Impact of EES and ETIAS on the Cruise Operations

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CLIA
CRUISE LINES
INTERNATIONAL
ASSOCIATION

The CLIA Cruise Community

57 CRUISE LINES

Includes 42 ocean cruise line members (278 vessels and 539,000 lower berths) and 15 river cruise marketing affiliates representing 95% of global capacity

400 EXECUTIVE PARTNERS

Includes members of the port, destination, and travel community; maritime and technical services providers; and product and service suppliers supporting cruise line food, beverage, and hotel operations.

15,000 TRAVEL AGENCIES

Includes the largest travel agencies, hosts, franchises, and consortia throughout the world

54,000 TRAVEL AGENTS

Includes travel agent members in North America, Europe, the United Kingdom, and Australasia

The CLIA community includes the world's most prestigious ocean, river and specialty cruise lines; a highly trained and certified travel agent community; and cruise line suppliers and partners, including ports & destinations, ship development, suppliers and business services.

CLIA membership as of 12 September 2020

The Cruise Industry

- Around 350 vessels worldwide

- 29,7 million passengers globally in 2019

- Variety of vessels : from less than 100 pax up to 7000 pax

- Crew: 1/3 of total seafarers – can represent up to one third of the passengers onboard

The Cruise Industry in Europe

- Second largest destination after the Caribbean with 7.7 Mio pax (in 2019)

- Second largest source market

- 246 vessels operating in European waters

- Operating in 300+ destinations including 64 non-TEN-T ports: Reaching outermost regions and communities of Europe

Cruise voyages

Average Cruise Duration

2019 | Up to 3 Days: 11% | 4-6 Days: 26% | 7 Days: 41% | 8-13 Days: 15% | 14 Days: 4% | 15-20 Days / 21 Days Plus: 3%

Legend: Up to 3 Days | 4-6 Days | 7 Days | 8-13 Days | 14 Days | 15-20 Days | 21 Days Plus

Include at least 2 different countries – generally a minimum of 3 for a typical 7-days cruise in Europe

Cruises in Europe

Cruises in Europe

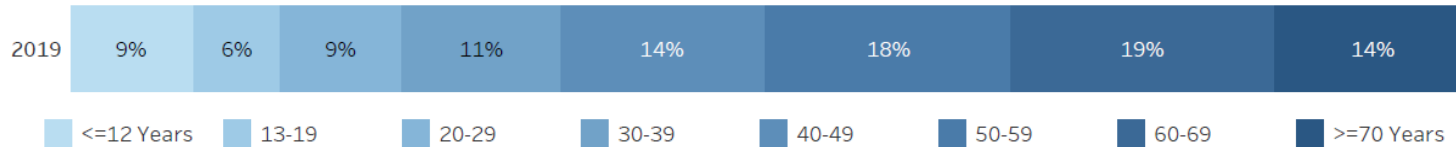# Repositioning Cruises

World Cruises
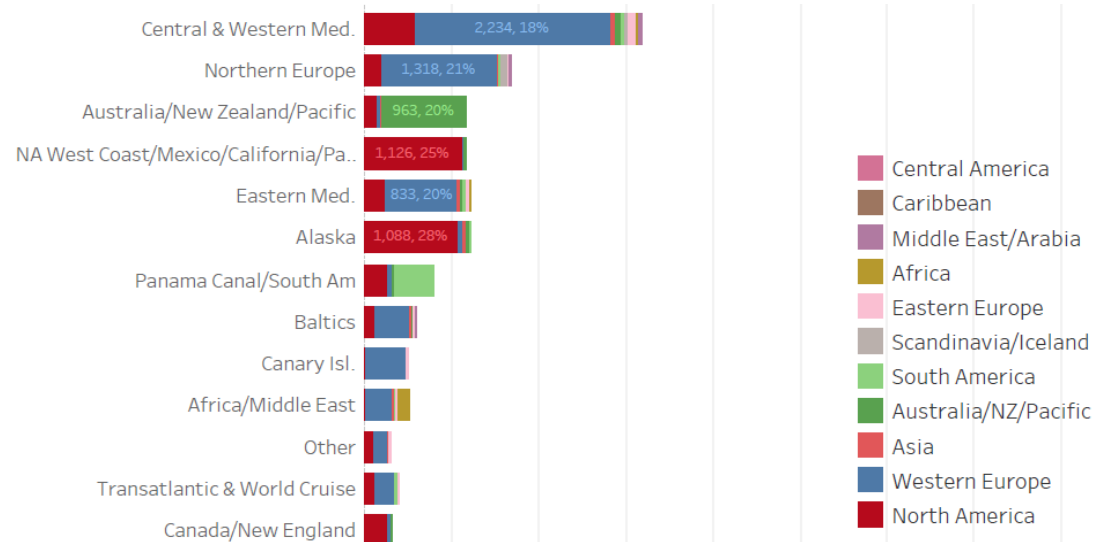
48 days

119 days

Cruisers Profile

Average Passenger Age Group

More than 50% of global cruisers are US citizens with important variations per cruise destinations and types of cruise

Check-in and Passenger Data

- On average up to 3 months prior to cruising up to 60 min prior to scheduled sailing time
- Via website or app – including document capture and checks

- Verification of documentation prior to boarding (over 4-5 hours on average)
- Passenger and crew manifest (IMO FAL Forms 5 & 6) sent up to 24h prior to arrival in port – as per IMO FAL Convention and EU legislation
- Submission via Maritime Single Window / No interactive API capability

Border Controls Challenges at Ports

EES and ETIAS implementation key challenges

- **Entry and Exit recording and passenger registration:**
  - When/Where?
    - Considering impact on homeports, on first entry points and status of transit stops outside of Schengen
  - How?
    - Resources at ports: number of border guards / kiosks?
    - Segregation of TCN and EU citizens?
    - Consider EES enrollment during the voyage – kiosk or app?

- **Verification of carrier gateway :**
  - Timing for verification?
    - Timing for check-in can differ from 3 months up to 60 min.
    - Every time touching a Schengen port during the voyage?
  - Consider ETIAS application during the voyage ?
  - Integration with Maritime reporting obligations

Thank you

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