



2021 Asia 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: Asia

Passenger Volume (K)

2019	2020	2021
3,738	497 (-86.7% ▼)	626 (26.0% ▲)

Average Duration, in Days

2019	2020	2021
4.2	3.9	3.1

Average Age

2019	2020	2021
46.2	46.3	35.4

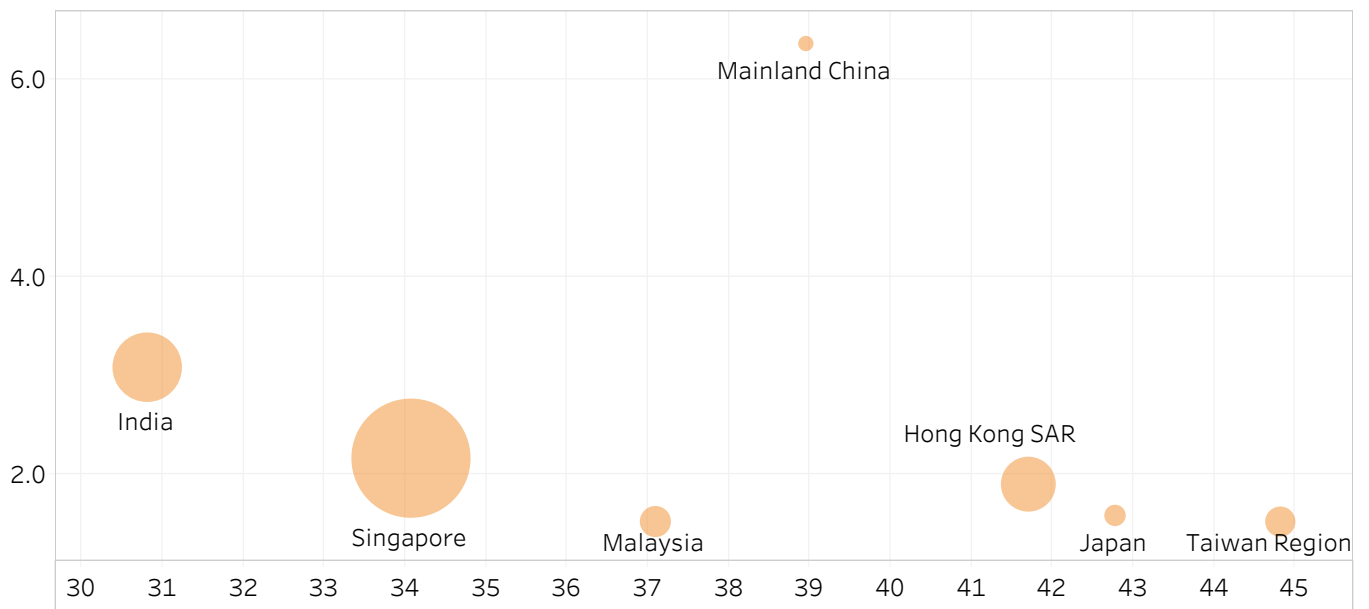
Passenger Volume (K) from Top Source Markets

	2019	2020	2021
Singapore	325	72 (-78.0% ▼)	360 (403.1% ▲)
India	313	46 (-85.4% ▼)	123 (168.0% ▲)
Hong Kong SAR	191	36 (-81.2% ▼)	77 (113.2% ▲)
Malaysia	121	13 (-88.9% ▼)	25 (83.1% ▲)
Taiwan Region	389	83 (-78.8% ▼)	23 (-71.9% ▼)
Japan	296	19 (-93.7% ▼)	12 (-37.8% ▼)
Mainland China	1,919	205 (-89.3% ▼)	6 (-97.1% ▼)
Vietnam	7	(-100.0% ▼)	
Thailand	20	(-100.0% ▼)	
South Korea	49	6 (-86.7% ▼)	(-100.0% ▼)
Philippines	29	(-100.0% ▼)	
Indonesia	62	9 (-85.2% ▼)	(-100.0% ▼)

Passenger Share from Top Source Markets

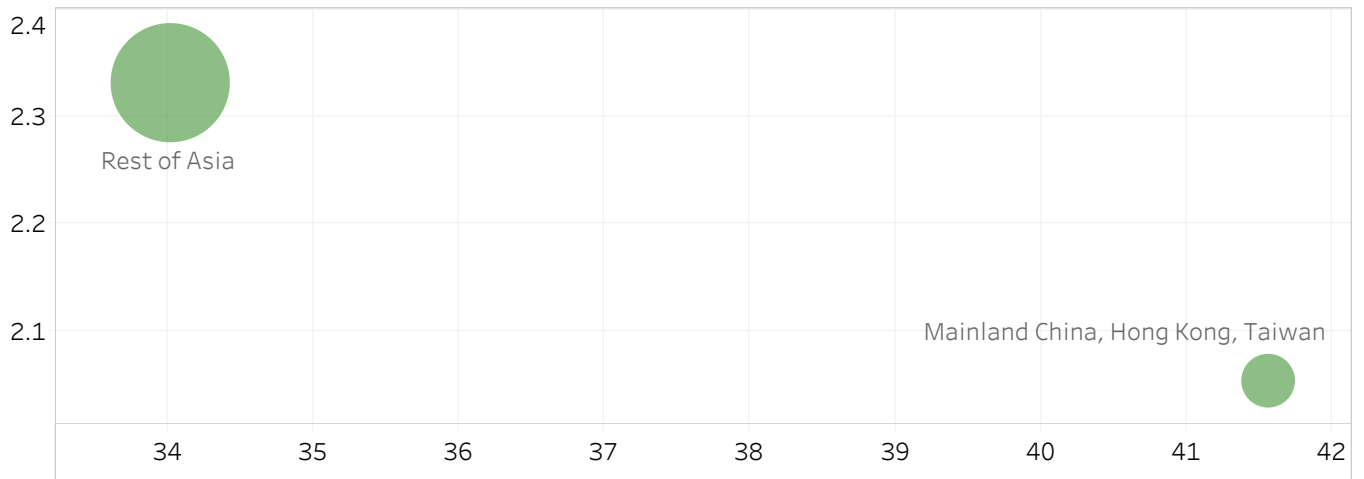
	2019	2020	2021
Singapore	8.7%	14.5%	57.6%
India	8.4%	9.2%	19.6%
Hong Kong SAR	5.1%	7.3%	12.2%
Malaysia	3.2%	2.7%	3.9%
Taiwan Region	10.4%	16.7%	3.7%
Japan	7.9%	3.8%	1.9%
Mainland China	51.4%	41.4%	1.0%
Vietnam	0.2%		
Thailand	0.5%		
South Korea	1.3%	1.3%	
Philippines	0.8%		
Indonesia	1.7%	1.9%	

Average Age and Cruise Length from Top Source Markets, 2021

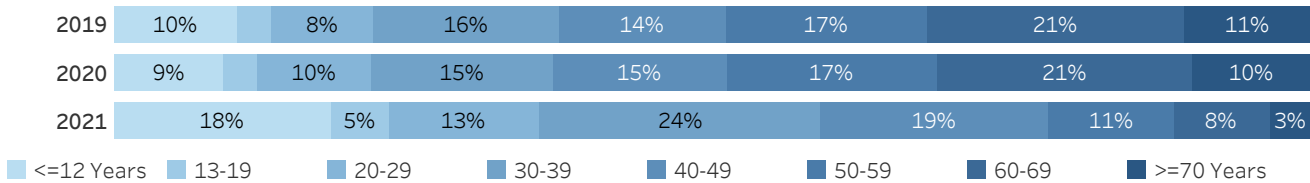


Regional Overview: Asia (Continued)

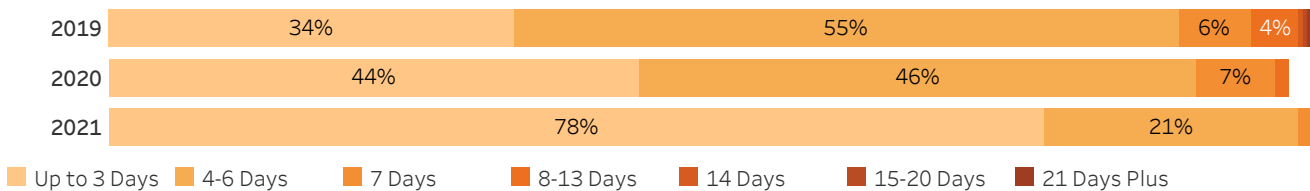
Average Age and Cruise Length by Destination / Trade Route, 2021



Average Passenger Age Groups

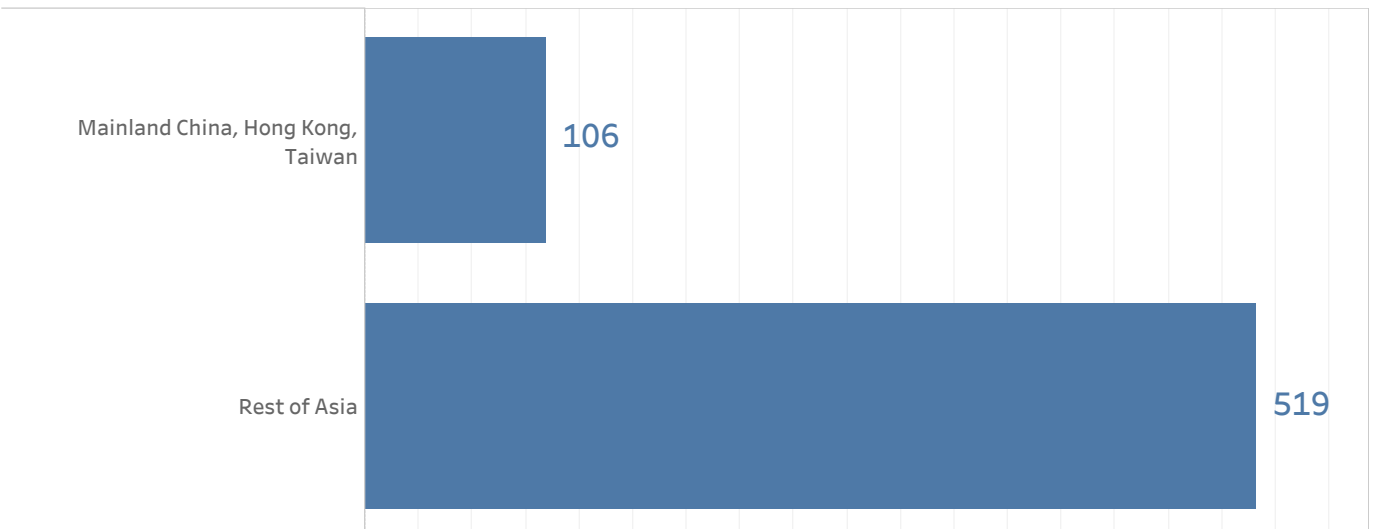


Average Cruise Duration



Volume of Passengers (K) by Destination/ Trade Route, 2021

At least 4K Passengers per Destination

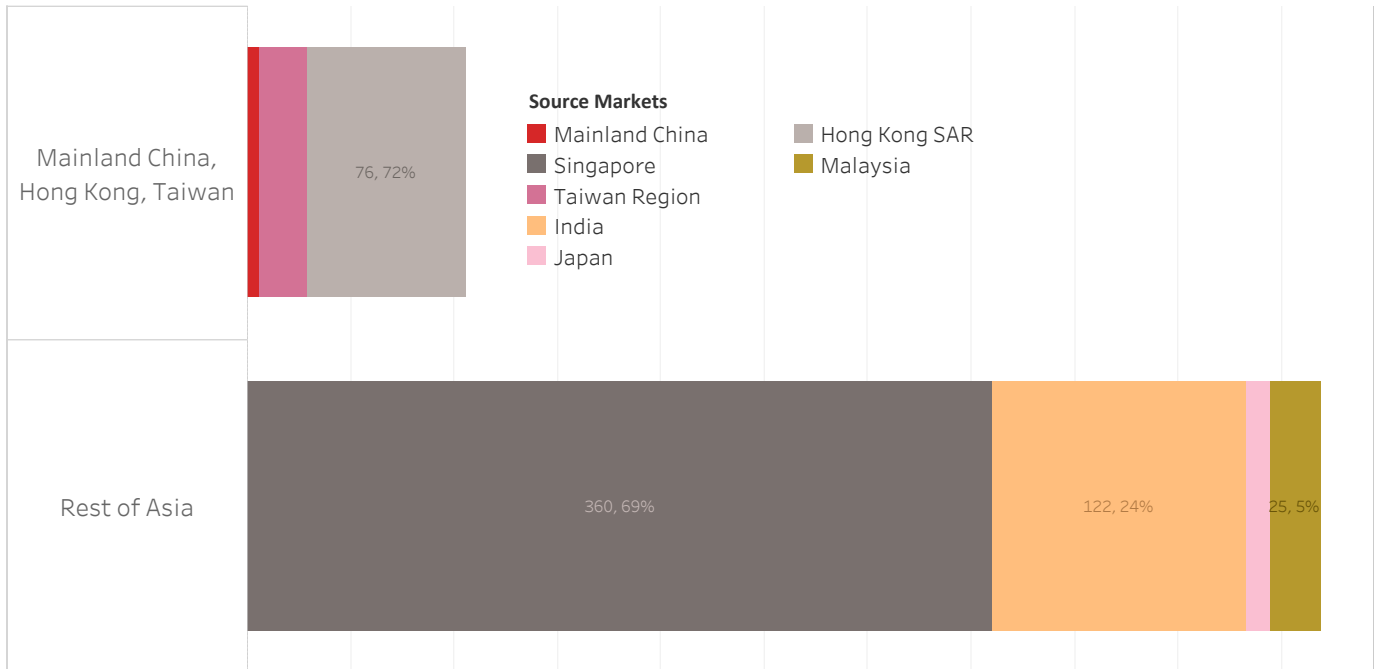


Regional Overview: Asia (Continued)

Passenger Volume (K) by Destination/Trade Route

	2019	2020	2021
Rest of Asia	1,571	194 (-88% ▼)	519 (167% ▲)
Mainland China, Hong Kong, Taiwan	1,904	269 (-86% ▼)	106 (-61% ▼)
Other	18	9 (-48% ▼)	(-100% ▼)
North America	10	(-100% ▼)	
Mediterranean	89	6 (-93% ▼)	(-100% ▼)
Expedition Destinations	11	(-100% ▼)	
Caribbean/South America	48	8 (-84% ▼)	(-100% ▼)
Baltics/Northern Europe	22	(-100% ▼)	
Australia/NZ/Pacific	14	6 (-60% ▼)	(-100% ▼)
Alaska	25	(-100% ▼)	
Africa/Mid-East/World Cruise/Trans..	21	(-100% ▼)	

Passenger Volume (K) by Destination/Trade Route & Top Source Markets



Source Market: Singapore

Passenger Volume (K)

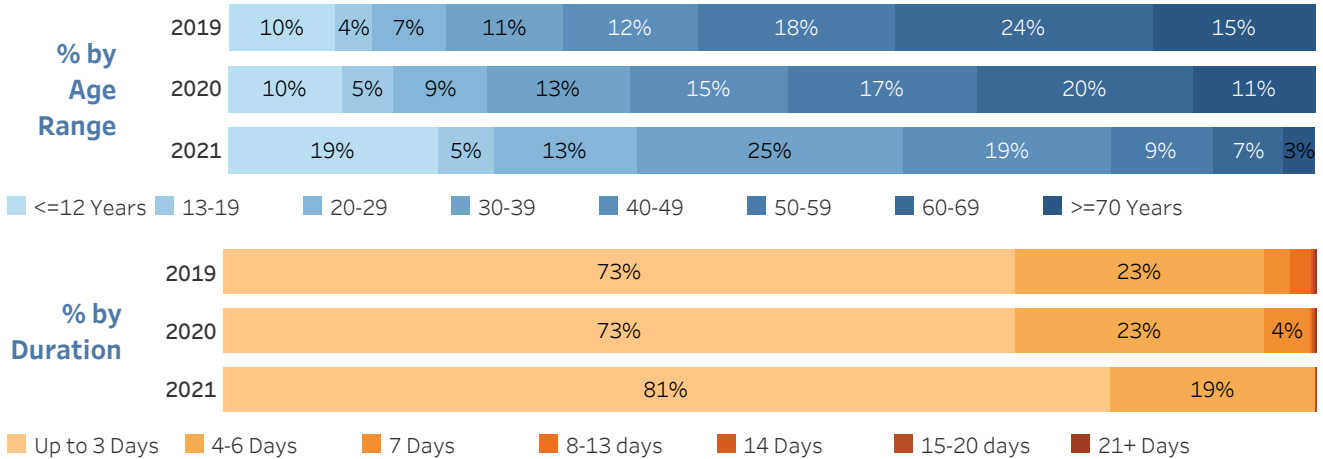
2019	2020	2021
325.4	71.7 (-78.0% ▼)	360.5 (403.1% ▲)

Average Duration, in Days

2019	2020	2021
2.7	2.6	2.2

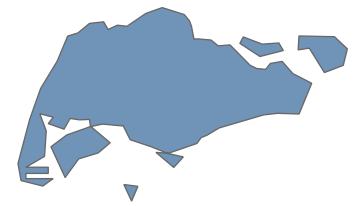
Average Age

2019	2020	2021
49	46	34



Passenger Percentages by Destination/Trade Route

	2019	2020	2021
Rest of Asia	96.2%	98.5%	100.0%
Mediterranean	0.7%		
Alaska	0.8%		
Mainland China, Hong Kong, Taiwan	0.8%		



Passenger Volume & YOY Change by Age Group

	Passenger in K			Variance		
	2019	2020	2021	2019	2020	2021
<=12 Years	32	7	28	-76%	277%	
13-19	11	3	8	-71%	127%	
20-29	22	6	19	-71%	203%	
30-39	35	9	36	-73%	282%	
40-49	40	10	28	-74%	168%	
50-59	58	12	13	-79%	9%	
60-69	76	14	10	-81%	-33%	
>=70 Years	48	8	4	-83%	-47%	

Passenger Volume & YOY Change by Duration

	Passenger in K			Variance		
	2019	2020	2021	2019	2020	2021
Up to 3 Days	236	52	293	-78%	463%	
4-6 Days	74	16	68	-78%	315%	
7 Days	8	3		-61%		
8-13 Days	6					

Source Market: India

Passenger Volume (K)

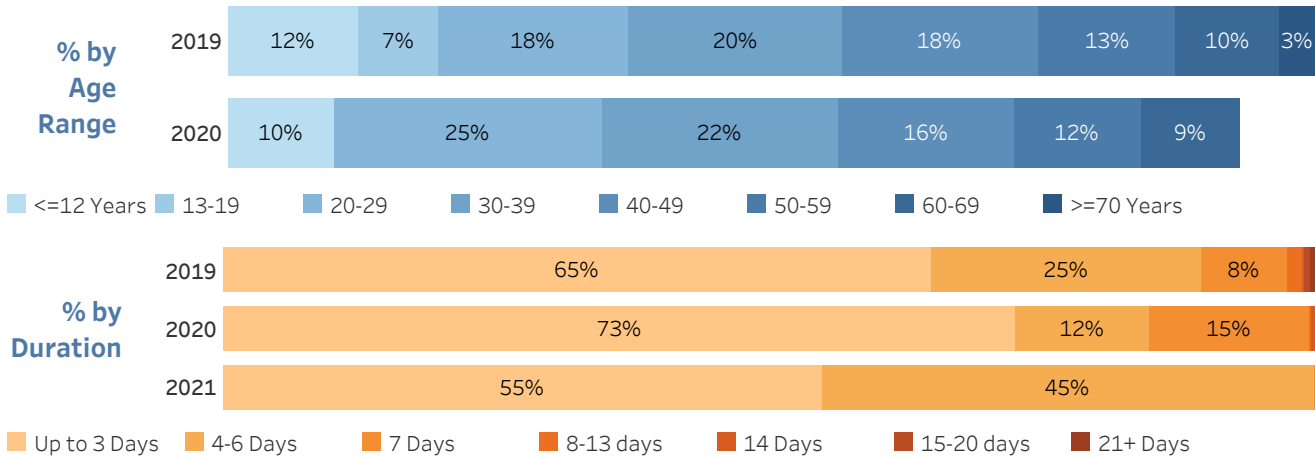
2019	2020	2021
312.6	45.7 (-85.4% ▼)	122.6 (168.0% ▲)

Average Duration, in Days

2019	2020	2021
3.2	2.8	3.1

Average Age

2019	2020	2021
37	37	31



Passenger Percentages by Destination/Trade Route

	2019	2020	2021
Rest of Asia	80.1%	86.4%	99.7%
Mediterranean	3.0%		
Alaska	1.6%		
Caribbean/South America	3.6%		
Other	2.0%	10.1%	
Mainland China, Hong Kong, Taiwan	2.1%		
Baltics/Northern Europe	1.6%		
North America	0.5%		
Africa/Mid-East/World Cruise/Transatla..	5.2%		



Passenger Volume & YOY Change by Age Group

	Passenger in K	Variance		
	2019	2020	2019	2020
<=12 Years	24	2		-91%
13-19	15			
20-29	36	6		-84%
30-39	40	5		-87%
40-49	37	4		-90%
50-59	26	3		-90%
60-69	20	2		-89%
>=70 Years	7			

Passenger Volume & YOY Change by Duration

	Passenger in K	Variance				
	2019	2020	2021	2019	2020	2021
Up to 3 Days	202	33	67		-84%	103%
4-6 Days	77	6	55		-93%	892%
7 Days	25	7			-73%	
8-13 Days	4					
21+ Days	2					

Source Market: Hong Kong SAR

Passenger Volume (K)

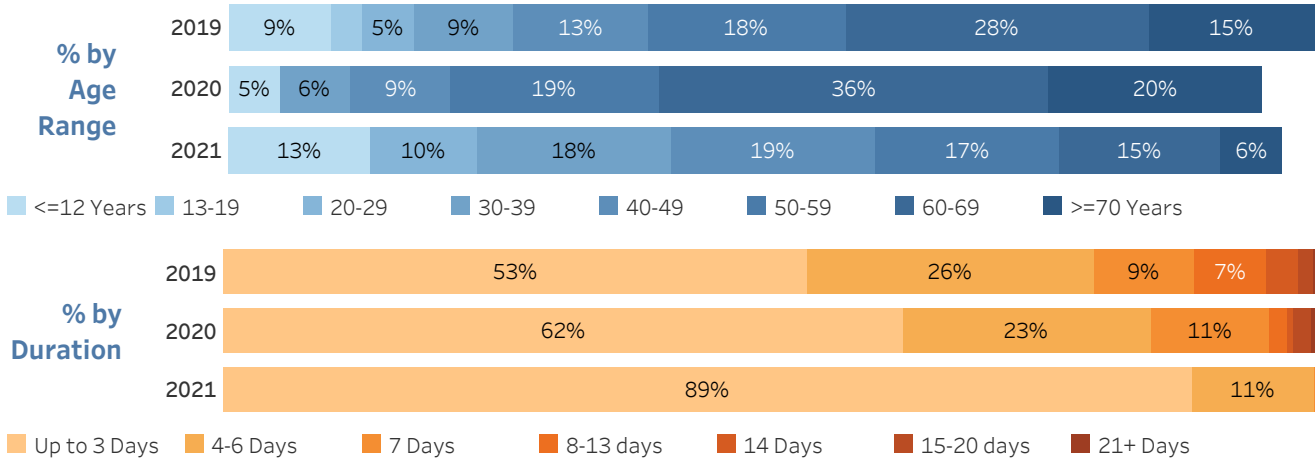
2019	2020	2021
191.2	35.9 (-81.2% ▼)	76.6 (113.2% ▲)

Average Duration, in Days

2019	2020	2021
4.2	3.5	1.9

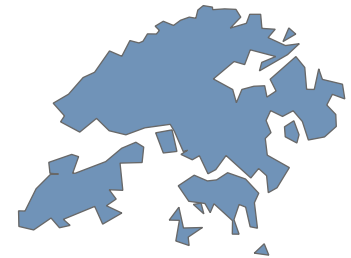
Average Age

2019	2020	2021
51	57	42



Passenger Percentages by Destination/Trade Route

	2019	2020	2021
Rest of Asia	13.7%	17.0%	
Mediterranean	5.1%		
Alaska	1.4%		
Caribbean/South America	1.3%		
Other	2.7%		
Mainland China, Hong Kong, Taiwan	71.1%	77.2%	99.9%
Australia/NZ/Pacific	1.3%		
Baltics/Northern Europe	2.1%		



Passenger Volume & YOY Change by Age Group

	Passenger in K			Variance		
	2019	2020	2021	2019	2020	2021
<=12 Years	18	2	4		-90%	116%
13-19	5					
20-29	9		3			123%
30-39	17	2	5		-87%	128%
40-49	23	3	5		-86%	62%
50-59	34	7	5		-80%	-29%
60-69	52	13	4		-75%	-67%
>=70 Years	28	7	2		-76%	-77%

Passenger Volume & YOY Change by Duration

	Passenger in K			Variance		
	2019	2020	2021	2019	2020	2021
Up to 3 Days	99	22	68		-78%	204%
4-6 Days	49	8	9		-83%	5%
7 Days	17	4			-77%	
8-13 Days	12					
14 Days	5					
15-20 days	3					

Source Market: Malaysia

Passenger Volume (K)

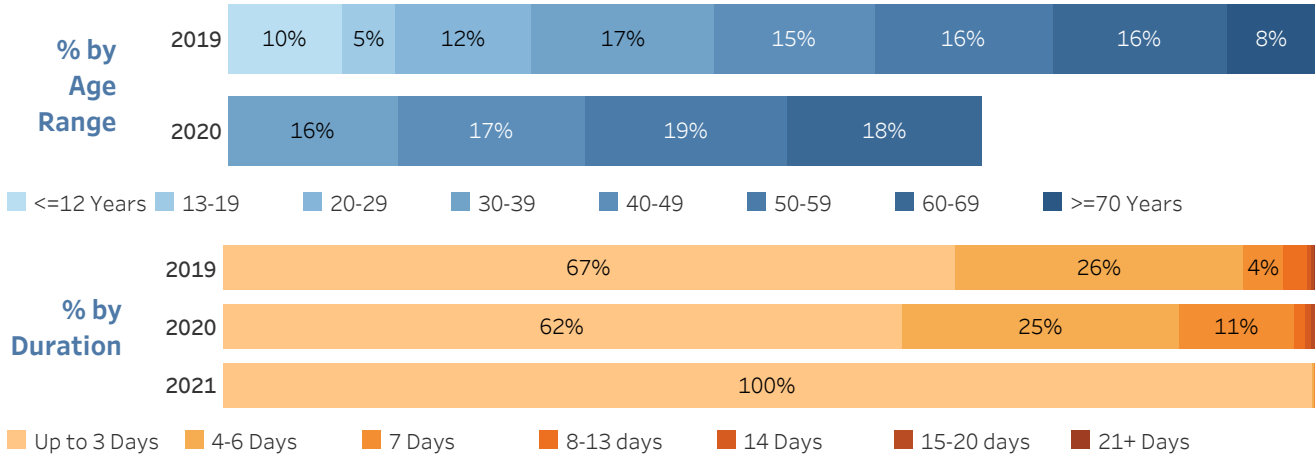
2019	2020	2021
120.7	13.4 (-88.9% ▼)	24.6 (83.1% ▲)

Average Duration, in Days

2019	2020	2021
2.9	3.2	1.5

Average Age

2019	2020	2021
43	46	37



Passenger Percentages by Destination/Trade Route

	2019	2020	2021
Rest of Asia	91.7%	93.6%	99.8%
Mediterranean	2.1%		
Mainland China, Hong Kong, Taiwan	2.9%		



Passenger Volume & YOY Change by Age Group

	Passenger in K	Variance				
	2019	2020	2021	2019	2020	2021
<=12 Years	12					
13-19	6					
20-29	15					
30-39	20	2				-90%
40-49	18	2				-87%
50-59	20	3				-87%
60-69	19	2				-88%
>=70 Years	10					

Passenger Volume & YOY Change by Duration

	Passenger in K	Variance				
	2019	2020	2021	2019	2020	2021
Up to 3 Days	81	8	25			
4-6 Days	32	3				-90%
7 Days	4					194%
8-13 Days	3					-89%

Source Market: Taiwan Region

Passenger Volume (K)

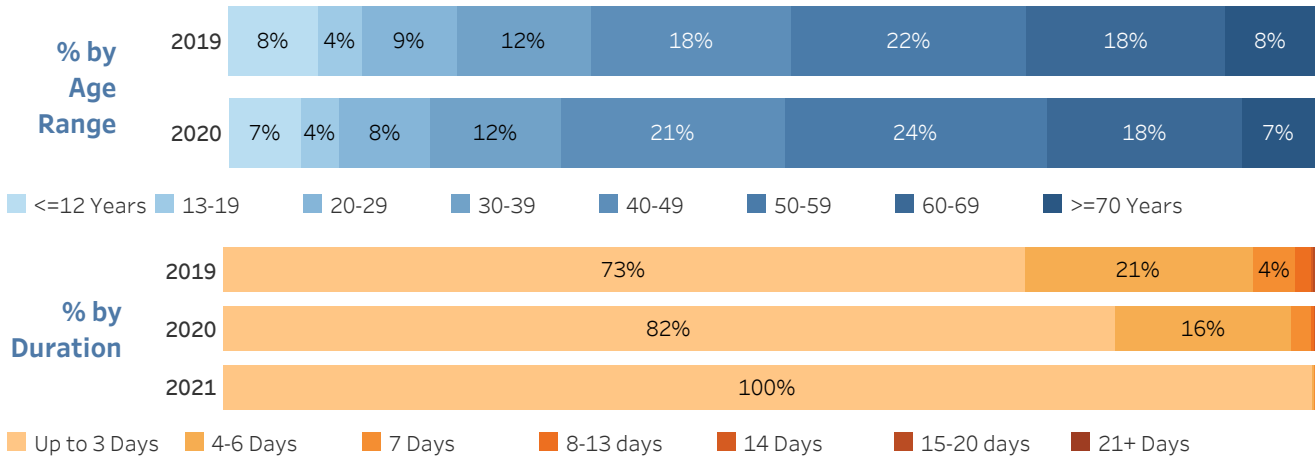
2019	2020	2021
389.5	82.6 (-78.8% ▼)	23.2 (-71.9% ▼)

Average Duration, in Days

2019	2020	2021
2.6	2.2	1.5

Average Age

2019	2020	2021
46	47	45



Passenger Percentages by Destination/Trade Route

	2019	2020	2021
Rest of Asia	2.3%		
Mediterranean	1.6%		
Alaska	0.6%		
Caribbean/South America	0.7%		
Mainland China, Hong Kong, Taiwan	94.0%	96.4%	99.7%



Passenger Volume & YOY Change by Age Group

	Passenger in K		Variance	
	2019	2020	2019	2020
<=12 Years	32	5		-83%
13-19	16	3		-81%
20-29	34	7		-79%
30-39	48	10		-79%
40-49	71	17		-76%
50-59	83	20		-76%
60-69	71	15		-79%
>=70 Years	32	6		-83%

Passenger Volume & YOY Change by Duration

	Passenger in K			Variance		
	2019	2020	2021	2019	2020	2021
Up to 3 Days	286	67	23		-76%	-66%
4-6 Days	81	13			-84%	
7 Days	16	2			-90%	
8-13 Days	6					

Source Market: Japan

Passenger Volume (K)

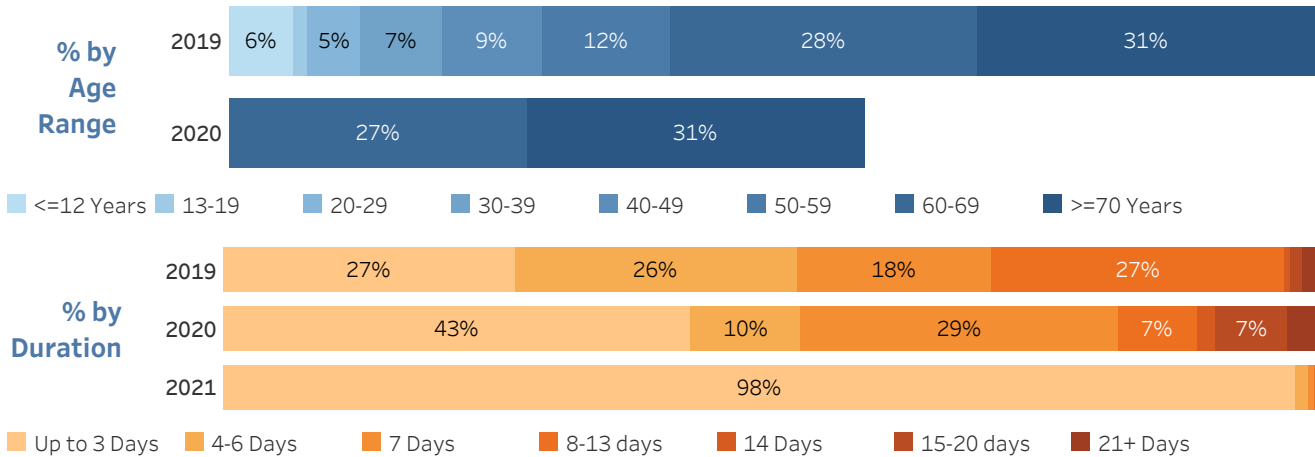
2019	2020	2021
296.5	18.7 (-93.7% ▼)	11.6 (-37.8% ▼)

Average Duration, in Days

2019	2020	2021
6.4	6.1	1.6

Average Age

2019	2020	2021
57	57	43



Passenger Percentages by Destination/Trade Route

	2019	2020	2021
Rest of Asia	79.1%	56.0%	99.1%
Mediterranean	9.9%	16.4%	
Alaska	0.8%		
Caribbean/South America	3.5%	12.8%	
Other	0.6%		
Mainland China, Hong Kong, Taiwan	1.9%		
Australia/NZ/Pacific	1.2%		
Baltics/Northern Europe	0.9%		
North America	0.6%		
Exploration Destinations	0.6%		
Hawaii	0.6%		
Africa/Mid-East/World Cruise/Transatla..	0.5%		



Passenger Volume & YOY Change by Age Group

	Passenger in K		Variance
	2019	2020	2019 2020
<=12 Years	11		
13-19	2		
20-29	9		
30-39	13		
40-49	16		
50-59	21		
60-69	50	3	-94%
>=70 Years	56	3	-94%

Passenger Volume & YOY Change by Duration

	Passenger in K		Variance
	2019	2020 2021	2019 2020 2021
Up to 3 Days	79	8 11	-90% 43%
4-6 Days	76	2	-97%
7 Days	53	5	-90%
8-13 days	80		
14 Days	2		
15-20 days	3		
21+ Days	4		

Source Market: Mainland China

Passenger Volume (K)

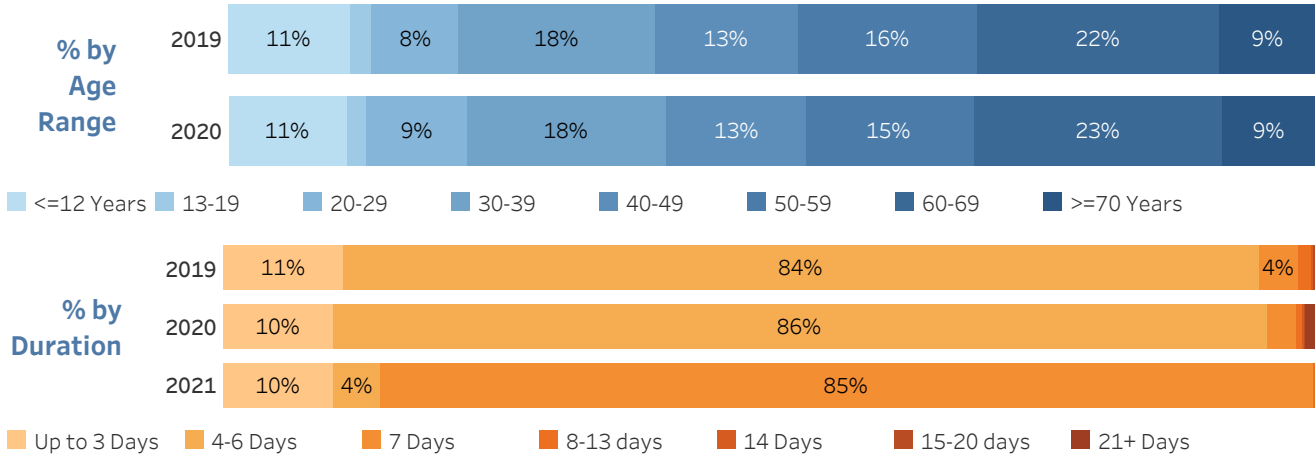
2019	2020	2021
1,919.5	204.7 (-89.3% ▼)	6.0 (-97.1% ▼)

Average Duration, in Days

2019	2020	2021
4.8	5.0	6.4

Average Age

2019	2020	2021
46	45	39



Passenger Percentages by Destination/Trade Route

	2019	2020	2021
Rest of Asia	26.2%	19.3%	
Mediterranean	0.7%		
Alaska	0.1%		
Caribbean/South America	0.6%	0.9%	
Other	0.2%		
Mainland China, Hong Kong, Taiwan	71.4%	77.7%	97.9%
Australia/NZ/Pacific	0.1%	0.7%	
Baltics/Northern Europe	0.2%		
North America	0.1%		
Exploration Destinations	0.3%		



Passenger Volume & YOY Change by Age Group

	Passenger in K		Variance	
	2019	2020	2019	2020
<=12 Years	205	21		-90%
13-19	35	3		-91%
20-29	148	18		-88%
30-39	335	35		-90%
40-49	241	25		-90%
50-59	302	30		-90%
60-69	412	44		-89%
>=70 Years	162	17		-90%

Passenger Volume & YOY Change by Duration

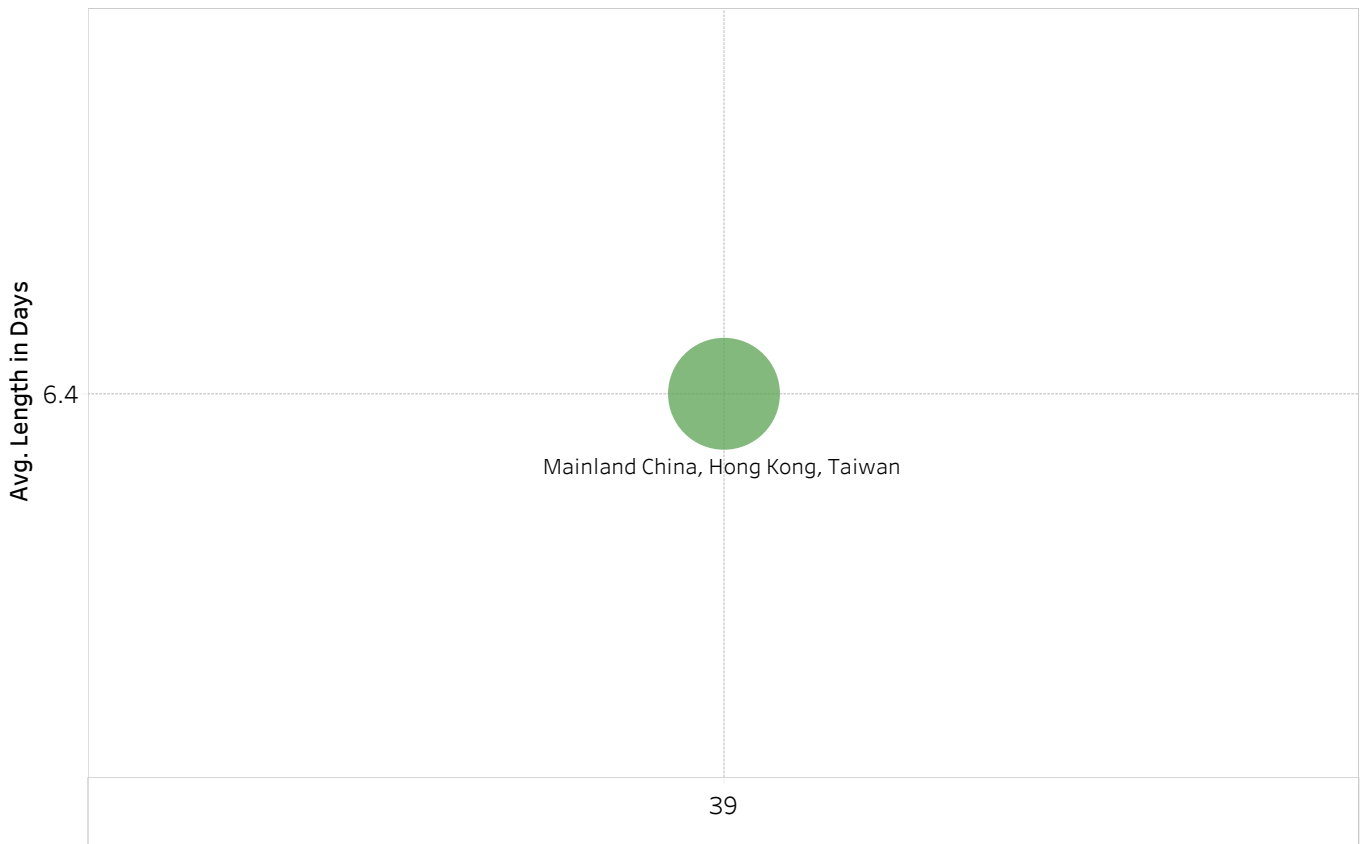
	Passenger in K			Variance		
	2019	2020	2021	2019	2020	2021
Up to 3 Days	211	20			-90%	
4-6 Days	1,605	175			-89%	
7 Days	68	6	5		-92%	-8%
8-13 Days	25					
14 Days	3					
15-20 Days	3					
21+ Days		2			65%	

Source Market: **Mainland China** (Continued)

Passenger Volume & YOY Change by Destination/Trade Route

	2019	2020	Passenger in K 2021	2019	2020	Variance 2021
Rest of Asia	503	39			-92%	
Caribbean/South America	11	2			-83%	
Other	4					
Mainland China, Hong Kong, Taiwan	1,371	159	6		-88%	-96%
Mediterranean	14					
Baltics/Northern Europe	3					
Australia/NZ/Pacific	2	2			-39%	
Alaska	2					
North America	2					
Exploration Destinations	5					

Mainland China, Average Age and Cruise Length by Destination/ 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 in normal years, but are exaggerated in 2020 and 2021 due to impacts from the Covid-19 pandemic.

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.

