



# 2018 Asia Cruise Industry Ocean Source Market Report

## **ASIA OCEAN SOURCE MARKETS 2018**

Asia sourced cruise passenger numbers hit another record high in 2018 with 4.24M taking an ocean cruise (up 4.6%). In 2018, global ocean passenger volume was 28.5M, and Asia accounted for 14.8% (versus 15.1% in 2017).

The more measured growth in Asia's passenger volume did not come as a surprise as cruise ship capacity dipped in 2018 after years of rapid expansion in this region. Asia's slowdown in ship capacity is due to the strong demand for cruise ships worldwide and reduced short cruise itinerary options ex-mainland China.

While still dominant, mainland China's share of all Asian passenger volume dropped to 55.8% from 59.3% in 2017. Taiwan remains the second largest Asian source market (9.3% share) followed by Singapore (8.8%), Japan (6.3%), Hong Kong (5.9%), India (5.2%) and Malaysia (3.6%).

Looking ahead, cruising in Asia is expected to continue growing in popularity with the arrival of new ships in 2019/2020 including from Costa Cruises, Genting Cruise Lines, Royal Caribbean International and MSC Cruises. Several Asian destinations are also building new infrastructure to support cruise development.

## REGIONAL OVERVIEW: ASIA

Mainland China continues to dominate the Asian source markets, accounting for 55.8% of all Asian passenger volume in 2018.

Most of the source markets in Asia saw year-on-year gains in 2018 except Mainland China and Malaysia. Passenger volume from Singapore, India, Indonesia, Philippines, South Korea, Thailand and Vietnam had double-digit growth.

Asian cruise passengers are found across the age spectrum with an estimated average age of 45.4 years. Only three markets show real divergence: India, a young 37 years average; Indonesia a young 39 years average; and Japan an older 57 years.

Asian cruise passengers predominantly cruise in the region with more than 50% (2,194K) cruising from Mainland China, Hong Kong and Taiwan. Almost 40% (1,694K) cruise in the rest of Asia.

Outside of Asia, the Mediterranean, Caribbean/South America, Baltics/ Northern Europe, and Alaska were popular choices in that order.

Shorter sailings remain the dominant choice of Asians, 89% of whom are sailing 4-6 nights with an average duration of 4.9 days – the lowest amongst source market regions in the world.

## GLOSSARY

- ❖ This report is based on 2018 calendar year passenger statistics provided by CLIA's ocean Cruise Line members, representing over 95 per cent of the global cruise industry capacity, plus additional data collected from non-CLIA Cruise Lines by CHART Management Consultants. The research is based on a methodology that is used in similar studies around the world. The consistency of 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's Asia source market reports.
- ❖ Destinations/ trade routes are determined by the area where the ship is predominantly sailing apart from:
  - Mainland China, Hong Kong & Taiwan – represents sailings that embark from these markets and sail within Asia.
  - Rest of Asia – excludes sailings that embark from Mainland China, Hong & Taiwan.
- ❖ "OTHER" in the Destinations/ Trade routes consists of Transatlantic, world cruise, Africa/Middle East, Panama Canal/South America, Canada/ New England, Exploration, no trade route identified and others.

# Regional Overview: Asia (Continued)

## Passenger Volume (K)

2016	2017	2018
3,370	4,052 (20.3% ▲)	4,240 (4.6% ▲)

## Average Duration, in Days

2016	2017	2018
4.3	4.4	4.3

## Average Age

2016	2017	2018
46.1	45.6	45.4

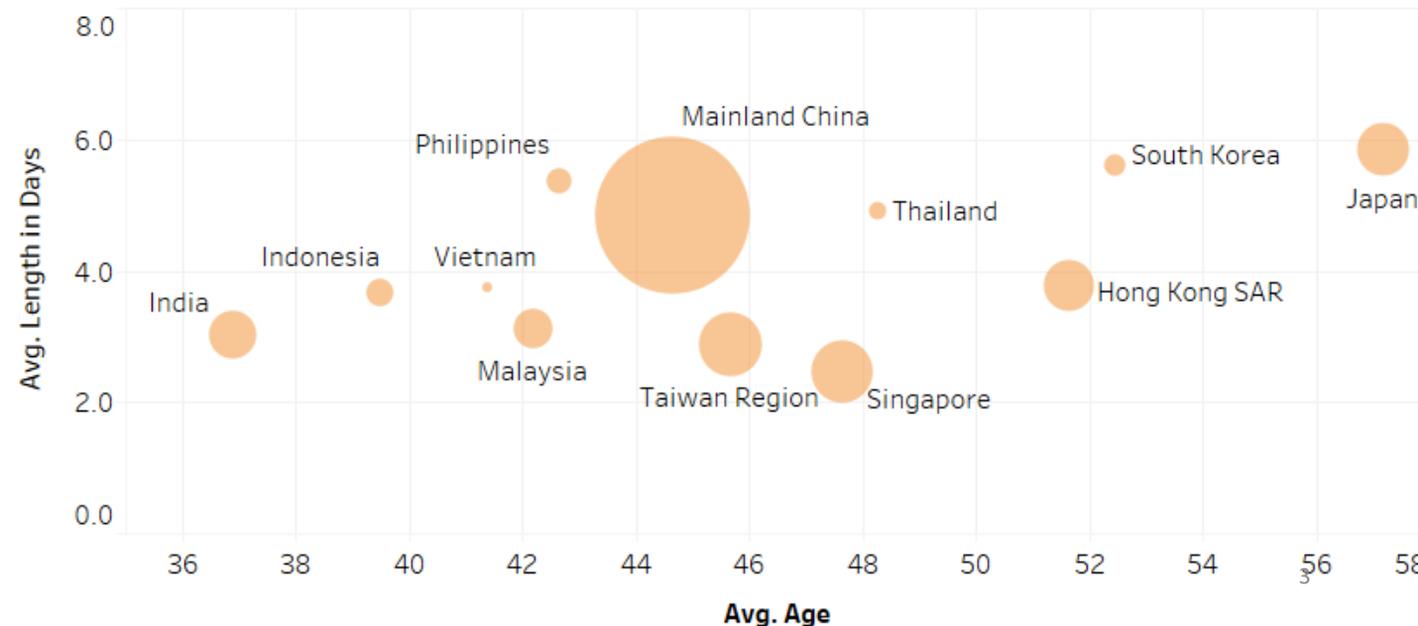
## Passenger Volume (K) from Top Source Markets

	2016	2017	2018
Mainland China	2,113	2,397 (13.4% ▲)	2,357 (-1.6% ▼)
Taiwan Region	299	374 (24.8% ▲)	391 (4.7% ▲)
Singapore	214	267 (24.4% ▲)	373 (39.9% ▲)
Japan	207	255 (22.9% ▲)	266 (4.5% ▲)
Hong Kong SAR	127	230 (80.6% ▲)	250 (8.6% ▲)
India	148	172 (16.1% ▲)	221 (28.1% ▲)
Malaysia	100	188 (87.8% ▲)	150 (-19.9% ▼)
Indonesia	33	47 (40.2% ▲)	72 (54.9% ▲)
Philippines	26	41 (56.1% ▲)	61 (49.1% ▲)
South Korea	32	39 (22.2% ▲)	44 (13.5% ▲)
Thailand	50	26 (-47.6% ▼)	30 (14.5% ▲)
Vietnam	6	6 (9.4% ▲)	10 (53.7% ▲)

## Passenger Share from Top Source Markets

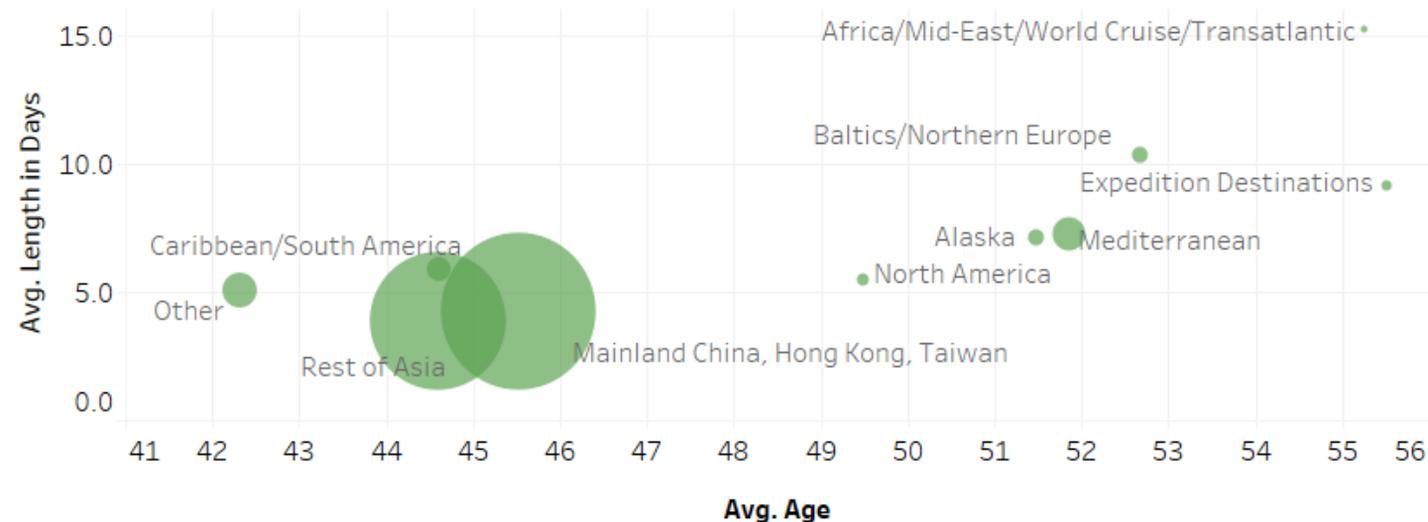
	2016	2017	2018
Mainland China	62.9%	59.3%	55.8%
Taiwan Region	8.9%	9.2%	9.3%
Singapore	6.4%	6.6%	8.8%
Japan	6.2%	6.3%	6.3%
Hong Kong SAR	3.8%	5.7%	5.9%
India	4.4%	4.3%	5.2%
Malaysia	3.0%	4.6%	3.6%
Indonesia	1.0%	1.2%	1.7%
Philippines	0.8%	1.0%	1.5%
South Korea	1.0%	1.0%	1.1%
Thailand	1.5%	0.7%	0.7%
Vietnam	0.2%	0.2%	0.2%

## Average Age and Cruise Length from Top Source Markets, 2018

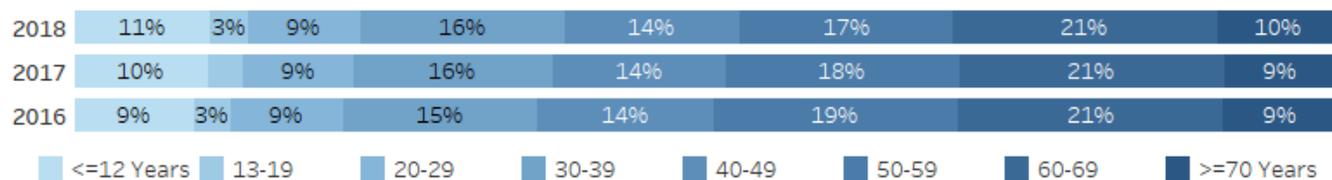


# Regional Overview: Asia (Continued)

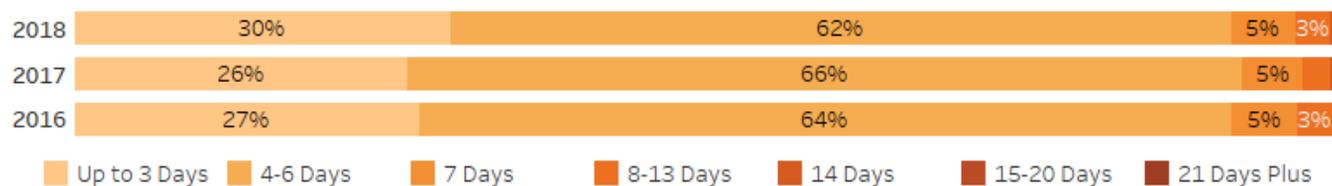
## Average Age and Cruise Length by Destination / Trade Route, 2018



## Average Passenger Age Groups

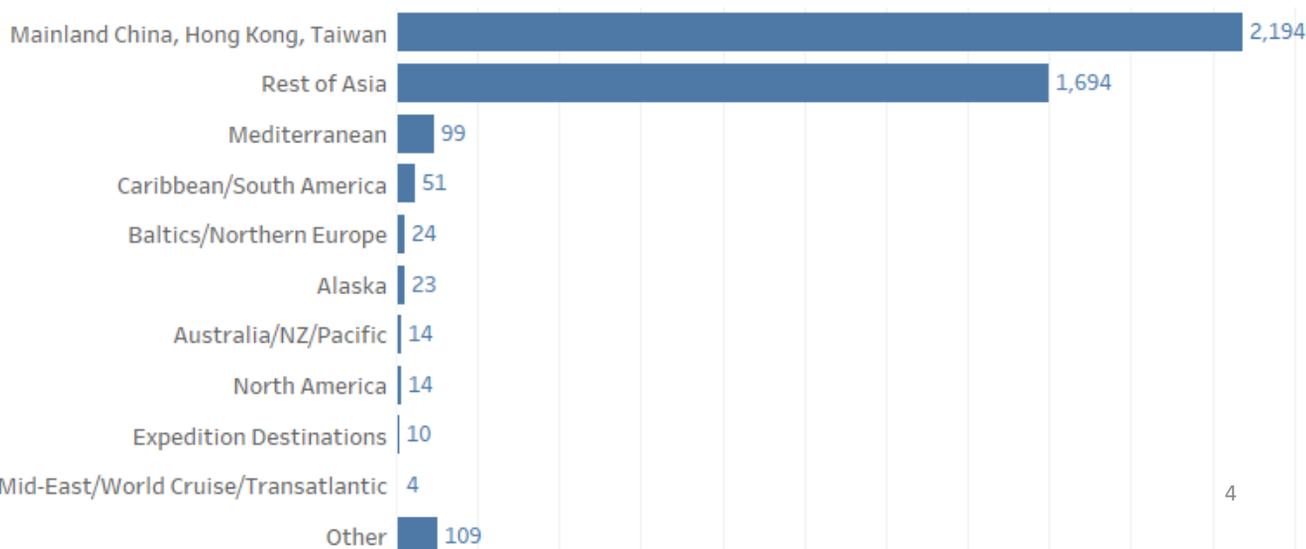


## Average Cruise Duration



## Volume of Passengers (K) by Destination/ Trade Route, 2018

At least 4K Passengers per Destination

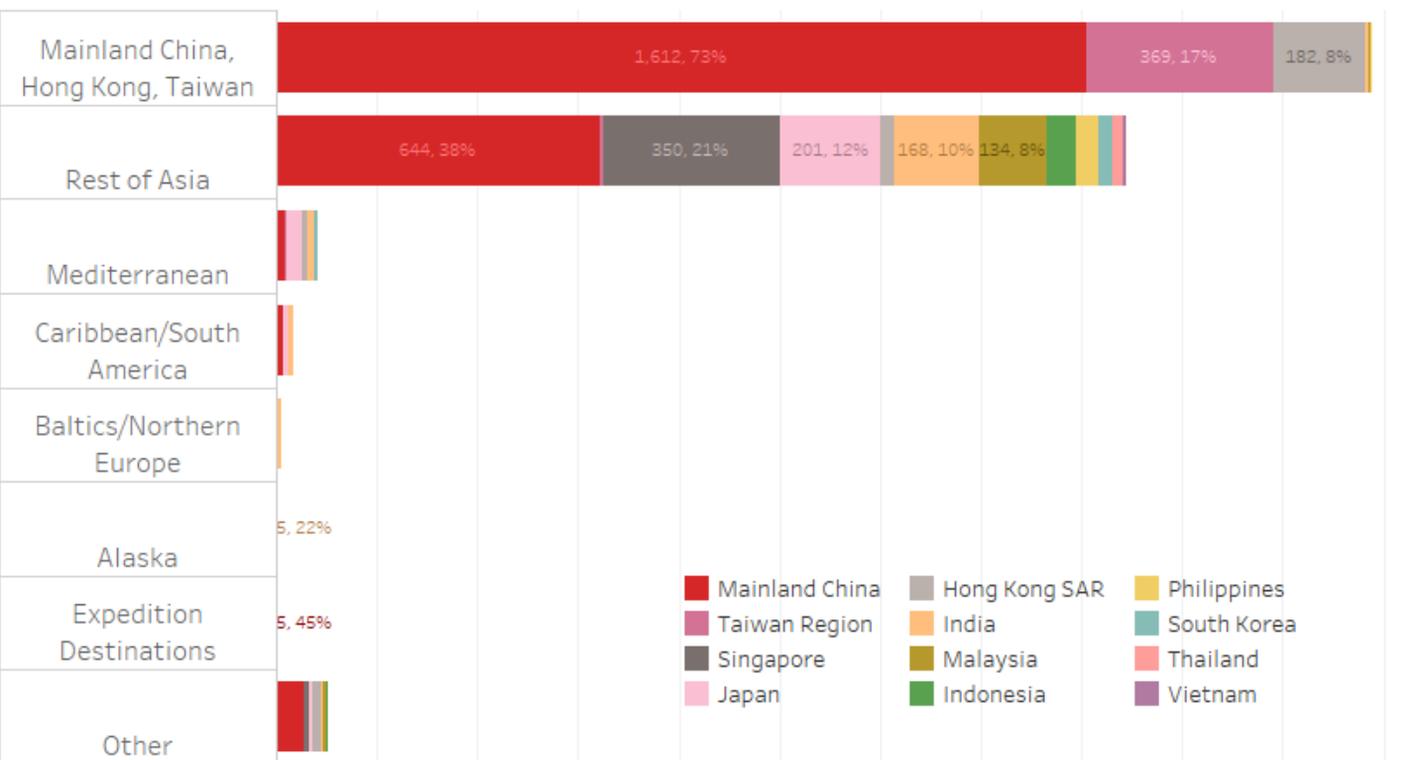


# Regional Overview: Asia (Continued)

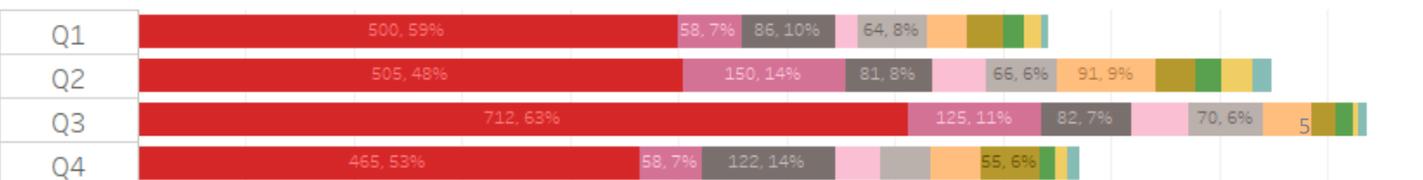
## Passenger Volume (K) by Destination/Trade Route

	2016	2017	2018
Mainland China, Hong Kong, Taiwan	1,664	2,084 (25% ▲)	2,194 (5% ▲)
Rest of Asia	1,396	1,576 (13% ▲)	1,694 (7% ▲)
Mediterranean	71	86 (22% ▲)	99 (15% ▲)
Caribbean/South America	58	56 (-4% ▼)	51 (-9% ▼)
Baltics/Northern Europe	22	27 (24% ▲)	24 (-10% ▼)
Alaska	23	24 (7% ▲)	23 (-5% ▼)
Australia/NZ/Pacific	9	11 (22% ▲)	14 (26% ▲)
North America	17	14 (-19% ▼)	14 (-4% ▼)
Expedition Destinations		7	10 (41% ▲)
Africa/Mid-East/World Cruise/Transatlantic			4
Other	102	161 (57% ▲)	109 (-32% ▼)

## Passenger Volume (K) by Destination/Trade Route & Top Source Markets in 2018



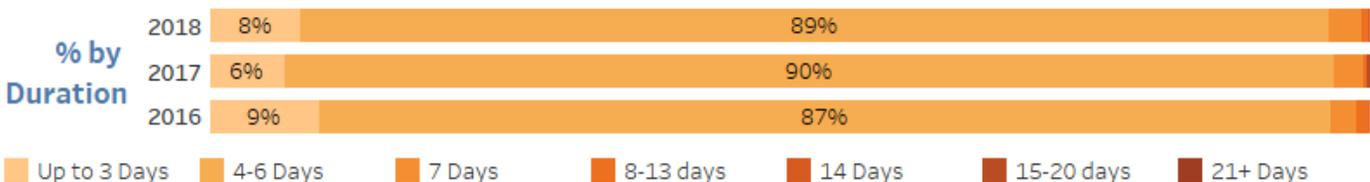
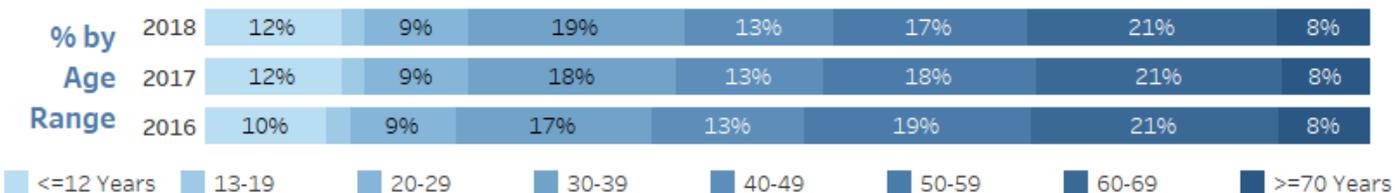
## Passenger Volume (K) by Quarter & Top 10 Source Markets in 2018



## Source Market: Mainland China

Mainland China maintained its dominance as Asia's leading source market, accounting for 55.8% of all Asian passengers. The Chinese market, which has been going through a period of adjustment, saw a marginal 1.6% decrease in passengers in 2018. Passengers sail predominantly in Mainland China, Hong Kong or Taiwan (68.4%). Further destinations such as Mediterranean, Australasia and exploration destinations saw growth while other long-haul destinations fell.

Passenger Volume (K)			Average Duration, in Days			Average Age		
2016	2017	2018	2016	2017	2018	2016	2017	2018
2,112.9	2,396.7 (13.4% ▲)	2,357.4 (-1.6% ▼)	4.8	4.9	4.9	45	45	45



## Passenger Percentages by Destination/Trade Route

	2016	2017	2018
Mainland China, Hong Kong, Taiwan	59.4%	64.5%	68.4%
Rest of Asia	37.5%	31.9%	27.3%
Mediterranean	0.5%	0.6%	0.7%
Caribbean/South America	0.7%	0.6%	0.6%
Exploration Destinations		0.1%	0.2%
Baltics/Northern Europe	0.1%	0.1%	0.1%
Alaska	0.2%	0.2%	0.1%
North America	0.2%	0.1%	0.1%
Australia/NZ/Pacific		0.1%	0.1%
Other	1.3%	1.7%	2.4%



## Passenger Volume & YOY Change by Age Group

	Passenger in K			Variance	
	2016	2017	2018	2016	2018
<=12 Years	186	247	254	33%	3%
13-19	38	41	44	7%	8%
20-29	160	186	193	16%	3%
30-39	300	375	403	25%	8%
40-49	236	265	277	12%	4%
50-59	349	382	358	10%	-6%
60-69	379	445	466	18%	5%
>=70 Years	142	160	174	12%	9%

## Passenger Volume & YOY Change by Duration

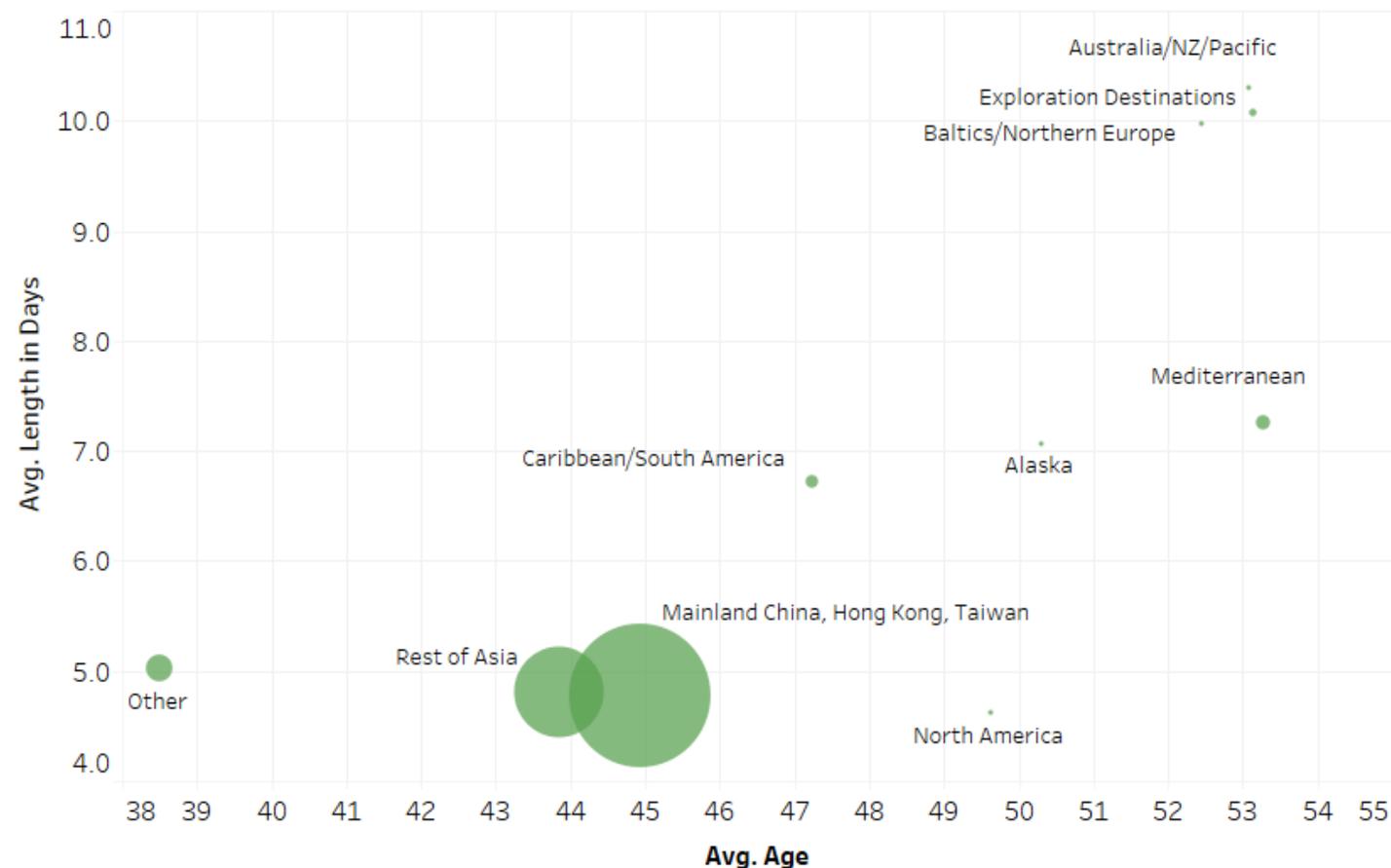
	Passenger in K			Variance	
	2016	2017	2018	2016	2018
Up to 3 Days	177	155	182	-12%	18%
4-6 Days	1,644	2,164	2,089	32%	-3%
7 days	42	59	65	40%	10%
8-13 Days	24	9	16	-61%	75%
14 Days			4		378%
15-20 Days		4		60%	
21+ Days		3		77%	

# Source Market: Mainland China (Continued)

## Passenger Volume & YOY Change by Destination/Trade Route

	Passenger in K			Variance		
	2016	2017	2018	2016	2017	2018
Mainland China, Hong Kong, Taiwan	1,256	1,546	1,612		23%	4%
Rest of Asia	791	765	644		-3%	-16%
Mediterranean	11	14	17		20%	23%
Caribbean/South America	16	15	13		-7%	-11%
Exploration Destinations		2	5		1138%	170%
Baltics/Northern Europe	2	3	3		55%	-18%
Alaska	3	5	3		51%	-51%
North America	4	3	2		-24%	-22%
Australia/NZ/Pacific		2	2		25%	31%
Other	26	42	57		58%	36%

## Mainland China, Average Age and Cruise Length by Destination/Trade Route, 2018



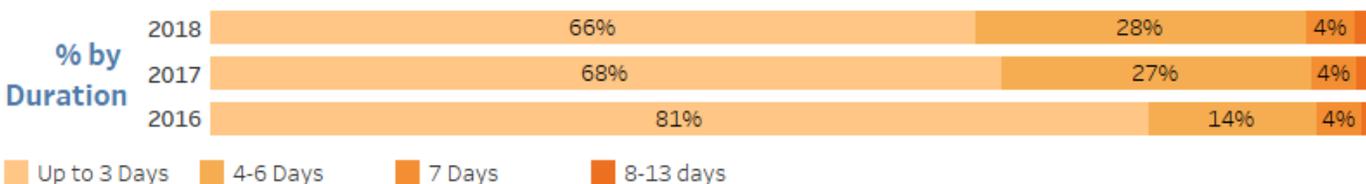
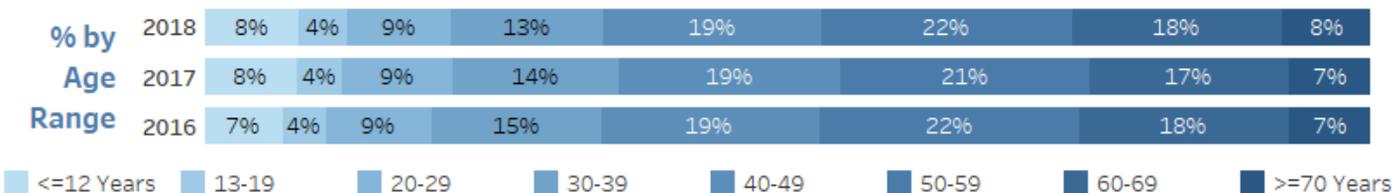
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# Source Market: Taiwan Region

Taiwan is Asia's second largest source market maintaining a market share of 9.3% of the total with a 4.7% growth. A breakdown of the trade route reveals that majority 94.2% cruise out from Mainland China, Hong Kong, Taiwan, with a small percentage cruising from other ports. While short cruises of up to 3 days remained the preferred choice, there is a slight trend to longer cruises over the last two years.

Passenger Volume (K)			Average Duration, in Days			Average Age		
2016	2017	2018	2016	2017	2018	2016	2017	2018
299.3	373.5 (24.8% ▲)	391.2 (4.7% ▲)	2.3	2.8	2.9	46	45	46



## Passenger Percentages by Destination/Trade Route

	2016	2017	2018
Mainland China, Hong Kong, Taiwan	91.3%	92.9%	94.2%
Rest of Asia	2.1%	1.2%	1.5%
Mediterranean	1.6%	1.4%	1.5%
Caribbean/South America	1.1%	1.1%	0.8%
Baltics/Northern Europe			0.5%
Alaska	0.9%	0.5%	0.4%
Other	2.0%	1.8%	



## Passenger Volume & YOY Change by Age Group

	Passenger in K			Variance	
	2016	2017	2018	2016	2018
<=12 Years	20	29	31	46%	8%
13-19	11	15	16	30%	11%
20-29	27	35	35	31%	-1%
30-39	44	53	51	21%	-4%
40-49	55	71	73	27%	3%
50-59	67	80	84	19%	5%
60-69	53	63	69	18%	10%
>=70 Years	21	26	30	24%	14%

## Passenger Volume & YOY Change by Duration

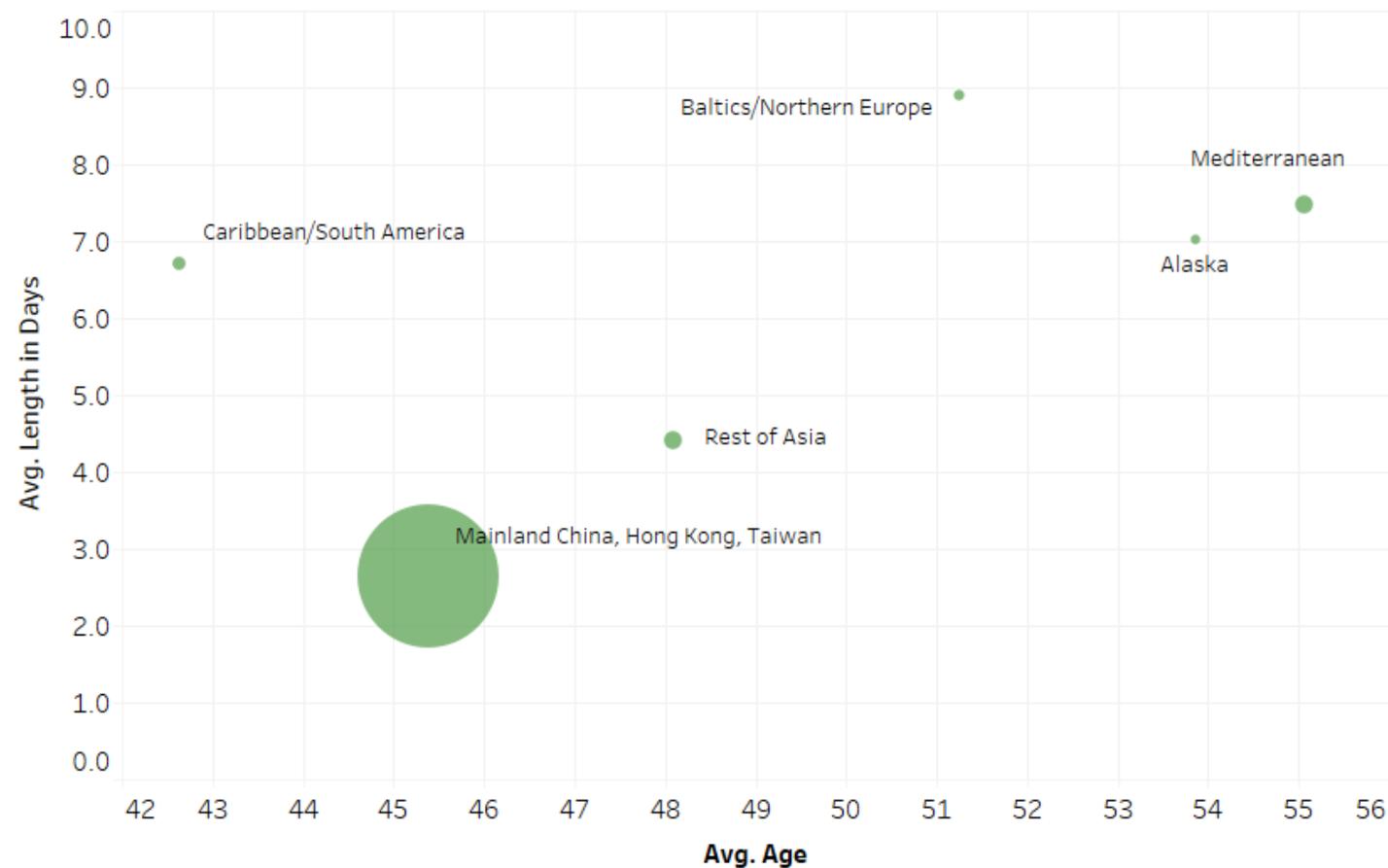
	Passenger in K			Variance		
	2016	2017	2018	2016	2018	
Up to 3 Days	241	254	257	5%	1%	
4-6 Days	43	99	111	132%	12%	
7 Days	12	15	17	23%	13%	
8-13 Days	2	5	5	8	123%	9%

# Source Market: Taiwan Region (Continued)

## Passenger Volume & YOY Change by Destination/Trade Route

	Passenger in K			2016	2017	Variance 2018
	2016	2017	2018			
Mainland China, Hong Kong, Taiwan	273	347	369		27%	6%
Rest of Asia	6	5	6		-27%	28%
Mediterranean	5	5	6		12%	7%
Caribbean/South America	3	4	3		21%	-21%
Baltics/Northern Europe			2			47%
Alaska	3	2	2		-29%	-13%
Other	6	7			15%	

## Taiwan Region, Average Age and Cruise Length by Destination/ Trade Route, 2018



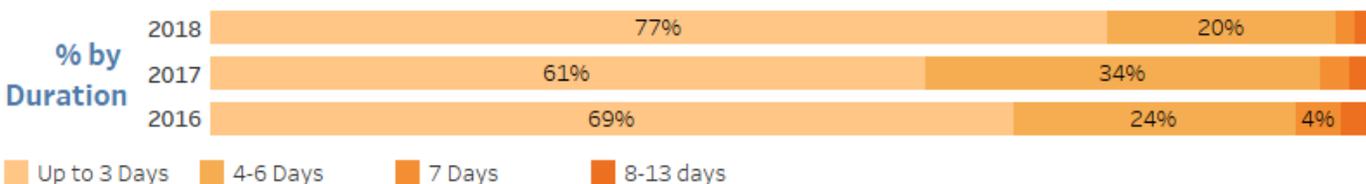
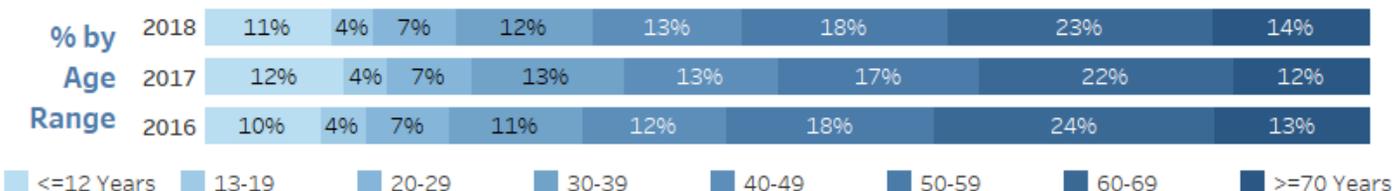
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## Source Market: Singapore

Singapore upheld its impressive double-digit growth, with 106K more passengers sailing in 2018 (the largest increase of all Asian markets). Singapore now represents 8.8% of the total market, up from 6.6% in 2017. Singaporeans continue to favour cruises in their region. With more passengers going for short up to 3 days cruises, the average duration was pushed down to 2.5 days in 2018, the lowest amongst source markets in the world.

Passenger Volume (K)			Average Duration, in Days			Average Age		
2016	2017	2018	2016	2017	2018	2016	2017	2018
214.2	266.6 (24.4% ▲)	373.0 (39.9% ▲)	2.9	3.1	2.4	48	46	48



### Passenger Percentages by Destination/Trade Route

	2016	2017	2018
Rest of Asia	88.7%	88.6%	93.9%
Mediterranean	0.9%	0.7%	0.9%
Alaska	1.2%	1.0%	0.7%
Mainland China, Hong Kong, Taiwan	2.2%	1.8%	0.5%
Baltics/Northern Europe	0.8%	0.7%	
Exploration Destinations		0.8%	
Other	5.0%	5.6%	2.8%



### Passenger Volume & YOY Change by Age Group

	Passenger in K			Variance	
	2016	2017	2018	2016	2018
<=12 Years	21	31	40	47%	28%
13-19	8	10	14	25%	35%
20-29	15	19	26	26%	36%
30-39	24	34	44	41%	27%
40-49	26	35	47	32%	36%
50-59	38	46	65	21%	43%
60-69	51	58	84	13%	46%
>=70 Years	29	31	50	9%	62%

### Passenger Volume & YOY Change by Duration

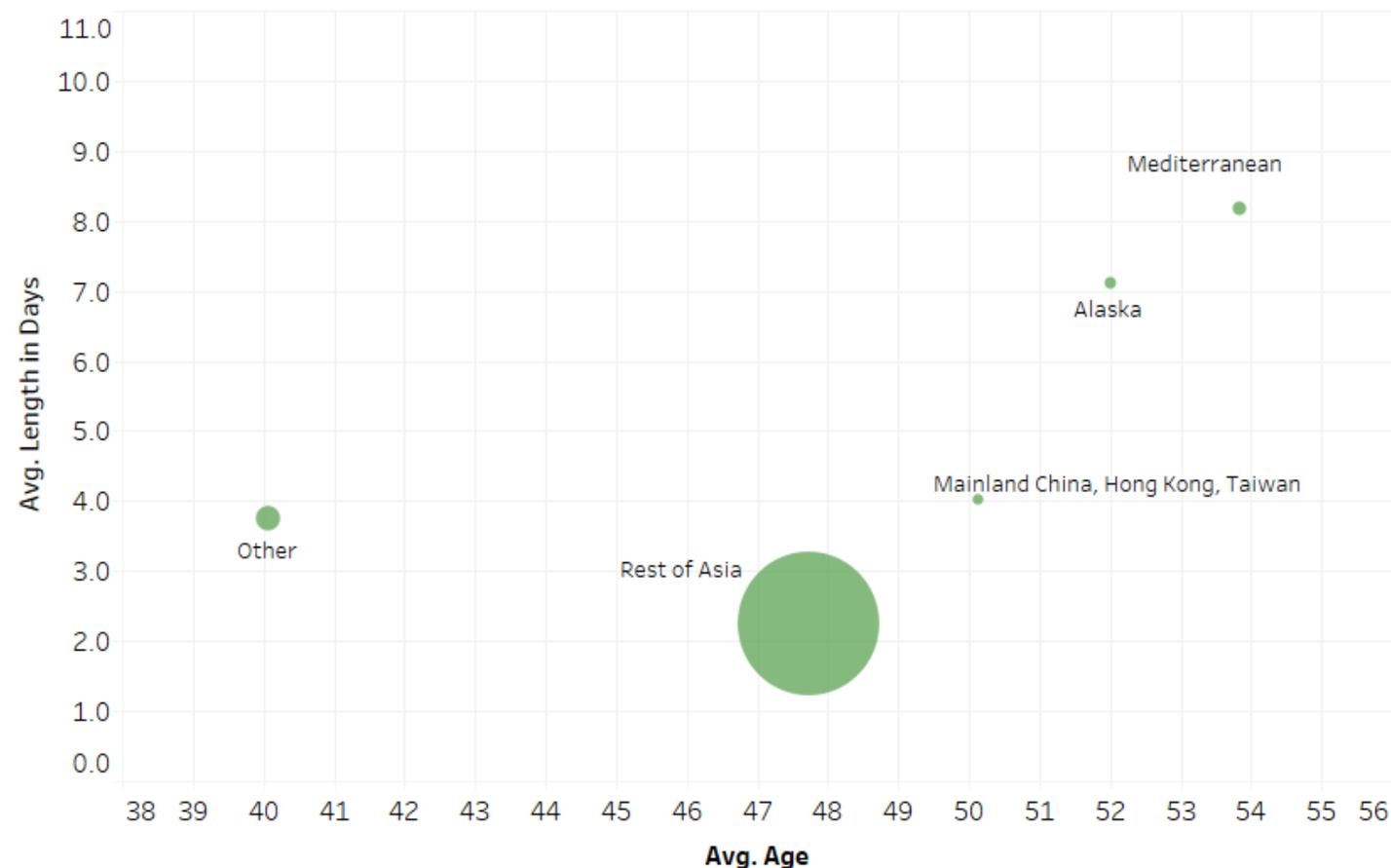
	Passenger in K			Variance	
	2016	2017	2018	2016	2018
Up to 3 Days	147	164	287	12%	75%
4-6 Days	52	90	73	75%	-19%
7 Days	8	7	6	-20%	-5%
8-13 Days	5	4	5	10%	13%

# Source Market: Singapore (Continued)

## Passenger Volume & YOY Change by Destination/Trade Route

	Passenger in K			2016	2017	Variance 2018
	2016	2017	2018			
Rest of Asia	190	236	350		24%	48%
Mediterranean	2	2	3		0%	72%
Alaska	3	3	2		2%	-4%
Mainland China, Hong Kong, Taiwan	5	5	2		2%	-58%
Baltics/Northern Europe	2	2			8%	
Exploration Destinations		2			3239%	
Other	11	15	10		39%	-30%

## Singapore, Average Age and Cruise Length by Destination/Trade Route, 2018



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# Source Market: Japan

Japan remained Asia's 4th largest market, saw a 4.5% increase in cruise passengers last year. The average age of 57, continues to be the oldest in Asia, well above the average of 45.4. Japanese passengers are more inclined to take longer cruises with an average of 6.9 days in duration. They also cruise to a much higher degree in other parts of the world with a sizeable 11.2% visiting the Mediterranean, though the majority still cruise closer to home in Asia at 76.8%.

## Passenger Volume (K)

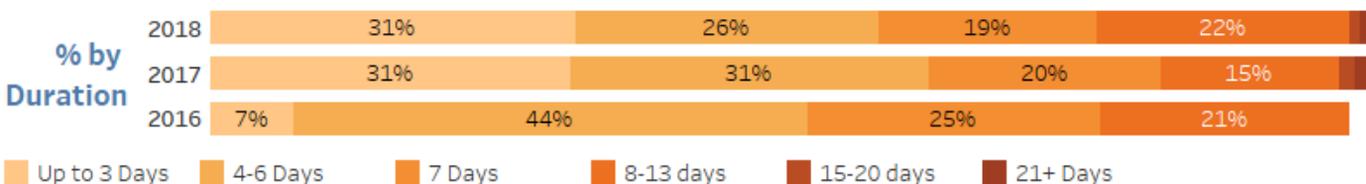
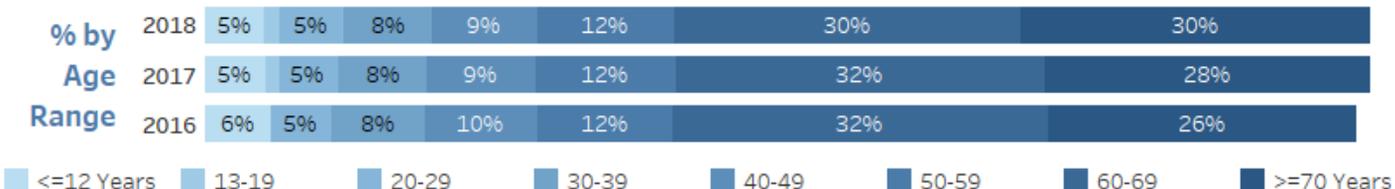
2016	2017	2018
207.3	254.7 (22.9% ▲)	266.2 (4.5% ▲)

## Average Duration, in Days

2016	2017	2018
6.7	6.9	6.9

## Average Age

2016	2017	2018
56	57	57



## Passenger Percentages by Destination/Trade Route

	2016	2017	2018
Rest of Asia	67.2%	64.2%	75.6%
Mediterranean	9.9%	10.0%	11.2%
Caribbean/South America	5.6%	4.6%	3.8%
Baltics/Northern Europe	1.4%	1.5%	1.4%
Australia/NZ/Pacific	1.3%	1.3%	1.2%
Mainland China, Hong Kong, Taiwan		1.9%	1.2%
Alaska	1.3%	0.9%	0.7%
Africa/Mid-East/World Cruise/Transatlantic			0.7%
Hawaii	0.8%	0.8%	0.7%
North America	1.0%		0.6%
Exploration Destinations			0.6%
Other	10.7%	13.4%	2.3%



## Passenger Volume & YOY Change by Age Group

	Passenger in K			Variance		
	2016	2017	2018	2016	2017	2018
<=12 Years	6	7	8	20%	3%	
13-19		2	2	26%	12%	
20-29	6	7	8	23%	14%	
30-39	9	11	12	24%	5%	
40-49	11	13	14	26%	2%	
50-59	13	17	18	34%	1%	
60-69	36	46	45	27%	-1%	
>=70 Years	29	40	45	37%	12%	

## Passenger Volume & YOY Change by Duration

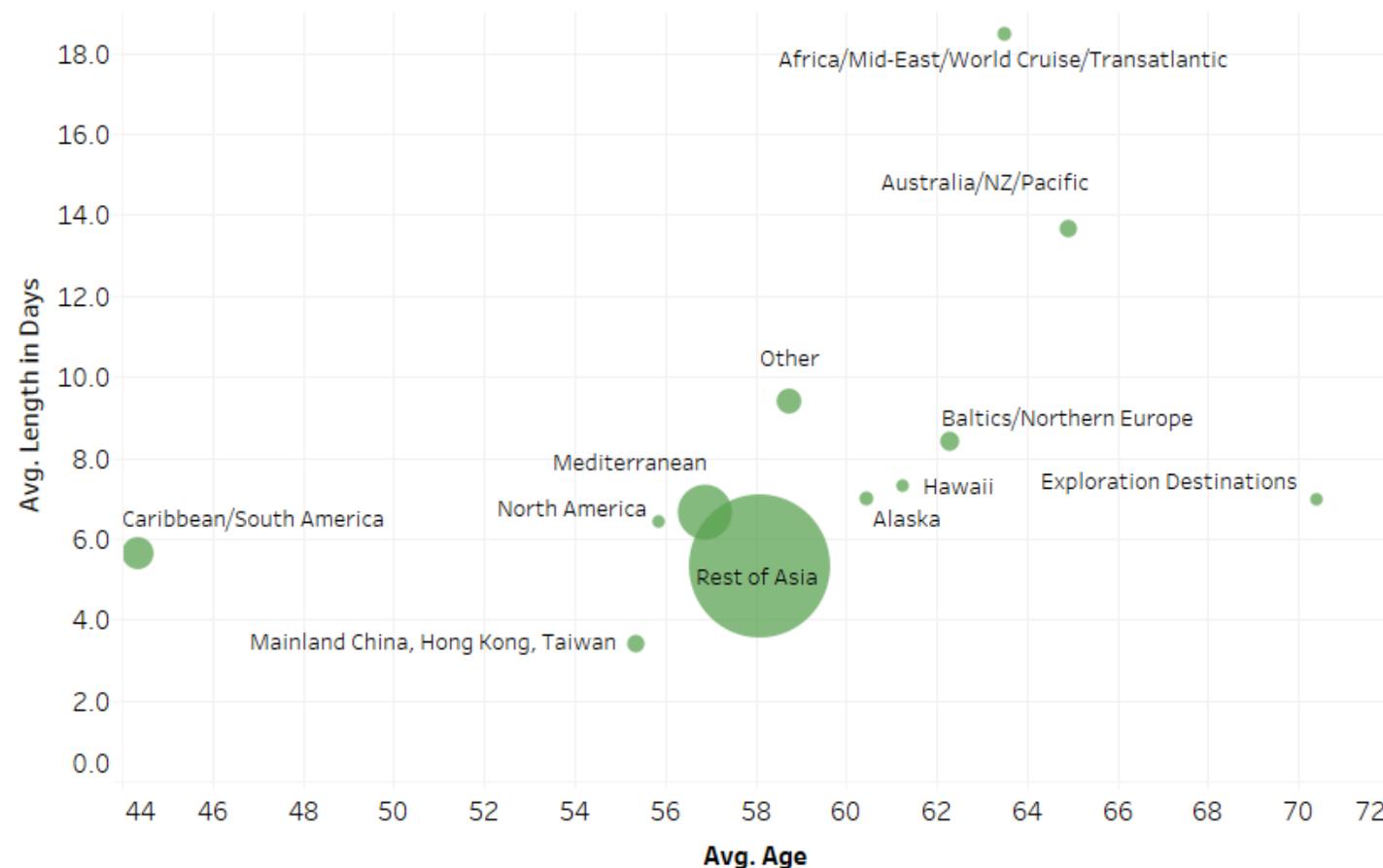
	Passenger in K			Variance		
	2016	2017	2018	2016	2017	2018
Up to 3 Days	8	79	83	892%	6%	
4-6 Days	49	78	69	59%	-12%	
7 Days	28	51	50	81%	-2%	
8-13 Days	24	39	58	63%	48%	
15-20 Days		3	2	22%	-36%	
21+ Days		4	2	1011%	-32%	

## Source Market: **Japan** (Continued)

### Passenger Volume & YOY Change by Destination/Trade Route

	Passenger in K			Variance		
	2016	2017	2018	2016	2017	2018
Rest of Asia	139	164	201		18%	23%
Mediterranean	20	25	30		24%	17%
Caribbean/South America	12	12	10		0%	-13%
Baltics/Northern Europe	3	4	4		33%	-4%
Australia/NZ/Pacific	3	3	3		23%	3%
Mainland China, Hong Kong, Taiwan		5	3		265%	-37%
Alaska	3	2	2		-15%	-13%
Africa/Mid-East/World Cruise/Transatlantic			2			89%
Hawaii	2	2	2		24%	-14%
North America	2		2			13%
Exploration Destinations			2			17%
Other	22	34	6		54%	-82%

### Japan, Average Age and Cruise Length by Destination/Trade Route, 2018



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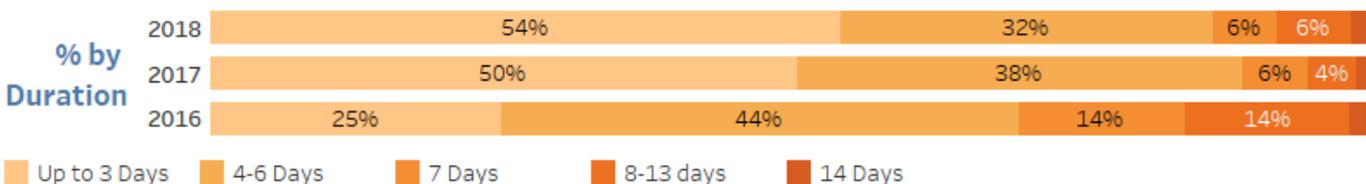
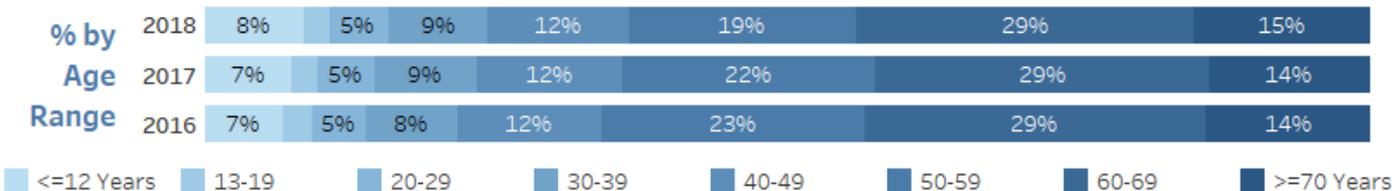
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## Source Market: Hong Kong SAR

After a hefty 80.6% gain in passenger volume from 2016 to 2017, Hong Kong persists as a strong source market of almost 250K passengers, up 8.6% from 2017. This was driven by passengers going on shorter cruises. Most cruises (72.9%) are taken from Hong Kong, Mainland China and Taiwan. For the longer-haul destinations, 4.3% of passengers from Hong Kong sail in the Mediterranean, followed by Baltics/ Northern Europe and Australasia.

### Passenger Volume (K)

Passenger Volume (K)			Average Duration, in Days			Average Age		
2016	2017	2018	2016	2017	2018	2016	2017	2018
127.3	229.8 (80.6% ▲)	249.6 (8.6% ▲)	5.4	3.7	3.7	52	52	52



### Passenger Percentages by Destination/Trade Route

	2016	2017	2018
Mainland China, Hong Kong, Taiwan	56.5%	68.6%	72.9%
Rest of Asia	24.3%	13.8%	10.9%
Mediterranean	5.1%	3.3%	4.3%
Baltics/Northern Europe	3.3%	2.4%	1.7%
Australia/NZ/Pacific	1.4%	1.0%	1.3%
Caribbean/South America	1.8%	1.0%	0.9%
Alaska	1.6%	1.0%	0.8%
Other	4.6%	8.1%	6.4%



### Passenger Volume & YOY Change by Age Group

	Passenger in K			Variance		
	2016	2017	2018	2016	2017	2018
<=12 Years	8	17	21	102%	21%	
13-19	3	5	6	53%	13%	
20-29	6	11	12	93%	9%	
30-39	10	20	21	99%	5%	
40-49	16	28	30	82%	5%	
50-59	29	50	48	73%	-4%	
60-69	37	66	71	78%	9%	
>=70 Years	18	31	37	75%	18%	

### Passenger Volume & YOY Change by Duration

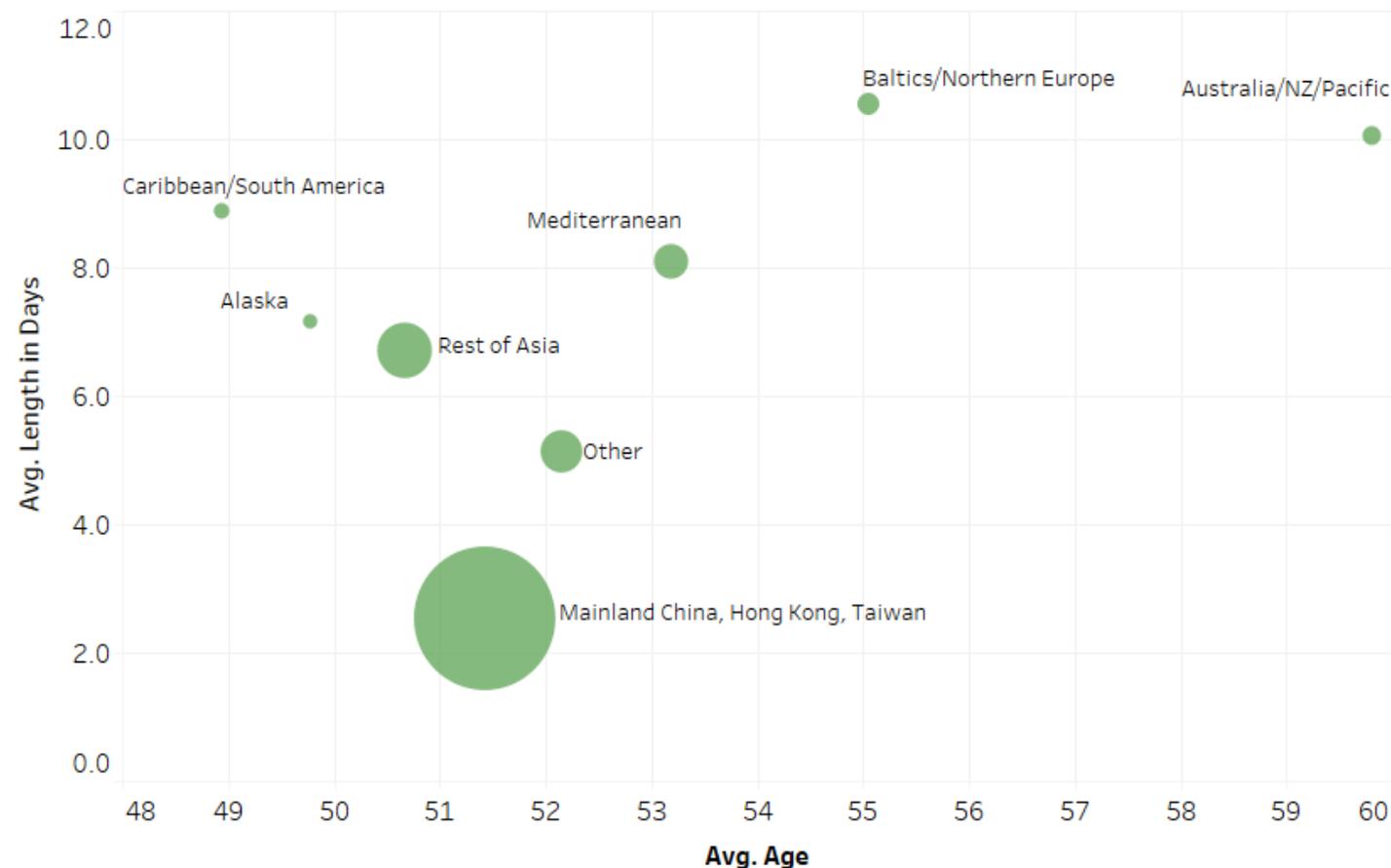
	Passenger in K			Variance		
	2016	2017	2018	2016	2017	2018
Up to 3 Days	32	116	135	267%	16%	
4-6 Days	56	87	80	56%	-9%	
7 Days	18	13	14	-26%	4%	
8-13 Days	18	10	16	-47%	67%	14
14 Days	2	3	4	45%	54%	

# Source Market: Hong Kong SAR (Continued)

## Passenger Volume & YOY Change by Destination/Trade Route

	Passenger in K			Variance		
	2016	2017	2018	2016	2017	2018
Mainland China, Hong Kong, Taiwan	72	158	182		119%	15%
Rest of Asia	31	32	27		3%	-14%
Mediterranean	7	8	11		18%	40%
Baltics/Northern Europe	4	6	4		32%	-22%
Australia/NZ/Pacific	2	2	3		31%	37%
Caribbean/South America	2	2	2		1%	-4%
Alaska	2	2	2		7%	-15%
Other	6	19	16		215%	-15%

## Hong Kong SAR, Average Age and Cruise Length by Destination/Trade Route, 2018



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

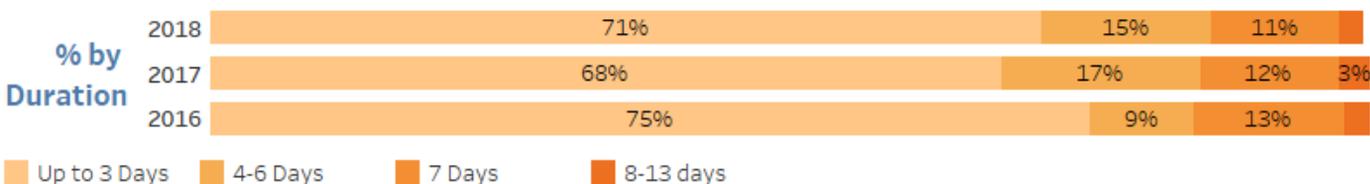
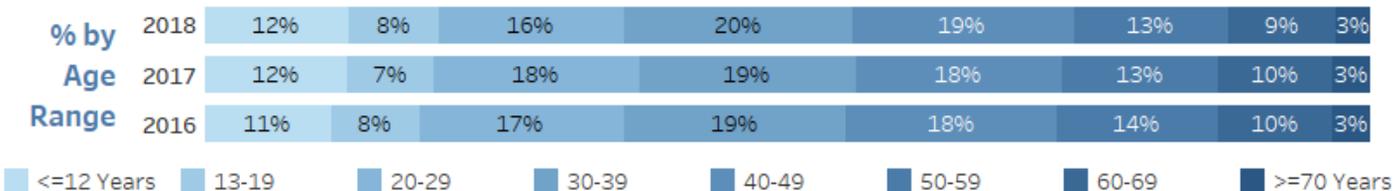
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## Source Market: India

True to market expectations, India saw a 28.1% boost in passengers in 2018. As one of the most populated countries in the world and with a low cruise penetration, the India source market is expected to carry on an upward trajectory. 80% of Indians cruise in Asia, with considerable fly-cruise market out of Singapore. There is also interest in more distant destinations with 8.4% sailing in Europe and 9.0% sailing in the Americas. Indian passengers remain the youngest in the region at 37 years.

### Passenger Volume (K)

Passenger Volume (K)			Average Duration, in Days			Average Age		
2016	2017	2018	2016	2017	2018	2016	2017	2018
148.5	172.4 (16.1% ▲)	220.9 (28.1% ▲)	2.8	3.1	2.9	38	37	37



### Passenger Percentages by Destination/Trade Route

	2016	2017	2018
Rest of Asia	71.9%	71.5%	76.2%
Mediterranean	7.6%	8.0%	6.2%
Caribbean/South America	9.3%	7.2%	5.6%
Mainland China, Hong Kong, Taiwan	1.8%	3.8%	3.8%
Alaska	2.5%	2.0%	2.3%
Baltics/Northern Europe	1.6%	2.4%	2.2%
North America	2.5%	1.5%	1.1%
Other	1.9%	2.7%	2.2%



### Passenger Volume & YOY Change by Age Group

	Passenger in K			Variance		
	2016	2017	2018	2016	2017	2018
<=12 Years	16	21	27	30%	30%	
13-19	11	13	17	14%	34%	
20-29	26	30	35	18%	15%	
30-39	28	32	43	13%	36%	
40-49	27	30	41	13%	37%	
50-59	20	23	29	13%	26%	
60-69	14	17	20	16%	19%	
>=70 Years	5	6	7	18%	20%	

### Passenger Volume & YOY Change by Duration

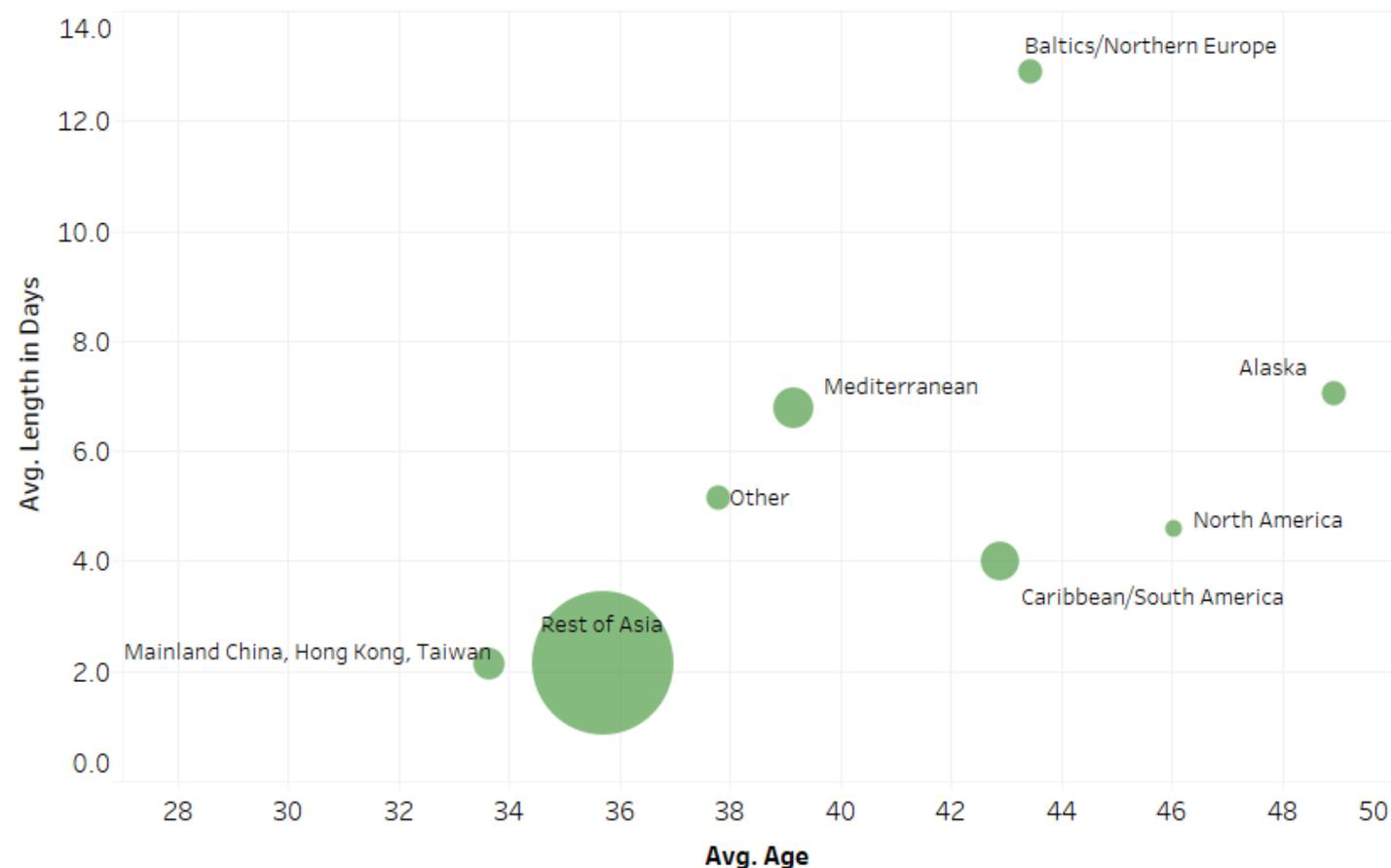
	Passenger in K			Variance		
	2016	2017	2018	2016	2017	2018
Up to 3 Days	111	117	157	5%	35%	
4-6 Days	13	29	32	122%	10%	
7 Days	19	20	24	6%	19%	
8-13 Days	3	5	5	16%	48%	-5%

# Source Market: **India** (Continued)

## Passenger Volume & YOY Change by Destination/Trade Route

	Passenger in K			Variance		
	2016	2017	2018	2016	2017	2018
Rest of Asia	107	123	168		15%	37%
Mediterranean	11	14	14		22%	-2%
Caribbean/South America	14	12	12		-10%	-1%
Mainland China, Hong Kong, Taiwan	3	7	8		145%	27%
Alaska	4	4	5		-7%	43%
Baltics/Northern Europe	2	4	5		67%	21%
North America	4	3	2		-28%	-8%
Other	3	5	5		63%	5%

## India, Average Age and Cruise Length by Destination/Trade Route, 2018



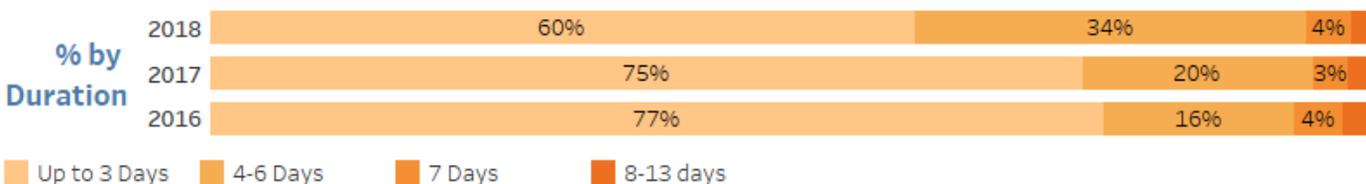
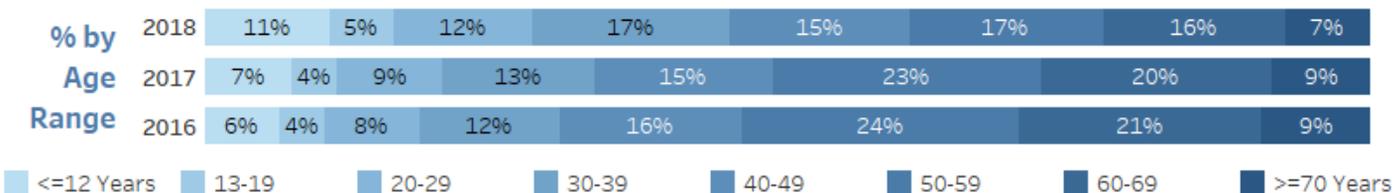
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# Source Market: Malaysia

After a substantial 88% increase in 2017, Malaysia's passenger volume fell by almost 20% year-on-year in 2018. The 2018 figure is still 50K passengers more than in 2016. Average age decreased to 42 from 47, with a higher proportion coming from children suggesting a growing family segment. There is also a trend towards 4-6 days cruises with 34% of Malaysians choosing those in 2018.

Passenger Volume (K)			Average Duration, in Days			Average Age		
2016	2017	2018	2016	2017	2018	2016	2017	2018
99.8	187.5 (87.8% ▲)	150.2 (-19.9% ▼)	2.6	2.6	3.1	48	47	42



## Passenger Percentages by Destination/Trade Route

	2016	2017	2018
Rest of Asia	80.8%	87.8%	89.2%
Mainland China, Hong Kong, Taiwan	5.3%	2.9%	2.7%
Mediterranean	2.1%	2.1%	2.5%
Baltics/Northern Europe	1.7%		
Other	8.0%	5.1%	3.3%



## Passenger Volume & YOY Change by Age Group

	Passenger in K			Variance		
	2016	2017	2018	2016	2017	2018
<=12 Years	6	14	16	120%	16%	
13-19	4	7	8	86%	12%	
20-29	8	17	18	110%	5%	
30-39	12	24	25	103%	4%	
40-49	15	29	23	85%	-19%	
50-59	24	43	25	83%	-42%	
60-69	21	37	23	78%	-37%	
>=70 Years	9	16	11	70%	-31%	

## Passenger Volume & YOY Change by Duration

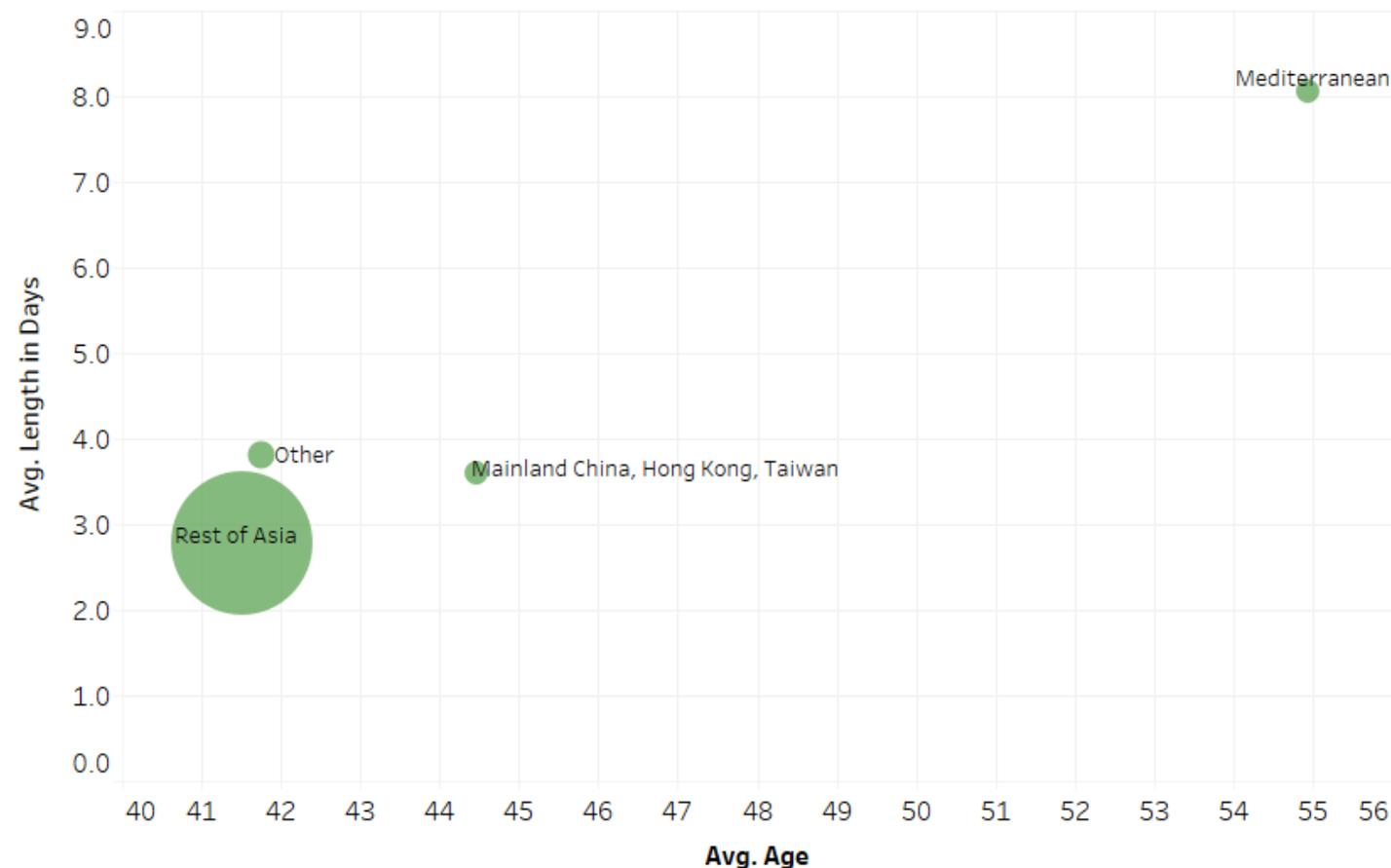
	Passenger in K			Variance		
	2016	2017	2018	2016	2017	2018
Up to 3 Days	76	140	91	84%	-35%	
4-6 days	16	37	50	128%	36%	
7 Days	4	6	6	40%	0%	
8-13 Days	2	4	2	18%	50%	-33%

# Source Market: **Malaysia** (Continued)

## Passenger Volume & YOY Change by Destination/Trade Route

	Passenger in K			2016	2017	Variance 2018
	2016	2017	2018			
Rest of Asia	81	165	134		104%	-19%
Mainland China, Hong Kong, Taiwan	5	5	4		2%	-25%
Mediterranean	2	4	4		85%	-4%
Baltics/Northern Europe	2					
Other	8	10	5		21%	-49%

## Malaysia, Average Age and Cruise Length by Destination/Trade Route, 2018



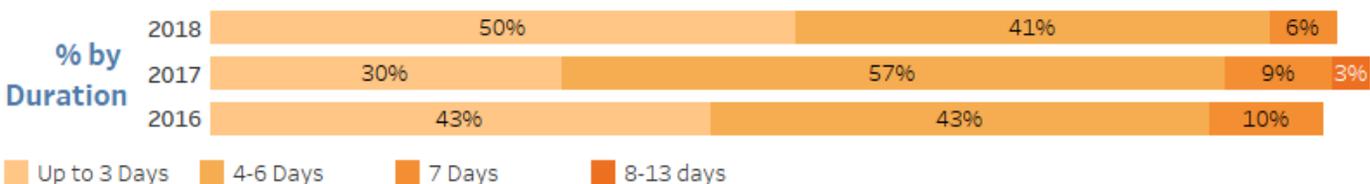
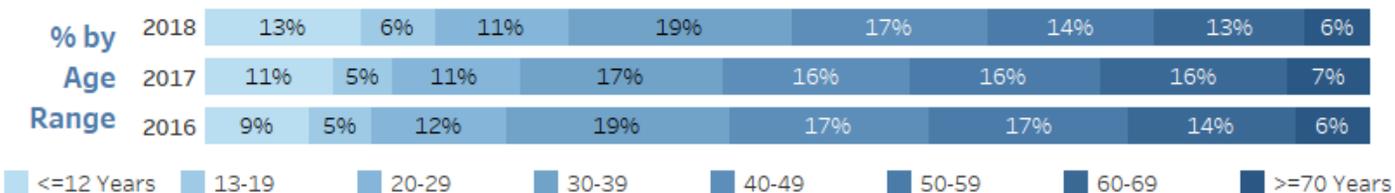
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# Source Market: Indonesia

Indonesia saw a 54.9% jump in passenger volume in 2018, which propelled it from 10th to 8th ranked source market in Asia. Indonesians still favour shorter cruises in Asia, the up to 3 days gaining on the 4-6 days options in 2018. A greater proportion of younger cruisers (<=12 and 13-19 years) suggests an escalating family segment, bringing the average age to 39, below previous years and lower than the Asia average 45.4.

Passenger Volume (K)			Average Duration, in Days			Average Age		
2016	2017	2018	2016	2017	2018	2016	2017	2018
33.2	46.5 (40.2% ▲)	72.1 (54.9% ▲)	4.0	4.4	3.5	42	42	39



## Passenger Percentages by Destination/Trade Route

	2016	2017	2018
Rest of Asia	62.1%	65.4%	80.4%
Mediterranean		3.3%	2.8%
Mainland China, Hong Kong, Taiwan	4.7%	4.2%	2.7%
Other	18.1%	18.5%	7.6%



## Passenger Volume & YOY Change by Age Group

	Passenger in K			Variance		
	2016	2017	2018	2016	2017	2018
<=12 Years	3	5	9	71%	87%	
13-19	2	2	4	37%	88%	
20-29	4	5	8	32%	61%	
30-39	6	8	14	27%	69%	
40-49	6	7	12	33%	59%	
50-59	6	8	10	33%	33%	
60-69	5	7	9	56%	24%	
>=70 Years	2	3	4	58%	19%	

## Passenger Volume & YOY Change by Duration

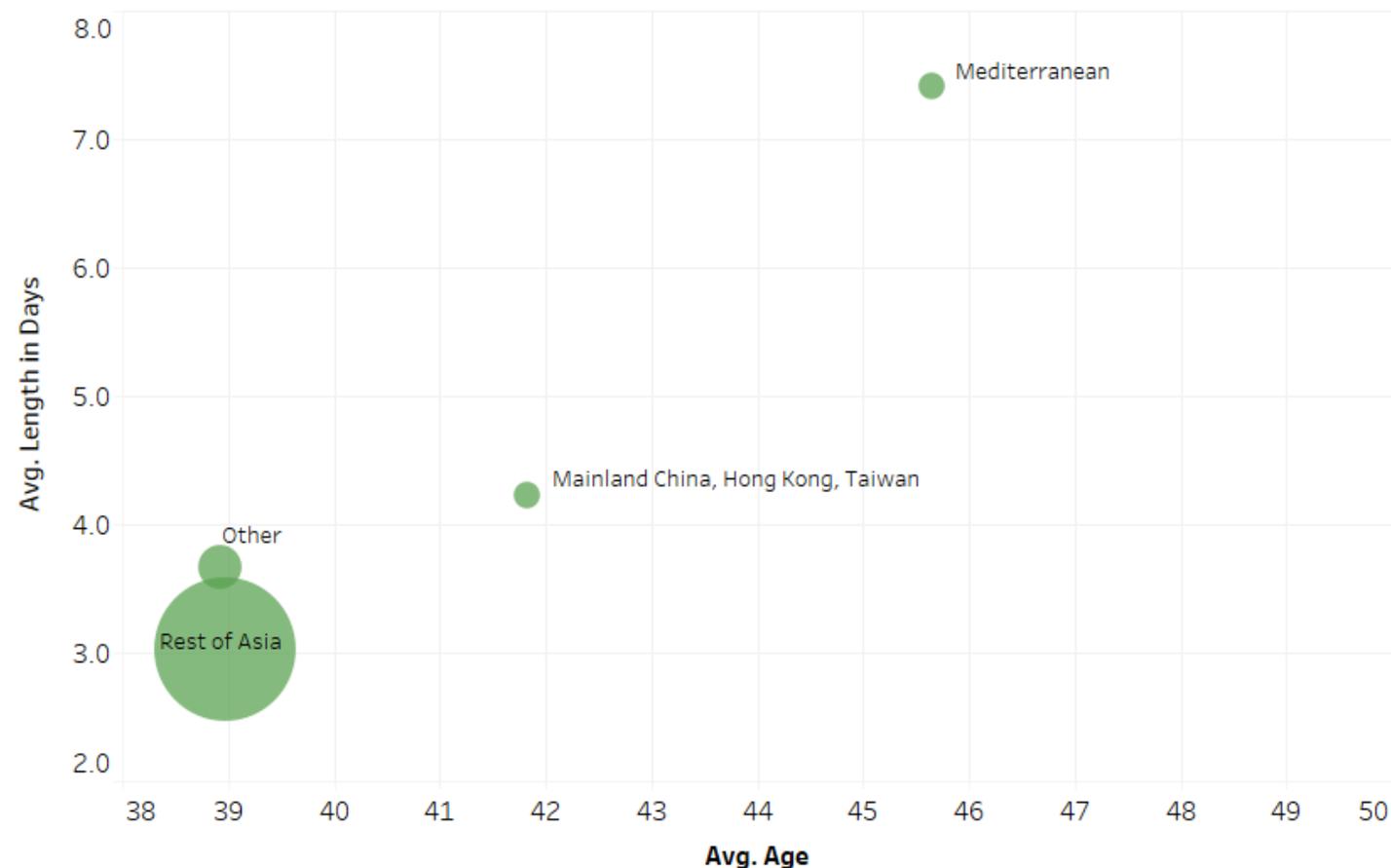
	Passenger in K			Variance		
	2016	2017	2018	2016	2017	2018
Up to 3 Days	14	14	36	-1%	158%	
4-6 days	14	26	29	87%	11%	
7 Days	3	4	4	33%	-3%	
8-13 Days		2		20%	12%	

# Source Market: **Indonesia** (Continued)

## Passenger Volume & YOY Change by Destination/Trade Route

	Passenger in K			2016	2017	Variance 2018
	2016	2017	2018			
Rest of Asia	21	30	58		48%	90%
Mediterranean		2	2		22%	29%
Mainland China, Hong Kong, Taiwan	2	2	2		26%	0%
Other	6	9	5		43%	-37%

## Indonesia, Average Age and Cruise Length by Destination/ Trade Route, 2018



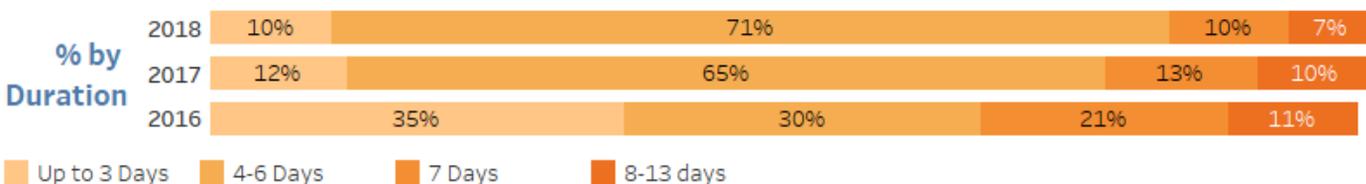
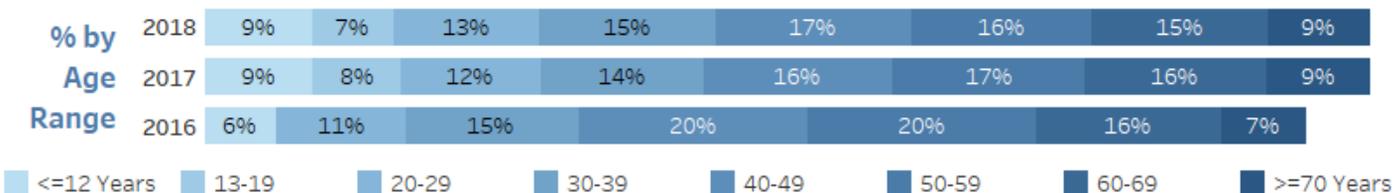
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# Source Market: Philippines

The Philippine source market doubled in 2018 to reach a total of 61.4K passengers, continuing the strong growth (around 50% annually) since the 16.7K of 2015. Philippine passengers overwhelmingly (71%) go on cruises of 4-6 days with an average of 5.3 days. Most of them (80.9%) cruise in Asia.

Passenger Volume (K)			Average Duration, in Days			Average Age		
2016	2017	2018	2016	2017	2018	2016	2017	2018
26.4	41.2 (56.1% ▲)	61.4 (49.1% ▲)	5.1	5.5	5.3	45	43	43



## Passenger Percentages by Destination/Trade Route

	2016	2017	2018
Rest of Asia	35.5%	60.6%	74.2%
Mainland China, Hong Kong, Taiwan	26.0%	8.1%	6.7%
Mediterranean	8.3%	6.6%	5.1%
Caribbean/South America	7.3%	4.6%	3.3%
Baltics/Northern Europe		5.3%	2.8%
Alaska			2.7%
North America	6.2%		
Other		7.0%	



## Passenger Volume & YOY Change by Age Group

	Passenger in K			Variance		
	2016	2017	2018	2016	2017	2018
<=12 Years	2	4	6	136%	49%	
13-19		3	4	115%	32%	
20-29	3	5	8	68%	53%	
30-39	4	6	9	48%	60%	
40-49	5	7	10	28%	53%	
50-59	5	7	9	32%	38%	
60-69	4	6	9	53%	42%	
>=70 Years	2	4	5	94%	46%	

## Passenger Volume & YOY Change by Duration

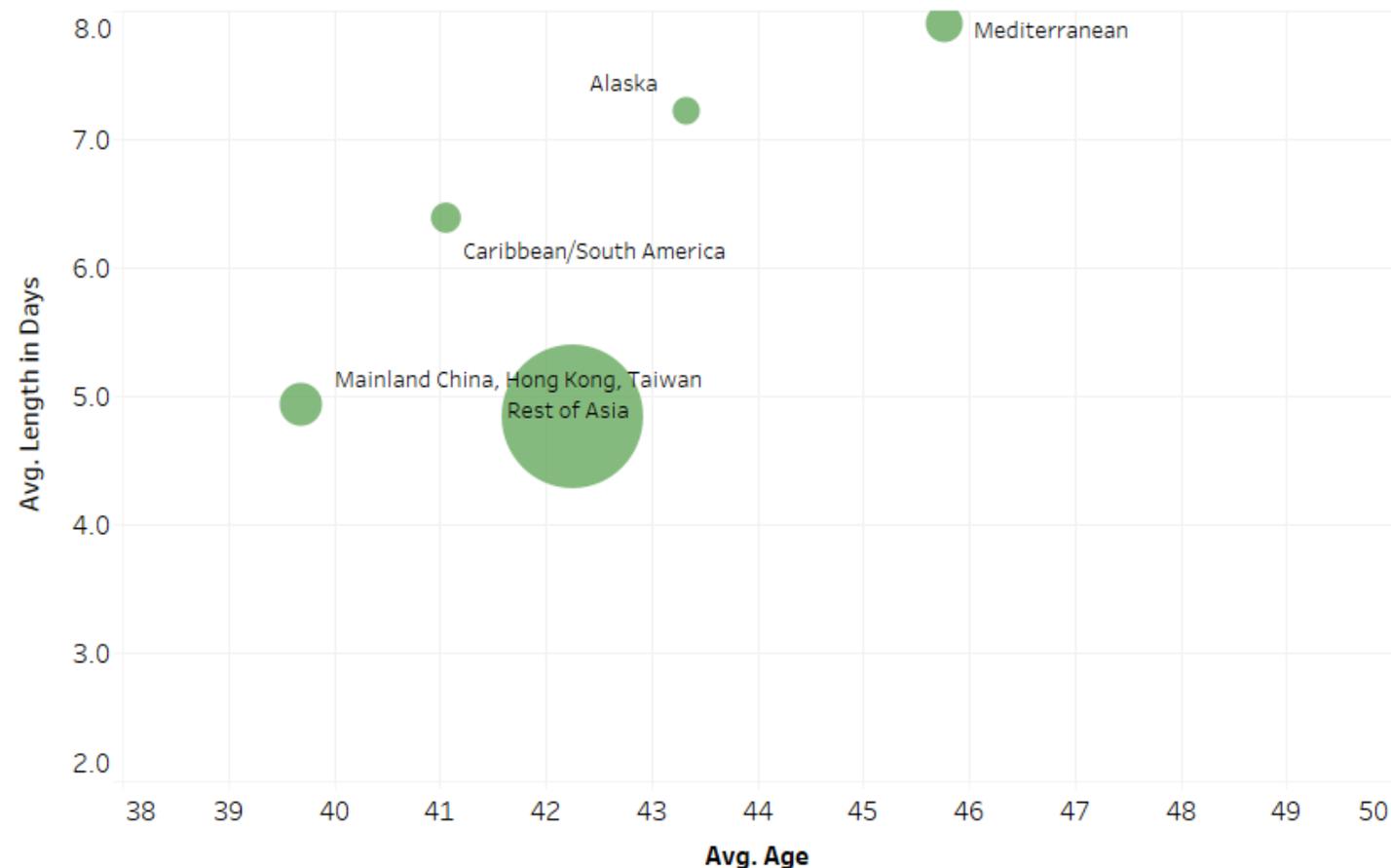
	Passenger in K			Variance		
	2016	2017	2018	2016	2017	2018
Up to 3 Days	9	5	6	-48%	32%	
4-6 days	8	27	44	235%	65%	
7 Days	6	5	6	-4%	17%	
8-13 Days	3	4	4	22%	38%	9%

# Source Market: **Philippines** (Continued)

## Passenger Volume & YOY Change by Destination/Trade Route

	Passenger in K			2016	2017	Variance 2018
	2016	2017	2018			
Rest of Asia	9	25	46		167%	83%
Mainland China, Hong Kong, Taiwan	7	3	4		-51%	23%
Mediterranean	2	3	3		24%	15%
Caribbean/South America	2	2	2		0%	7%
Baltics/Northern Europe		2	2		47%	-22%
Alaska			2			37%
North America	2					
Other		3			143%	

## Philippines, Average Age and Cruise Length by Destination/Trade Route, 2018



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# Source Market: South Korea

South Korea continues to show growth on a small base, up 13.5% in 2018 to reach 44.4K (against 22% growth the previous year). The increase is in cruising in Asia (from 12K in 2017 to 30K). The average age (52) and average duration (5.6 days) is mostly the same year over year.

## Passenger Volume (K)

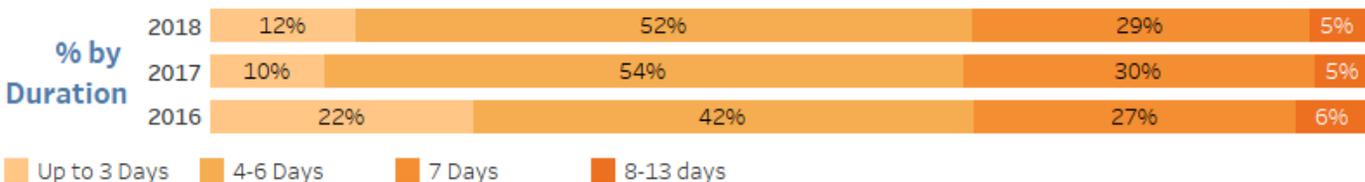
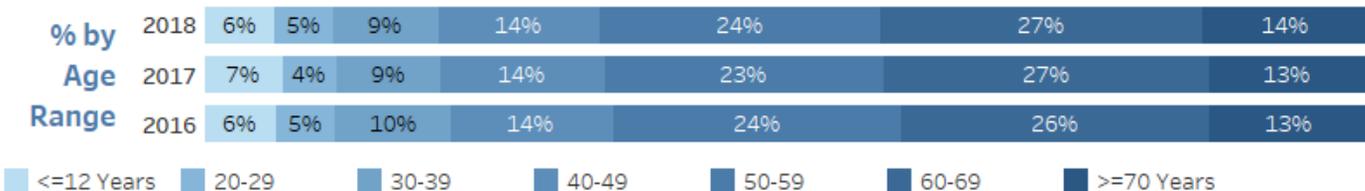
2016	2017	2018
32.0	39.1 (22.2% ▲)	44.4 (13.5% ▲)

## Average Duration, in Days

2016	2017	2018
5.3	5.7	5.6

## Average Age

2016	2017	2018
52	52	52



## Passenger Percentages by Destination/Trade Route

	2016	2017	2018
Rest of Asia	23.2%	25.2%	60.2%
Mediterranean	11.4%	11.4%	12.0%
Mainland China, Hong Kong, Taiwan		4.6%	7.7%
Caribbean/South America	8.2%	8.5%	5.6%
Alaska	5.2%	5.6%	5.1%
North America			3.7%
Other	37.7%	35.8%	



## Passenger Volume & YOY Change by Age Group

	Passenger in K			Variance		
	2016	2017	2018	2016	2017	2018
<=12 Years	2	2	3	34%	2%	
20-29	2	2	2	7%	30%	
30-39	3	3	4	8%	15%	
40-49	4	5	6	22%	13%	
50-59	8	9	10	17%	16%	
60-69	8	10	12	27%	14%	
>=70 Years	4	5	6	18%	23%	

## Passenger Volume & YOY Change by Duration

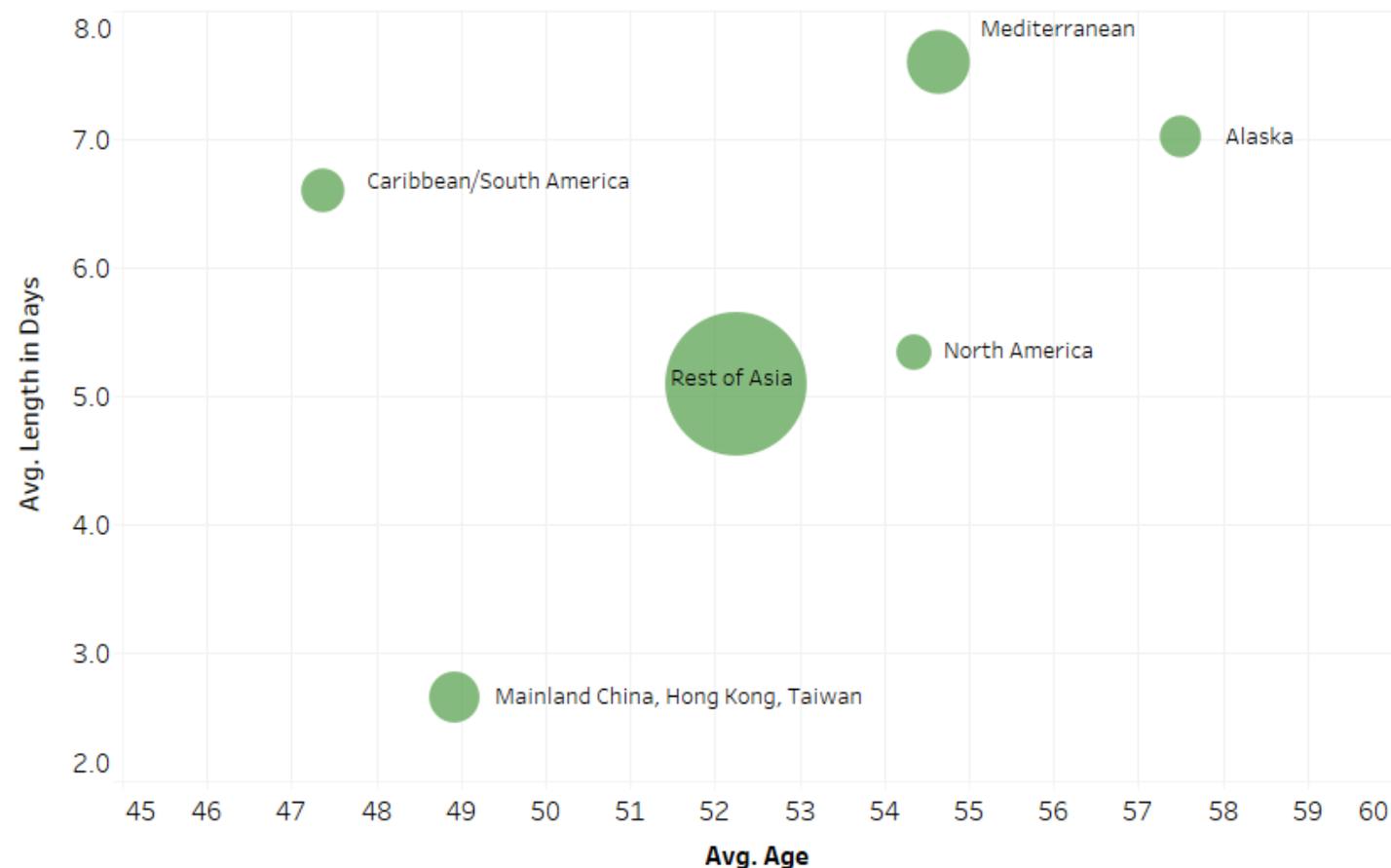
	Passenger in K			Variance		
	2016	2017	2018	2016	2017	2018
Up to 3 Days	7	4	5	-46%	45%	
4-6 Days	13	21	23	60%	10%	
7 Days	8	12	13	37%	10%	
8-13 Days	2	2	2	-4%	14%	

# Source Market: South Korea (Continued)

## Passenger Volume & YOY Change by Destination/Trade Route

	Passenger in K			2016	2017	Variance 2018
	2016	2017	2018			
Rest of Asia	7	10	27		32%	172%
Mediterranean	4	4	5		22%	19%
Mainland China, Hong Kong, Taiwan		2	3		40%	88%
Caribbean/South America	3	3	3		27%	-25%
Alaska	2	2	2		33%	3%
North America			2			11%
Other	12	14			16%	

## South Korea, Average Age and Cruise Length by Destination/ Trade Route, 2018



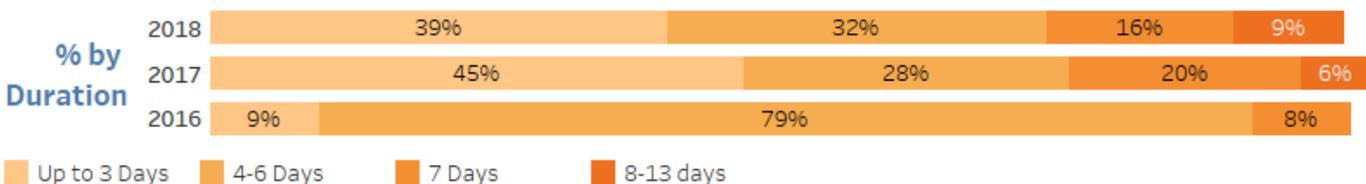
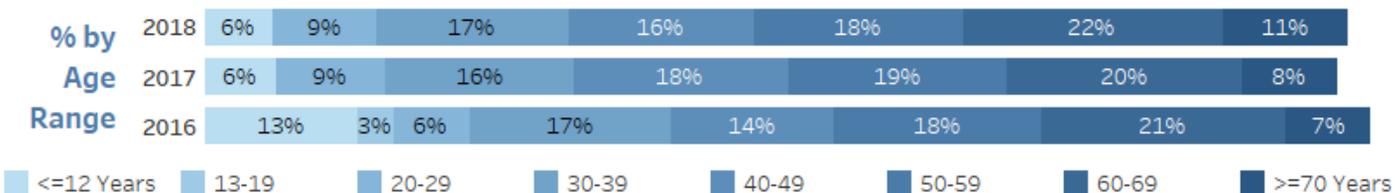
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# Source Market: Thailand

After a significant decline in 2017, Thailand's passenger volume rose a little closer to the 2016 level, up by 14.5% in 2018 to 30.3K passengers. The increase came in the form of passengers cruising in Asia, with more passengers over 60. In 2018, the average duration remained largely the same at 4.4 days.

Passenger Volume (K)			Average Duration, in Days			Average Age		
2016	2017	2018	2016	2017	2018	2016	2017	2018
50.5	26.4 (-47.6% ▼)	30.3 (14.5% ▲)	5.1	4.3	4.4	44	47	48



## Passenger Percentages by Destination/Trade Route

	2016	2017	2018
Rest of Asia	11.2%	48.8%	65.4%
Mediterranean	5.9%	14.6%	12.1%
Mainland China, Hong Kong, Taiwan	73.8%	8.3%	7.9%
Baltics/Northern Europe	3.0%		
Other		16.6%	



## Passenger Volume & YOY Change by Age Group

	Passenger in K			Variance		
	2016	2017	2018	2016	2017	2018
<=12 Years	7	2	2	-76%		3%
13-19	2					
20-29	3	2	3	-23%		3%
30-39	9	4	5	-51%		10%
40-49	7	5	4	-31%		-7%
50-59	9	5	5	-45%		3%
60-69	11	5	6	-49%		18%
>=70 Years	4	2	3	-42%		41%

## Passenger Volume & YOY Change by Duration

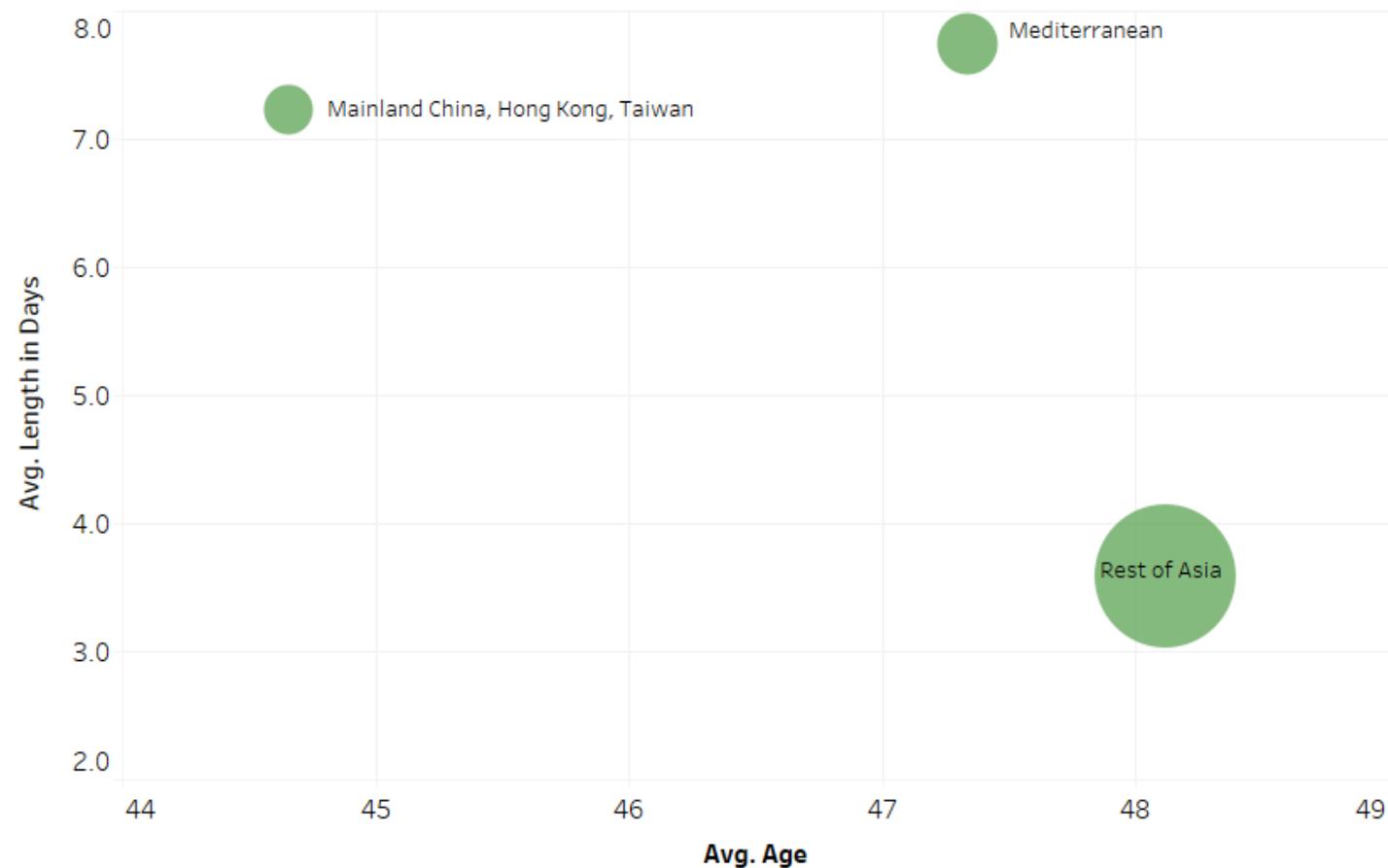
	Passenger in K			Variance		
	2016	2017	2018	2016	2017	2018
Up to 3 Days	5	12	12	154%		-2%
4-6 Days	40	7	10	-82%		33%
7 Days	4	5	5	22%		-8%
8-13 Days		2	3		26%	80%

# Source Market: Thailand (Continued)

## Passenger Volume & YOY Change by Destination/Trade Route

	Passenger in K			2016	2017	Variance 2018
	2016	2017	2018			
Rest of Asia	6	13	20		129%	53%
Mediterranean	3	4	4		29%	-5%
Mainland China, Hong Kong, Taiwan	37	2	2		-94%	9%
Baltics/Northern Europe	2					
Other		4			506%	

## Thailand, Average Age and Cruise Length by Destination/Trade Route, 2018



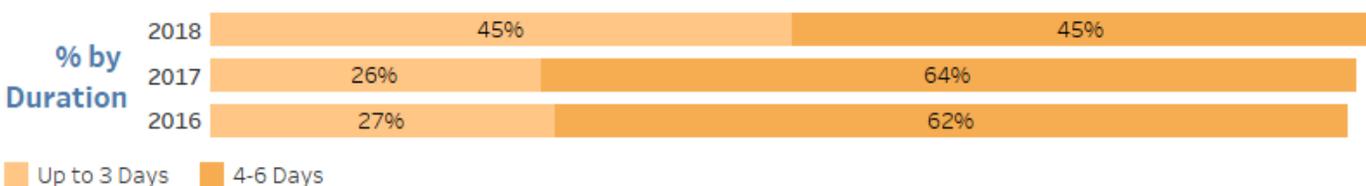
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# Source Market: Vietnam

Vietnam remains one of the smallest of the Asian source markets, though it more than doubled in passenger volume to hit 10K in 2018. The average age is 41. Younger travellers are going on a cruise holiday with a 102% bump in the 30-39 age group. Vietnamese take shorter cruises of up to 3 days and 4-6 days with the majority of them cruising in Asia.

Passenger Volume (K)			Average Duration, in Days			Average Age		
2016	2017	2018	2016	2017	2018	2016	2017	2018
5.9	6.5 (9.4% ▲)	10.0 (53.7% ▲)	4.4	4.4	3.7	42	42	41



## Passenger Percentages by Destination/Trade Route

	2016	2017	2018
Rest of Asia	65.1%	72.8%	73.3%

## Passenger Volume & YOY Change by Age Group

	Passenger in K 2018	Variance 2018
30-39	2	102%
40-49	2	70%
50-59	2	42%

## Passenger Volume & YOY Change by Duration

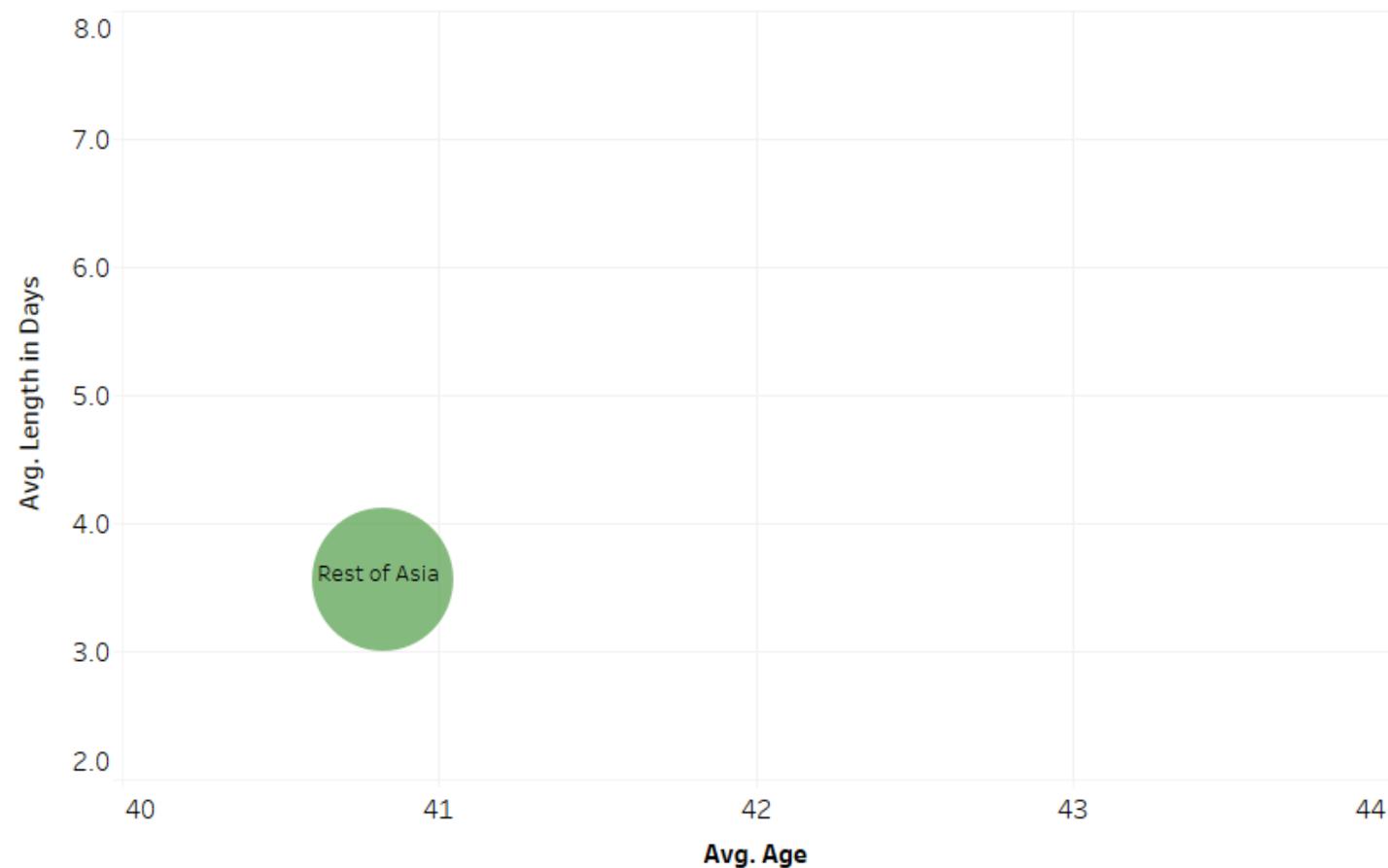
	Passenger in K			Variance		
	2016	2017	2018	2016	2017	2018
Up to 3 Days	2	2	5	5%	173%	
4-6 Days	4	4	5	28%	10%	

# Source Market: Vietnam (Continued)

## Passenger Volume & YOY Change by Destination/Trade Route

	Passenger in K			Variance		
	2016	2017	2018	2016	2017	2018
Rest of Asia	4	5	7		22%	55%

## Vietnam, Average Age and Cruise Length by Destination/Trade Route, 2018



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## Passenger Volume (k) for Other Source Markets

	2016	2017	2018
Macau Region		2	2
Sri Lanka	2	2	2
Pakistan	2	2	2
Afghanistan	4	2	

Cruise Lines International Association (CLIA) is the world's largest cruise industry trade association, providing a unified voice and leading authority of the global cruise community. CLIA supports policies and practices that foster a safe, secure, healthy and sustainable cruise ship environment and is dedicated to promoting the cruise travel experience. Economic, environmental and cultural sustainability is of the utmost importance to the cruise industry. We support local economies not just by bringing guests and crew to their shores but by using local services and goods on our ships. We sustain +1.1M jobs and US\$134B in economic impact worldwide. Every day, the global cruise industry is hard at work protecting the environment and strengthening local destinations through bold leadership, innovative stewardship, and strong strategic partnerships.

For more information about CLIA and the Cruise Industry visit [www.cliaasia.org](http://www.cliaasia.org)



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