	
14 Days	407	90	55	-78%	-38%	
15-20 Days	127	15	12	-88%	-22%	
21+ Days	63	15	6	-75%	-59%	

Source Market: Ireland & United Kingdom (Continued)

Passenger Volume & YOY Change by Trade Route / Destination

	Passenger in K			2019	2020	Variance 2021
	2019	2020	2021			
Northern Europe	468	9	275		-98%	2952%
Central & Western Med.	498	13	64		-97%	379%
Baltics	76		40		-100%	
Canary Isl.	152	20	37		-87%	81%
Caribbean/Bahamas/Bermuda	306	108	24		-65%	-78%
Eastern Med.	143		19		-100%	
Other	6	2	8		-66%	301%
Exploration Dest	47		6		-100%	
Transatlantic/World Cr.	79	11	4		-86%	-62%
Panama Canal/South Am	23	11			-53%	-100%
No Trade Identified		23				-100%
NA West Coast/Mexico/California/Pacific ..	8				-100%	
Hawaii	6	2			-68%	-100%
Canada/New England	10				-100%	
Australasia	24	12			-50%	-100%
Asia/China	76	25			-67%	-100%
Alaska	29				-100%	
Africa/Mid-East	40	19			-52%	-100%

Ireland & United Kingdom, Average Age and Cruise Length by Trade Route, 2021



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Source Market: Italy

Passenger Volume (K)

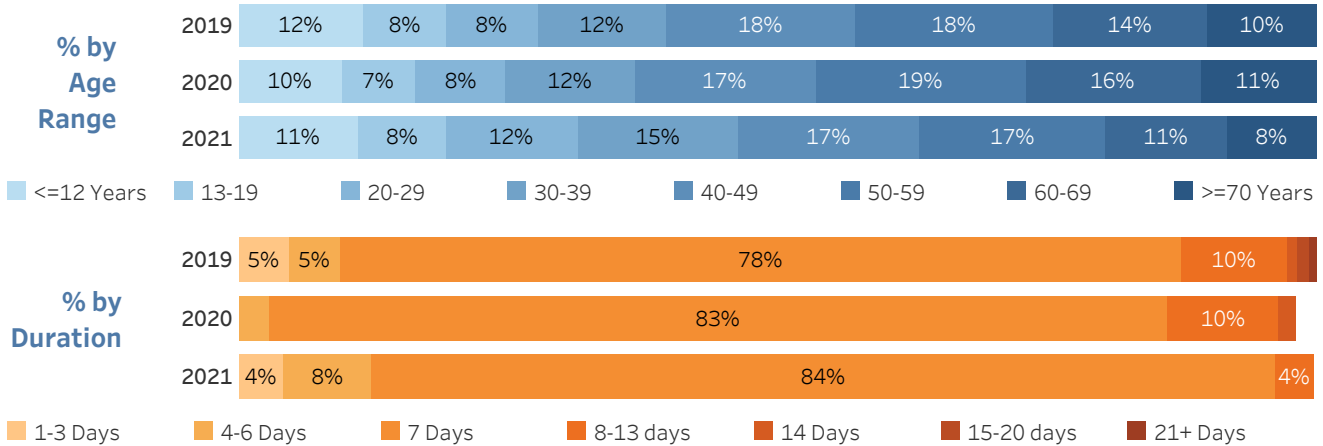
2019	2020	2021
950	151 (-84.1% ▼)	340 (124.6% ▲)

Average Duration, in Days

2019	2020	2021
7.3	7.8	6.9

Average Age

2019	2020	2021
43	45	41



Passenger Percentages by Trade Route / Destination

	2019	2020	2021
Central & Western Med.	49.5%	36.1%	65.7%
Northern Europe	5.2%		
Canary Isl.	1.4%		
Baltics	2.7%		0.9%
Eastern Med.	25.5%	7.1%	31.9%
Caribbean/Bahamas/Bermuda	7.8%	22.4%	
Africa/Mid-East	3.3%	8.9%	0.8%
Other	1.1%	3.2%	
Transatlantic/World Cr.	1.3%	2.1%	
Exploration Dest	0.5%		
Asia/China	1.2%	18.8%	



Passenger Volume & YOY Change by Age Group

	Passenger in K			Variance		
	2019	2020	2021	2019	2020	2021
<=12 Years	108	14	36	-87%		164%
13-19	71	10	27	-86%		180%
20-29	78	12	40	-85%		235%
30-39	111	17	49	-84%		182%
40-49	164	24	55	-85%		131%
50-59	171	28	57	-84%		104%
60-69	133	23	37	-83%		62%
>=70 Years	94	15	27	-84%		75%

Passenger Volume & YOY Change by Duration

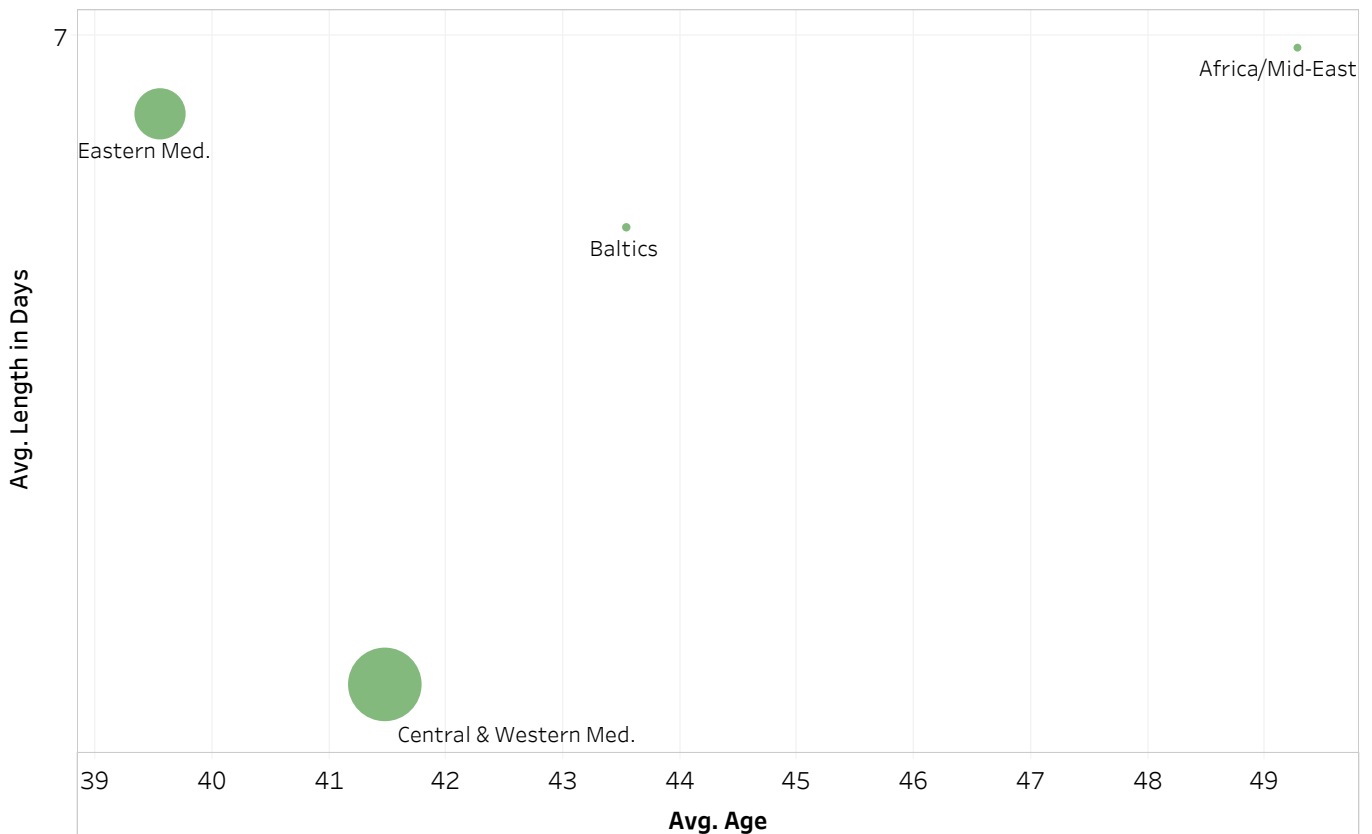
	Passenger in K			Variance		
	2019	2020	2021	2019	2020	2021
1-3 Days	44		14			-100%
4-6 Days	45	4	28		-91%	580%
7 Days	741	126	285		-83%	127%
8-13 Days	95	16	12		-84%	-22%
14 Days	8	2			-70%	-100%
15-20 days	11					-100%
21+ Days	6					-100%

Source Market: **Italy** (Continued)

Passenger Volume & YOY Change by Trade Route / Destination

	2019	2020	Passenger in K 2021	2019	2020	Variance 2021
Central & Western Med.	470	55	223		-88%	309%
Eastern Med.	243	11	108		-96%	909%
Baltics	26		3		-100%	
Africa/Mid-East	32	13	3		-58%	-81%
Transatlantic/World Cr.	12	3			-74%	-100%
Other	11	5			-54%	-100%
Northern Europe	50				-100%	
Exploration Dest	5				-100%	
Caribbean/Bahamas/Bermuda	74	34			-54%	-100%
Canary Isl.	14				-100%	
Asia/China	11	28			151%	-100%

Italy, Average Age and Cruise Length by Trade Route, 2021



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Source Market: France

Passenger Volume (K)

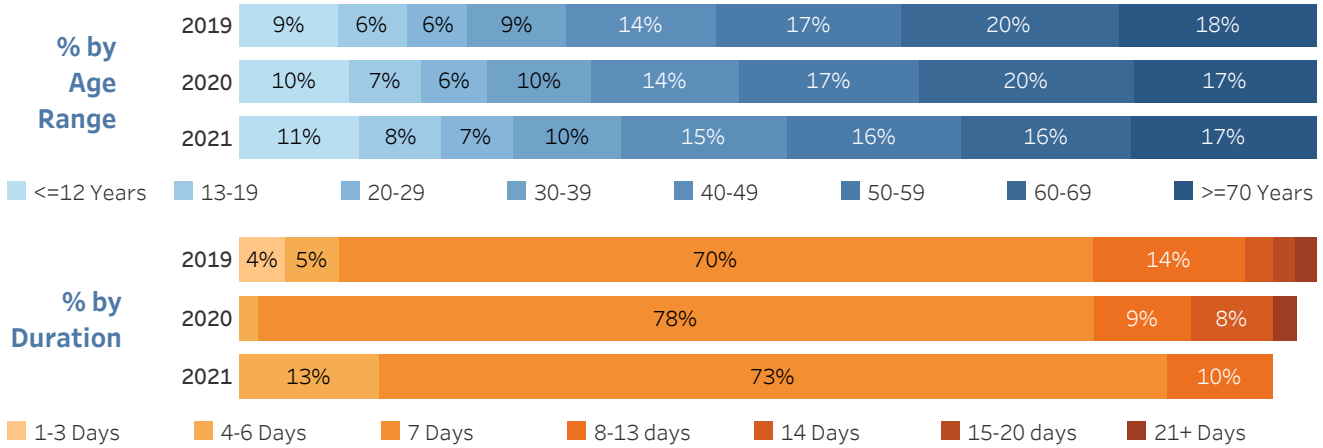
2019	2020	2021
545	146 (-73.2% ▼)	116 (-20.7% ▼)

Average Duration, in Days

2019	2020	2021
8.0	8.5	7.4

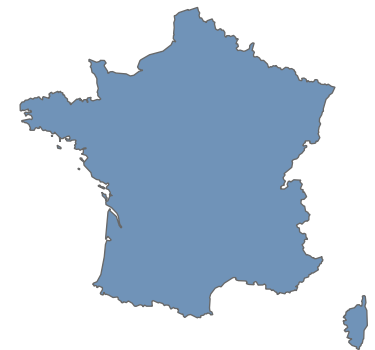
Average Age

2019	2020	2021
49	48	46



Passenger Percentages by Trade Route / Destination

	2019	2020	2021
Central & Western Med.	40.0%	17.4%	75.2%
Northern Europe	6.5%		2.6%
Canary Isl.	1.1%		
Baltics	2.2%		
Eastern Med.	14.4%	2.6%	10.4%
Caribbean/Bahamas/Bermuda	22.3%	49.8%	4.1%
Africa/Mid-East	3.5%	7.7%	
Other	0.7%		
Transatlantic/World Cr.	3.6%	4.0%	
Exploration Dest	1.8%		
No Trade Identified		6.3%	
Asia/China	2.0%	6.9%	
Panama Canal/South Am	1.2%	2.9%	
Australasia	0.6%		



Passenger Volume & YOY Change by Age Group

	Passenger in K			Variance	
	2019	2020	2021	2019	2021
<=12 Years	46	13	12	-71%	-14%
13-19	32	9	8	-72%	-9%
20-29	28	8	7	-70%	-17%
30-39	46	13	11	-72%	-17%
40-49	70	18	16	-74%	-12%
50-59	86	22	17	-74%	-24%
60-69	102	27	17	-74%	-37%
>=70 Years	92	22	18	-76%	-20%

Passenger Volume & YOY Change by Duration

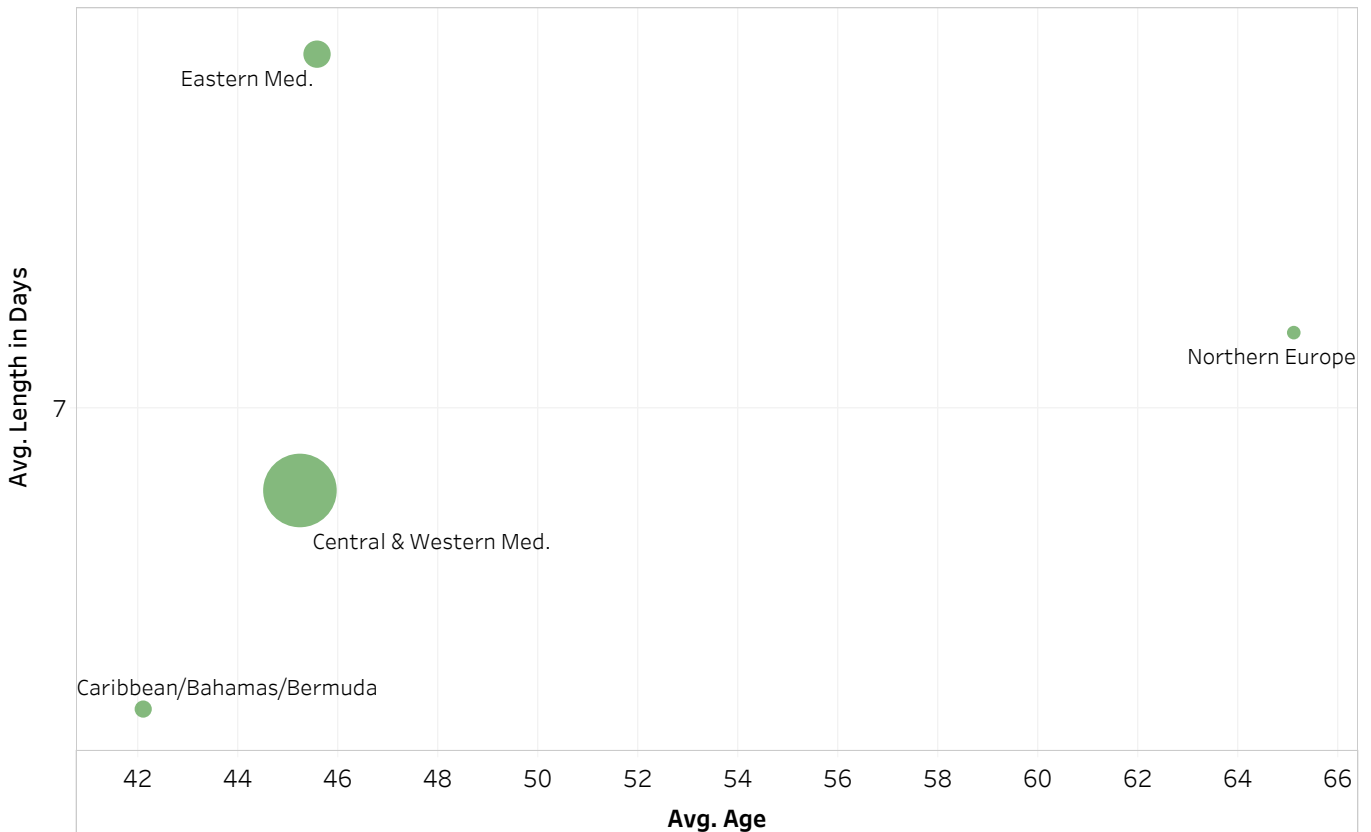
	Passenger in K			Variance	
	2019	2020	2021	2019	2021
1-3 Days	23			-100%	
4-6 Days	27	2	15	-91%	521%
7 Days	381	106	85	-72%	-20%
8-13 Days	77	12	11	-84%	-9%
14 Days	14	10		-25%	-100%
15-20 Days	12			-100%	
21+ Days	10	3		-70%	-100%

Source Market: **France** (Continued)

Passenger Volume & YOY Change by Trade Route / Destination

	2019	2020	Passenger in K 2021	2019	2020	Variance 2021
Central & Western Med.	218	25	87		-88%	242%
Eastern Med.	78	4	12		-95%	215%
Caribbean/Bahamas/Bermuda	121	73	5		-40%	-93%
Northern Europe	35		3		-100%	
Transatlantic/World Cr.	20	6			-70%	-100%
Panama Canal/South Am	6	4			-35%	-100%
Other	4				-100%	
No Trade Identified		9				-100%
Exploration Dest	10				-100%	
Canary Isl.	6				-100%	
Baltics	12				-100%	
Australasia	3				-100%	
Asia/China	11	10			-9%	-100%
Africa/Mid-East	19	11			-41%	-100%

France, Average Age and Cruise Length by Trade Route, 2021



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Source Market: Spain

Passenger Volume (K)

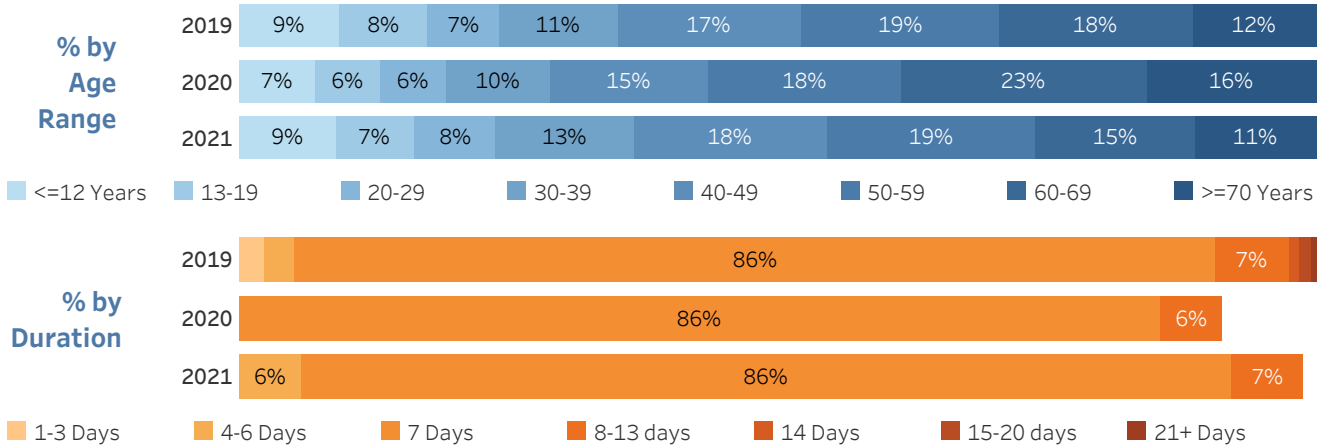
2019	2020	2021
553	45 (-91.9% ▼)	74 (65.4% ▲)

Average Duration, in Days

2019	2020	2021
7.4	7.9	7.2

Average Age

2019	2020	2021
46	50	45



Passenger Percentages by Trade Route / Destination

	2019	2020	2021
Central & Western Med.	50.6%	29.3%	78.7%
Northern Europe	10.2%		
Canary Isl.	2.8%	5.3%	
Baltics	5.3%		
Eastern Med.	18.7%		14.5%
Caribbean/Bahamas/Bermuda	5.1%	16.6%	
Africa/Mid-East	3.3%	27.2%	
Transatlantic/World Cr.	1.4%		
Exploration Dest	0.6%		
Asia/China	0.7%	11.0%	



Passenger Volume & YOY Change by Age Group

	Passenger in K			Variance		
	2019	2020	2021	2019	2020	2021
<=12 Years	51	3	7	-94%		118%
13-19	44	3	5	-94%		97%
20-29	37	3	6	-93%		111%
30-39	60	4	9	-93%		123%
40-49	92	6	13	-93%		106%
50-59	101	8	14	-92%		82%
60-69	97	10	11	-90%		10%
>=70 Years	63	7	8	-89%		20%

Passenger Volume & YOY Change by Duration

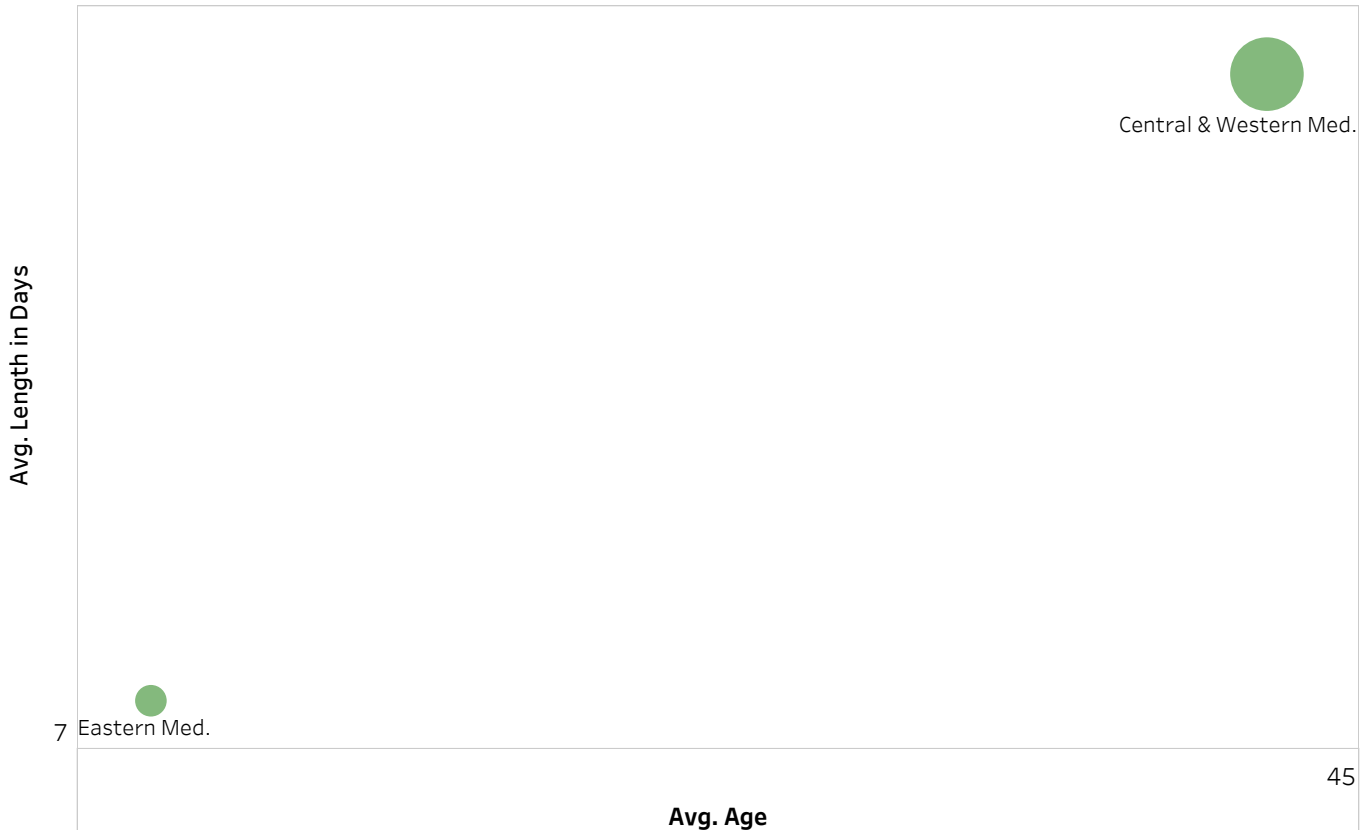
	Passenger in K			Variance		
	2019	2020	2021	2019	2020	2021
1-3 Days	13					-100%
4-6 Days	15		4			-100%
7 Days	474	38	64			-92%
8-13 Days	38	3	5			-93%
14 days	5					-100%
15-20 Days	6					-100%
21+ Days	3					-100%

Source Market: **Spain** (Continued)

Passenger Volume & YOY Change by Trade Route / Destination

	2019	2020	Passenger in K 2021	2019	2020	Variance 2021
Central & Western Med.	280	13	58		-95%	345%
Eastern Med.	104		11		-100%	
Transatlantic/World Cr.	8				-100%	
Northern Europe	57				-100%	
Exploration Dest	4				-100%	
Caribbean/Bahamas/Bermuda	28	7			-74%	-100%
Canary Isl.	15	2			-84%	-100%
Baltics	29				-100%	
Asia/China	4	5			31%	-100%
Africa/Mid-East	18	12			-34%	-100%

Spain, Average Age and Cruise Length by Trade Route, 2021



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Source Market: Switzerland

Passenger Volume (K)

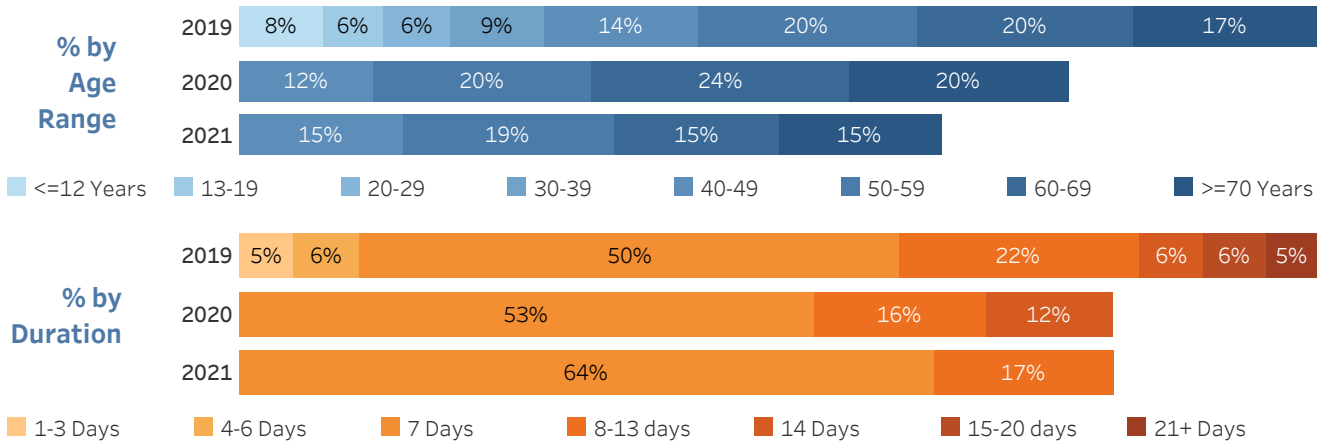
2019	2020	2021
140	23 (-83.8% ▼)	20 (-11.5% ▼)

Average Duration, in Days

2019	2020	2021
9.4	11.2	7.8

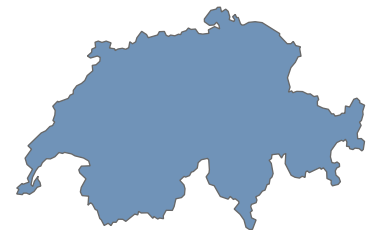
Average Age

2019	2020	2021
50	53	46



Passenger Percentages by Trade Route / Destination

	2019	2020	2021
Central & Western Med.	27.1%	12.1%	52.1%
Northern Europe	17.3%		
Canary Isl.	4.1%		
Baltics	4.2%		
Eastern Med.	13.0%		17.3%
Caribbean/Bahamas/Bermuda	9.8%	23.2%	
Africa/Mid-East	6.6%	14.9%	
Other	2.0%		
Transatlantic/World Cr.	4.9%		
Exploration Dest	2.9%		
No Trade Identified		11.7%	
Asia/China	3.4%	11.7%	
Panama Canal/South Am	2.0%		



Passenger Volume & YOY Change by Age Group

	Passenger in K			Variance	
	2019	2020	2021	2019	2021
<=12 Years	9			-100%	
13-19	7			-100%	
20-29	7			-100%	
30-39	11			-100%	
40-49	17	2	2	-86%	3%
50-59	25	4	3	-84%	-20%
60-69	24	5	3	-81%	-46%
>=70 Years	21	4	2	-81%	-38%

Passenger Volume & YOY Change by Duration

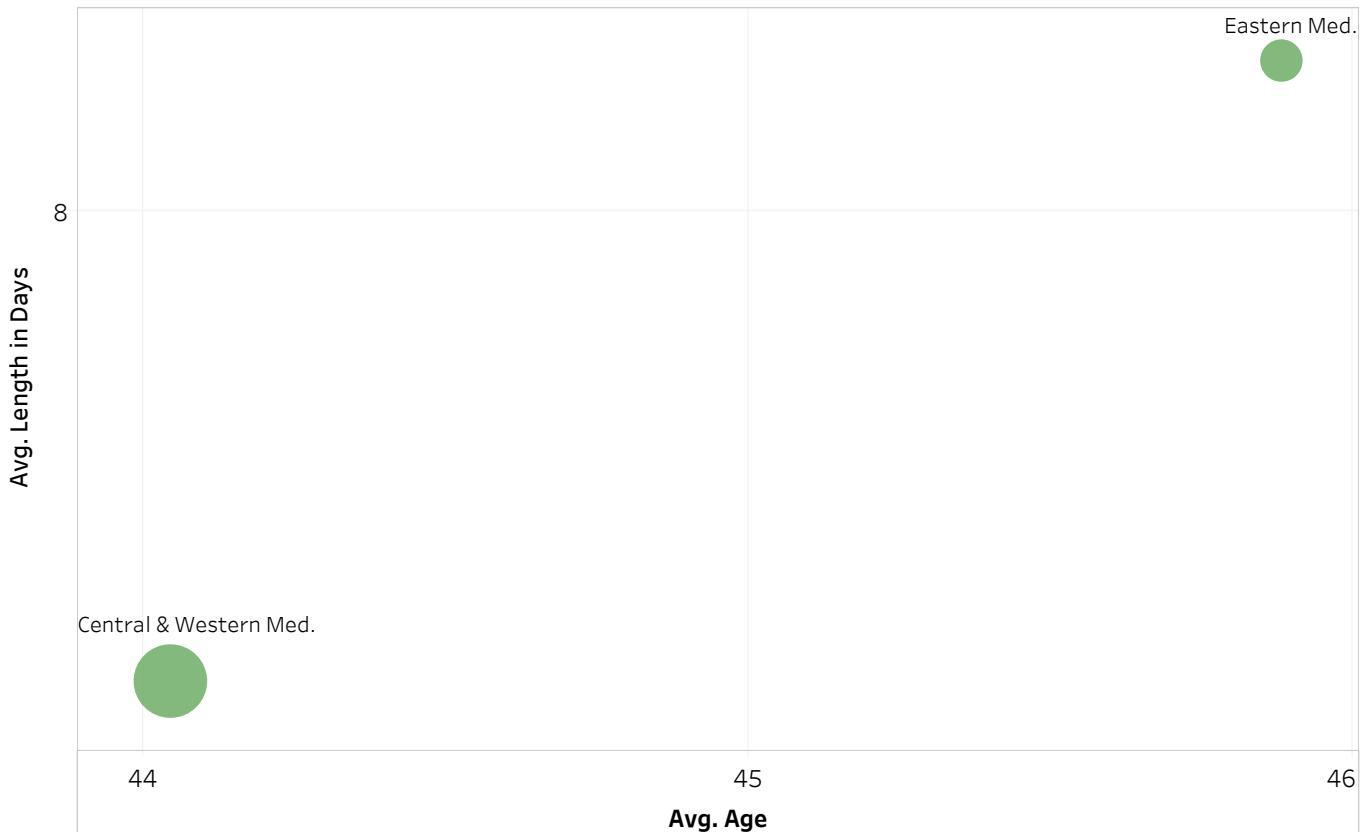
	Passenger in K			Variance	
	2019	2020	2021	2019	2021
1-3 Days	7			-100%	
4-6 Days	9			-100%	
7 Days	70	11	13	-85%	21%
8-13 Days	31	3	3	-90%	5%
14 Days	8	2		-72%	-100%
15-20 Days	8			-100%	
21+ Days	7			-100%	

Source Market: **Switzerland** (Continued)

Passenger Volume & YOY Change by Trade Route / Destination

	2019	2020	Passenger in K 2021	2019	2020	Variance 2021
Central & Western Med.	38	3	10		-93%	282%
Eastern Med.	18		3		-100%	
Transatlantic/World Cr.	7				-100%	
Panama Canal/South Am	3				-100%	
Other	3				-100%	
Northern Europe	24				-100%	
No Trade Identified		3				-100%
Exploration Dest	4				-100%	
Caribbean/Bahamas/Bermuda	14	5			-61%	-100%
Canary Isl.	6				-100%	
Baltics	6				-100%	
Asia/China	5	3			-43%	-100%
Africa/Mid-East	9	3			-64%	-100%

Switzerland, Average Age and Cruise Length by Trade Route, 2021



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Source Market: Austria

Passenger Volume (K)

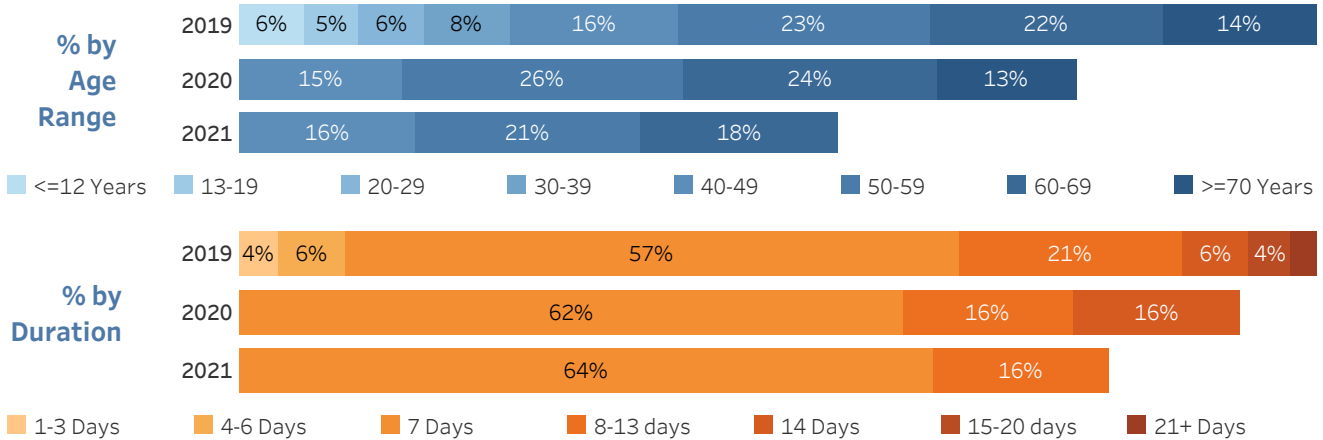
2019	2020	2021
136	25 (-81.9% ▼)	15 (-40.2% ▼)

Average Duration, in Days

2019	2020	2021
8.5	9.6	7.4

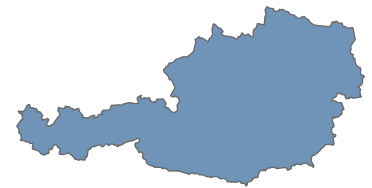
Average Age

2019	2020	2021
50	51	48



Passenger Percentages by Trade Route / Destination

	2019	2020	2021
Central & Western Med.	28.1%	9.9%	40.6%
Northern Europe	12.6%		
Canary Isl.	6.0%	13.8%	
Baltics	4.8%		
Eastern Med.	19.7%		30.6%
Caribbean/Bahamas/Bermuda	10.1%	26.9%	
Africa/Mid-East	6.7%	19.6%	
Other	2.3%		
Transatlantic/World Cr.	3.0%		
Exploration Dest	1.5%		
Asia/China	2.9%	11.5%	



Passenger Volume & YOY Change by Age Group

	Passenger in K			Variance	
	2019	2020	2021	2019	2021
<=12 Years	8			-100%	
13-19	6			-100%	
20-29	8			-100%	
30-39	10			-100%	
40-49	19	3	2	-83%	-38%
50-59	29	6	3	-80%	-54%
60-69	27	5	2	-81%	-55%
>=70 Years	18	3		-84%	-100%

Passenger Volume & YOY Change by Duration

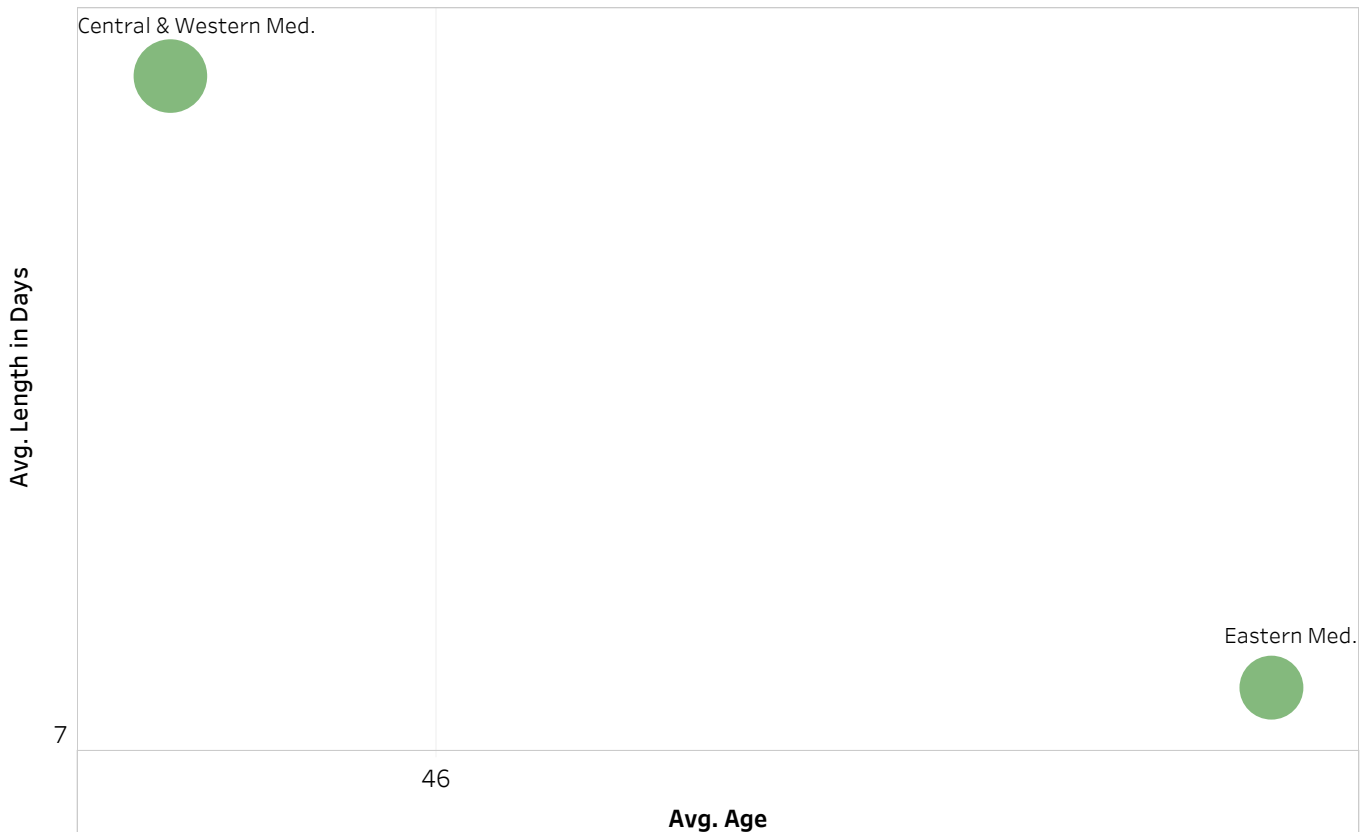
	Passenger in K			Variance	
	2019	2020	2021	2019	2021
1-3 Days	5			-100%	
4-6 Days	8			-100%	
7 Days	78	14	9	-82%	-33%
8-13 Days	28	4	2	-87%	-33%
14 Days	8	4		-58%	-100%
15-20 Days	5			-100%	
21+ Days	3			-100%	

Source Market: **Austria** (Continued)

Passenger Volume & YOY Change by Trade Route / Destination

	2019	2020	Passenger in K 2021	2019	2020	Variance 2021
Central & Western Med.	38	2	6		-94%	144%
Eastern Med.	27		5		-100%	
Transatlantic/World Cr.	4				-100%	
Other	3				-100%	
Northern Europe	17				-100%	
Exploration Dest	2				-100%	
Caribbean/Bahamas/Bermuda	14	7			-52%	-100%
Canary Isl.	8	3			-58%	-100%
Baltics	7				-100%	
Asia/China	4	3			-28%	-100%
Africa/Mid-East	9	5			-47%	-100%

Austria, Average Age and Cruise Length by Trade Route, 2021



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Source Market: Netherlands

Passenger Volume (K)

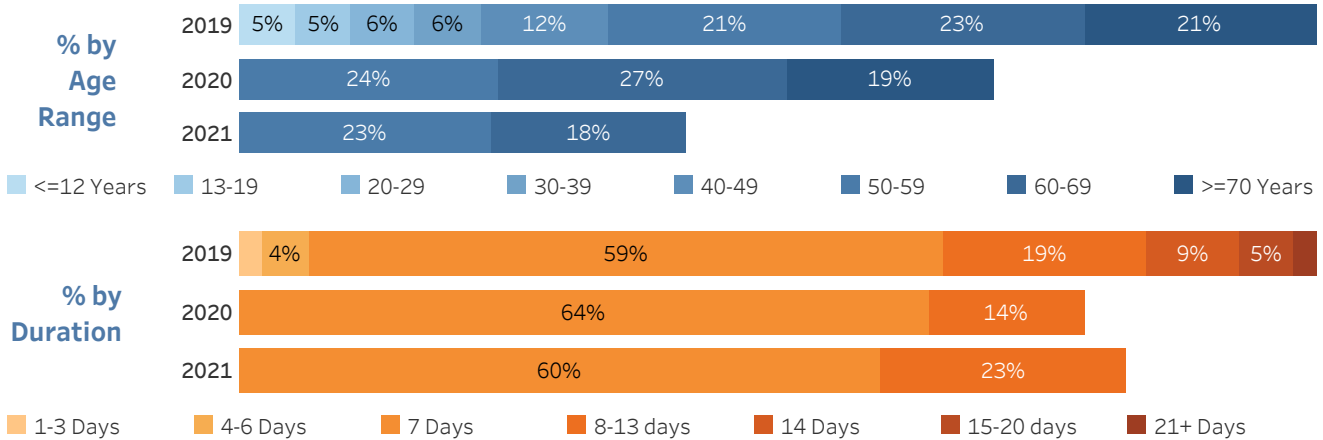
2019	2020	2021
123	18 (-85.6% ▼)	13 (-26.1% ▼)

Average Duration, in Days

2019	2020	2021
9.1	9.4	7.9

Average Age

2019	2020	2021
53	54	50



Passenger Percentages by Trade Route / Destination

	2019	2020	2021
Central & Western Med.	20.1%		44.5%
Northern Europe	21.1%		17.0%
Canary Isl.	4.9%	13.3%	
Baltics	4.3%		
Eastern Med.	6.6%		
Caribbean/Bahamas/Bermuda	20.9%	28.9%	
Africa/Mid-East	5.7%	18.3%	
Transatlantic/World Cr.	2.0%		
Exploration Dest	4.9%		
Asia/China	3.2%		
Panama Canal/South Am	2.1%		
Alaska	1.7%		



Passenger Volume & YOY Change by Age Group

	Passenger in K			Variance	
	2019	2020	2021	2019	2021
<=12 Years	6				-100%
13-19	6				-100%
20-29	7				-100%
30-39	7				-100%
40-49	13				-100%
50-59	24	4	3	-84%	-32%
60-69	26	4	2	-83%	-53%
>=70 Years	24	3		-87%	-100%

Passenger Volume & YOY Change by Duration

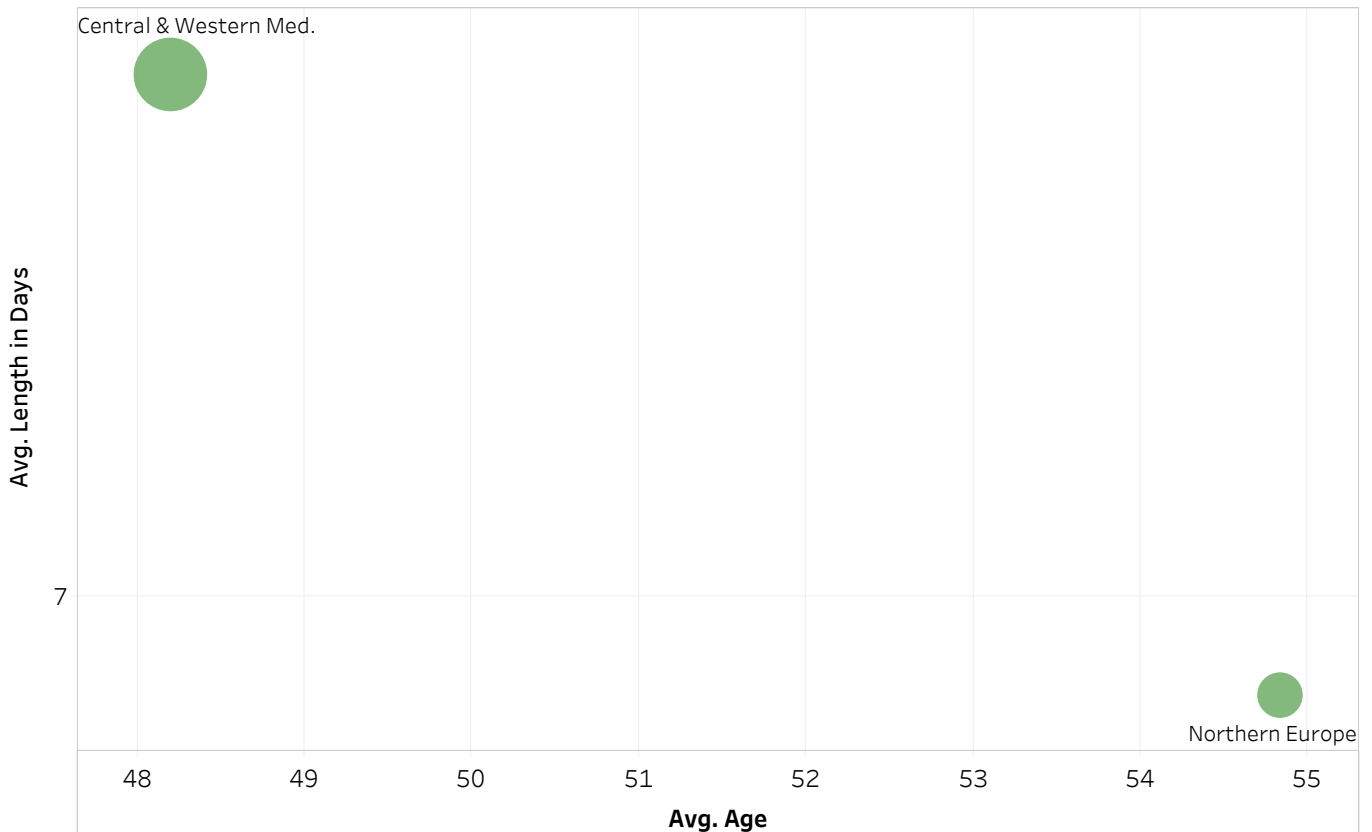
	Passenger in K			Variance	
	2019	2020	2021	2019	2021
1-3 Days	3				-100%
4-6 days	5				-100%
7 Days	72	11	8	-85%	-26%
8-13 Days	23	2	3	-90%	26%
14 days	11				-100%
15-20 Days	6				-100%
21+ Days	3				-100%

Source Market: **Netherlands** (Continued)

Passenger Volume & YOY Change by Trade Route / Destination

	2019	2020	Passenger in K 2021	2019	2020	Variance 2021
Central & Western Med.	25		6		-100%	
Northern Europe	26		2		-100%	
Transatlantic/World Cr.	2				-100%	
Panama Canal/South Am	3				-100%	
Exploration Dest	6				-100%	
Eastern Med.	8				-100%	
Caribbean/Bahamas/Bermuda	26	5			-80%	-100%
Canary Isl.	6	2			-61%	-100%
Baltics	5				-100%	
Asia/China	4				-100%	
Alaska	2				-100%	
Africa/Mid-East	7	3			-53%	-100%

Netherlands, Average Age and Cruise Length by Trade Route, 2021



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Source Market: Portugal

Passenger Volume (K)

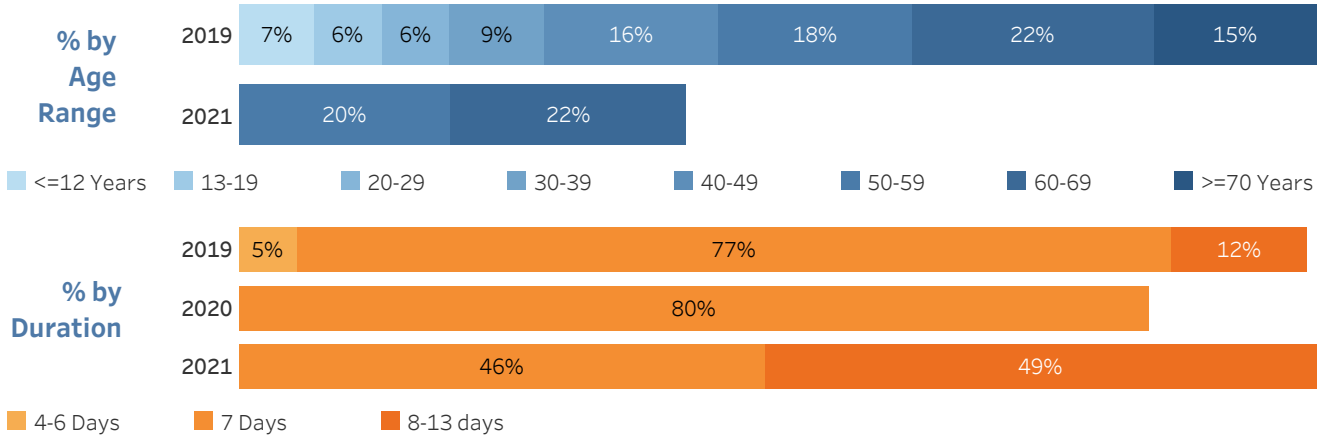
2019	2020	2021
69	8 (-88.4% ▼)	12 (48.8% ▲)

Average Duration, in Days

2019	2020	2021
7.5	7.8	8.8

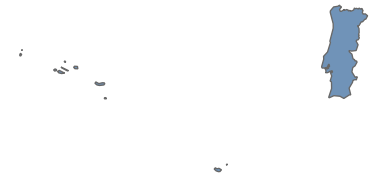
Average Age

2019	2020	2021
49	52	50



Passenger Percentages by Trade Route / Destination

	2019	2020	2021
Central & Western Med.	35.1%		69.0%
Northern Europe	7.5%		
Canary Isl.	5.8%		
Baltics	4.3%		
Eastern Med.	24.0%		17.0%
Caribbean/Bahamas/Bermuda	13.8%	26.3%	
Africa/Mid-East	3.2%	34.4%	



Passenger Volume & YOY Change by Age Group

	Passenger in K		2019	Variance
	2019	2021		
<=12 Years	5			-100%
13-19	4			-100%
20-29	4			-100%
30-39	6			-100%
40-49	11			-100%
50-59	12	2		-81%
60-69	15	3		-83%
>=70 Years	10			-100%

Passenger Volume & YOY Change by Duration

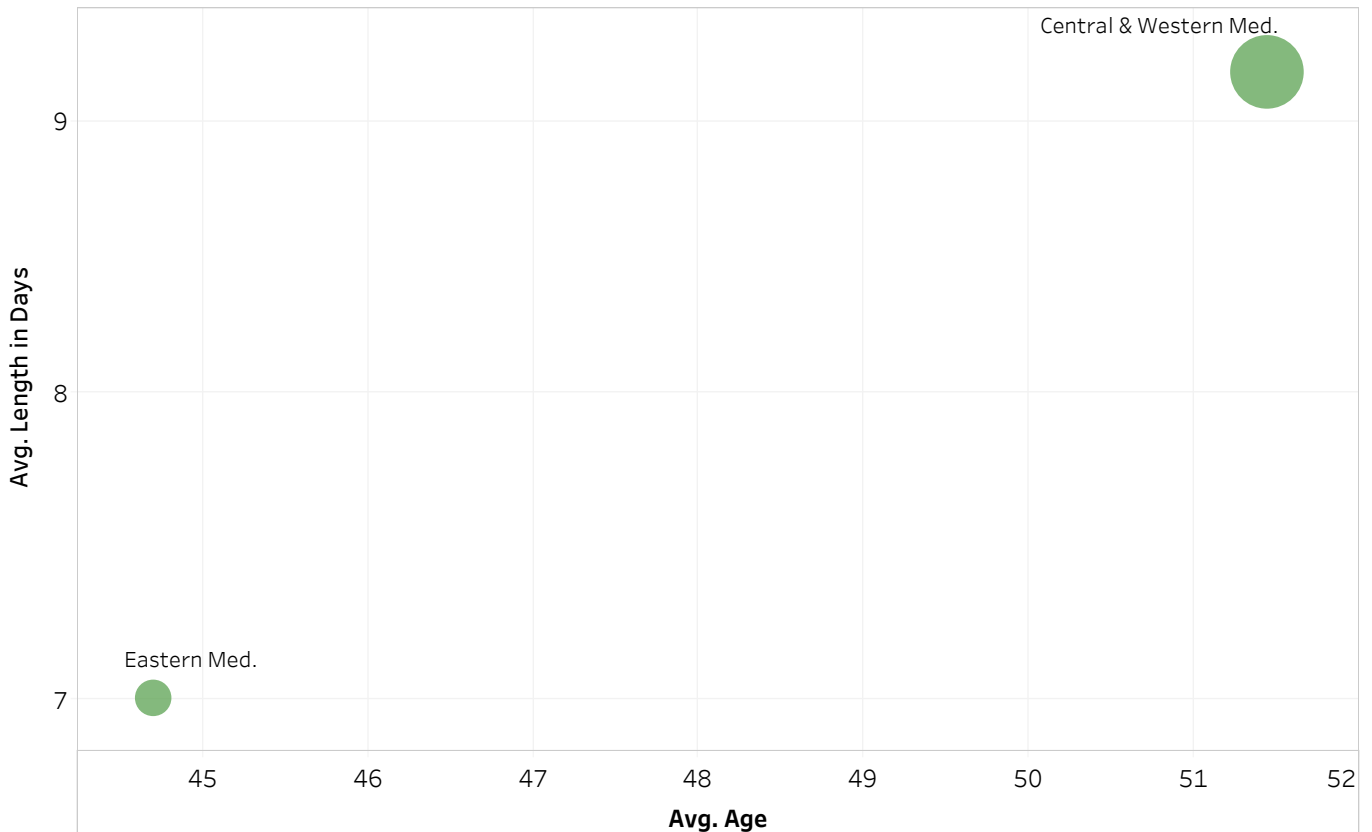
	2019	Passenger in K		2019	2020	Variance
		2020	2021			
4-6 Days	3					-100%
7 Days	53	6	5		-88%	-14%
8-13 Days	8		6			-100%

Source Market: Portugal (Continued)

Passenger Volume & YOY Change by Trade Route / Destination

	2019	2020	Passenger in K 2021	2019	2020	Variance 2021
Central & Western Med.	24		8		-100%	
Eastern Med.	16		2		-100%	
Northern Europe	5				-100%	
Caribbean/Bahamas/Bermuda	9	2			-78%	-100%
Canary Isl.	4				-100%	
Baltics	3				-100%	
Africa/Mid-East	2	3			26%	-100%

Portugal, Average Age and Cruise Length by Trade Route, 2021



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GLOSSARY

This report is based on 2021 calendar year passenger statistics provided by the ocean-going cruise line members of the Cruise Lines International Association (CLIA), who represent nearly 90% of global cruise industry capacity, plus additional data collected by IRN and CHART Management Consultants from non-CLIA cruise lines. The research is based on a methodology that is used in similar studies around the world. This consistent approach facilitates comparisons with other major cruise markets. Data points below 2,000 passengers (for source markets) and 4,000 (for destinations) are not displayed.

All analyses and information exclude one-night cruises, consistent with past CLIA Asia source market reports. Destinations and trade routes are determined by the area where the ship is predominantly sailing, with the exception of the following:

- “Mainland China, Hong Kong, and Taiwan” represents sailings that embark from these markets and sail within Asia.
- “Rest of Asia” excludes sailings that embark from Mainland China, Hong Kong, and Taiwan.
- References to “Other” in the destinations/trade routes consist of transatlantic, world cruise, Africa/Middle East, Panama Canal/South America, Canada/New England, exploration, no trade route identified, and others.



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