



CLIA

2025

EUROPE

MARKET

REPORT



Europe 2025

In 2025, Europe produced 8.9 million source passengers who took an ocean-going cruise anywhere in the world. This represents a 5.3% increase from the 8.4 million Europeans who sailed in 2024. Overall, Europeans sailed for an average of 8.6 days per cruise, slightly down from last year's 8.8 average days. Average ages of sailing guests increased by half a year, from 48.0 to 48.5 years.

Approximately 45% of European cruise passengers, nearly 4 million and up 3% from the previous year, sailed in the Mediterranean. An additional 31%, or about 2.8 million, cruised in non-Mediterranean Europe, a 6% increase from the prior year.

Germany remained Europe's largest source market with 2.83 million cruise guests, a 10% increase from 2.57 million in 2024. The average age was 48, up from 47.2 in 2024, and the average duration was 9.1 days, down from 9.3 in 2024. The UK+Ireland retained the number two position in Europe overall with 2.54 million guests, up 5.7% from 2.4 million.

Their average cruise duration was 9.6 days, the longest among European markets, and the average age increased slightly to 54.6 years.

Italy, in third place, recorded 1.12 million cruise guests, down 3% from 1.15 million in 2024. Average duration was 7.2 days, compared with 7.3 in 2024, and average age was 42.5, up by half a year from 42.0 in 2024. Spain and France round out the top five source markets with 635,000 and 584,000 source passengers, respectively, up 4% and 2%. In 2024, Singapore unseated France as the 10th-largest source market globally, but in 2025, France returned to 10th place.

Regional Overview: Europe 2022 to 2025

Passenger Volume (K)

2022	2023	2024	2025
5,726.7	8,205.1 (43.3% ▲)	8,435.9 (2.8% ▲)	8,882.5 (5.3% ▲)

Average Duration, in Days

2022	2023	2024	2025
8.7	8.9	8.8	8.6

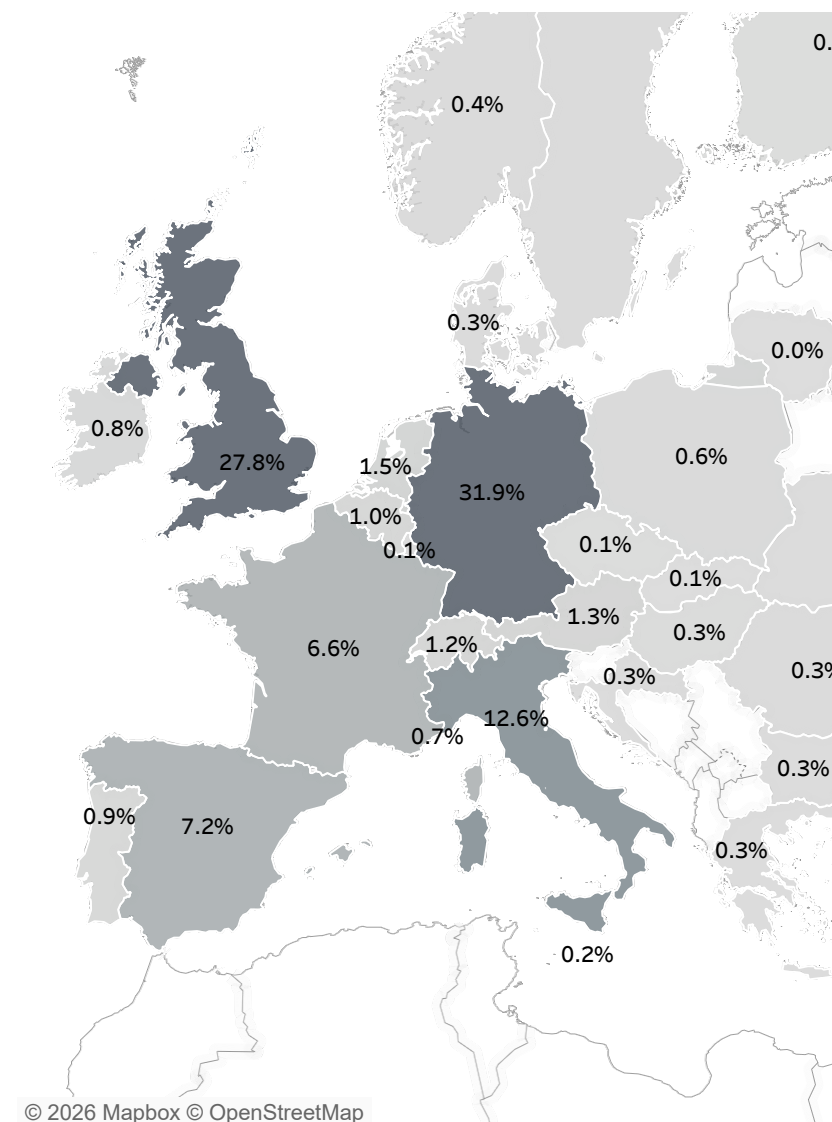
Average Age

2022	2023	2024	2025
48.3	47.9	48.0	48.5

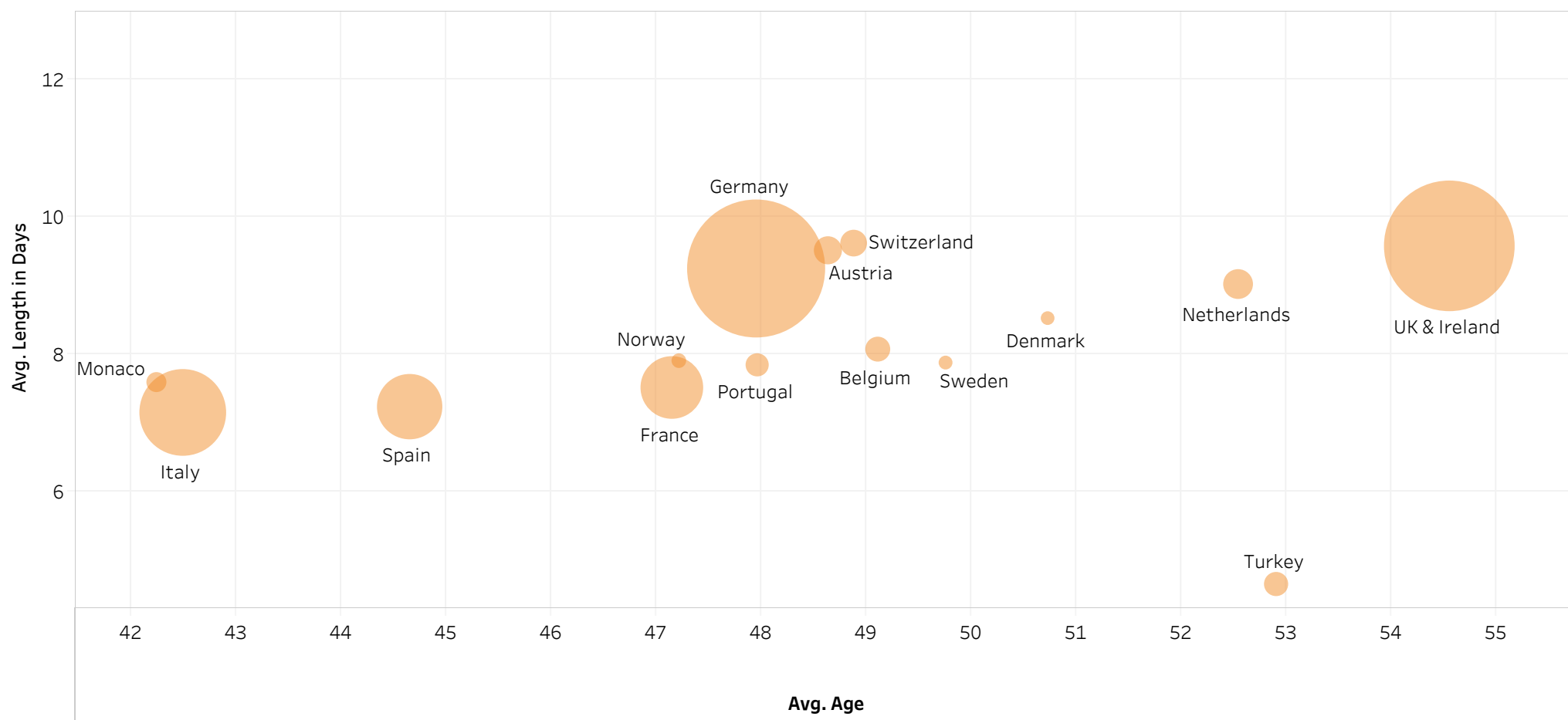
Passenger Volume (K) for Top Countries

	2022	2023	2024	2025
Germany	1,875.8	2,512.9 (34.0% ▲)	2,574.3 (2.4% ▲)	2,831.9 (10.0% ▲)
UK & Ireland	1,663.9	2,281.0 (37.1% ▲)	2,400.4 (5.2% ▲)	2,538.1 (5.7% ▲)
Italy	790.8	1,176.0 (48.7% ▲)	1,147.6 (-2.4% ▼)	1,118.4 (-2.5% ▼)
Spain	413.5	586.8 (41.9% ▲)	609.9 (3.9% ▲)	635.2 (4.1% ▲)
France	324.8	575.9 (77.3% ▲)	573.3 (-0.4% ▼)	583.6 (1.8% ▲)
Netherlands	82.3	120.2 (46.0% ▲)	128.3 (6.8% ▲)	131.9 (2.8% ▲)
Austria	55.4	109.5 (97.7% ▲)	112.8 (3.0% ▲)	117.4 (4.0% ▲)
Switzerland	69.6	101.4 (45.7% ▲)	110.8 (9.3% ▲)	106.2 (-4.2% ▼)
Belgium	55.1	83.5 (51.5% ▲)	93.4 (11.9% ▲)	92.4 (-1.1% ▼)
Turkey	18.2	35.8 (96.2% ▲)	64.1 (79.0% ▲)	86.8 (35.5% ▲)
Portugal	44.5	74.0 (66.2% ▲)	74.1 (0.2% ▲)	79.5 (7.3% ▲)
Monaco	21.2	52.4 (147.3% ▲)	57.7 (10.1% ▲)	59.4 (3.0% ▲)
Poland	16.6	34.1 (106.0% ▲)	43.1 (26.4% ▲)	49.8 (15.5% ▲)
Norway	59.7	71.9 (20.4% ▲)	55.5 (-22.7% ▼)	31.8 (-42.8% ▼)
Romania	13.1	27.5 (110.5% ▲)	27.8 (0.9% ▲)	29.0 (4.4% ▲)
Sweden	32.1	29.5 (-8.1% ▼)	28.4 (-3.8% ▼)	28.5 (0.4% ▲)
Denmark	29.6	35.3 (19.5% ▲)	31.9 (-9.6% ▼)	27.8 (-12.8% ▼)
Hungary	10.3	22.2 (116.2% ▲)	23.4 (5.3% ▲)	26.1 (11.8% ▲)
Greece	14.6	15.6 (6.7% ▲)	16.7 (7.6% ▲)	22.5 (34.7% ▲)
Malta	11.4	18.8 (65.3% ▲)	18.7 (-0.5% ▼)	17.8 (-4.9% ▼)

Share of Source Passengers, 2025 Geographic Share

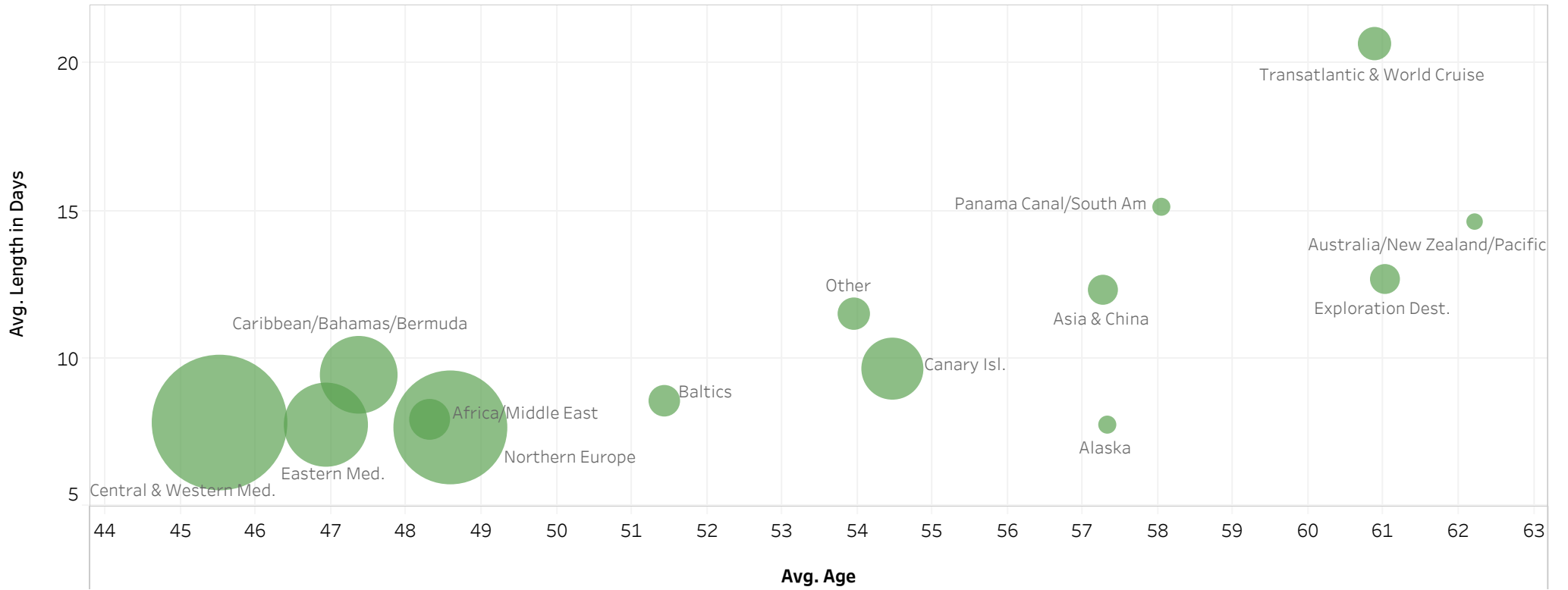


Average Age and Cruise Length for Top Source Markets, 2025

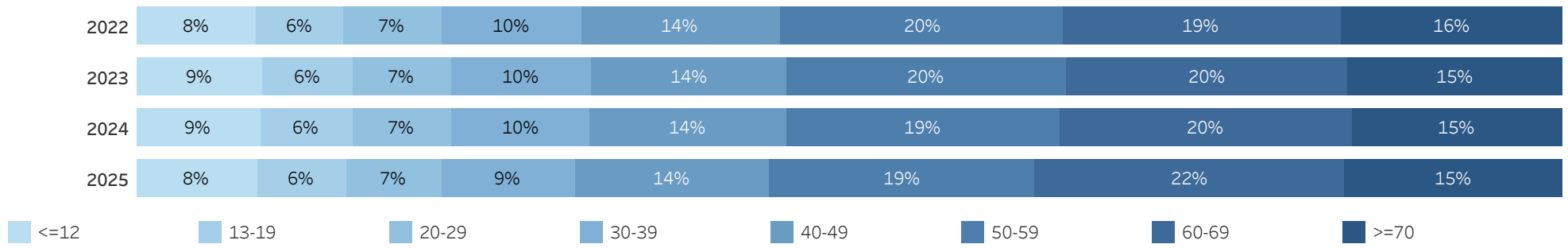


Regional Overview: Europe (Continued)

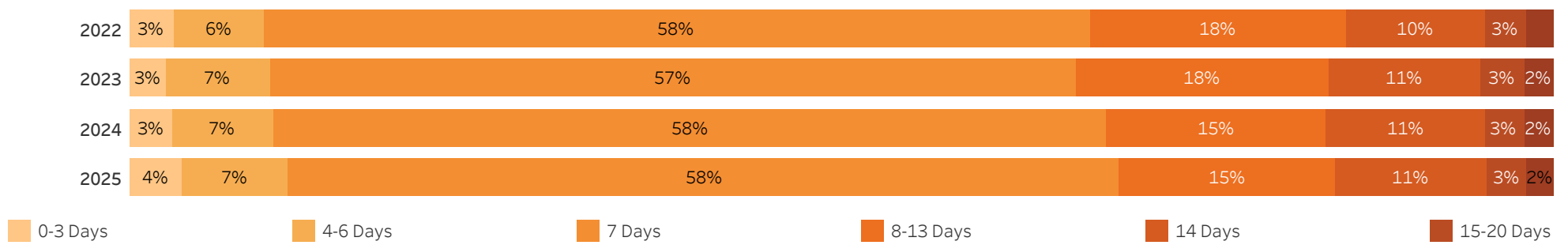
Average Age and Cruise Length by Destination / Trade Route, 2025



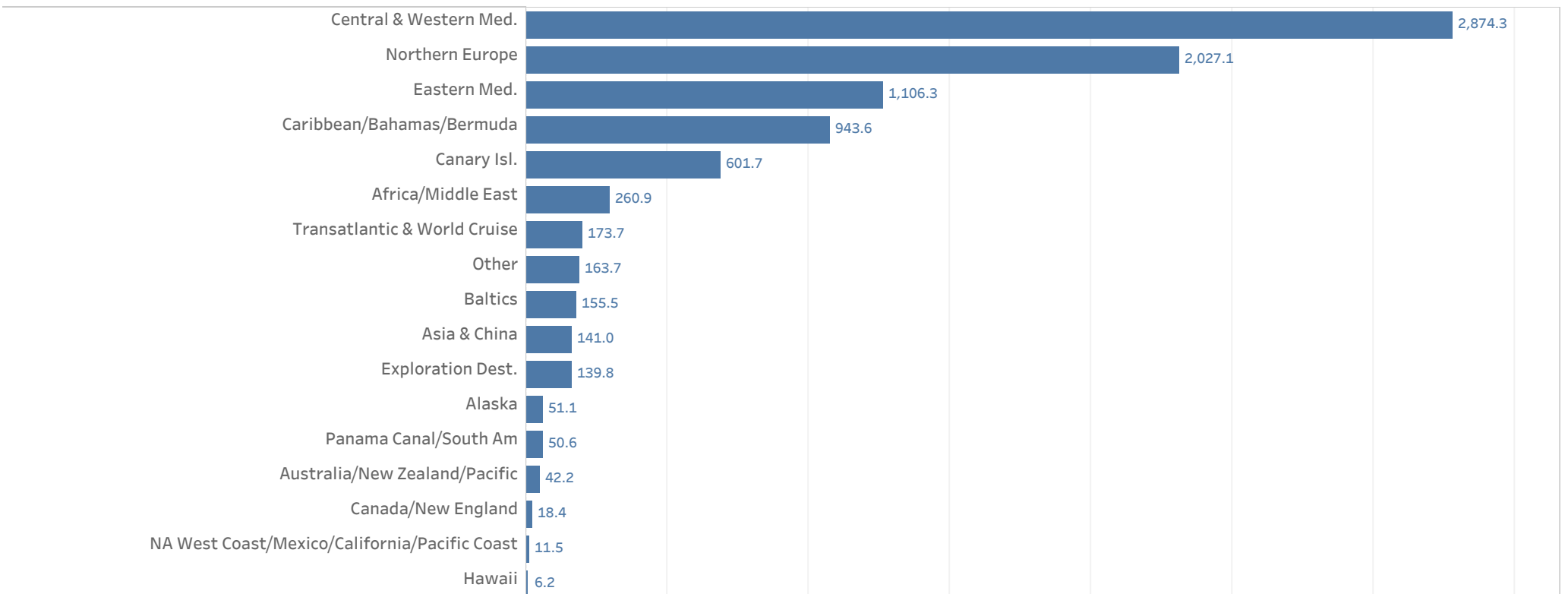
Average Passenger Age Groups



Average Cruise Duration



Volume of Passengers (in K) to Destinations, 2025
At least 4K Passengers per Destination

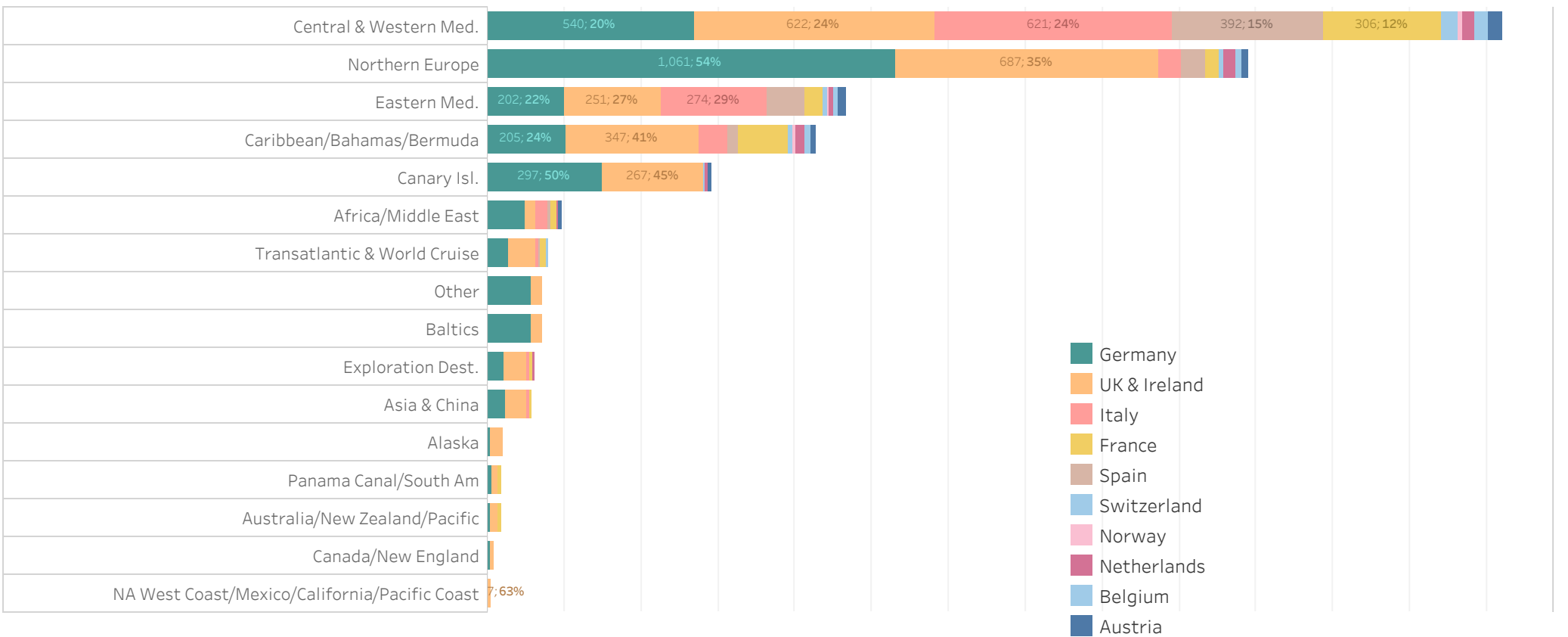


Regional Overview: Europe (Continued)

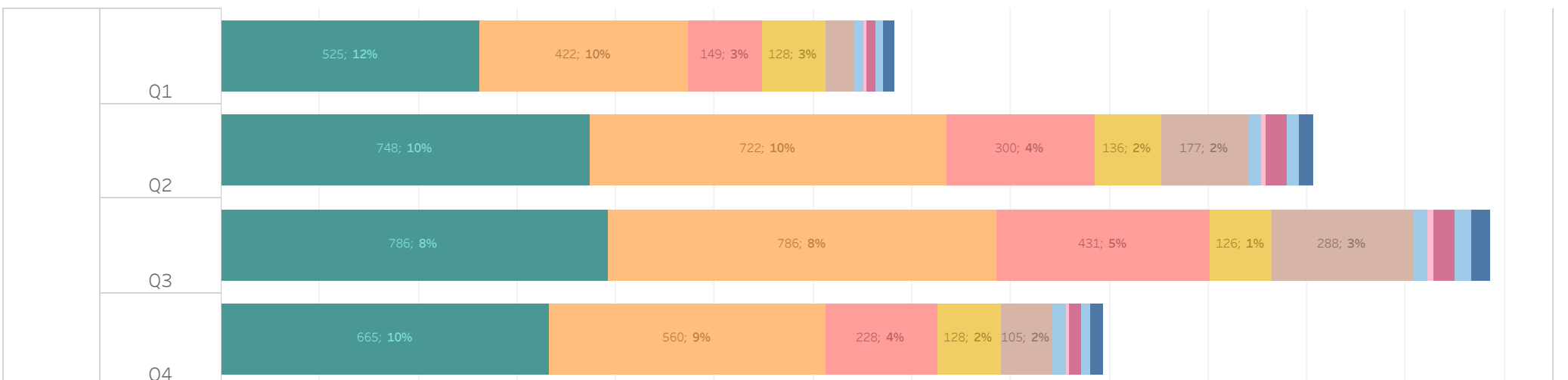
Passenger Volume by Trade (K)

	2022	2023	2024	2025
Central & Western Med.	2,042.4	2,788.6 (36.5% ▲)	2,744.4 (-1.6% ▼)	2,874.3 (4.7% ▲)
Northern Europe	1,418.6	1,961.2 (38.3% ▲)	1,880.4 (-4.1% ▼)	2,027.1 (7.8% ▲)
Eastern Med.	838.3	966.1 (15.2% ▲)	1,131.3 (17.1% ▲)	1,106.3 (-2.2% ▼)
Caribbean/Bahamas/Bermuda	409.6	749.5 (83.0% ▲)	850.2 (13.4% ▲)	943.6 (11.0% ▲)
Canary Isl.	328.5	475.8 (44.8% ▲)	572.5 (20.3% ▲)	601.7 (5.1% ▲)
Africa/Middle East	150.5	332.6 (121.0% ▲)	298.4 (-10.3% ▼)	260.9 (-12.6% ▼)
Transatlantic & World Cruise	109.6	192.9 (76.0% ▲)	185.3 (-3.9% ▼)	173.7 (-6.3% ▼)
Other	99.7	100.7 (1.0% ▲)	97.6 (-3.1% ▼)	163.7 (67.8% ▲)
Baltics	159.6	181.2 (13.5% ▲)	171.1 (-5.6% ▼)	155.5 (-9.1% ▼)
Asia & China	14.0	82.1 (488.7% ▲)	120.8 (47.1% ▲)	141.0 (16.7% ▲)
Exploration Dest.	68.0	176.1 (159.1% ▲)	191.5 (8.7% ▲)	139.8 (-27.0% ▼)
No Trade Identified	4.4	(-100.0% ▼)	24.4	110.3 (351.9% ▲)
Alaska	35.3	44.2 (25.3% ▲)	45.8 (3.7% ▲)	51.1 (11.5% ▲)
Panama Canal/South Am	11.7	43.8 (275.2% ▲)	43.9 (0.2% ▲)	50.6 (15.3% ▲)
Australia/New Zealand/Pacific	10.5	34.0 (223.4% ▲)	37.9 (11.6% ▲)	42.2 (11.3% ▲)
Canada/New England	10.4	17.5 (68.5% ▲)	18.8 (7.5% ▲)	18.4 (-2.0% ▼)
NA West Coast/Mexico/California/Pacific Coast	9.0	44.9 (401.2% ▲)	12.4 (-72.4% ▼)	11.5 (-7.2% ▼)
Hawaii	6.8	10.3 (52.4% ▲)	9.1 (-11.9% ▼)	6.2 (-31.7% ▼)

Passenger Volume (K) by Trade & Top Source Countries



Passenger Volume (K) by Quarter & Top Source Countries in 2025



Passenger Volume (K) for Other Countries

	2022	2023	2024	2025
Czech Republic	6.9	12.0 (73.5% ▲)	12.4 (3.8% ▲)	13.2 (5.9% ▲)
Finland	8.5	12.0 (41.0% ▲)	12.4 (3.7% ▲)	12.8 (3.1% ▲)
Slovakia		8.7	9.2 (6.0% ▲)	8.2 (-10.6% ▼)
Cyprus	13.4	7.7 (-42.1% ▼)	(-100.0% ▼)	7.0
Moldova				6.9
Latvia	15.9	(-100.0% ▼)		

Source Market: Germany

2022-2025

Passenger Volume (K)

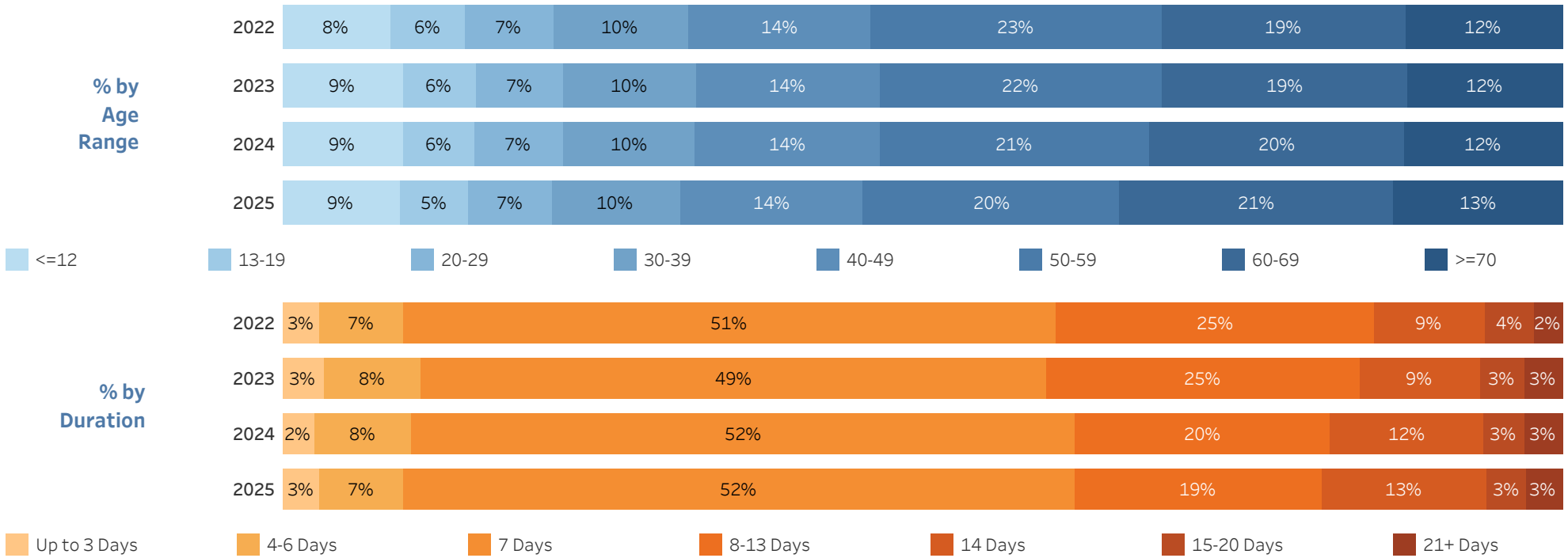
2022	2023	2024	2025
1,875.8	2,512.9 (34.0% ▲)	2,574.3 (2.4% ▲)	2,831.9 (10.0% ▲)

Average Duration, in Days

2022	2023	2024	2025
9.1	9.2	9.3	9.3

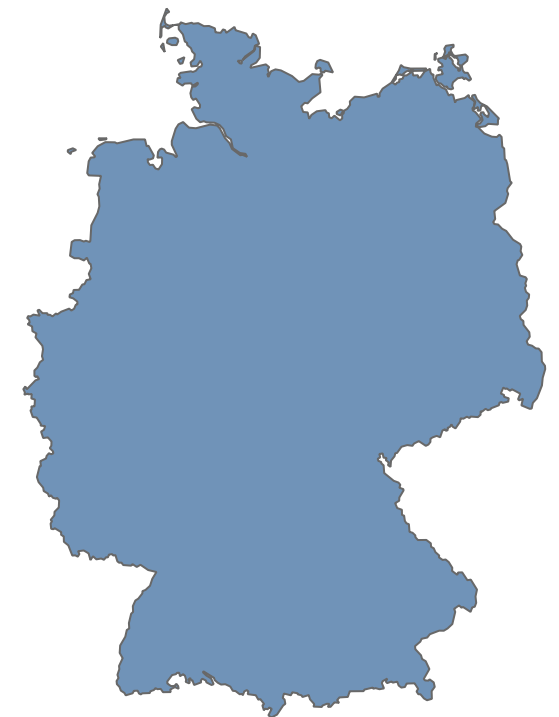
Average Age

2022	2023	2024	2025
47.5	47.0	47.2	48.0



Passenger Percentages by Trade Route / Destination

	2022	2023	2024	2025
Central & Western Med.	20.4%	19.3%	16.8%	19.2%
Eastern Med.	11.3%	5.1%	8.2%	7.2%
Caribbean/Bahamas/Bermuda	5.0%	6.4%	7.2%	7.3%
Northern Europe	39.4%	40.1%	37.5%	37.6%
Canary Isl.	8.5%	8.9%	9.8%	10.6%
Exploration Dest	0.7%	1.7%	2.4%	1.6%
Africa/Mid-East	3.6%	5.6%	5.1%	3.5%
Transatlantic/World Cr.	1.4%	2.5%	2.5%	1.9%
Baltics	4.7%	4.7%	5.0%	4.1%
Other	4.3%	3.3%	2.7%	4.0%
Asia/China		1.2%	1.4%	1.7%
Panama Canal/South Am		0.4%	0.3%	0.4%
Australasia		0.3%	0.4%	0.3%
Canada/New England				0.3%
Alaska				0.2%
NA West Coast/Mexico/California/Pacific Coast		0.3%		



Passenger Volume & YOY Change by Age Group

	Passenger				YOY along Sail Year			
	2022	2023	2024	2025	2022	2023	2024	2025
<=12	144.8	223.8	232.5	248.6		54.6%	3.9%	6.9%
13-19	100.0	135.5	138.2	145.6		35.6%	2.0%	5.3%
20-29	118.7	162.2	169.8	179.5		36.6%	4.7%	5.7%
30-39	179.3	246.7	252.7	269.5		37.6%	2.4%	6.7%
40-49	246.0	339.5	356.8	386.8		38.0%	5.1%	8.4%
50-59	389.4	523.8	519.1	547.0		34.5%	-0.9%	5.4%
60-69	328.1	456.4	491.8	582.0		39.1%	7.8%	18.3%
>=70	209.2	285.5	304.0	358.6		36.5%	6.5%	18.0%

Passenger Volume & YOY Change by Duration

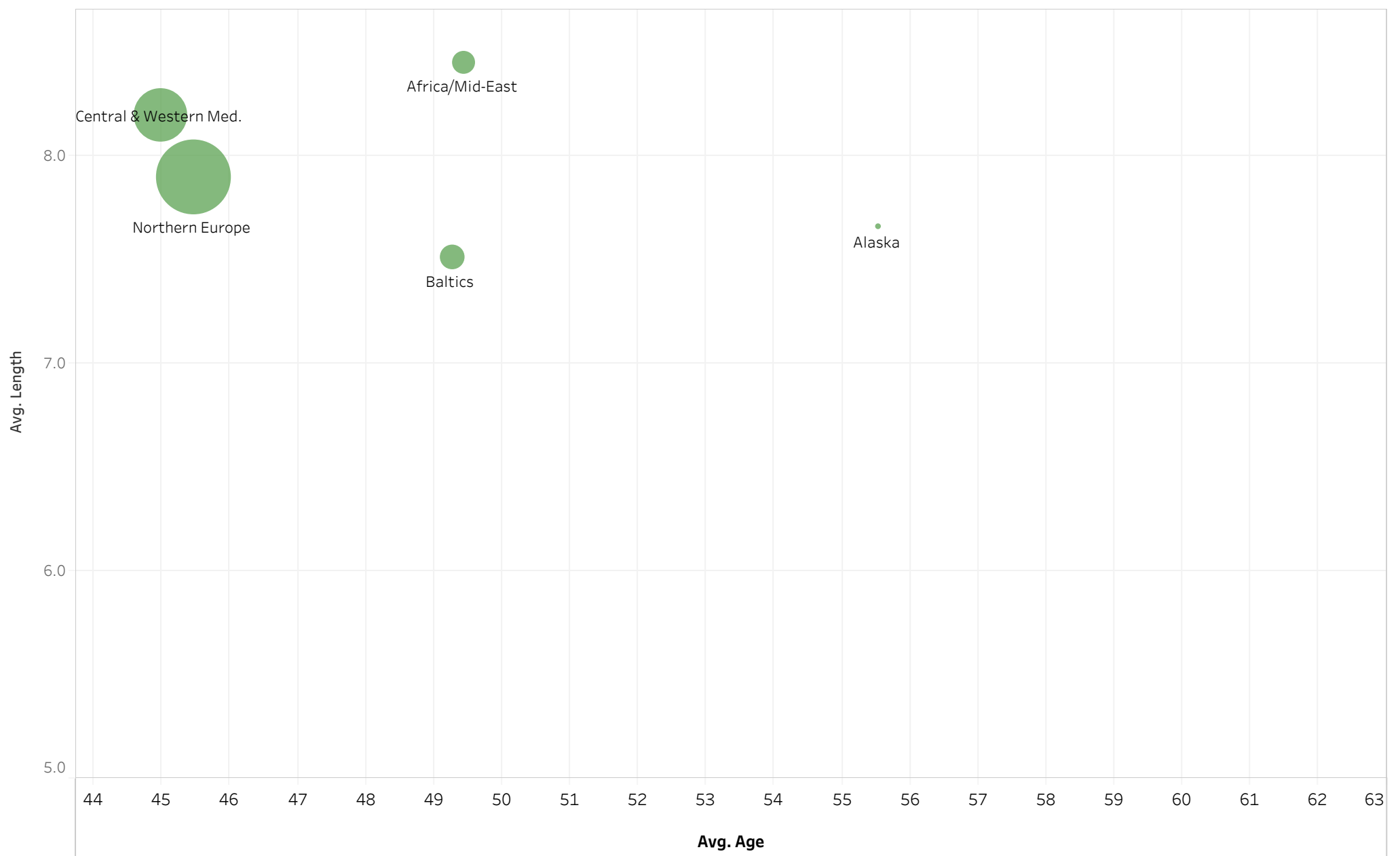
	Passenger				YOY along Sail Year			
	2022	2023	2024	2025	2022	2023	2024	2025
Up to 3 Days	52.9	80.6	62.5	79.4		52.3%	-22.5%	27.1%
4-6 Days	123.9	190.7	194.9	187.9		54.0%	2.2%	-3.6%
7 Days	956.1	1,228.6	1,334.9	1,484.2		28.5%	8.7%	11.2%
8-13 Days	467.2	616.0	513.4	548.6		31.9%	-16.7%	6.9%
14 Days	163.3	235.0	310.5	362.9		43.9%	32.1%	16.9%
15-20 Days	71.4	87.8	80.7	90.4		22.9%	-8.1%	12.1%
21+ Days	40.7	73.2	76.6	78.1		79.7%	4.7%	1.9%

Source Market: **Germany** (Continued)
2022-2025

Passenger Volume & YOY Change by Trade Route / Destination

	Passenger				YOY along Sail Year			
	2022	2023	2024	2025	2022	2023	2024	2025
Northern Europe	738.6	1,006.5	964.7	1,060.5		36.3%	-4.2%	9.9%
Central & Western Med.	382.6	483.8	432.6	540.5		26.4%	-10.6%	24.9%
Canary Isl.	159.8	224.0	253.0	297.5		40.2%	12.9%	17.6%
Caribbean/Bahamas/Bermuda	93.8	161.2	185.3	205.1		71.9%	14.9%	10.7%
Eastern Med.	211.1	128.3	211.7	201.8		-39.2%	65.1%	-4.7%
Baltics	87.4	117.3	129.2	115.2		34.2%	10.1%	-10.8%
Other	81.0	83.8	69.5	113.7		3.5%	-17.1%	63.6%
Africa/Mid-East	66.6	139.5	132.0	99.7		109.3%	-5.3%	-24.5%
Transatlantic/World Cr.	27.1	62.1	63.3	54.7		129.0%	1.9%	-13.5%
Asia/China		30.5	37.1	47.1			21.3%	27.2%
Exploration Dest	12.6	42.2	60.5	43.8		234.3%	43.4%	-27.6%
Panama Canal/South Am		9.4	7.9	10.7			-16.6%	36.1%
Australasia		6.9	9.5	9.1			37.1%	-3.3%
Canada/New England				7.3				
Alaska				6.2				
NA West Coast/Mexico/California/Pacific Coast		7.0					-100.0%	

Germany, Average Age and Cruise Length by Trade Route, 2025



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

2022-2025

Passenger Volume (K)

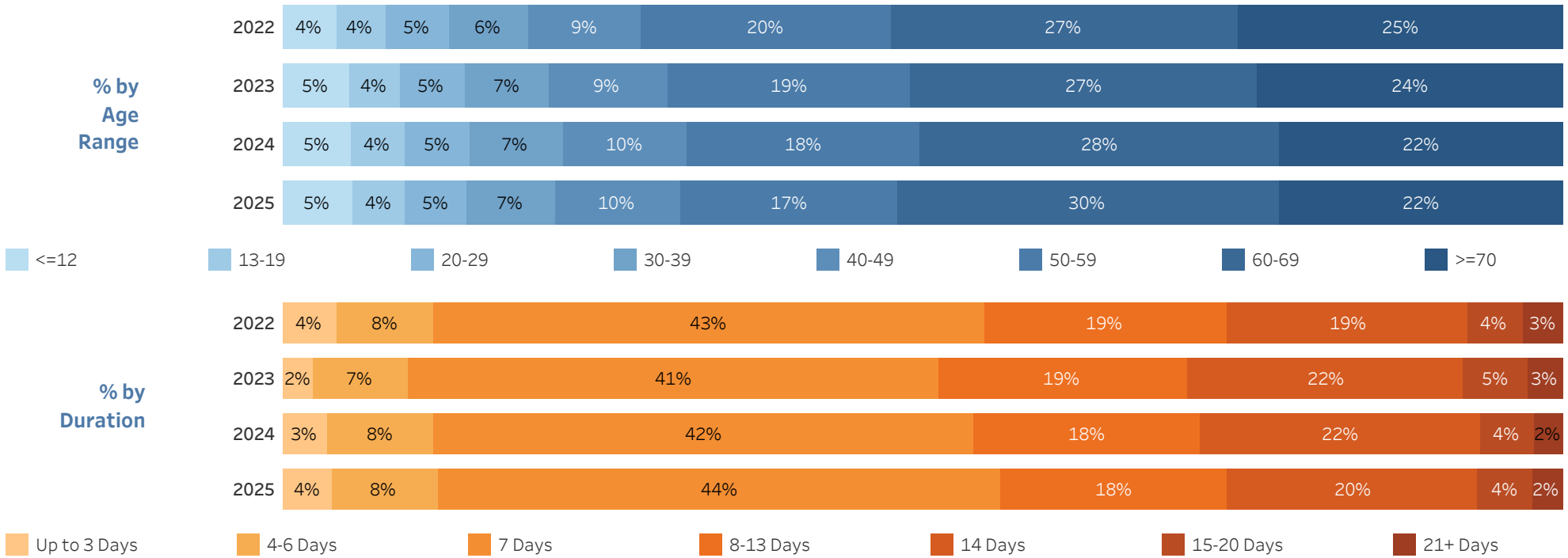
2022	2023	2024	2025
1,663.9	2,281.0 (37.1% ▲)	2,400.4 (5.2% ▲)	2,538.1 (5.7% ▲)

Average Duration, in Days

2022	2023	2024	2025
9.8	10.1	9.7	9.6

Average Age

2022	2023	2024	2025
55.9	54.9	54.3	54.6



Passenger Percentages by Trade Route / Destination

	2022	2023	2024	2025
Central & Western Med.	27.5%	26.5%	25.5%	24.6%
Eastern Med.	10.9%	8.2%	9.8%	9.9%
Caribbean/Bahamas/Bermuda	10.6%	11.8%	12.8%	13.7%
Northern Europe	29.0%	29.3%	26.5%	27.2%
Canary Isl.	9.3%	9.4%	11.8%	10.5%
Exploration Dest	2.2%	2.4%	2.2%	2.3%
Africa/Mid-East	1.0%	0.8%	0.9%	1.0%
Transatlantic/World Cr.	3.0%	3.3%	2.8%	2.8%
Baltics	2.0%	1.4%	1.1%	1.0%
Other	0.8%	0.4%	0.5%	1.1%
Asia/China		1.3%	2.5%	2.2%
Panama Canal/South Am		0.7%	0.7%	0.7%
Australasia	0.4%	0.9%	0.8%	0.8%
Canada/New England	0.4%	0.4%	0.4%	0.3%
Alaska	1.5%	1.4%	1.3%	1.4%
NA West Coast/Mexico/California/Pacific Coast	0.4%	1.5%	0.3%	0.3%
Hawaii		0.3%		



Passenger Volume & YOY Change by Age Group

	Passenger				YOY along Sail Year			
	2022	2023	2024	2025	2022	2023	2024	2025
<=12	57.1	96.4	107.4	114.9	68.9%	11.4%	7.0%	
13-19	50.4	75.0	82.6	87.1	48.8%	10.2%	5.5%	
20-29	65.8	92.8	103.6	103.3	41.1%	11.7%	-0.3%	
30-39	83.4	124.4	144.8	147.8	49.3%	16.4%	2.0%	
40-49	118.5	170.9	194.1	205.4	44.2%	13.6%	5.8%	
50-59	261.9	353.5	364.6	362.3	35.0%	3.1%	-0.6%	
60-69	361.8	505.3	564.3	631.0	39.7%	11.7%	11.8%	
>=70	340.0	444.9	443.4	470.3	30.9%	-0.3%	6.1%	

Passenger Volume & YOY Change by Duration

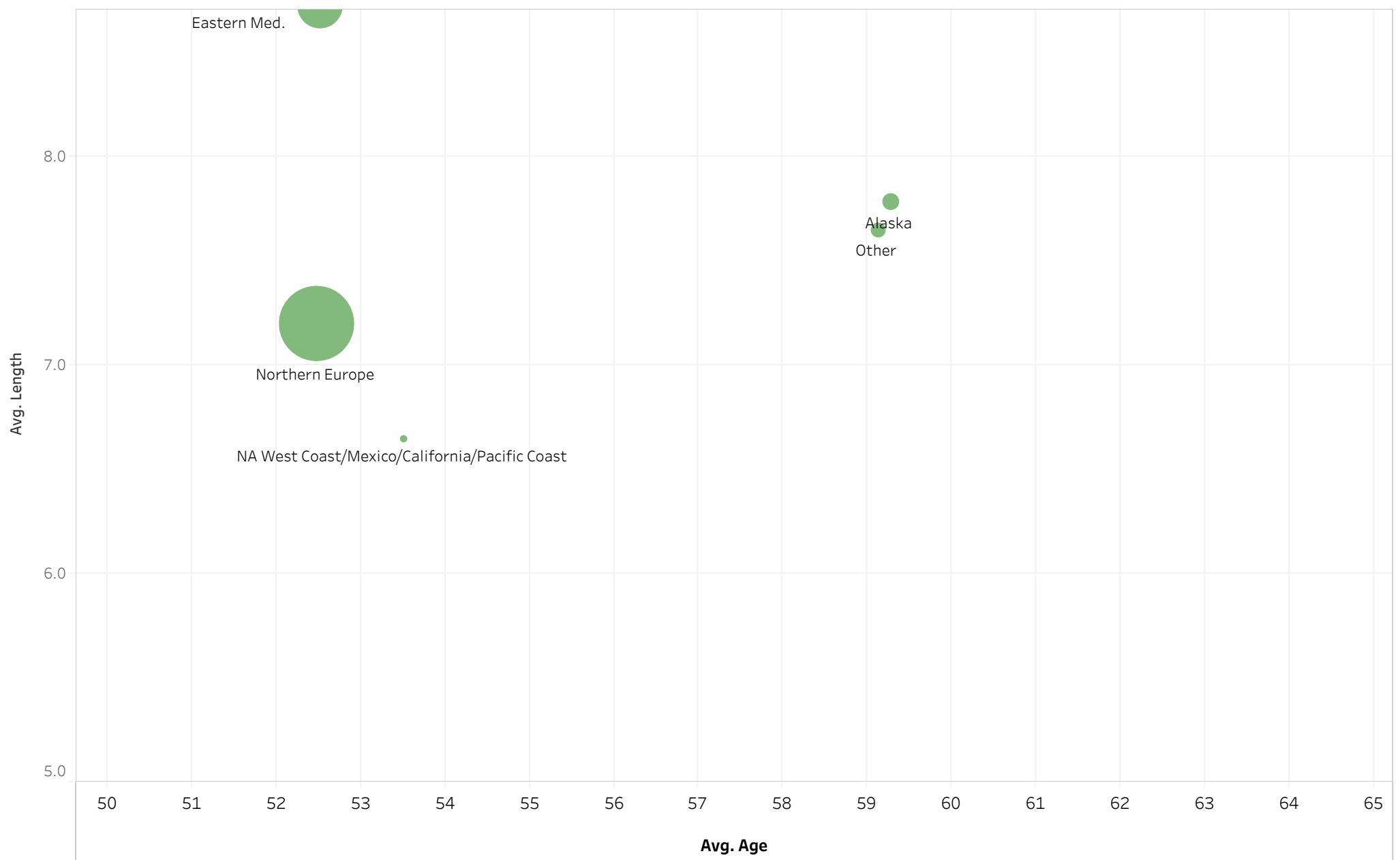
	Passenger				YOY along Sail Year			
	2022	2023	2024	2025	2022	2023	2024	2025
Up to 3 Days	70.0	54.1	82.6	98.5	-22.7%	52.6%	19.2%	
4-6 Days	125.0	169.3	199.6	208.5	35.5%	17.9%	4.4%	
7 Days	716.6	944.8	1,011.7	1,114.7	31.8%	7.1%	10.2%	
8-13 Days	313.4	440.8	424.3	447.1	40.7%	-3.7%	5.4%	
14 Days	313.9	493.4	524.5	497.2	57.2%	6.3%	-5.2%	
15-20 Days	70.5	115.4	101.8	109.2	63.5%	-11.8%	7.3%	
21+ Days	51.4	59.9	50.8	57.4	16.5%	-15.2%	13.1%	

Source Market: **Ireland & United Kingdom** (Continued)
2022-2025

Passenger Volume & YOY Change by Trade Route / Destination

	Passenger				YOY along Sail Year			
	2022	2023	2024	2025	2022	2023	2024	2025
Northern Europe	482.5	667.3	636.2	687.4		38.3%	-4.7%	8.1%
Central & Western Med.	458.0	604.7	611.7	622.1		32.0%	1.2%	1.7%
Caribbean/Bahamas/Bermuda	176.8	268.2	307.1	347.0		51.7%	14.5%	13.0%
Canary Isl.	155.2	215.2	282.6	266.8		38.6%	31.4%	-5.6%
Eastern Med.	182.0	187.6	234.3	251.2		3.1%	24.9%	7.3%
Transatlantic/World Cr.	49.5	74.8	66.5	71.4		51.1%	-11.2%	7.4%
Exploration Dest	36.1	55.2	52.2	58.6		52.8%	-5.5%	12.3%
Asia/China		30.3	59.2	56.9			95.5%	-4.0%
Alaska	25.3	31.2	31.5	34.3		23.2%	0.9%	9.1%
Other	13.7	8.0	11.2	27.3		-41.4%	39.8%	143.6%
Africa/Mid-East	17.1	18.9	20.9	25.4		10.3%	10.5%	21.4%
Baltics	33.2	32.6	27.1	25.1		-2.0%	-16.8%	-7.3%
Australasia	6.1	19.5	18.9	20.0		219.0%	-2.9%	5.6%
Panama Canal/South Am		15.5	16.3	18.4			4.8%	13.2%
Canada/New England	7.2	9.9	10.5	8.7		38.0%	6.3%	-16.8%
NA West Coast/Mexico/California/Pacific Coast	6.2	34.7	7.9	6.6		464.0%	-77.3%	-16.5%
Hawaii		6.9					-100.0%	

Ireland & United Kingdom, Average Age and Cruise Length by Trade Route, 2025



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Source Market: Italy

2022-2025

Passenger Volume (K)

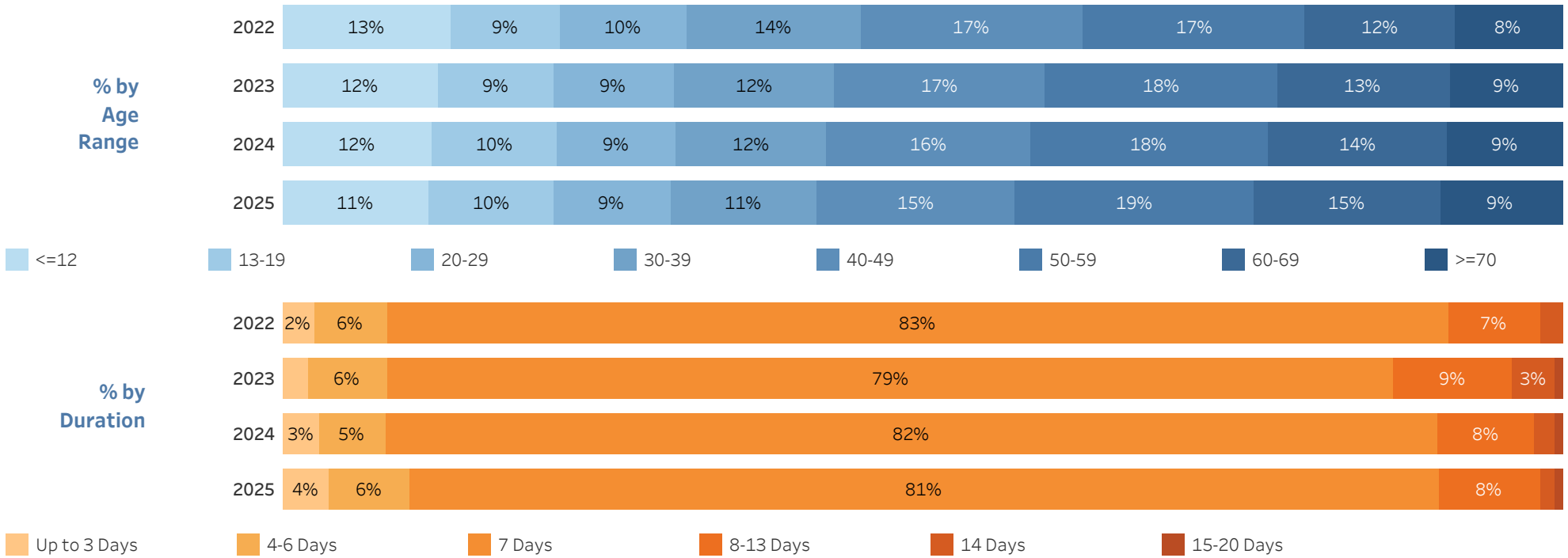
2022	2023	2024	2025
790.8	1,176.0 (48.7% ▲)	1,147.6 (-2.4% ▼)	1,118.4 (-2.5% ▼)

Average Duration, in Days

2022	2023	2024	2025
7.2	7.5	7.3	7.2

Average Age

2022	2023	2024	2025
40.7	41.7	42.0	42.5



Passenger Percentages by Trade Route / Destination

	2022	2023	2024	2025
Central & Western Med.	61.8%	56.0%	57.5%	57.1%
Eastern Med.	27.7%	26.2%	26.3%	25.2%
Caribbean/Bahamas/Bermuda	2.8%	5.4%	5.4%	6.6%
Northern Europe	4.4%	4.9%	5.1%	5.4%
Exploration Dest		1.0%	0.9%	0.6%
Africa/Mid-East	2.0%	3.9%	3.0%	3.1%
Transatlantic/World Cr.		0.8%	0.8%	0.7%
Baltics		0.6%		



Passenger Volume & YOY Change by Age Group

	Passenger				YOY along Sail Year			
	2022	2023	2024	2025	2022	2023	2024	2025
<=12	102.4	140.6	131.4	124.5	37.4%	-6.5%	-5.3%	
13-19	67.1	104.4	111.0	107.4	55.7%	6.3%	-3.2%	
20-29	76.9	107.8	105.2	100.4	40.2%	-2.5%	-4.6%	
30-39	106.0	144.0	133.3	125.2	35.8%	-7.4%	-6.1%	
40-49	135.1	190.9	180.5	169.5	41.3%	-5.4%	-6.1%	
50-59	136.0	209.8	208.8	205.2	54.2%	-0.5%	-1.7%	
60-69	91.9	155.0	158.4	160.8	68.7%	2.2%	1.5%	
>=70	64.9	101.6	102.1	103.7	56.6%	0.5%	1.6%	

Passenger Volume & YOY Change by Duration

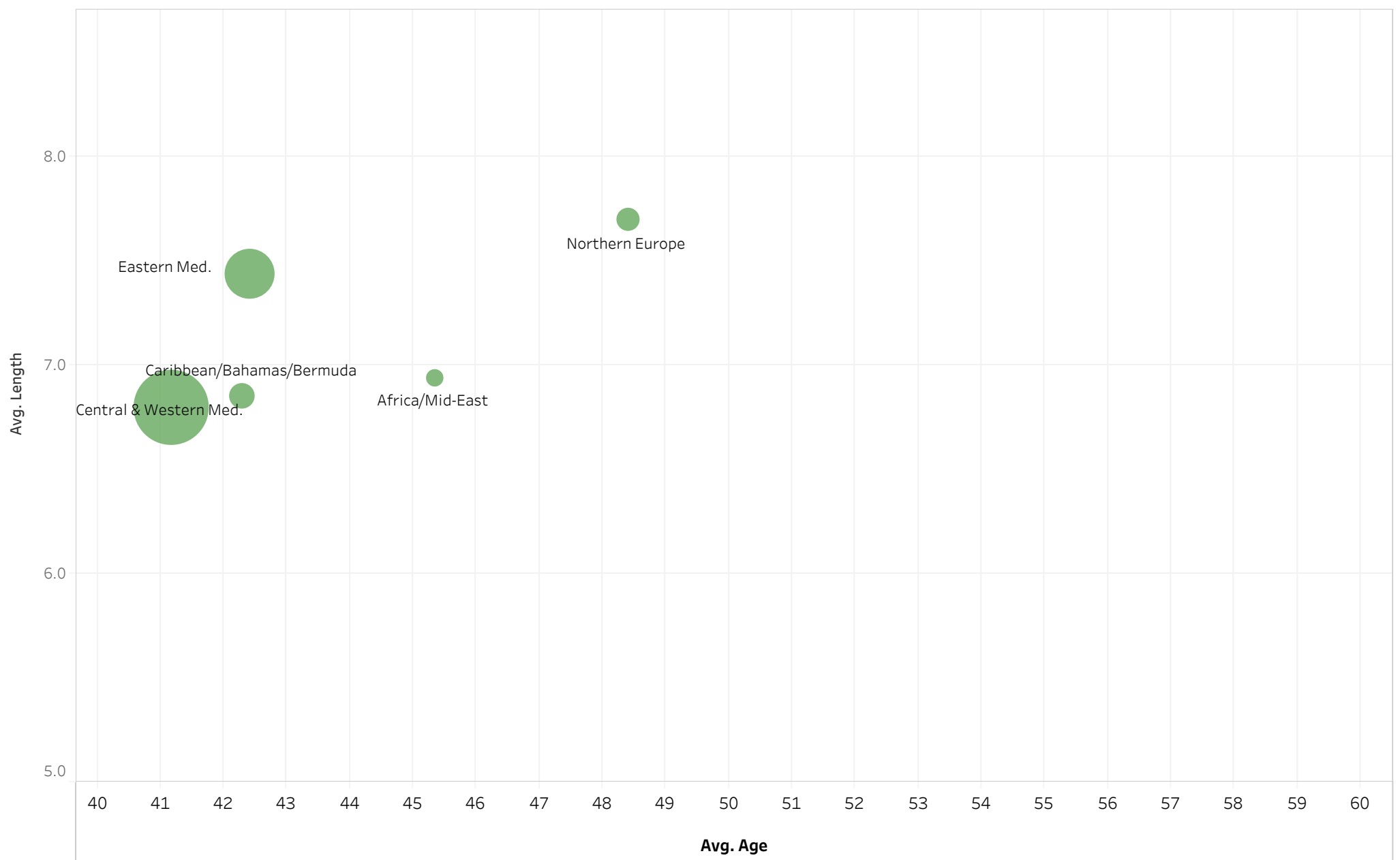
	Passenger				YOY along Sail Year			
	2022	2023	2024	2025	2022	2023	2024	2025
Up to 3 Days	19.6	22.6	32.0	40.6		15.4%	41.7%	26.8%
4-6 Days	44.8	73.0	59.9	70.1		62.8%	-18.0%	17.1%
7 Days	651.8	920.7	938.0	897.5		41.3%	1.9%	-4.3%
8-13 Days	56.3	108.9	86.3	87.8		93.2%	-20.7%	1.7%
14 Days	13.7	38.9	18.3	12.4		183.6%	-52.9%	-32.2%
15-20 Days		6.4	7.2	6.5			13.0%	-10.4%

Source Market: **Italy** (Continued)
2022-2025

Passenger Volume & YOY Change by Trade Route / Destination

	Passenger				YOY along Sail Year			
	2022	2023	2024	2025	2022	2023	2024	2025
Central & Western Med.	487.1	658.6	657.7	621.3		35.2%	-0.1%	-5.5%
Eastern Med.	218.6	308.2	300.8	274.3		41.0%	-2.4%	-8.8%
Caribbean/Bahamas/Bermuda	22.5	63.7	61.8	71.7		183.5%	-3.0%	16.1%
Northern Europe	34.8	57.7	58.6	59.0		65.9%	1.5%	0.7%
Africa/Mid-East	15.5	46.1	34.3	33.2		197.7%	-25.6%	-3.0%
Transatlantic/World Cr.		9.9	9.7	8.0			-2.1%	-16.8%
Exploration Dest		11.9	10.2	6.2			-14.4%	-38.8%
Baltics		7.4					-100.0%	

Italy, Average Age and Cruise Length by Trade Route, 2025



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Source Market: Spain

2022-2025

Passenger Volume (K)

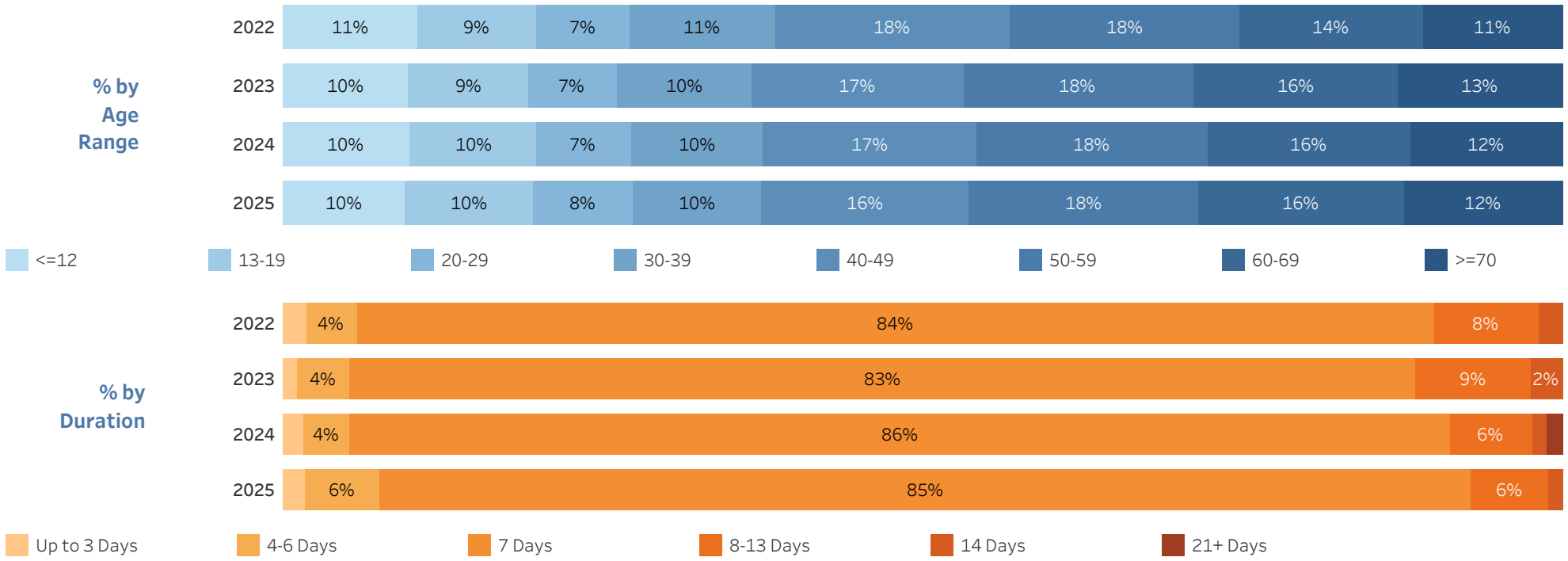
2022	2023	2024	2025
413.5	586.8 (41.9% ▲)	609.9 (3.9% ▲)	635.2 (4.1% ▲)

Average Duration, in Days

2022	2023	2024	2025
7.4	7.6	7.5	7.2

Average Age

2022	2023	2024	2025
43.6	45.0	44.4	44.7



Passenger Percentages by Trade Route / Destination

	2022	2023	2024	2025
Central & Western Med.	69.1%	62.4%	62.4%	63.6%
Eastern Med.	15.3%	17.1%	17.9%	15.9%
Caribbean/Bahamas/Bermuda	3.6%	3.9%	4.1%	5.0%
Northern Europe	7.0%	8.8%	9.8%	10.2%
Exploration Dest		1.1%	1.1%	
Africa/Mid-East		2.4%	1.3%	1.3%
Transatlantic/World Cr.		1.4%	1.4%	



Passenger Volume & YOY Change by Age Group

	Passenger				YOY along Sail Year			
	2022	2023	2024	2025	2022	2023	2024	2025
<=12	42.9	55.9	59.6	59.9	30.5%	6.6%	0.4%	
13-19	37.6	54.5	60.4	63.2	44.9%	10.9%	4.7%	
20-29	29.5	39.8	44.5	48.9	35.0%	12.0%	9.7%	
30-39	46.2	60.3	62.6	63.0	30.5%	3.8%	0.7%	
40-49	74.2	95.5	101.1	101.9	28.6%	5.9%	0.7%	
50-59	73.0	102.6	109.3	113.5	40.6%	6.5%	3.8%	
60-69	58.0	92.3	95.5	100.9	59.1%	3.4%	5.7%	
>=70	44.0	73.4	71.8	77.6	67.0%	-2.2%	8.1%	

Passenger Volume & YOY Change by Duration

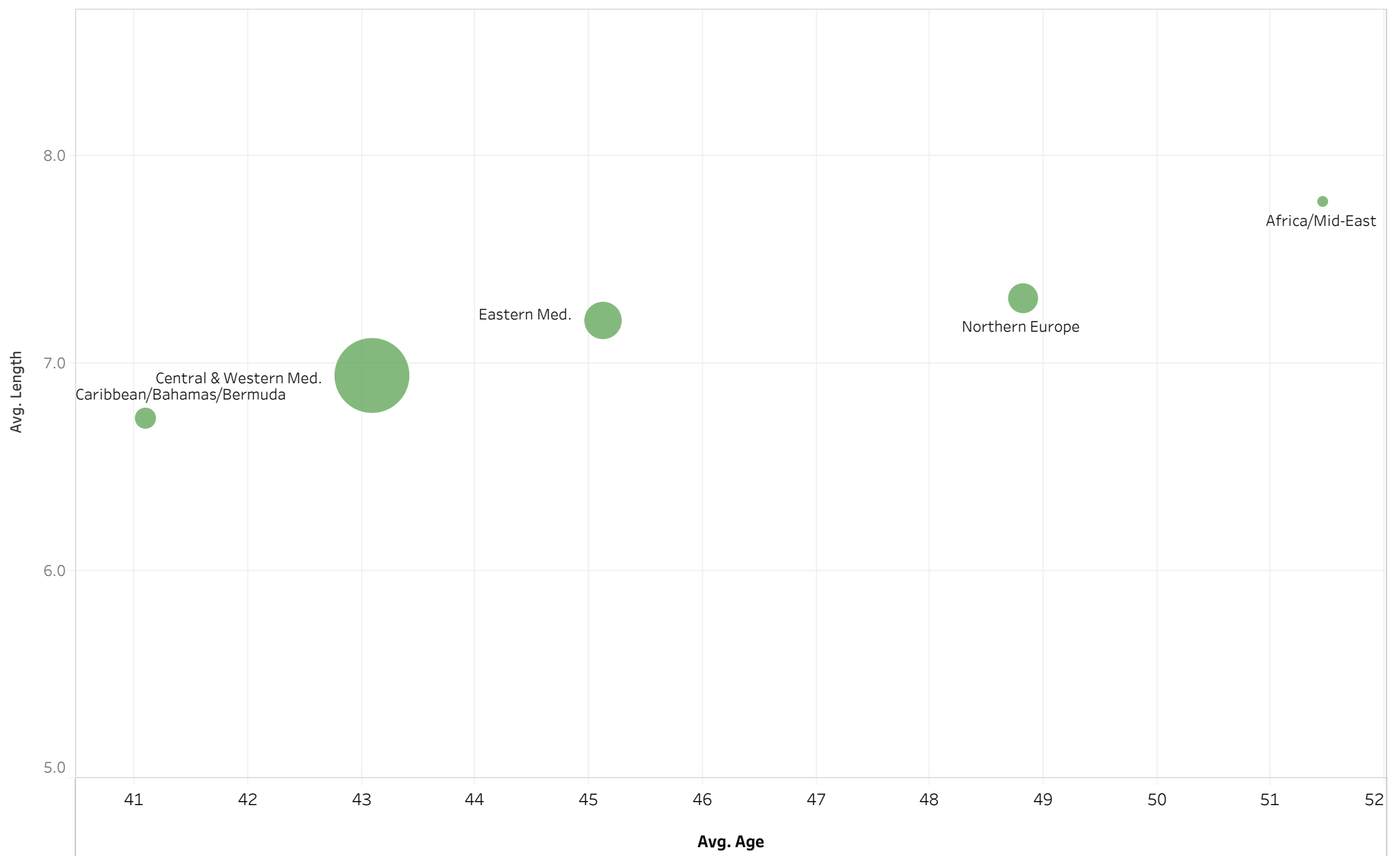
	Passenger				YOY along Sail Year			
	2022	2023	2024	2025	2022	2023	2024	2025
Up to 3 Days	7.7	6.3	9.5	11.2	-17.7%	49.6%	18.2%	
4-6 Days	15.9	23.5	22.1	36.5	47.9%	-5.7%	64.6%	
7 Days	344.2	481.0	521.8	535.7	39.8%	8.5%	2.7%	
8-13 Days	33.5	52.4	38.8	37.8	56.3%	-25.9%	-2.6%	
14 Days	7.4	14.2	7.0	6.8	92.6%	-50.7%	-2.8%	
21+ Days			7.0				-100.0%	

Source Market: **Spain** (Continued)
2022-2025

Passenger Volume & YOY Change by Trade Route / Destination

	Passenger				YOY along Sail Year			
	2022	2023	2024	2025	2022	2023	2024	2025
Central & Western Med.	285.5	365.8	377.2	391.7		28.1%	3.1%	3.8%
Eastern Med.	63.3	100.2	108.4	97.8		58.3%	8.2%	-9.8%
Northern Europe	28.9	51.8	59.4	62.7		79.2%	14.6%	5.6%
Caribbean/Bahamas/Bermuda	15.0	22.9	24.5	31.1		52.4%	7.1%	26.8%
Africa/Mid-East		14.0	8.1	8.2			-42.4%	2.0%
Transatlantic/World Cr.		8.2	8.2				0.3%	-100.0%
Exploration Dest		6.4	6.5				1.8%	-100.0%

Spain, Average Age and Cruise Length by Trade Route, 2025



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Source Market: France

2022-2025

Passenger Volume (K)

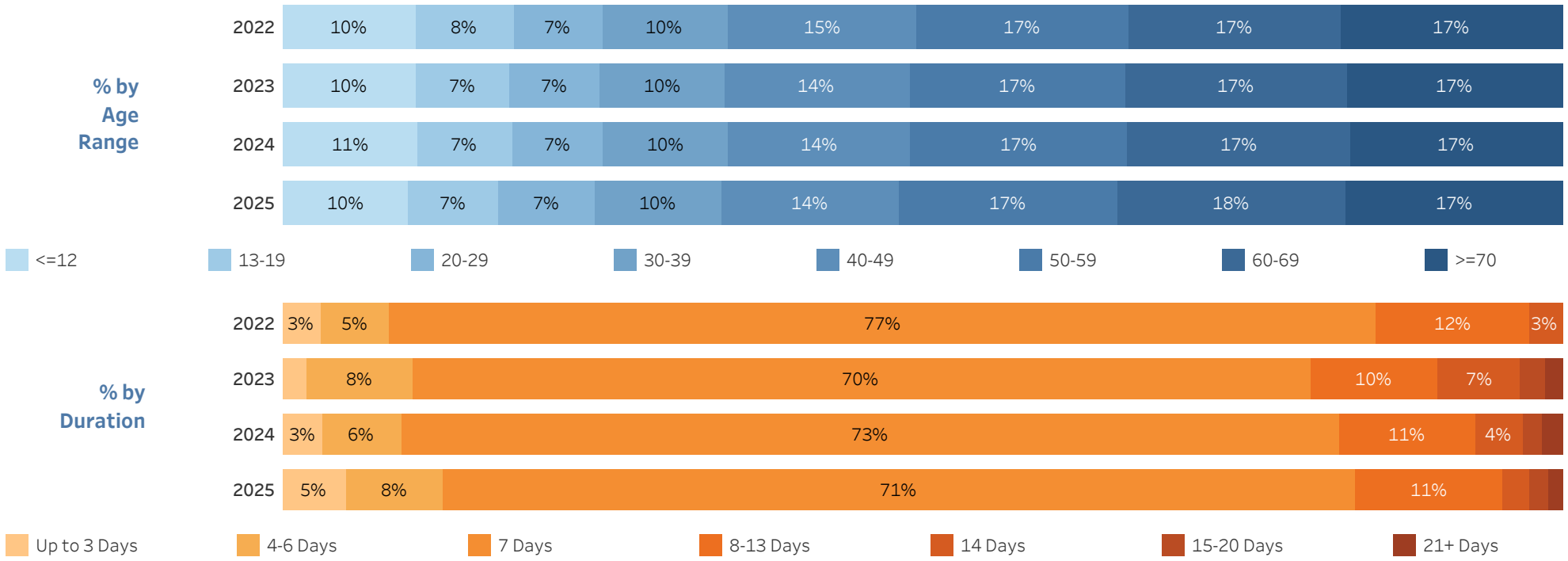
2022	2023	2024	2025
324.8	575.9 (77.3% ▲)	573.3 (-0.4% ▼)	583.6 (1.8% ▲)

Average Duration, in Days

2022	2023	2024	2025
7.5	8.0	7.9	7.5

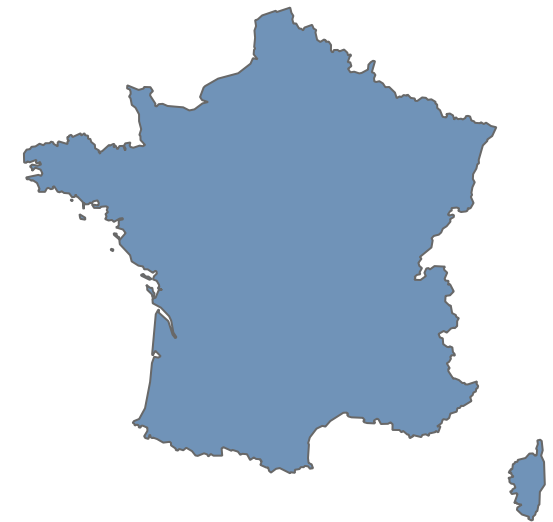
Average Age

2022	2023	2024	2025
46.7	46.8	46.7	47.2



Passenger Percentages by Trade Route / Destination

	2022	2023	2024	2025
Central & Western Med.	62.3%	55.1%	52.7%	53.3%
Eastern Med.	11.4%	10.0%	11.0%	8.5%
Caribbean/Bahamas/Bermuda	11.4%	18.2%	21.1%	22.6%
Northern Europe	5.6%	6.8%	5.5%	5.7%
Exploration Dest		1.8%	2.6%	1.4%
Africa/Mid-East	3.0%	2.1%	1.5%	2.7%
Transatlantic/World Cr.	1.9%	2.5%	2.5%	2.1%



Passenger Volume & YOY Change by Age Group

	Passenger				YOY along Sail Year			
	2022	2023	2024	2025	2022	2023	2024	2025
<=12	31.0	53.3	53.2	50.1	72.0%	-0.2%	-5.8%	
13-19	22.5	37.4	37.5	36.0	65.8%	0.4%	-3.9%	
20-29	20.7	35.9	35.7	38.2	73.2%	-0.6%	7.1%	
30-39	28.8	50.3	49.8	50.4	74.6%	-1.0%	1.1%	
40-49	43.9	73.8	71.9	70.8	67.9%	-2.6%	-1.5%	
50-59	49.0	86.3	86.5	87.2	76.0%	0.2%	0.8%	
60-69	49.3	88.4	88.3	91.0	79.1%	0.0%	3.0%	
>=70	51.3	86.2	83.6	86.3	68.2%	-3.0%	3.2%	

Passenger Volume & YOY Change by Duration

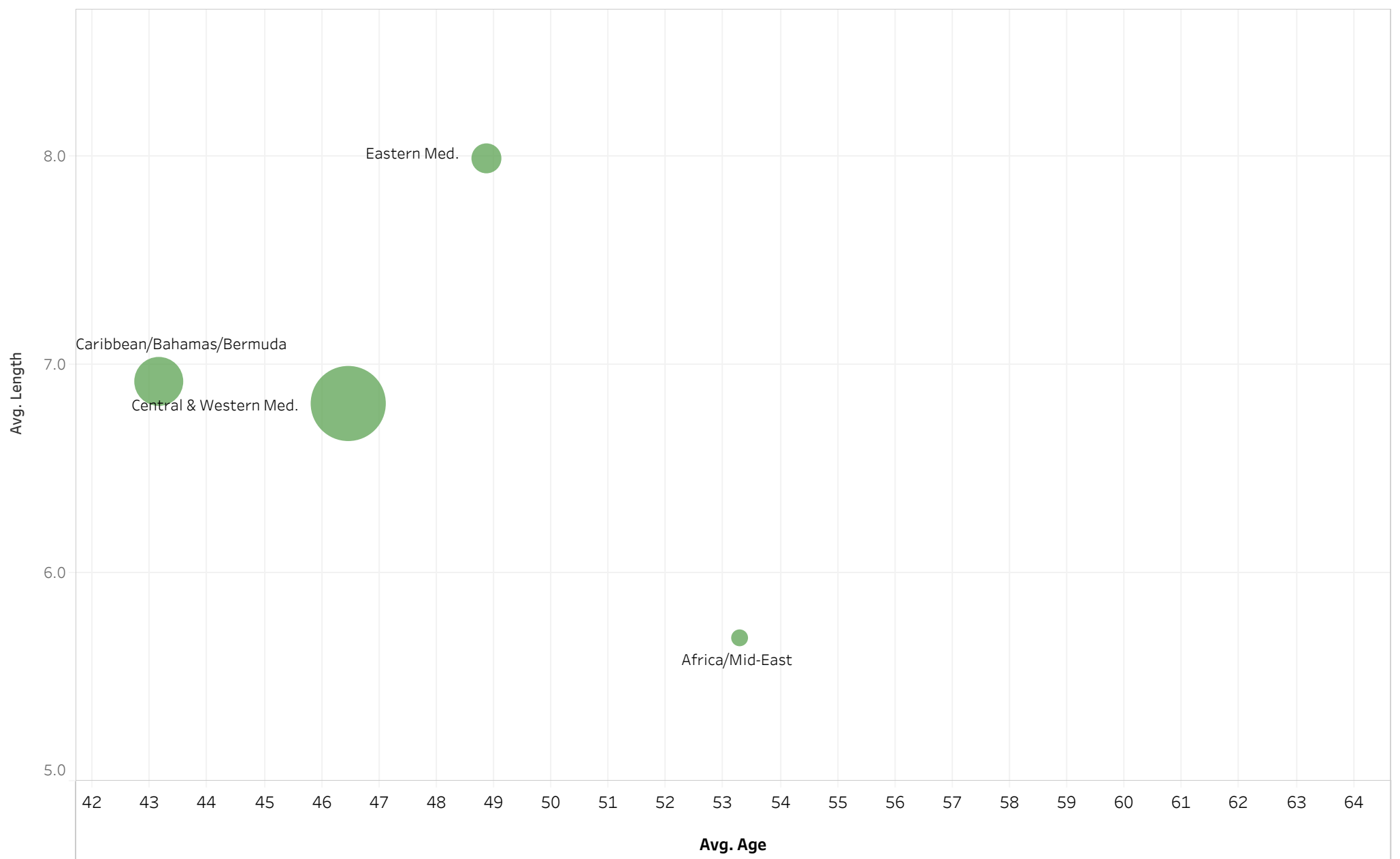
	Passenger				YOY along Sail Year			
	2022	2023	2024	2025	2022	2023	2024	2025
Up to 3 Days	9.6	10.8	17.9	29.2	13.3%	64.8%	63.2%	
4-6 Days	16.9	47.9	35.5	44.1	184.1%	-25.9%	24.2%	
7 Days	246.6	403.8	420.2	416.3	63.8%	4.1%	-0.9%	
8-13 Days	38.7	56.9	60.7	67.1	46.9%	6.7%	10.6%	
14 Days	8.0	37.7	21.4	11.8	371.7%	-43.2%	-44.8%	
15-20 Days		11.0	8.6	9.0		-21.3%	4.7%	
21+ Days		7.7	9.0	6.2		16.2%	-31.0%	

Source Market: **France** (Continued)
2022-2025

Passenger Volume & YOY Change by Trade Route / Destination

	Passenger				YOY along Sail Year			
	2022	2023	2024	2025	2022	2023	2024	2025
Central & Western Med.	202.2	317.1	301.1	305.9		56.8%	-5.1%	1.6%
Caribbean/Bahamas/Bermuda	37.1	104.8	120.9	129.9		182.3%	15.3%	7.5%
Eastern Med.	36.8	57.8	62.6	48.6		57.0%	8.3%	-22.4%
Northern Europe	18.1	38.9	31.3	32.7		114.7%	-19.6%	4.5%
Africa/Mid-East	9.9	12.3	8.4	15.3		24.5%	-31.9%	83.1%
Transatlantic/World Cr.	6.3	14.4	14.1	12.3		128.6%	-2.7%	-12.7%
Exploration Dest		10.1	15.0	8.0			48.1%	-46.6%

France, Average Age and Cruise Length by Trade Route, 2025



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Source Market: Netherlands

2022-2025

Passenger Volume (K)

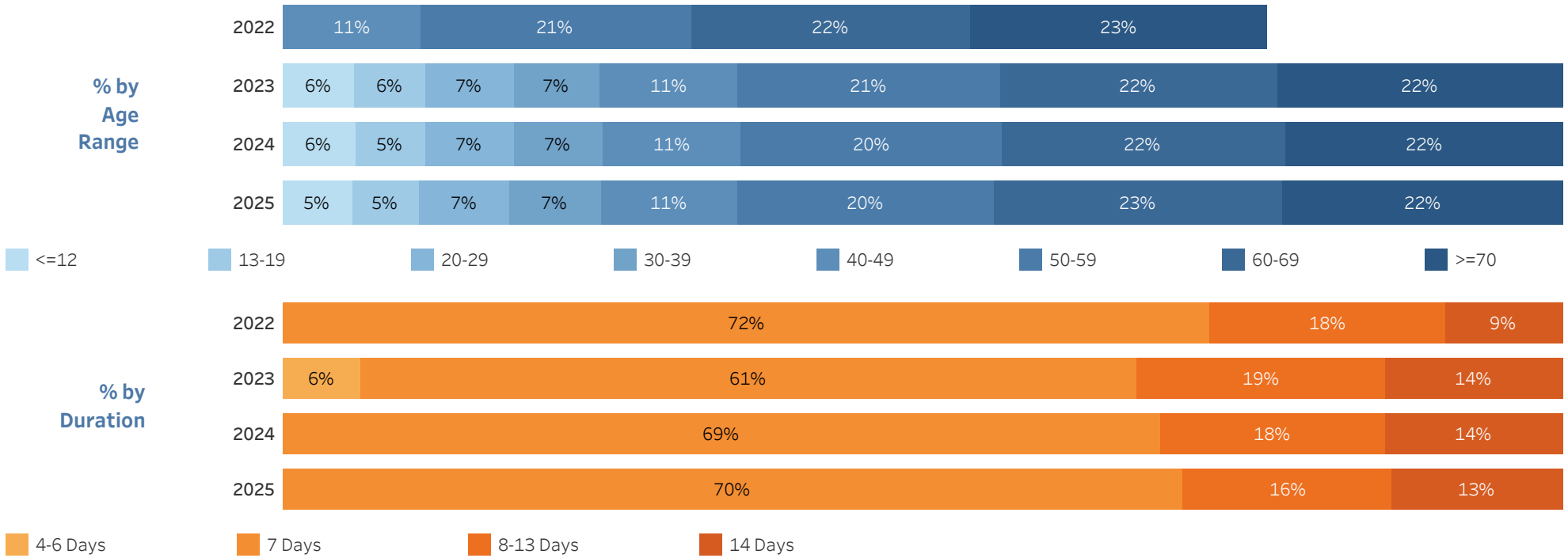
2022	2023	2024	2025
82.3	120.2 (46.0% ▲)	128.3 (6.8% ▲)	131.9 (2.8% ▲)

Average Duration, in Days

2022	2023	2024	2025
8.7	9.2	9.1	9.0

Average Age

2022	2023	2024	2025
53.3	52.4	52.3	52.5



Passenger Percentages by Trade Route / Destination

	2022	2023	2024	2025
Central & Western Med.	20.5%	22.9%	23.4%	24.3%
Eastern Med.	9.5%	8.8%	9.3%	9.1%
Caribbean/Bahamas/Bermuda	11.1%	14.4%	16.5%	16.7%
Northern Europe	37.7%	29.6%	25.3%	26.2%
Canary Isl.				4.7%
Exploration Dest		5.8%	8.6%	4.9%
Africa/Mid-East		5.0%		



Passenger Volume & YOY Change by Age Group

	Passenger				YOY along Sail Year			
	2022	2023	2024	2025	2022	2023	2024	2025
<=12		6.5	7.0	6.9			7.2%	-0.7%
13-19		6.4	6.6	6.6			2.3%	-0.4%
20-29		8.0	8.5	9.0			6.8%	6.0%
30-39		7.8	8.4	9.2			8.0%	9.6%
40-49	8.3	12.5	13.2	13.6	50.7%		5.4%	3.0%
50-59	16.2	23.8	24.9	25.4	46.8%		4.6%	2.1%
60-69	16.7	25.0	26.9	28.7	49.3%		7.7%	6.8%
>=70	17.8	25.8	26.4	27.8	45.0%		2.1%	5.7%

Passenger Volume & YOY Change by Duration

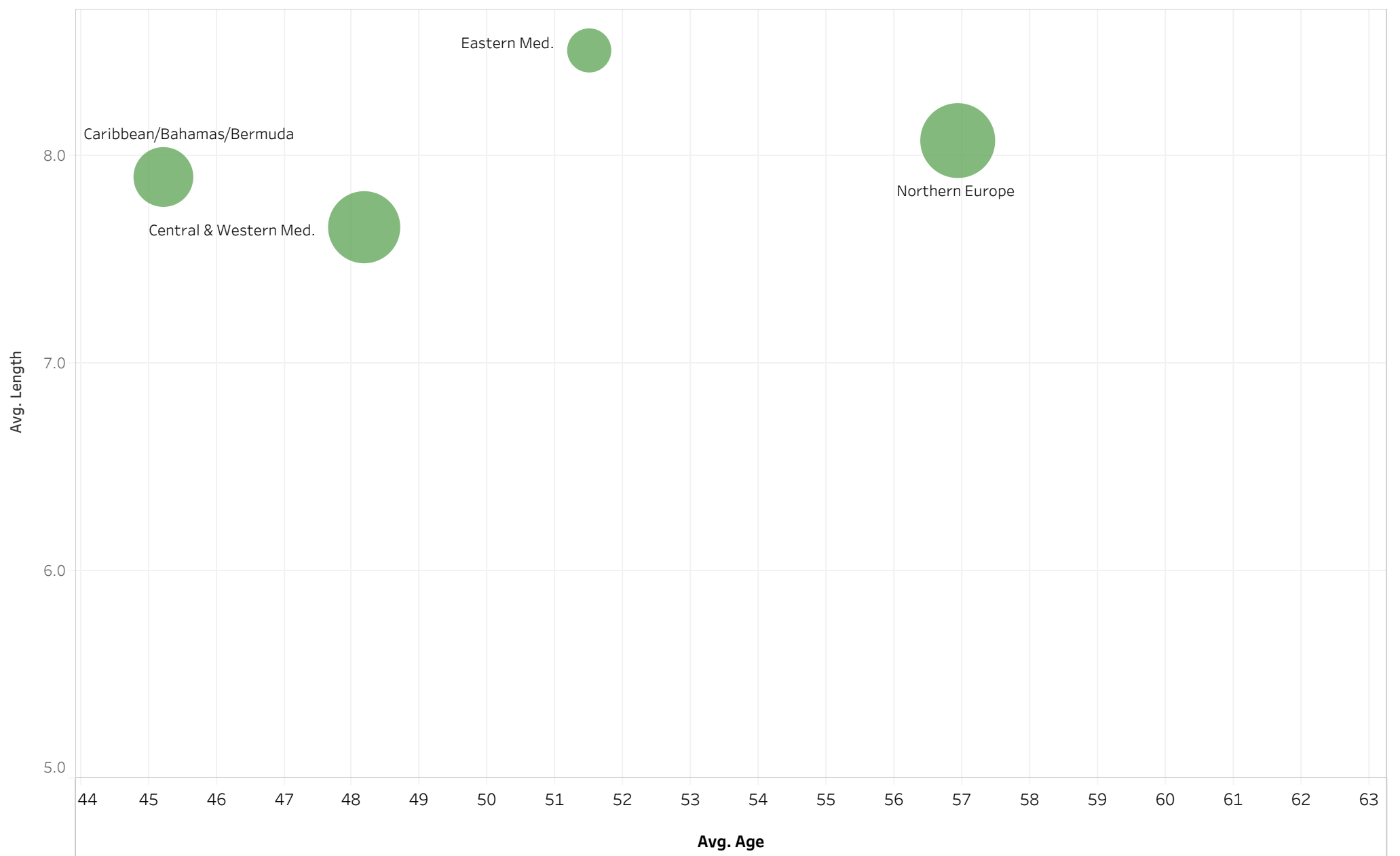
	Passenger				YOY along Sail Year			
	2022	2023	2024	2025	2022	2023	2024	2025
4-6 Days		6.8						-100.0%
7 Days	53.9	67.0	78.7	81.9		24.4%	17.5%	4.1%
8-13 Days	13.7	21.5	20.1	19.2		56.5%	-6.2%	-4.9%
14 Days	6.8	15.3	15.8	15.5		124.8%	3.7%	-2.4%

Source Market: **Netherlands** (Continued)
2022-2025

Passenger Volume & YOY Change by Trade Route / Destination

	Passenger				YOY along Sail Year			
	2022	2023	2024	2025	2022	2023	2024	2025
Northern Europe	31.0	35.5	32.4	34.0		14.4%	-8.8%	5.0%
Central & Western Med.	16.9	27.5	30.0	31.6		62.7%	9.3%	5.3%
Caribbean/Bahamas/Bermuda	9.1	17.2	21.1	21.7		88.4%	22.4%	2.8%
Eastern Med.	7.8	10.5	11.9	11.8		34.3%	13.1%	-0.5%
Exploration Dest		7.0	11.0	6.4			57.0%	-41.5%
Canary Isl.				6.1				
Africa/Mid-East		6.0					-100.0%	

Netherlands, Average Age and Cruise Length by Trade Route, 2025



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Source Market: Austria

2022-2025

Passenger Volume (K)

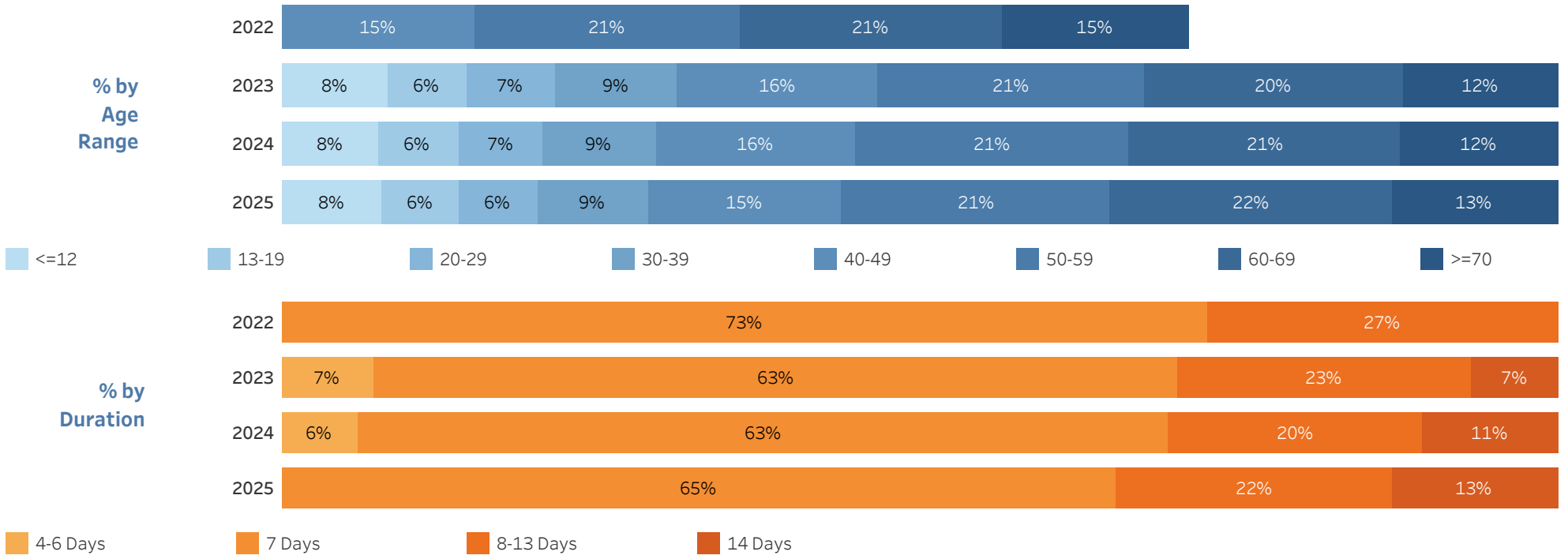
2022	2023	2024	2025
55.4	109.5 (97.7% ▲)	112.8 (3.0% ▲)	117.4 (4.0% ▲)

Average Duration, in Days

2022	2023	2024	2025
8.9	8.8	9.3	9.5

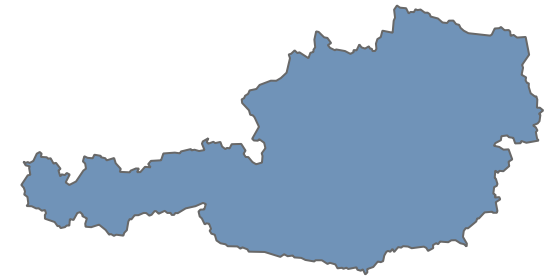
Average Age

2022	2023	2024	2025
48.9	47.5	48.3	48.6



Passenger Percentages by Trade Route / Destination

	2022	2023	2024	2025
Central & Western Med.	36.9%	36.7%	29.9%	32.9%
Eastern Med.	23.3%	21.1%	21.5%	16.8%
Caribbean/Bahamas/Bermuda		8.4%	10.3%	10.3%
Northern Europe	14.6%	11.3%	11.2%	13.6%
Canary Isl.			5.8%	7.2%
Africa/Mid-East		6.9%	6.9%	



Passenger Volume & YOY Change by Age Group

	Passenger				YOY along Sail Year			
	2022	2023	2024	2025	2022	2023	2024	2025
<=12		8.4	7.9	8.6			-5.4%	8.5%
13-19		6.3	6.4	6.6			3.1%	2.4%
20-29		7.1	6.9	6.8			-2.5%	-0.8%
30-39		9.6	9.2	9.5			-3.6%	2.9%
40-49	7.4	15.9	16.2	16.5		116.2%	2.1%	1.5%
50-59	10.1	21.1	22.3	23.2		108.8%	5.2%	4.0%
60-69	10.0	20.5	22.3	24.3		105.6%	8.5%	9.1%
>=70	7.1	12.2	12.8	14.2		72.3%	4.5%	10.9%

Passenger Volume & YOY Change by Duration

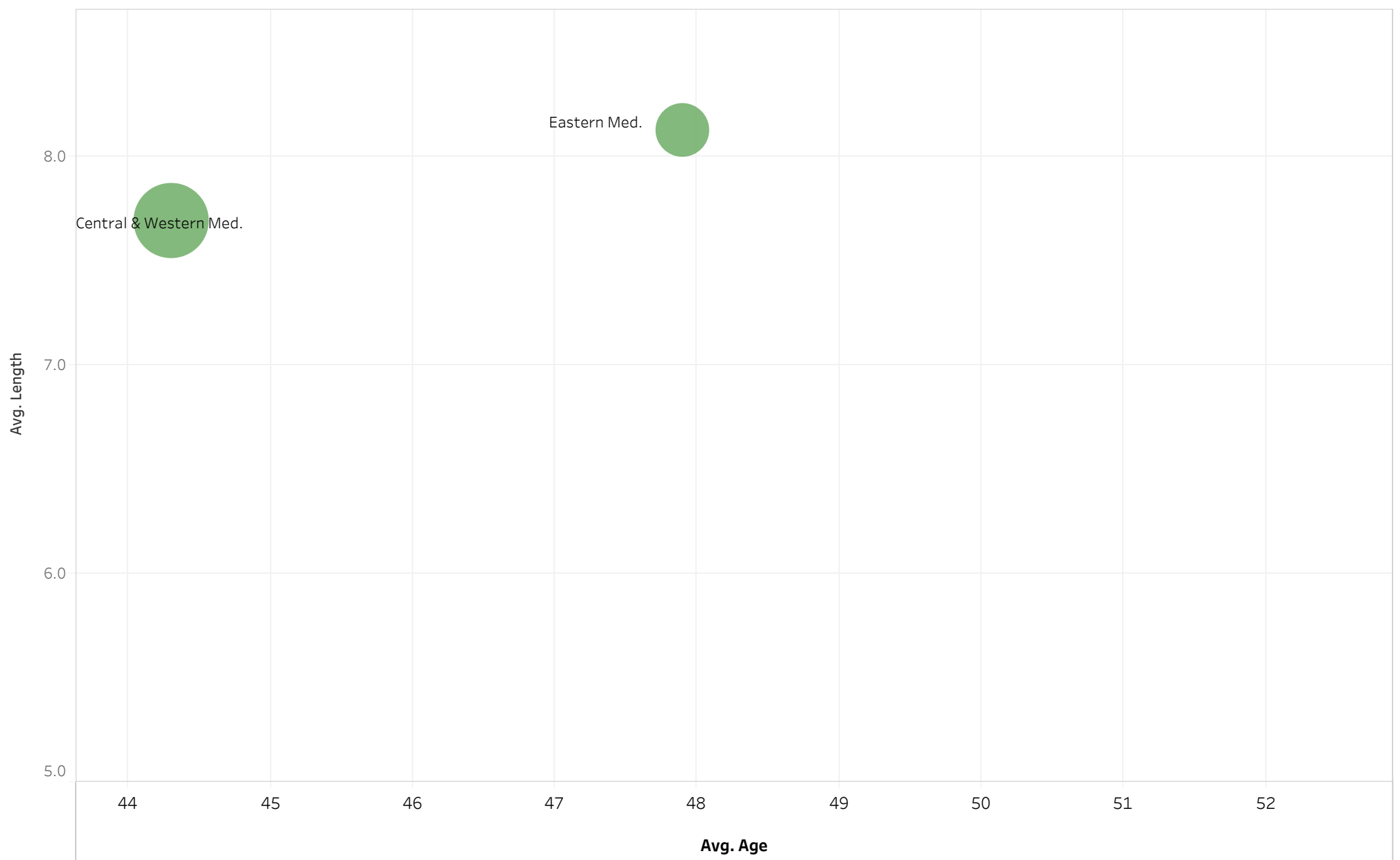
	Passenger				YOY along Sail Year			
	2022	2023	2024	2025	2022	2023	2024	2025
4-6 Days		7.1	6.0				-15.0%	-100.0%
7 Days	32.3	62.3	64.6	66.5		92.8%	3.6%	3.0%
8-13 Days	12.2	22.8	20.4	22.1		86.4%	-10.6%	8.7%
14 Days		6.7	10.7	13.1			58.9%	22.6%

Source Market: **Austria** (Continued)
2022-2025

Passenger Volume & YOY Change by Trade Route / Destination

	Passenger				YOY along Sail Year			
	2022	2023	2024	2025	2022	2023	2024	2025
Central & Western Med.	20.4	40.2	33.6	37.6	97.3%	-16.4%	11.9%	
Eastern Med.	12.8	23.1	24.1	19.1	79.7%	4.6%	-20.6%	
Northern Europe	8.0	12.3	12.6	15.5	53.5%	1.9%	23.3%	
Caribbean/Bahamas/Bermuda		9.2	11.6	11.8		25.9%	1.6%	
Canary Isl.			6.5	8.3			28.2%	
Africa/Mid-East		7.5	7.8			3.1%	-100.0%	

Austria, Average Age and Cruise Length by Trade Route, 2025



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Source Market: Switzerland

2022-2025

Passenger Volume (K)

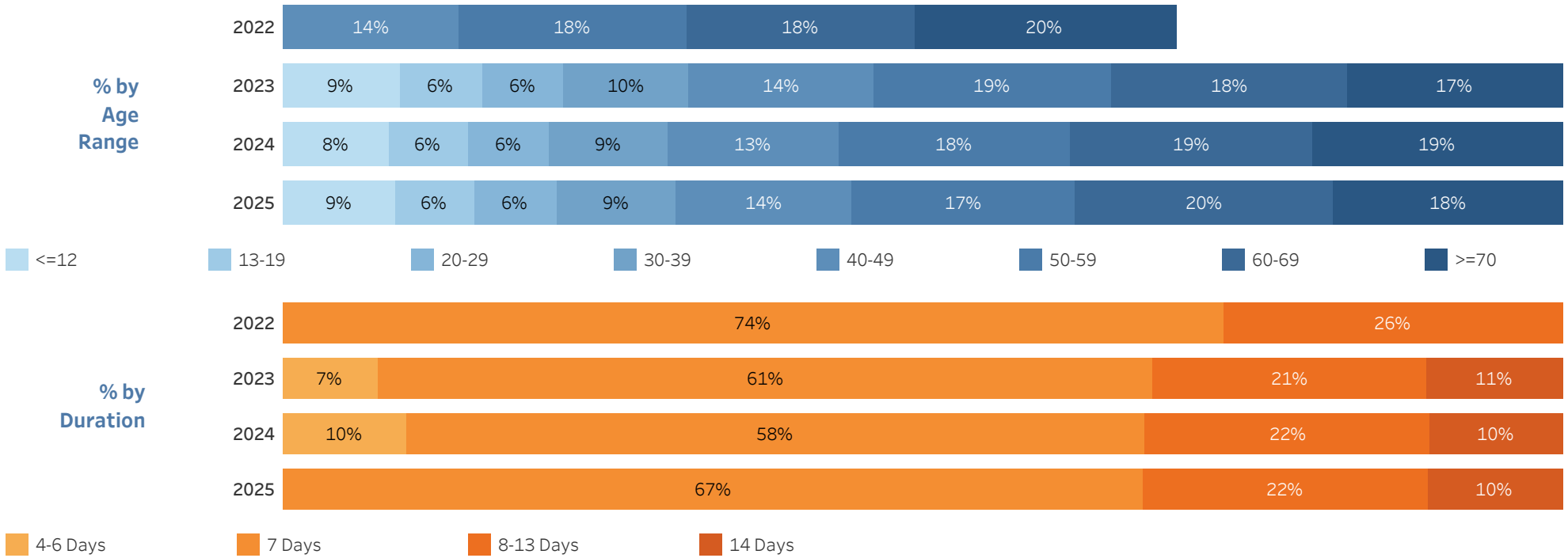
2022	2023	2024	2025
69.6	101.4 (45.7% ▲)	110.8 (9.3% ▲)	106.2 (-4.2% ▼)

Average Duration, in Days

2022	2023	2024	2025
8.7	9.3	9.5	9.6

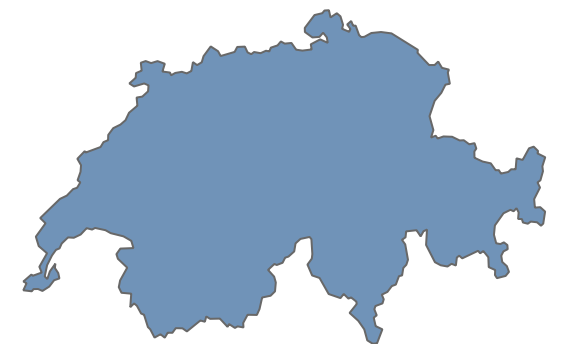
Average Age

2022	2023	2024	2025
49.4	48.1	49.4	48.9



Passenger Percentages by Trade Route / Destination

	2022	2023	2024	2025
Central & Western Med.	45.0%	39.7%	39.1%	41.8%
Eastern Med.	19.5%	10.5%	12.8%	11.2%
Caribbean/Bahamas/Bermuda		11.0%	11.8%	10.9%
Northern Europe	12.6%	12.9%	11.4%	11.9%



Passenger Volume & YOY Change by Age Group

	Passenger				YOY along Sail Year			
	2022	2023	2024	2025	2022	2023	2024	2025
<=12		8.7	8.3	8.9			-3.8%	6.3%
13-19		6.2	6.1	6.2			-1.1%	1.6%
20-29		6.0	6.3	6.4			5.0%	0.7%
30-39		9.3	9.4	9.3			1.2%	-0.4%
40-49	8.0	13.7	13.4	13.9	70.5%		-2.6%	3.6%
50-59	10.4	17.7	18.1	17.5	70.0%		2.5%	-3.2%
60-69	10.4	17.6	19.0	20.2	68.9%		8.1%	6.4%
>=70	11.9	16.0	19.5	18.0	34.7%		21.9%	-7.8%

Passenger Volume & YOY Change by Duration

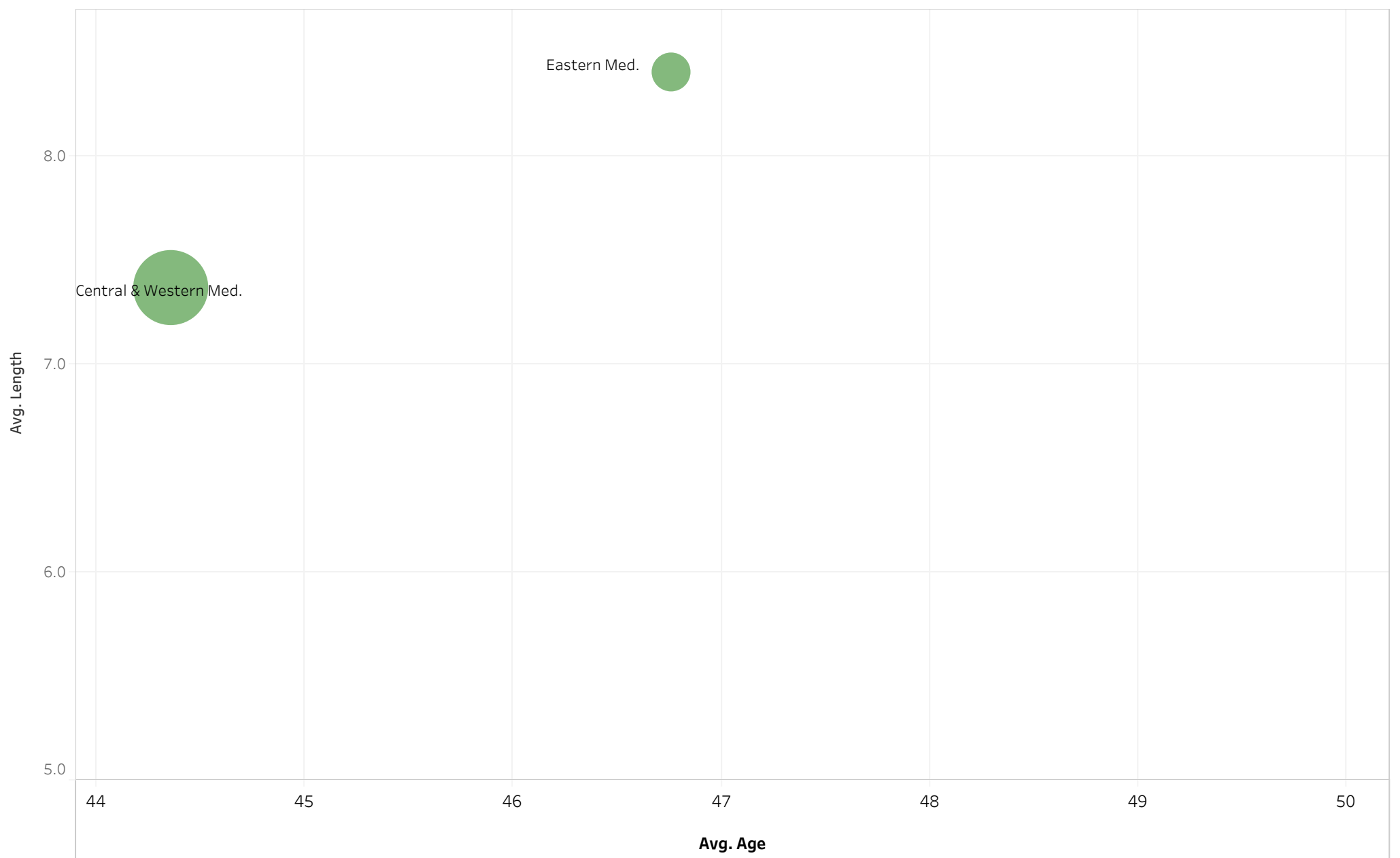
	Passenger				YOY along Sail Year			
	2022	2023	2024	2025	2022	2023	2024	2025
4-6 Days		6.6	9.4				42.6%	-100.0%
7 Days	42.0	54.4	56.1	58.8		29.3%	3.3%	4.8%
8-13 Days	15.1	19.2	21.8	19.5		26.9%	13.8%	-10.3%
14 Days		9.5	10.1	9.1			5.7%	-9.4%

Source Market: **Switzerland** (Continued)
2022-2025

Passenger Volume & YOY Change by Trade Route / Destination

	Passenger				YOY along Sail Year			
	2022	2023	2024	2025	2022	2023	2024	2025
Central & Western Med.	31.3	40.3	43.2	43.7	28.7%	7.4%	1.0%	
Northern Europe	8.8	13.1	12.6	12.4	49.3%	-4.1%	-1.1%	
Eastern Med.	13.6	10.6	14.1	11.7	-21.6%	32.9%	-17.0%	
Caribbean/Bahamas/Bermuda		11.1	13.1	11.4		17.6%	-13.0%	

Switzerland, Average Age and Cruise Length by Trade Route, 2025



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Source Market: Belgium

2022-2025

Passenger Volume (K)

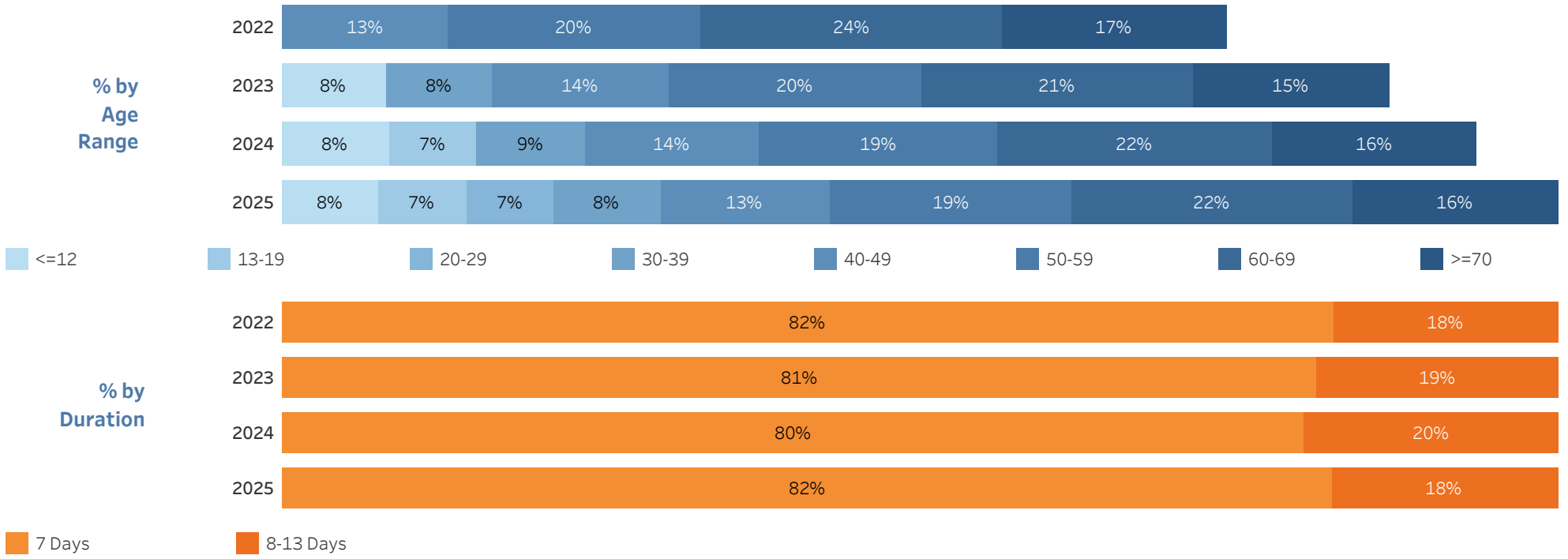
2022	2023	2024	2025
55.1	83.5 (51.5% ▲)	93.4 (11.9% ▲)	92.4 (-1.1% ▼)

Average Duration, in Days

2022	2023	2024	2025
8.0	8.1	8.2	8.1

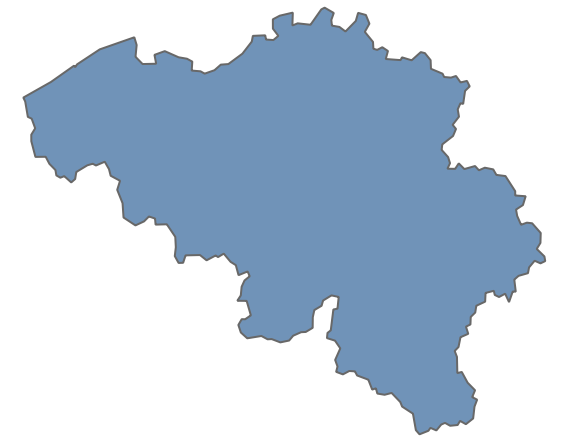
Average Age

2022	2023	2024	2025
50.9	48.7	48.7	49.1



Passenger Percentages by Trade Route / Destination

	2022	2023	2024	2025
Central & Western Med.	38.3%	36.0%	38.3%	39.8%
Eastern Med.	13.5%	12.9%	13.0%	11.8%
Caribbean/Bahamas/Bermuda		14.9%	13.6%	16.5%
Northern Europe	20.5%	18.7%	18.3%	16.9%



Passenger Volume & YOY Change by Age Group

	Passenger				YOY along Sail Year			
	2022	2023	2024	2025	2022	2023	2024	2025
<=12		6.4	7.3	6.9			13.8%	-5.2%
13-19			6.0	6.3				4.3%
20-29				6.2				
30-39		6.5	7.5	7.7			14.5%	3.3%
40-49	6.9	10.8	11.9	12.0		56.9%	9.9%	1.2%
50-59	10.5	15.6	16.4	17.3		48.8%	5.1%	5.8%
60-69	12.5	16.7	18.8	20.1		33.4%	12.6%	6.9%
>=70	9.2	12.0	13.9	14.7		29.8%	16.1%	5.3%

Passenger Volume & YOY Change by Duration

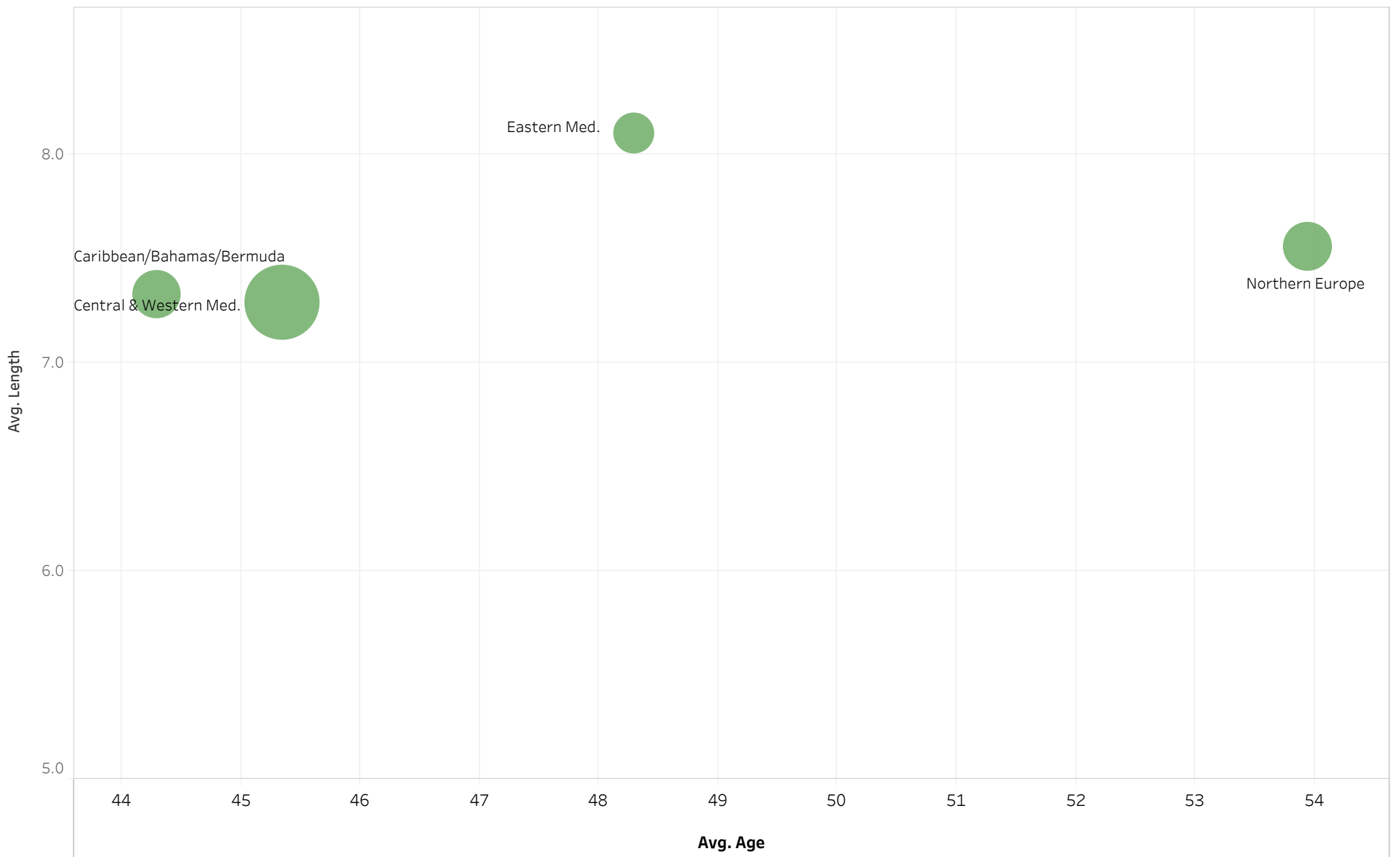
	Passenger				YOY along Sail Year			
	2022	2023	2024	2025	2022	2023	2024	2025
7 Days	41.0	56.4	64.2	66.7		37.7%	13.7%	3.9%
8-13 Days	8.7	13.2	15.9	14.2		50.8%	20.7%	-10.6%

Source Market: **Belgium** (Continued)
2022-2025

Passenger Volume & YOY Change by Trade Route / Destination

	Passenger				YOY along Sail Year			
	2022	2023	2024	2025	2022	2023	2024	2025
Central & Western Med.	21.1	30.0	35.4	35.2		42.6%	17.9%	-0.7%
Northern Europe	11.3	15.6	17.0	15.0		38.0%	8.9%	-11.7%
Caribbean/Bahamas/Bermuda		12.4	12.6	14.6			1.8%	15.5%
Eastern Med.	7.4	10.8	12.0	10.5		44.6%	11.5%	-12.7%

Belgium, Average Age and Cruise Length by Trade Route, 2025



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Source Market: Turkey

2022-2025

Passenger Volume (K)

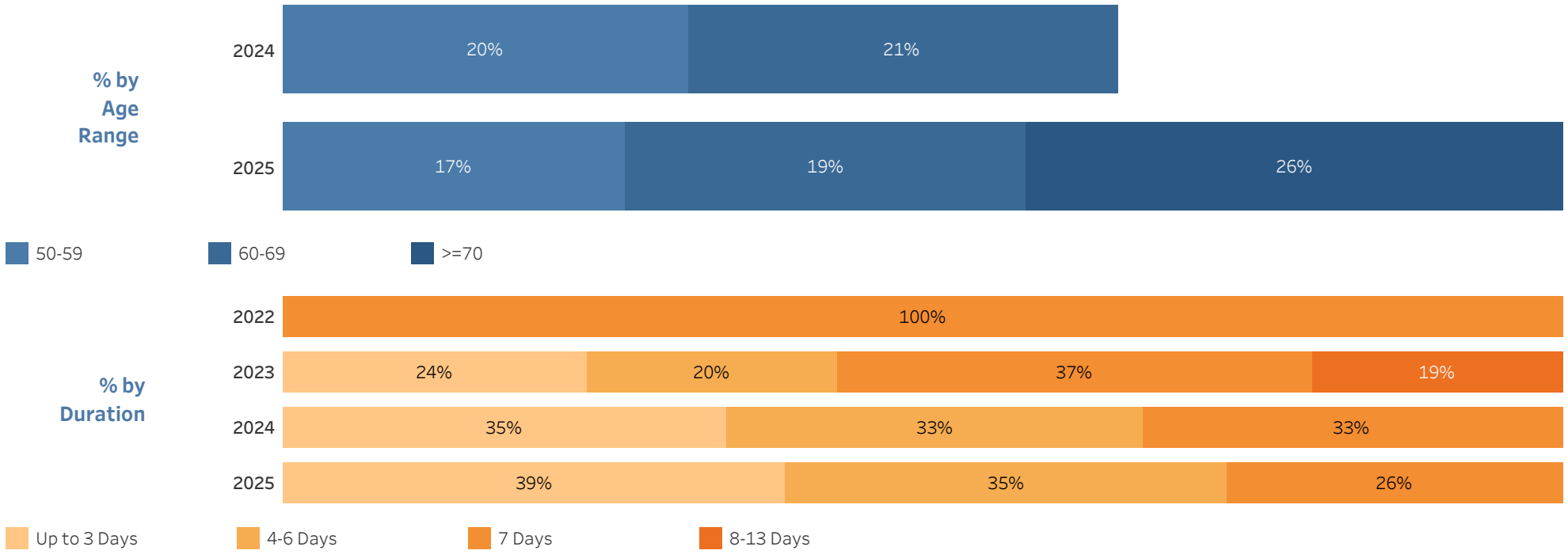
2022	2023	2024	2025
18.2	35.8 (96.2% ▲)	64.1 (79.0% ▲)	86.8 (35.5% ▲)

Average Duration, in Days

2022	2023	2024	2025
6.2	6.5	5.3	4.7

Average Age

2022	2023	2024	2025
48.9	47.6	48.6	52.9



Passenger Percentages by Trade Route / Destination

	2022	2023	2024	2025
Central & Western Med.		17.4%	10.8%	9.3%
Eastern Med.	51.1%	54.4%	70.1%	74.1%



Passenger Volume & YOY Change by Age Group

	Passenger		YOY along Sail Year	
	2024	2025	2024	2025
50-59	6.4	6.5		1.5%
60-69	6.7	7.6		12.6%
>=70		10.2		

Passenger Volume & YOY Change by Duration

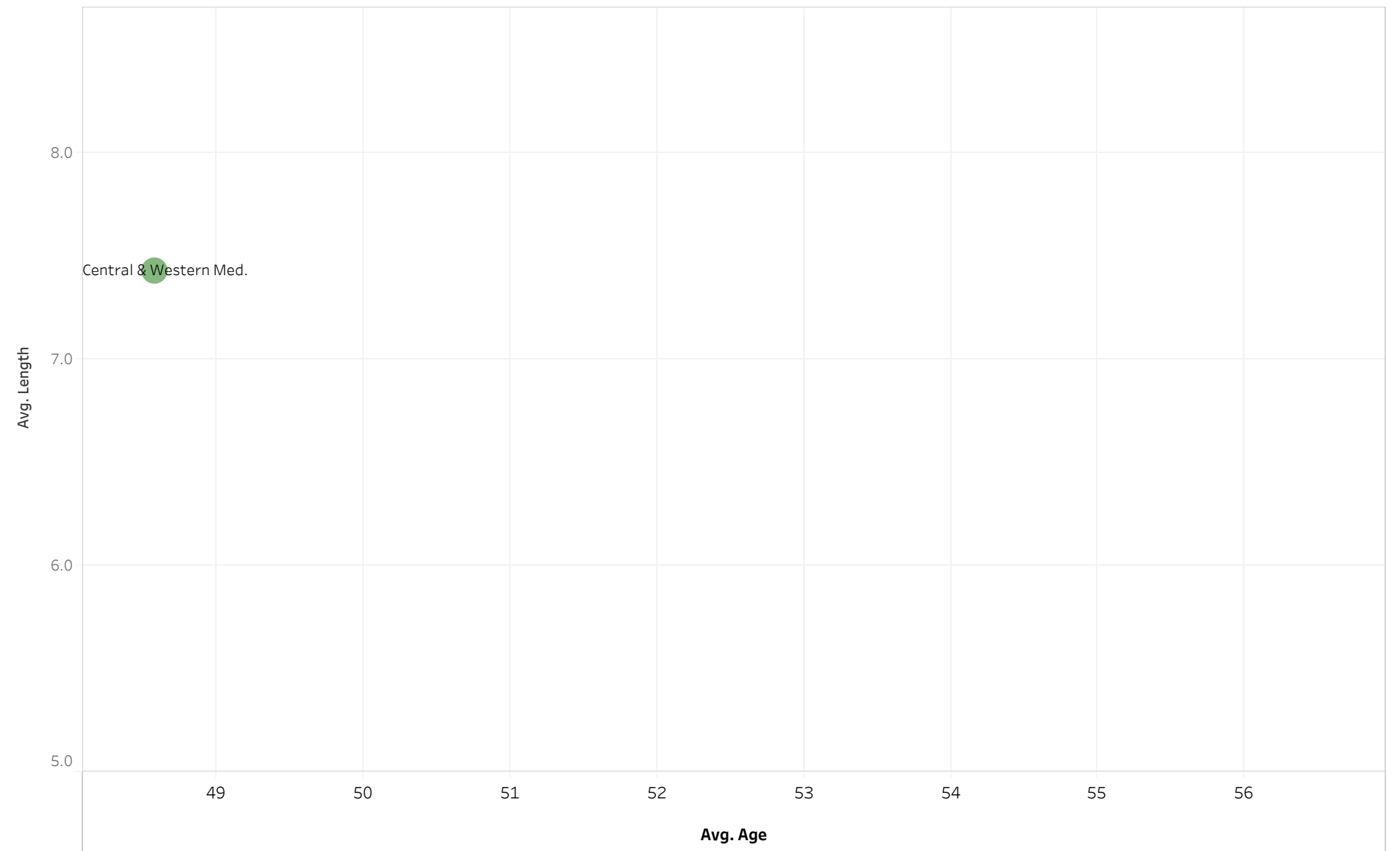
	Passenger				YOY along Sail Year			
	2022	2023	2024	2025	2022	2023	2024	2025
Up to 3 Days		8.2	19.8	31.7			143.1%	59.7%
4-6 Days		6.7	18.6	27.9			177.2%	49.9%
7 Days	7.3	12.7	18.7	21.2		74.5%	46.8%	13.2%
8-13 Days		6.7					-100.0%	

Source Market: **Turkey** (Continued)
2022-2025

Passenger Volume & YOY Change by Trade Route / Destination

	Passenger				YOY along Sail Year			
	2022	2023	2024	2025	2022	2023	2024	2025
Eastern Med.	9.3	19.5	44.9	64.3	108.7%	130.7%	43.2%	
Central & Western Med.		6.2	6.9	8.0		11.7%	15.8%	

Turkey, Average Age and Cruise Length by Trade Route, 2025



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Source Market: Portugal

2022-2025

Passenger Volume (K)

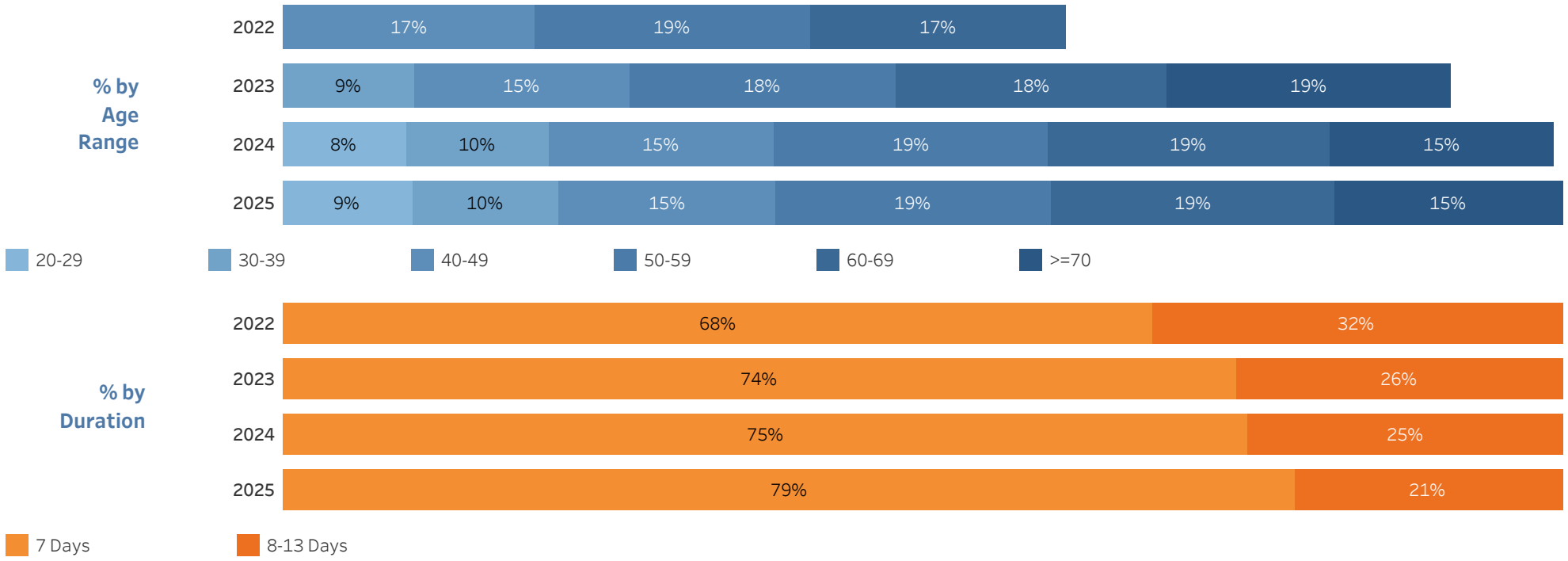
2022	2023	2024	2025
44.5	74.0 (66.2% ▲)	74.1 (0.2% ▲)	79.5 (7.3% ▲)

Average Duration, in Days

2022	2023	2024	2025
8.3	8.1	8.2	7.9

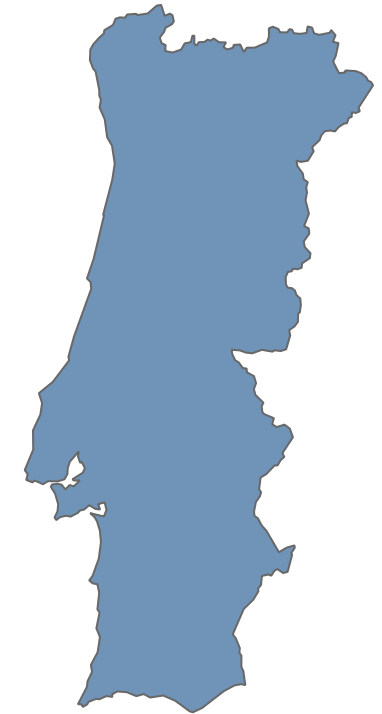
Average Age

2022	2023	2024	2025
46.4	49.3	47.8	48.0



Passenger Percentages by Trade Route / Destination

	2022	2023	2024	2025
Central & Western Med.	51.6%	41.5%	42.4%	44.2%
Eastern Med.	19.0%	23.3%	24.8%	22.1%
Caribbean/Bahamas/Bermuda		9.8%	13.4%	14.2%
Northern Europe		13.2%		



Passenger Volume & YOY Change by Age Group

	Passenger				YOY along Sail Year			
	2022	2023	2024	2025	2022	2023	2024	2025
20-29			6.2	6.9				12.9%
30-39		6.6	7.1	7.8			7.2%	10.4%
40-49	7.4	10.7	11.2	11.6	44.8%	4.4%	3.8%	
50-59	8.1	13.2	13.7	14.7	63.5%	3.3%	7.8%	
60-69	7.5	13.5	14.0	15.2	80.7%	3.7%	8.6%	
>=70		14.1	11.1	12.2			-21.3%	9.8%

Passenger Volume & YOY Change by Duration

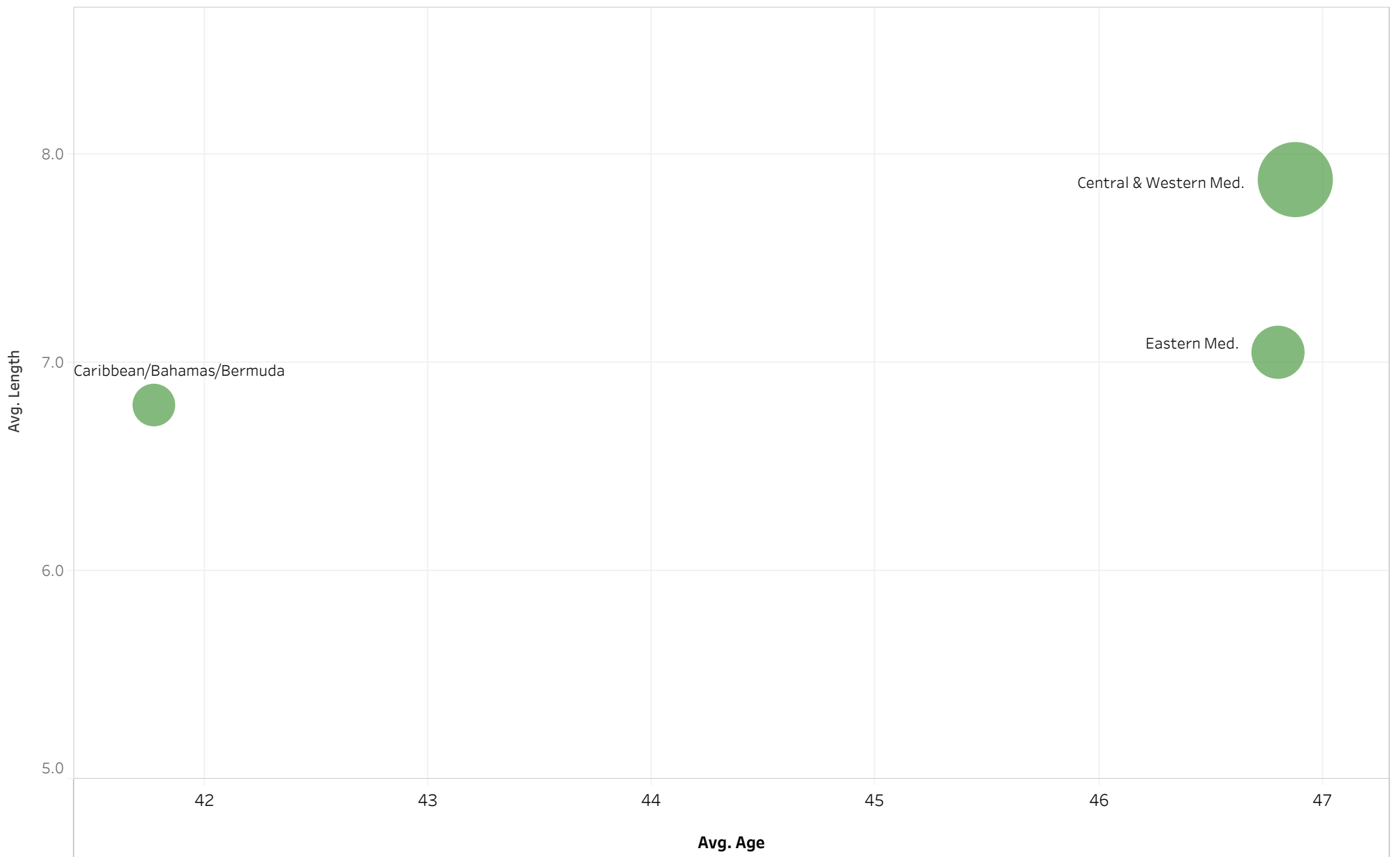
	Passenger				YOY along Sail Year			
	2022	2023	2024	2025	2022	2023	2024	2025
7 Days	27.0	49.5	50.3	55.7		83.3%	1.5%	10.8%
8-13 Days	12.7	17.0	16.4	14.7		33.5%	-3.1%	-10.6%

Source Market: **Portugal** (Continued)
2022-2025

Passenger Volume & YOY Change by Trade Route / Destination

	Passenger				YOY along Sail Year			
	2022	2023	2024	2025	2022	2023	2024	2025
Central & Western Med.	23.0	30.7	30.8	32.5		33.8%	0.4%	5.5%
Eastern Med.	8.5	17.2	18.0	16.3		103.3%	4.8%	-9.6%
Caribbean/Bahamas/Bermuda		7.3	9.8	10.5			34.8%	7.3%
Northern Europe		9.8					-100.0%	

Portugal, Average Age and Cruise Length by Trade Route, 2025



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