



# 2019 Asia Market Report



## ASIA OCEAN SOURCE MARKETS 2019

### MARKET SIZES

Asia-sourced cruise passenger numbers dropped 11.8% to 3.7 million in 2019. This was largely driven by the known decrease in passenger capacity in Asia of 6% against the previous year, 2018. (Capacity was steady in 2018 after years of rapid expansion in this region to 2017.) Passenger capacity was expected to see a growth rebound in 2020 with the announced deployment of new ships to the region, but that has been disrupted by the global COVID-19 pandemic.

While the majority of source markets declined in 2019, three markets still showed growth—India (+41.5%), Japan (+11.4%) and South Korea (+9.6%). The 313,000 Indian cruise passengers in 2019 registered that market's most substantial year-on-year increase, driven largely by increased capacity deployed there, targeted at the local market.

Mainland China had 1.9 million cruisers, showing an 18.6% decline in 2019. Yet China's five-year CAGR (compound annual growth rate) is a strong 22.2% since 2014. Indeed, all-Asia CAGR for the past five-year period was 19.2%, with every one of the 12 markets showing double-digit growth.

Mainland China continues to dominate in Asia with a 51.6% market share, followed by Taiwan (10.5%) and Singapore (8.7%). India (8.4%) overtook Japan (8.0%) to be the fourth-largest Asian source market.

### CRUISE DURATIONS

The average duration of cruises taken by Asian passengers during 2019 saw a minimal decrease to 4.2 days from 4.3 days in 2018.

As in past years, Japanese passengers typically selected longer cruises (average duration 7.5 days). All others ranged from an average 2.6 days (Taiwan and Singapore) to 5.6 days (South Korea).

### AVERAGE AGES

The average age of Asian-sourced passengers increased slightly to 46.2 from 45.4 in 2018. Markets like India (37 years old) and Indonesia (40 years old) continue to have lower average ages. In contrast, Japan (57), South Korea (55) and Hong Kong SAR (51) have higher average ages.

### DESTINATIONS

The vast majority of Asian passengers cruise in Asia (51% departing from Mainland China, Hong Kong and Taiwan and 42% from the other Asian ports). Of the 7% cruising the rest of the world, Alaska, world and expedition cruises experienced more interest from Asian passengers in 2019.

### OPERATIONS

The emergence of COVID-19 in 2020 led the cruise industry to take immediate and aggressive action to mitigate the risk—which culminated in a global pause in operations in mid-March.

Following the pause in operations, with strict protocols in place, and with the approval and support of local and regional authorities, cruise lines were able to successfully resume limited operations in parts of Asia. The successes of these initial sailings demonstrate that the new protocols are working as designed, and CLIA and our cruise line members look forward to continue welcoming back passengers from around the world.

## GLOSSARY

- This report is based on 2019 calendar year passenger statistics provided by CLIA's ocean cruise line members, representing over 95% 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. 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's Asia source market reports.
- Destinations/trade routes are determined by the area where the ship is predominantly sailing, with the exception of the below:
  - "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.
- "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	2019
3,370	4,052 (20.3% ▲)	4,240 (4.6% ▲)	3,738 (-11.8% ▼)

### Average Duration, in Days

2016	2017	2018	2019
4.3	4.4	4.3	4.2

### Average Age

2016	2017	2018	2019
46.1	45.6	45.4	46.2

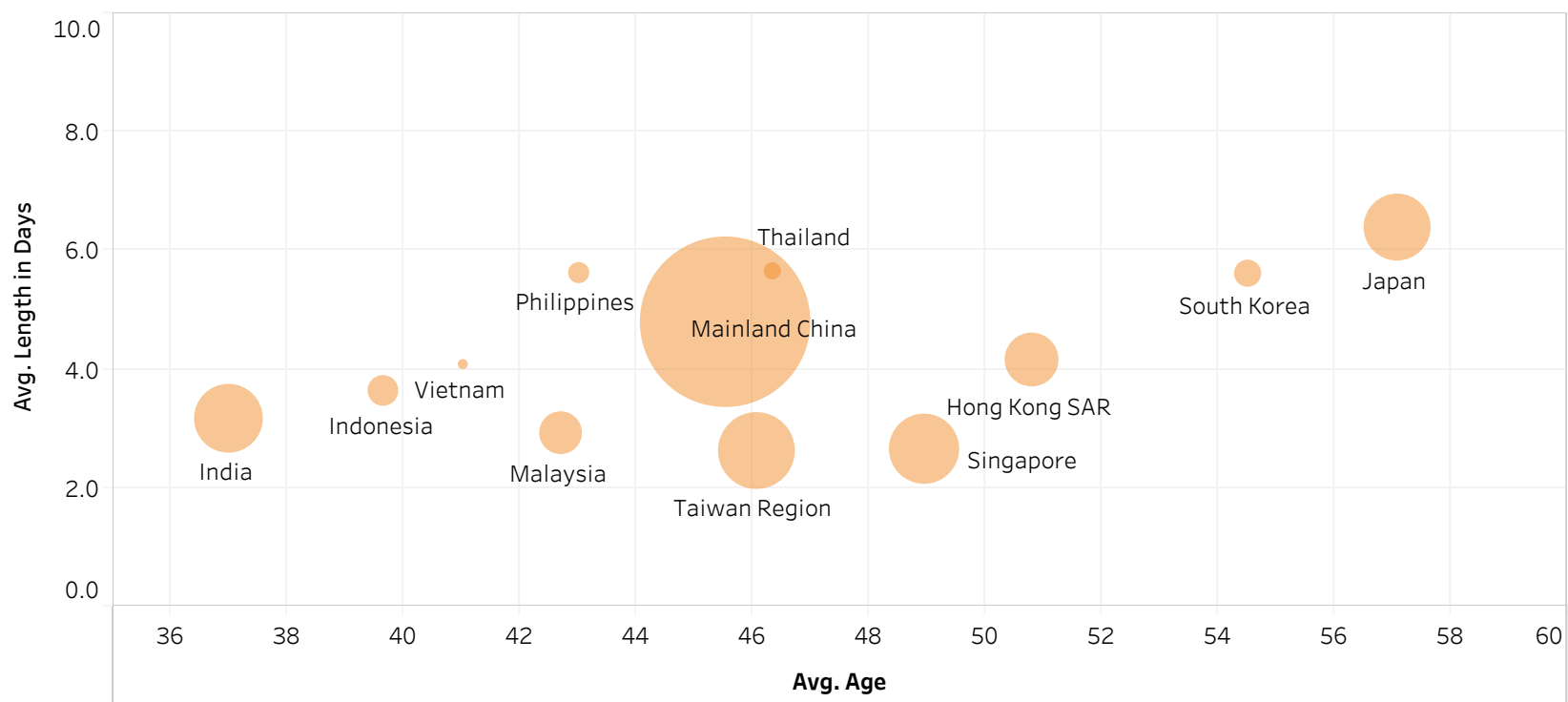
### Passenger Volume (K) from Top Source Markets

	2016	2017	2018	2019
Mainland China	2,113	2,397 (13.4% ▲)	2,357 (-1.6% ▼)	1,919 (-18.6% ▼)
Taiwan Region	299	374 (24.8% ▲)	391 (4.7% ▲)	389 (-0.4% ▼)
Singapore	214	267 (24.4% ▲)	373 (39.9% ▲)	325 (-12.7% ▼)
India	148	172 (16.1% ▲)	221 (28.1% ▲)	313 (41.5% ▲)
Japan	207	255 (22.9% ▲)	266 (4.5% ▲)	296 (11.4% ▲)
Hong Kong SAR	127	230 (80.6% ▲)	250 (8.6% ▲)	191 (-23.4% ▼)
Malaysia	100	188 (87.8% ▲)	150 (-19.9% ▼)	121 (-19.6% ▼)
Indonesia	33	47 (40.2% ▲)	72 (54.9% ▲)	62 (-13.8% ▼)
South Korea	32	39 (22.2% ▲)	44 (13.5% ▲)	49 (9.6% ▲)
Philippines	26	41 (56.1% ▲)	61 (49.1% ▲)	29 (-52.0% ▼)
Thailand	50	26 (-47.6% ▼)	30 (14.5% ▲)	20 (-34.9% ▼)
Vietnam	6	6 (9.4% ▲)	10 (53.7% ▲)	7 (-31.6% ▼)

### Passenger Share from Top Source Markets

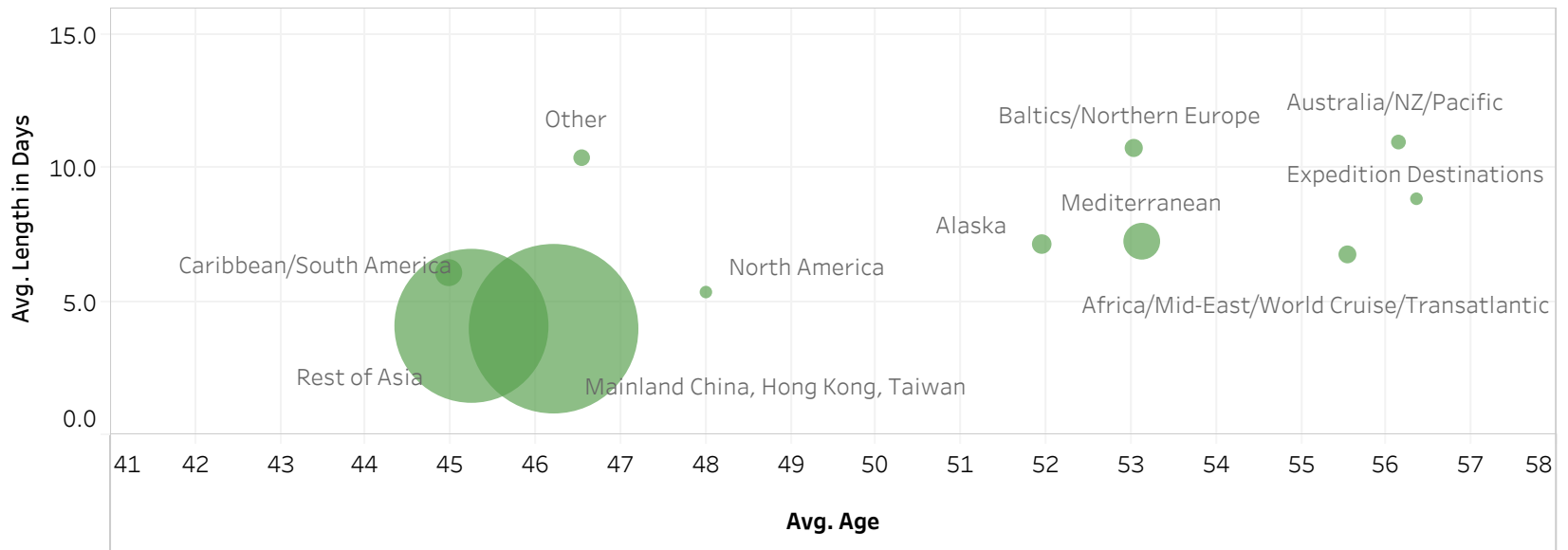
	2016	2017	2018	2019
Mainland China	62.9%	59.3%	55.8%	51.6%
Taiwan Region	8.9%	9.2%	9.3%	10.5%
Singapore	6.4%	6.6%	8.8%	8.7%
India	4.4%	4.3%	5.2%	8.4%
Japan	6.2%	6.3%	6.3%	8.0%
Malaysia	3.0%	4.6%	3.6%	3.2%
Hong Kong SAR	3.8%	5.7%	5.9%	5.1%
Indonesia	1.0%	1.2%	1.7%	1.7%
South Korea	1.0%	1.0%	1.1%	1.3%
Philippines	0.8%	1.0%	1.5%	0.8%
Thailand	1.5%	0.7%	0.7%	0.5%
Vietnam	0.2%	0.2%	0.2%	0.2%

### Average Age and Cruise Length from Top Source Markets, 2019

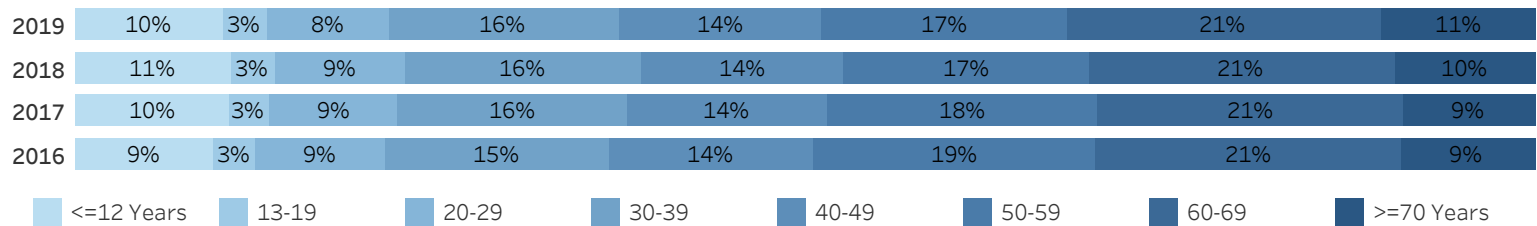


## Regional Overview: Asia (Continued)

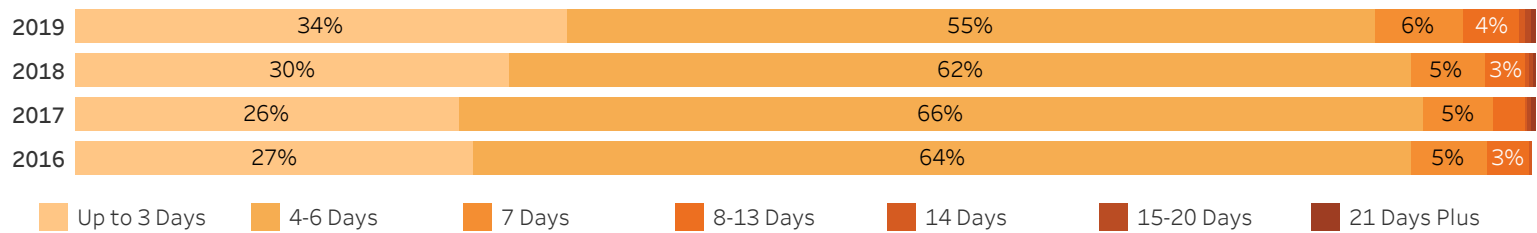
Average Age and Cruise Length by Destination / Trade Route, 2019



Average Passenger Age Groups

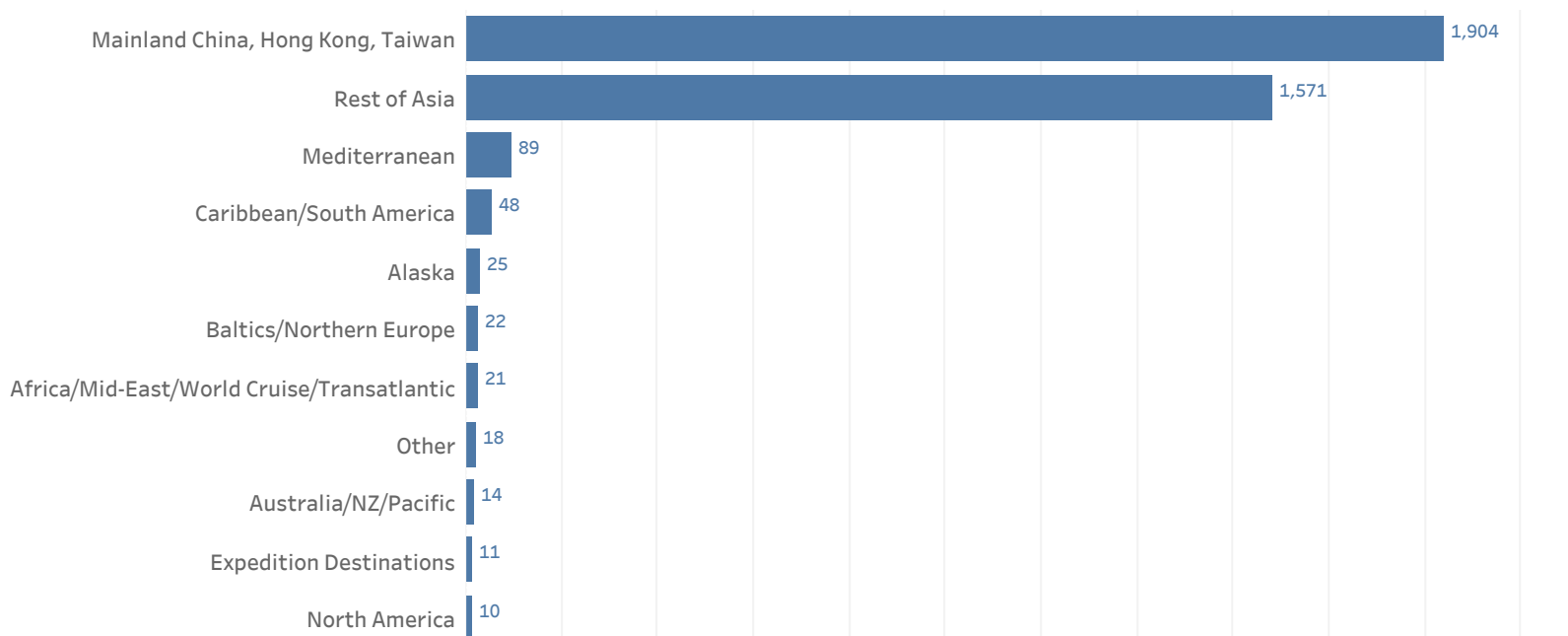


Average Cruise Duration



Volume of Passengers (K) by Destination / Trade Route, 2019

At least 4K Passengers per Destination

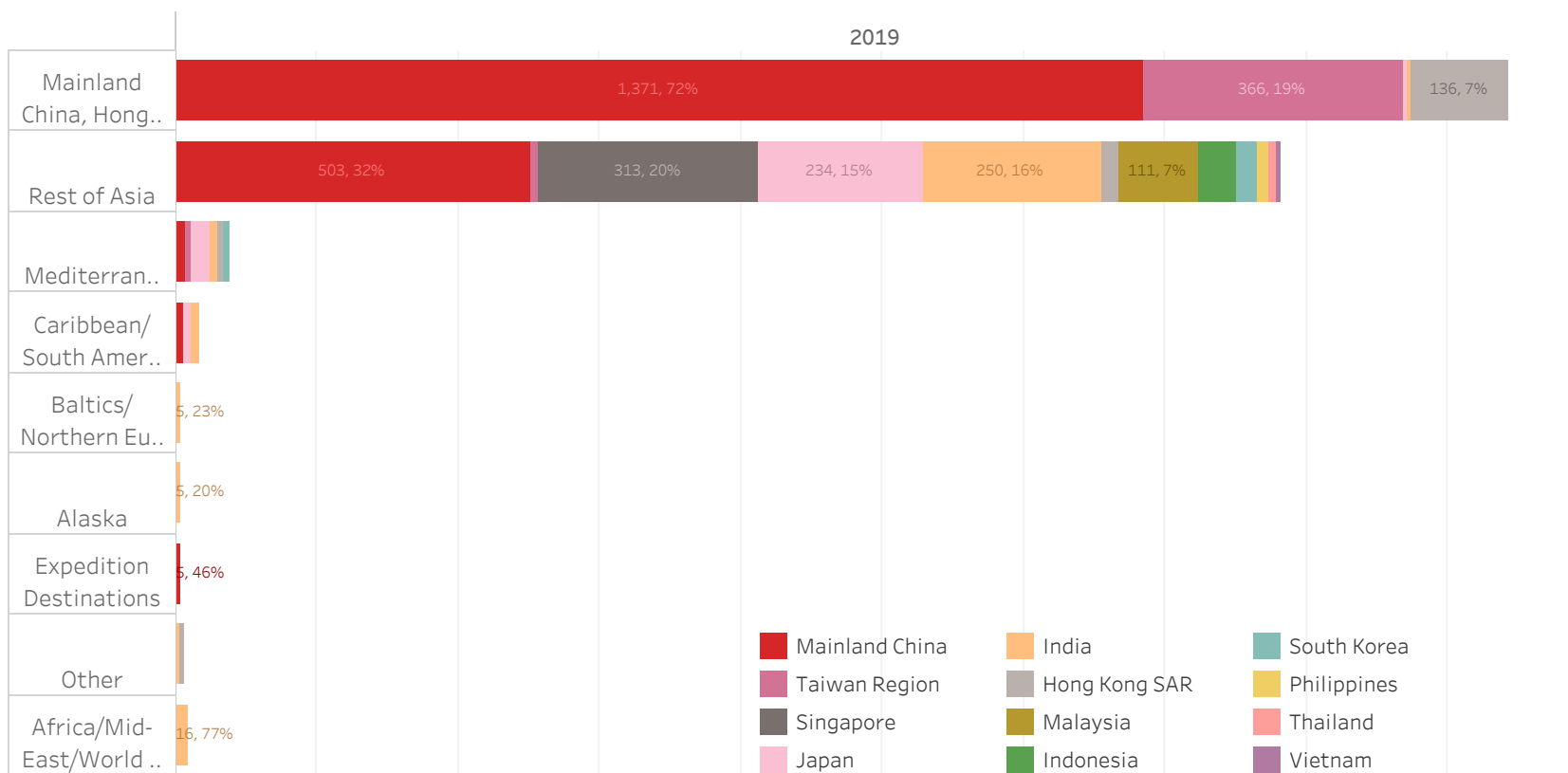


## Regional Overview: Asia (Continued)

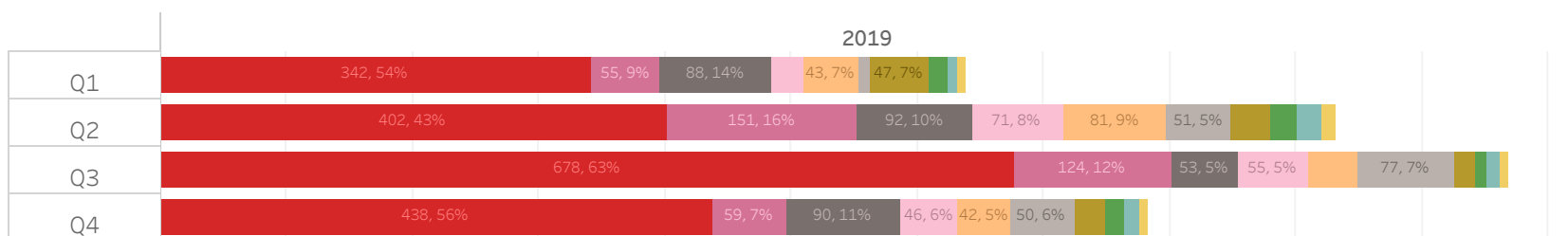
### Passenger Volume (K) by Destination/Trade Route

	2016	2017	2018	2019
Mainland China, Hong Kong, Taiwan	1,664	2,084 (25% ▲)	2,194 (5% ▲)	1,904 (-13% ▼)
Rest of Asia	1,396	1,576 (13% ▲)	1,694 (7% ▲)	1,571 (-7% ▼)
Mediterranean	71	86 (22% ▲)	99 (15% ▲)	89 (-10% ▼)
Caribbean/South America	58	56 (-4% ▼)	51 (-9% ▼)	48 (-6% ▼)
Alaska	23	24 (7% ▲)	23 (-5% ▼)	25 (11% ▲)
Baltics/Northern Europe	22	27 (24% ▲)	24 (-10% ▼)	22 (-9% ▼)
Africa/Mid-East/World Cruise/Transatlantic			4	21 (372% ▲)
Other	102	161 (57% ▲)	109 (-32% ▼)	18 (-83% ▼)
Australia/NZ/Pacific	9	11 (22% ▲)	14 (26% ▲)	14 (0% ▲)
Expedition Destinations		7	10 (41% ▲)	11 (5% ▲)
North America	17	14 (-19% ▼)	14 (-4% ▼)	10 (-24% ▼)

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



### Passenger Volume (K) by Quarter & Top 10 Source Markets in 2019



# Source Market: Mainland China

## Passenger Volume (K)

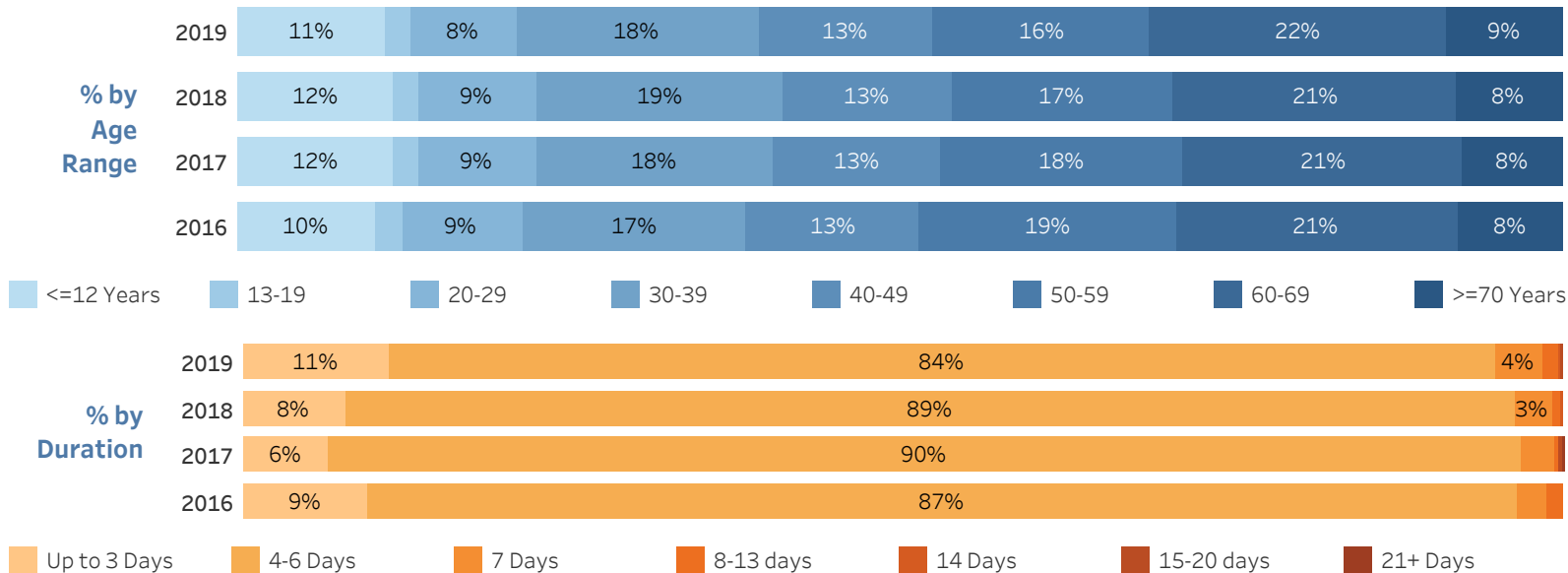
2016	2017	2018	2019
2,112.9	2,396.7 (13.4% ▲)	2,357.4 (-1.6% ▼)	1,919.5 (-18.6% ▼)

## Average Duration, in Days

2016	2017	2018	2019
4.8	4.9	4.9	4.8

## Average Age

2016	2017	2018	2019
45	45	45	46



## Passenger Percentages by Destination/Trade Route

	2016	2017	2018	2019
Mainland China, Hong Kong, Taiwan	59.4%	64.5%	68.4%	71.4%
Rest of Asia	37.5%	31.9%	27.3%	26.2%
Mediterranean	0.5%	0.6%	0.7%	0.7%
Caribbean/South America	0.7%	0.6%	0.6%	0.6%
Alaska	0.2%	0.2%	0.1%	0.1%
Exploration Destinations		0.1%	0.2%	0.3%
Other	1.3%	1.7%	2.4%	0.2%
Baltics/Northern Europe	0.1%	0.1%	0.1%	0.2%
Australia/NZ/Pacific		0.1%	0.1%	0.1%
North America	0.2%	0.1%	0.1%	0.1%



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## Passenger Volume & YOY Change by Age Group

	Passenger in K				Variance			
	2016	2017	2018	2019	2016	2017	2018	2019
<=12 Years	186	247	254	205	33%	3%	-19%	
13-19	38	41	44	35	7%	8%	-20%	
20-29	160	186	193	148	16%	3%	-23%	
30-39	300	375	403	335	25%	8%	-17%	
40-49	236	265	277	241	12%	4%	-13%	
50-59	349	382	358	302	10%	-6%	-16%	
60-69	379	445	466	412	18%	5%	-12%	
>=70 Years	142	160	174	162	12%	9%	-7%	

## Passenger Volume & YOY Change by Duration

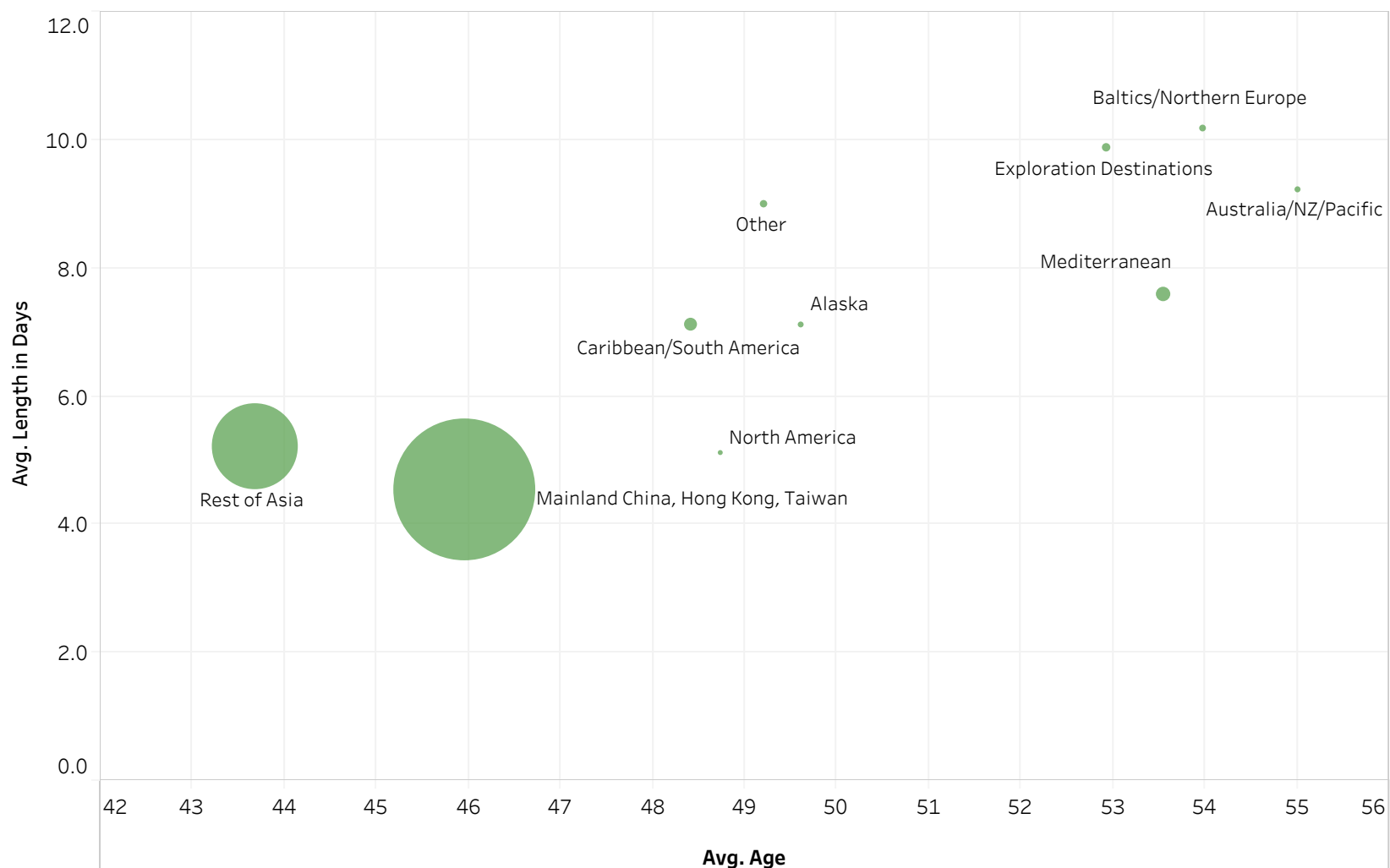
	Passenger in K				Variance			
	2016	2017	2018	2019	2016	2017	2018	2019
Up to 3 Days	177	155	182	211	-12%	18%	16%	
4-6 Days	1,644	2,164	2,089	1,605	32%	-3%	-23%	
7 Days	42	59	65	68	40%	10%	5%	
8-13 Days	24	9	16	25	-61%	75%	51%	
14 Days			4	3		378%	-26%	
15-20 days		4		3		640%	222%	
21+ Days		3				777%		

## Source Market: Mainland China (Continued)

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

	Passenger in K				Variance			
	2016	2017	2018	2019	2016	2017	2018	2019
Mainland China, Hong Kong, Taiwan	1,256	1,546	1,612	1,371	23%	4%	-15%	
Rest of Asia	791	765	644	503	-3%	-16%	-22%	
Mediterranean	11	14	17	14	20%	23%	-15%	
Caribbean/South America	16	15	13	11	-7%	-11%	-13%	
Exploration Destinations		2	5	5	1138%	170%	7%	
Other	26	42	57	4	58%	36%	-93%	
Baltics/Northern Europe	2	3	3	3	55%	-18%	19%	
Australia/NZ/Pacific		2	2	2	25%	31%	24%	
Alaska	3	5	3	2	51%	-51%	-7%	
North America	4	3	2	2	-24%	-22%	-26%	

### Mainland China, Average Age and Cruise Length by Destination/ Trade Route, 2019



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# Source Market: Taiwan Region

## Passenger Volume (K)

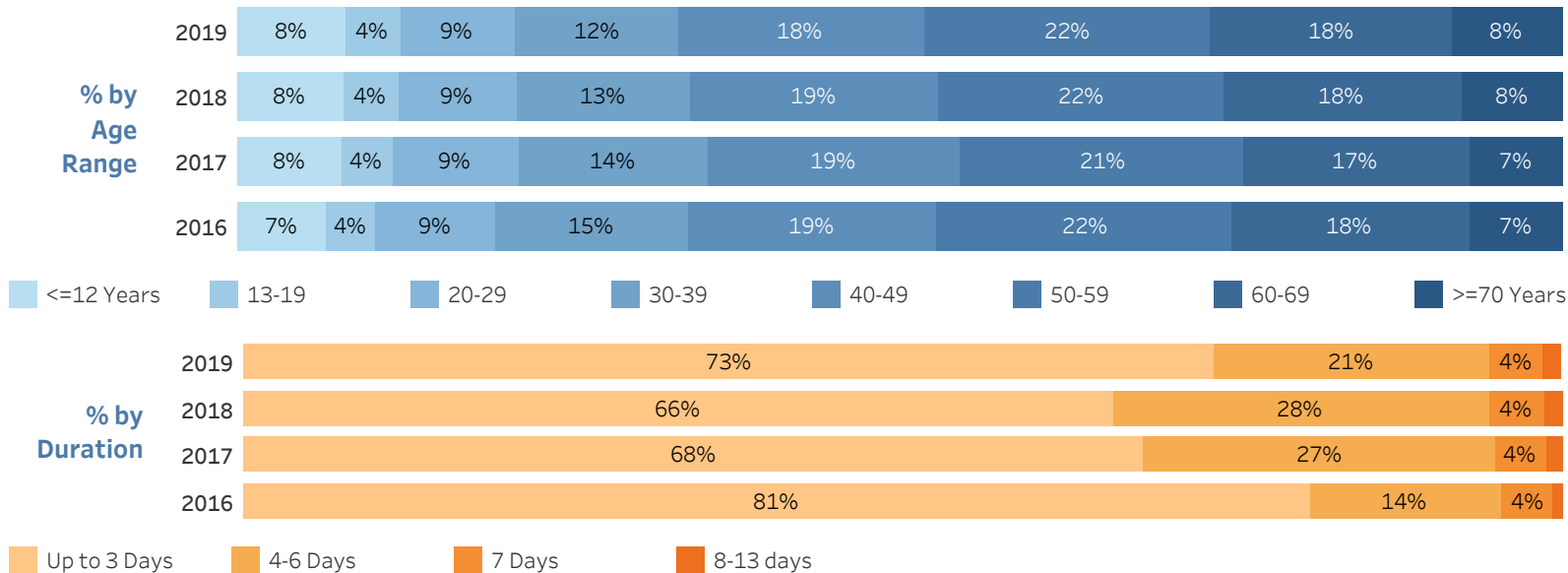
2016	2017	2018	2019
299.3	373.5 (24.8%▲)	391.2 (4.7%▲)	389.5 (-0.4%▼)

## Average Duration, in Days

2016	2017	2018	2019
2.3	2.8	2.9	2.6

## Average Age

2016	2017	2018	2019
46	45	46	46



## Passenger Percentages by Destination/Trade Route

	2016	2017	2018	2019
Mainland China, Hong Kong, Taiwan	91.3%	92.9%	94.2%	94.0%
Rest of Asia	2.1%	1.2%	1.5%	2.3%
Mediterranean	1.6%	1.4%	1.5%	1.6%
Caribbean/South America	1.1%	1.1%	0.8%	0.7%
Alaska	0.9%	0.5%	0.4%	0.6%
Other	2.0%	1.8%		
Baltics/Northern Europe			0.5%	



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## Passenger Volume & YOY Change by Age Group

	Passenger in K				Variance			
	2016	2017	2018	2019	2016	2017	2018	2019
<=12 Years	20	29	31	32	46%	8%	1%	
13-19	11	15	16	16	30%	11%	-1%	
20-29	27	35	35	34	31%	-1%	-3%	
30-39	44	53	51	48	21%	-4%	-5%	
40-49	55	71	73	71	27%	3%	-2%	
50-59	67	80	84	83	19%	5%	0%	
60-69	53	63	69	71	18%	10%	2%	
>=70 Years	21	26	30	32	24%	14%	8%	

## Passenger Volume & YOY Change by Duration

	Passenger in K				Variance			
	2016	2017	2018	2019	2016	2017	2018	2019
Up to 3 Days	241	254	257	286		5%	1%	11%
4-6 Days	43	99	111	81	132%	12%	-27%	
7 Days	12	15	17	16	23%	13%	-6%	
8-13 Days	2	5	5	6	123%	9%	8%	

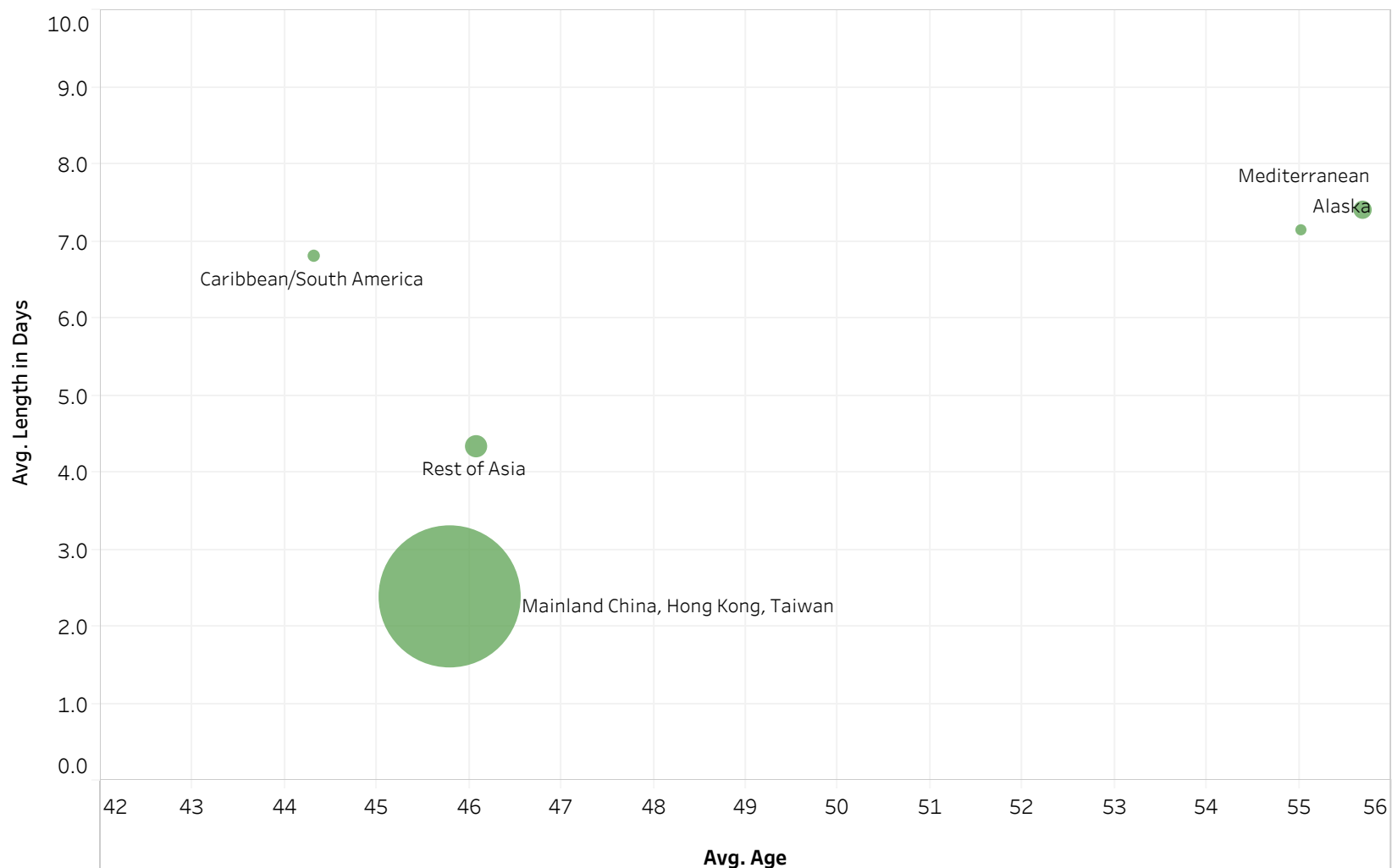


## Source Market: Taiwan Region (Continued)

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

	Passenger in K				Variance			
	2016	2017	2018	2019	2016	2017	2018	2019
Mainland China, Hong Kong, Taiwan	273	347	369	366		27%	6%	-1%
Rest of Asia	6	5	6	9		-27%	28%	50%
Mediterranean	5	5	6	6		12%	7%	5%
Caribbean/South America	3	4	3	3		21%	-21%	-15%
Alaska	3	2	2	2		-29%	-13%	35%
Other	6	7				15%		
Baltics/Northern Europe			2				47%	

### Taiwan Region, Average Age and Cruise Length by Destination/Trade Route, 2019



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# Source Market: Singapore

## Passenger Volume (K)

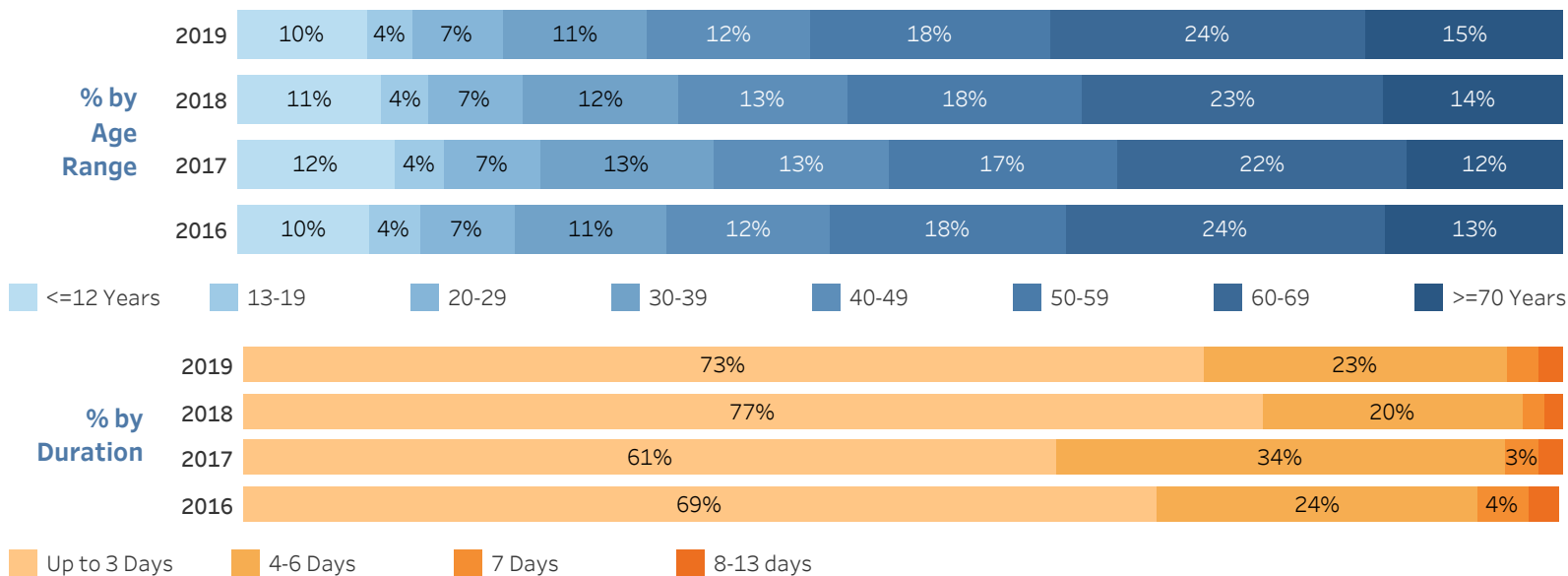
2016	2017	2018	2019
214.2	266.6 (24.4% ▲)	373.0 (39.9% ▲)	325.4 (-12.7% ▼)

## Average Duration, in Days

2016	2017	2018	2019
2.9	3.1	2.4	2.6

## Average Age

2016	2017	2018	2019
48	46	48	49



## Passenger Percentages by Destination/Trade Route

	2016	2017	2018	2019
Rest of Asia	88.7%	88.6%	93.9%	96.2%
Alaska	1.2%	1.0%	0.7%	0.8%
Mainland China, Hong Kong, Taiwan	2.2%	1.8%	0.5%	0.8%
Mediterranean	0.9%	0.7%	0.9%	0.7%
Exploration Destinations		0.8%		
Other	5.0%	5.6%	2.8%	
Baltics/Northern Europe	0.8%	0.7%		



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## Passenger Volume & YOY Change by Age Group

	Passenger in K				Variance			
	2016	2017	2018	2019	2016	2017	2018	2019
<=12 Years	21	31	40	32	47%	28%	-21%	
13-19	8	10	14	11	25%	35%	-17%	
20-29	15	19	26	22	26%	36%	-17%	
30-39	24	34	44	35	41%	27%	-20%	
40-49	26	35	47	40	32%	36%	-16%	
50-59	38	46	65	58	21%	43%	-11%	
60-69	51	58	84	76	13%	46%	-9%	
>=70 Years	29	31	50	48	9%	62%	-4%	

## Passenger Volume & YOY Change by Duration

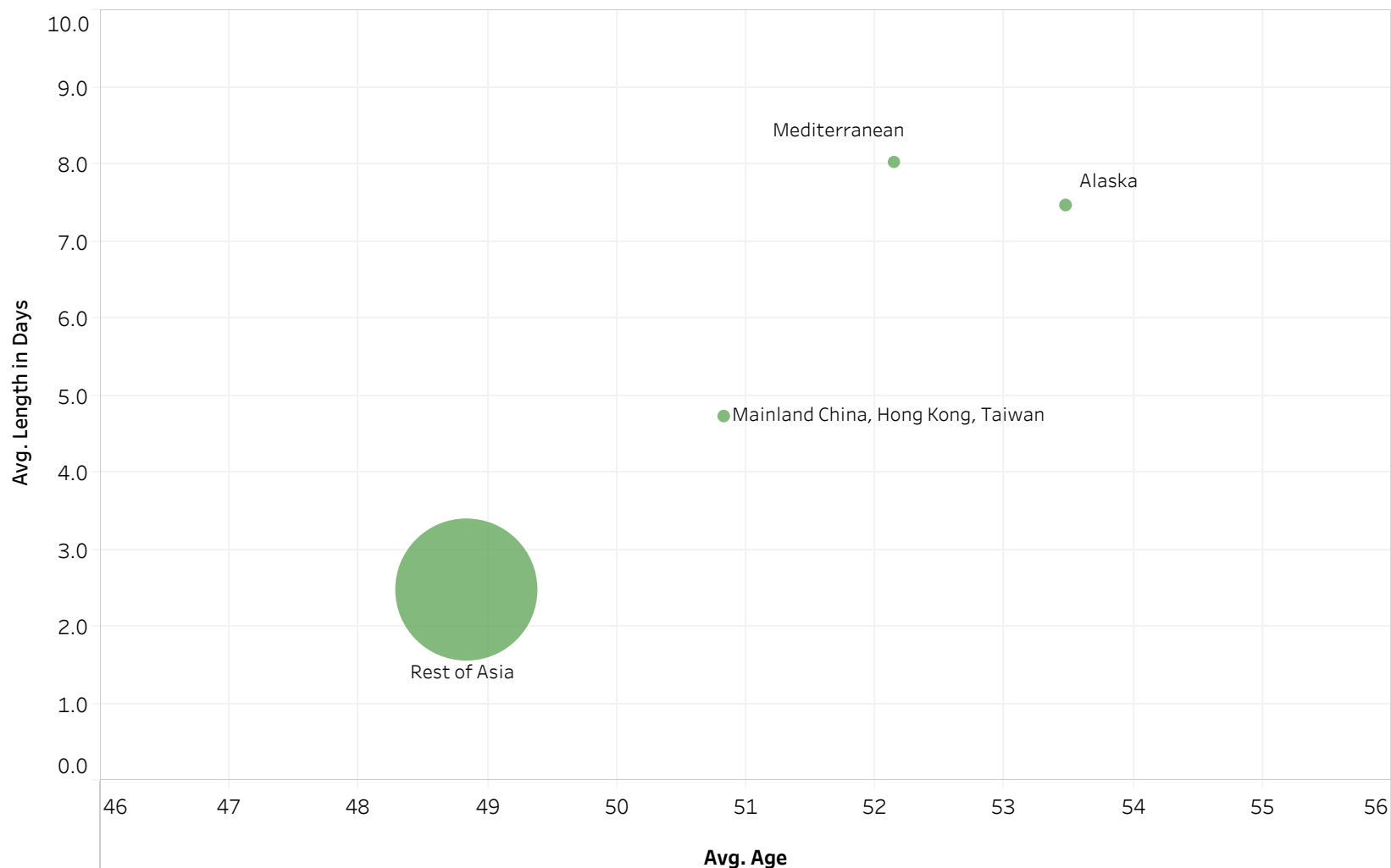
	Passenger in K				Variance			
	2016	2017	2018	2019	2016	2017	2018	2019
Up to 3 Days	147	164	287	236	12%	75%	-18%	
4-6 Days	52	90	73	74	75%	-19%	2%	
7 Days	8	7	6	8	-20%	-5%	20%	
8-13 Days	5	4	5	6	-4%	13%	23%	

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

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

	Passenger in K				Variance			
	2016	2017	2018	2019	2016	2017	2018	2019
Rest of Asia	190	236	350	313		24%	48%	-11%
Alaska	3	3	2	3		2%	-4%	3%
Mainland China, Hong Kong, Taiwan	5	5	2	2		2%	-58%	21%
Mediterranean	2	2	3	2		0%	72%	-29%
Other	11	15	10			39%	-30%	
Exploration Destinations		2				3239%		
Baltics/Northern Europe	2	2				8%		

### Singapore, Average Age and Cruise Length by Destination/ Trade Route, 2019



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# Source Market: India

## Passenger Volume (K)

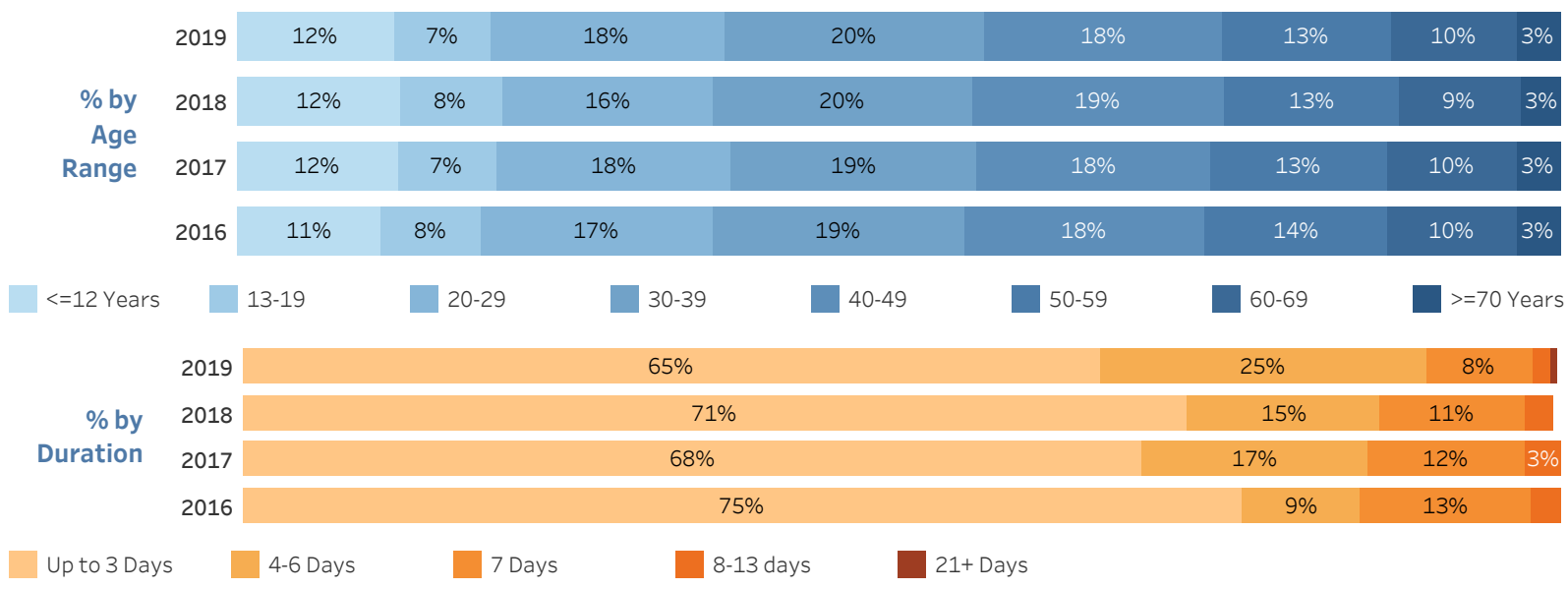
2016	2017	2018	2019
148.5	172.4 (16.1%▲)	220.9 (28.1%▲)	312.6 (41.5%▲)

## Average Duration, in Days

2016	2017	2018	2019
2.8	3.1	2.9	3.0

## Average Age

2016	2017	2018	2019
38	37	37	37



## Passenger Percentages by Destination/Trade Route

	2016	2017	2018	2019
Rest of Asia	71.9%	71.5%	76.2%	80.1%
Africa/Mid-East/World Cruise/Transatlantic				5.2%
Caribbean/South America	9.3%	7.2%	5.6%	3.6%
Mediterranean	7.6%	8.0%	6.2%	3.0%
Mainland China, Hong Kong, Taiwan	1.8%	3.8%	3.8%	2.1%
Other	1.9%	2.7%	2.2%	2.0%
Alaska	2.5%	2.0%	2.3%	1.6%
Baltics/Northern Europe	1.6%	2.4%	2.2%	1.6%
North America	2.5%	1.5%	1.1%	0.5%



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## Passenger Volume & YOY Change by Age Group

	Passenger in K				Variance			
	2016	2017	2018	2019	2016	2017	2018	2019
<=12 Years	16	21	27	24	30%	30%	-10%	
13-19	11	13	17	15	14%	34%	-11%	
20-29	26	30	35	36	18%	15%	3%	
30-39	28	32	43	40	13%	36%	-6%	
40-49	27	30	41	37	13%	37%	-11%	
50-59	20	23	29	26	13%	26%	-9%	
60-69	14	17	20	20	16%	19%	-3%	
>=70 Years	5	6	7	7	18%	20%	1%	

## Passenger Volume & YOY Change by Duration

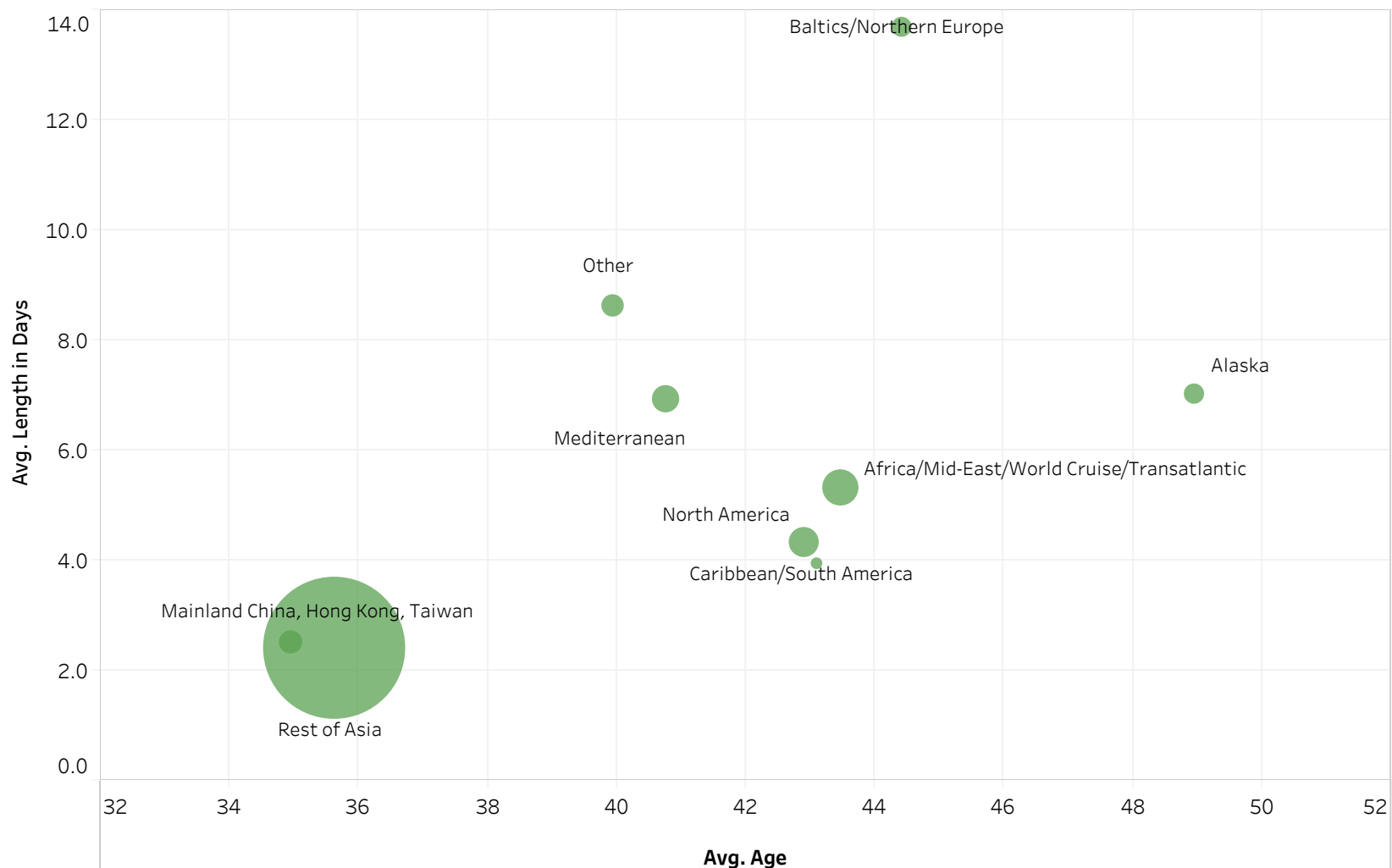
	Passenger in K				Variance			
	2016	2017	2018	2019	2016	2017	2018	2019
Up to 3 Days	111	117	157	202	5%	35%	29%	
4-6 Days	13	29	32	77	122%	10%	138%	
7 Days	19	20	24	25	6%	19%	3%	
8-13 Days	3	5	5	4	48%	-5%	-10%	
21+ Days				2				81%

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

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

	Passenger in K				Variance			
	2016	2017	2018	2019	2016	2017	2018	2019
Rest of Asia	107	123	168	250		15%	37%	49%
Africa/Mid-East/World Cruise/Transatlantic				16				3330%
Caribbean/South America	14	12	12	11		-10%	-1%	-9%
Mediterranean	11	14	14	9		22%	-2%	-32%
Mainland China, Hong Kong, Taiwan	3	7	8	7		145%	27%	-19%
Other	3	5	5	6		63%	5%	28%
Alaska	4	4	5	5		-7%	43%	2%
Baltics/Northern Europe	2	4	5	5		67%	21%	1%
North America	4	3	2	2		-28%	-8%	-30%

### India, Average Age and Cruise Length by Destination/ Trade Route, 2019



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# Source Market: Japan

## Passenger Volume (K)

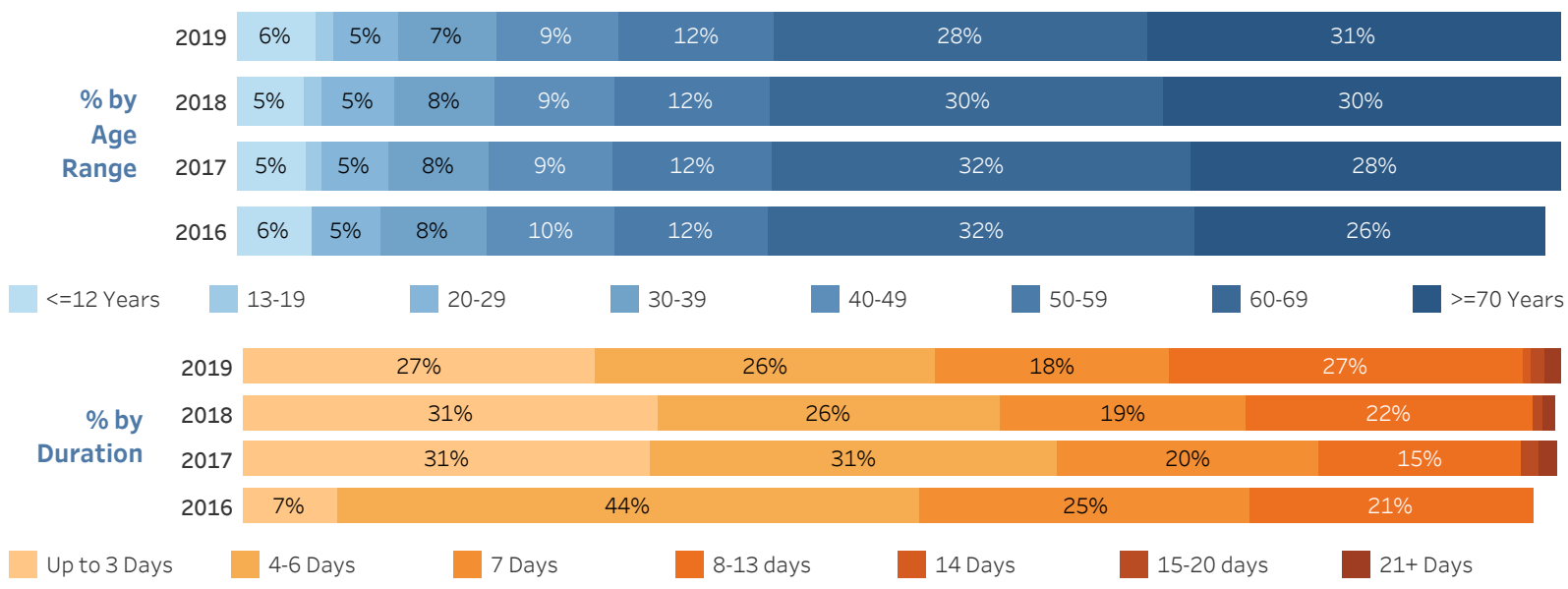
2016	2017	2018	2019
207.3	254.7 (22.9%▲)	266.2 (4.5%▲)	296.5 (11.4%▲)

## Average Duration, in Days

2016	2017	2018	2019
6.7	6.9	6.9	7.5

## Average Age

2016	2017	2018	2019
56	57	57	57



## Passenger Percentages by Destination/Trade Route

	2016	2017	2018	2019
Mainland China, Hong Kong, Taiwan		1.9%	1.2%	1.9%
Rest of Asia	67.2%	64.2%	75.6%	79.1%
Mediterranean	9.9%	10.0%	11.2%	9.9%
Caribbean/South America	5.6%	4.6%	3.8%	3.5%
Alaska	1.3%	0.9%	0.7%	0.8%
Exploration Destinations			0.6%	0.6%
Other	10.7%	13.4%	2.3%	0.6%
Baltics/Northern Europe	1.4%	1.5%	1.4%	0.9%
Australia/NZ/Pacific	1.3%	1.3%	1.2%	1.2%
North America	1.0%		0.6%	0.6%
Hawaii	0.8%	0.8%	0.7%	0.6%
Africa/Mid-East/World Cruise/Transatlantic			0.7%	0.5%



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## Passenger Volume & YOY Change by Age Group

	Passenger in K				Variance			
	2016	2017	2018	2019	2016	2017	2018	2019
<=12 Years	6	7	8	11	20%	3%	38%	
13-19		2	2	2	26%	12%	14%	
20-29	6	7	8	9	23%	14%	6%	
30-39	9	11	12	13	24%	5%	15%	
40-49	11	13	14	16	26%	2%	19%	
50-59	13	17	18	21	34%	1%	19%	
60-69	36	46	45	50	27%	-1%	11%	
>=70 Years	29	40	45	56	37%	12%	22%	

## Passenger Volume & YOY Change by Duration

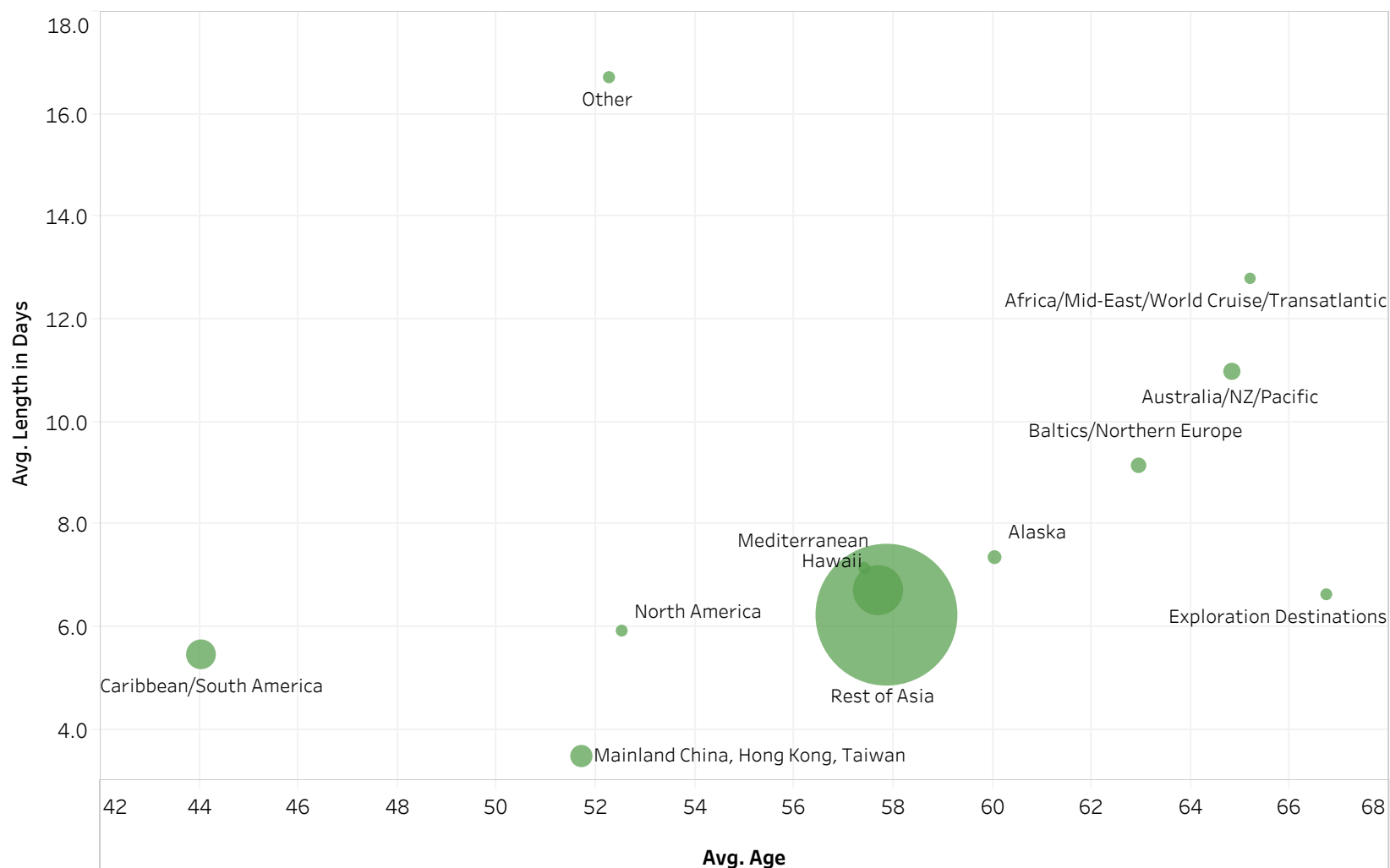
	Passenger in K				Variance			
	2016	2017	2018	2019	2016	2017	2018	2019
Up to 3 Days	8	79	83	79	892%	6%	-5%	
4-6 Days	49	78	69	76	59%	-12%	11%	
7 Days	28	51	50	53	81%	-2%	6%	
8-13 Days	24	39	58	80	63%	48%	37%	
14 Days				2				38%
15-20 days		3	2	3	220%	-36%	46%	
21+ Days		4	2	4	####	-32%	58%	

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

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

	Passenger in K				Variance			
	2016	2017	2018	2019	2016	2017	2018	2019
Rest of Asia	139	164	201	234		18%	23%	16%
Mediterranean	20	25	30	29		24%	17%	-1%
Caribbean/South America	12	12	10	10		0%	-13%	2%
Mainland China, Hong Kong, Taiwan		5	3	6		265%	-37%	85%
Australia/NZ/Pacific	3	3	3	3		23%	3%	4%
Baltics/Northern Europe	3	4	4	3		33%	-4%	-23%
Alaska	3	2	2	2		-15%	-13%	12%
Other	22	34	6	2		54%	-82%	-72%
Hawaii	2	2	2	2		24%	-14%	-5%
North America	2		2	2			13%	2%
Exploration Destinations			2	2			17%	8%
Africa/Mid-East/World Cruise/Transatlantic			2	2			89%	-21%

### Japan, Average Age and Cruise Length by Destination/ Trade Route, 2019



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# Source Market: Hong Kong SAR

## Passenger Volume (K)

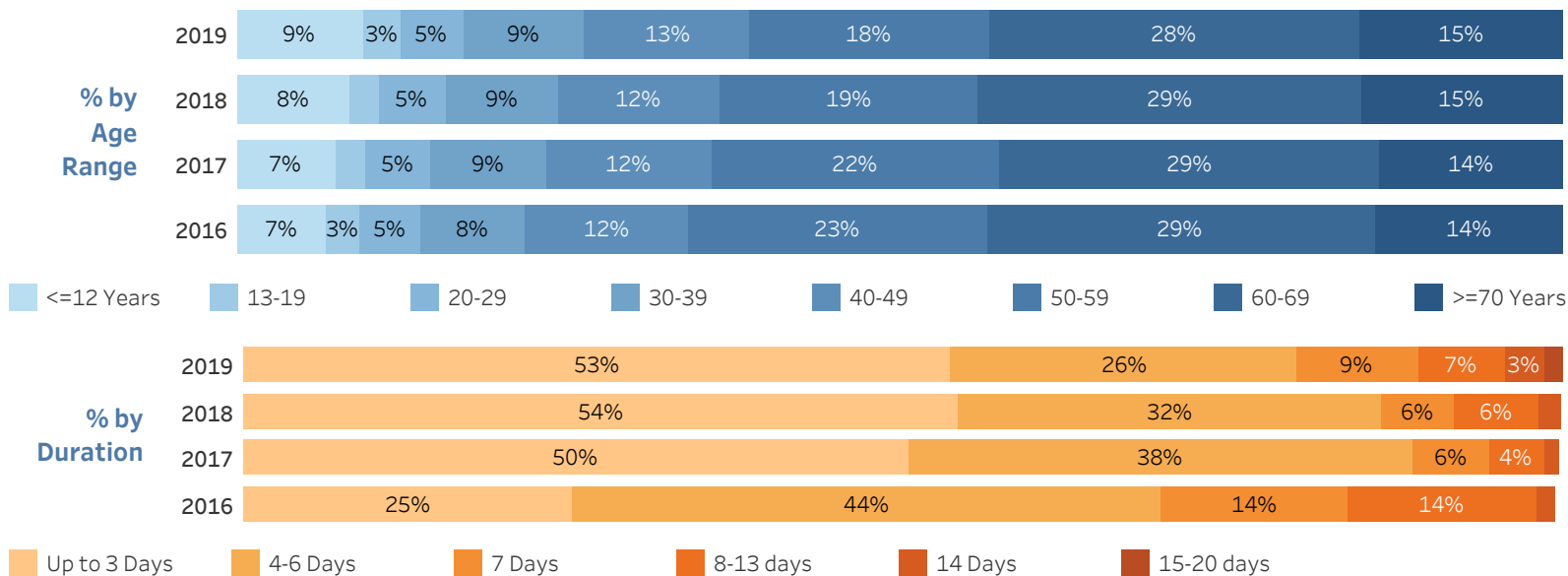
2016	2017	2018	2019
127.3	229.8 (80.6% ▲)	249.6 (8.6% ▲)	191.2 (-23.4% ▼)

## Average Duration, in Days

2016	2017	2018	2019
5.4	3.7	3.7	3.9

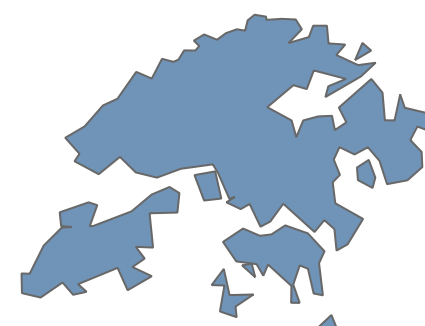
## Average Age

2016	2017	2018	2019
52	52	52	51



## Passenger Percentages by Destination/Trade Route

	2016	2017	2018	2019
Mainland China, Hong Kong, Taiwan	56.5%	68.6%	72.9%	71.1%
Rest of Asia	24.3%	13.8%	10.9%	13.7%
Mediterranean	5.1%	3.3%	4.3%	5.1%
Other	4.6%	8.1%	6.4%	2.7%
Baltics/Northern Europe	3.3%	2.4%	1.7%	2.1%
Alaska	1.6%	1.0%	0.8%	1.4%
Australia/NZ/Pacific	1.4%	1.0%	1.3%	1.3%
Caribbean/South America	1.8%	1.0%	0.9%	1.3%



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## Passenger Volume & YOY Change by Age Group

	Passenger in K				Variance			
	2016	2017	2018	2019	2016	2017	2018	2019
<=12 Years	8	17	21	18	###	21%	-15%	
13-19	3	5	6	5	53%	13%	-6%	
20-29	6	11	12	9	93%	9%	-28%	
30-39	10	20	21	17	99%	5%	-20%	
40-49	16	28	30	23	82%	5%	-22%	
50-59	29	50	48	34	73%	-4%	-30%	
60-69	37	66	71	52	78%	9%	-27%	
>=70 Years	18	31	37	28	75%	18%	-23%	

## Passenger Volume & YOY Change by Duration

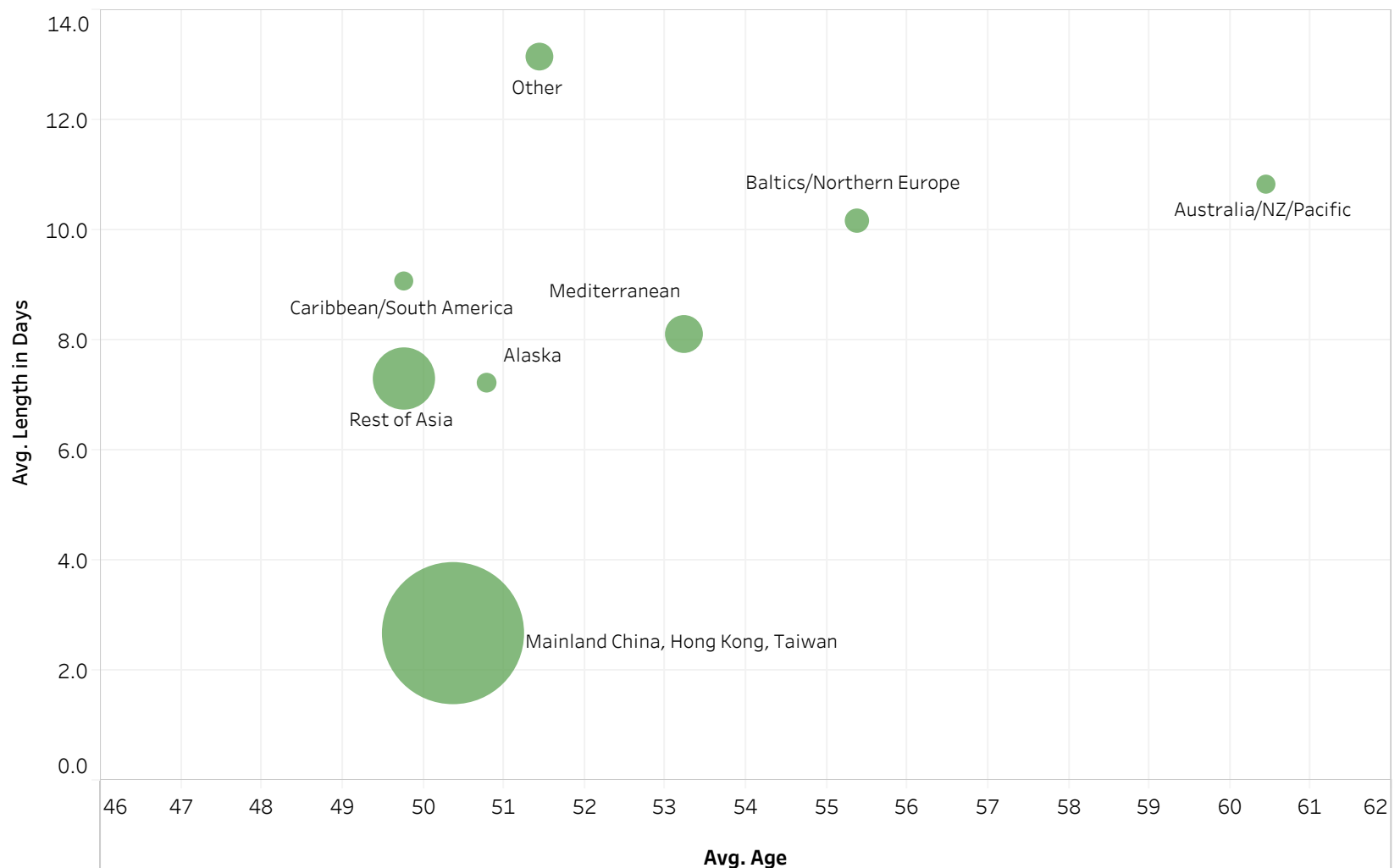
	Passenger in K				Variance			
	2016	2017	2018	2019	2016	2017	2018	2019
Up to 3 Days	32	116	135	99	267%	16%	-26%	
4-6 Days	56	87	80	49	56%	-9%	-38%	
7 Days	18	13	14	17	-26%	4%	24%	
8-13 Days	18	10	16	12	-47%	67%	-23%	
14 Days	2	3	4	5	45%	54%	33%	
15-20 Days				3				205%

## Source Market: Hong Kong SAR (Continued)

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

	Passenger in K				Variance			
	2016	2017	2018	2019	2016	2017	2018	2019
Mainland China, Hong Kong, Taiwan	72	158	182	136	119%	15%	-25%	
Rest of Asia	31	32	27	26	3%	-14%	-4%	
Mediterranean	7	8	11	10	18%	40%	-9%	
Other	6	19	16	5	215%	-15%	-67%	
Baltics/Northern Europe	4	6	4	4	32%	-22%	-9%	
Alaska	2	2	2	3	7%	-15%	38%	
Australia/NZ/Pacific	2	2	3	2	31%	37%	-23%	
Caribbean/South America	2	2	2	2	1%	-4%	8%	

### Hong Kong SAR, Average Age and Cruise Length by Destination/Trade Route, 2019



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# Source Market: Malaysia

## Passenger Volume (K)

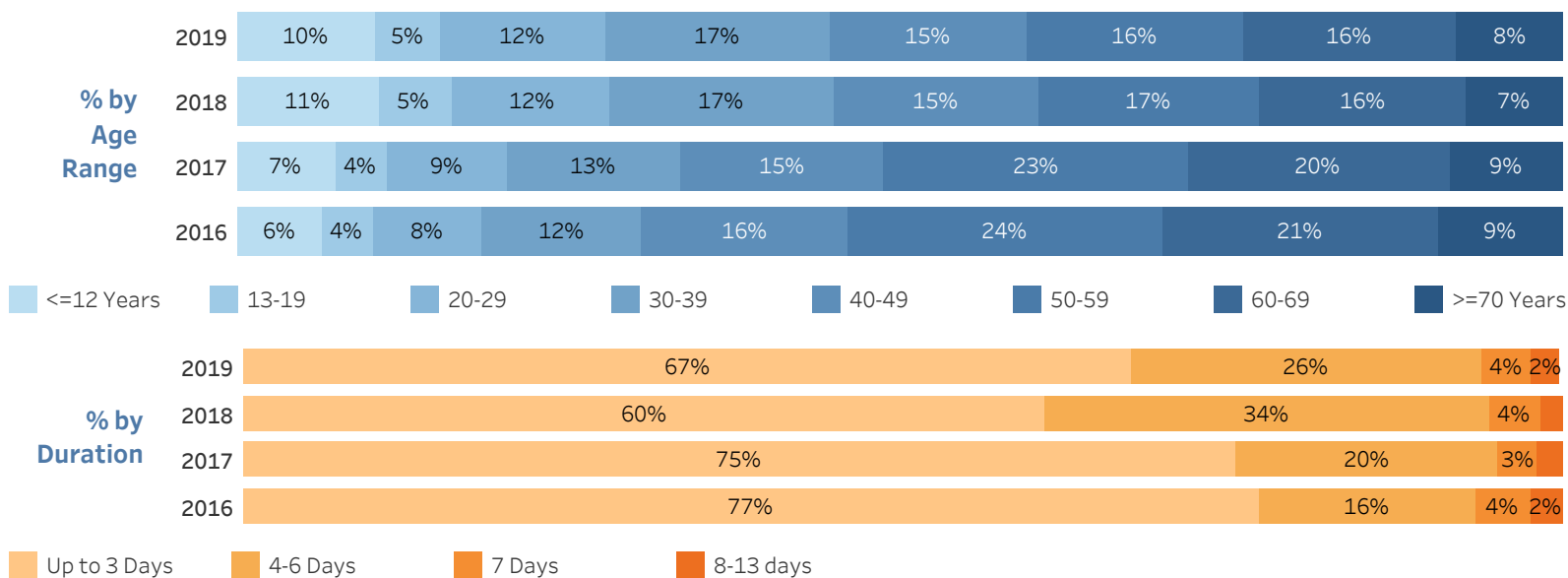
2016	2017	2018	2019
99.8	187.5 (87.8% ▲)	150.2 (-19.9% ▼)	120.7 (-19.6% ▼)

## Average Duration, in Days

2016	2017	2018	2019
2.6	2.6	3.1	2.9

## Average Age

2016	2017	2018	2019
48	47	42	43



## Passenger Percentages by Destination/Trade Route

	2016	2017	2018	2019
Rest of Asia	80.8%	87.8%	89.2%	91.7%
Mainland China, Hong Kong, Taiwan	5.3%	2.9%	2.7%	2.9%
Mediterranean	2.1%	2.1%	2.5%	2.1%
Other	8.0%	5.1%	3.3%	
Baltics/Northern Europe	1.7%			



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## Passenger Volume & YOY Change by Age Group

	Passenger in K				Variance			
	2016	2017	2018	2019	2016	2017	2018	2019
<=12 Years	6	14	16	12	###	16%	-22%	
13-19	4	7	8	6	86%	12%	-26%	
20-29	8	17	18	15	###	5%	-17%	
30-39	12	24	25	20	###	4%	-20%	
40-49	15	29	23	18	85%	-19%	-23%	
50-59	24	43	25	20	83%	-42%	-21%	
60-69	21	37	23	19	78%	-37%	-17%	
>=70 Years	9	16	11	10	70%	-31%	-11%	

## Passenger Volume & YOY Change by Duration

	Passenger in K				Variance			
	2016	2017	2018	2019	2016	2017	2018	2019
Up to 3 Days	76	140	91	81	84%	-35%	-11%	
4-6 Days	16	37	50	32	128%	36%	-37%	
7 Days	4	6	6	4	40%	0%	-23%	
8-13 Days	2	4	2	3	50%	-33%	8%	

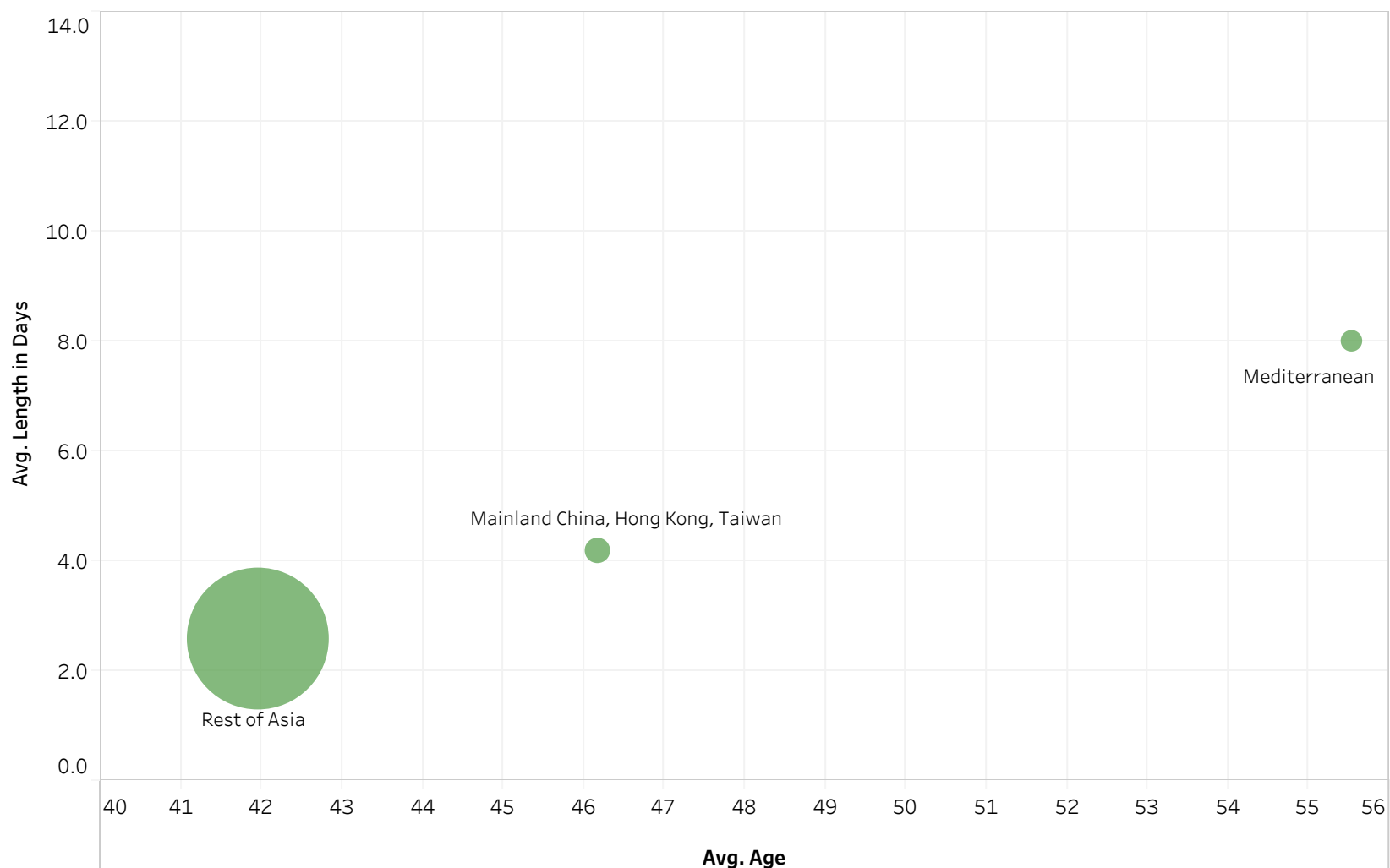


## Source Market: **Malaysia** (Continued)

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

	Passenger in K				Variance			
	2016	2017	2018	2019	2016	2017	2018	2019
Rest of Asia	81	165	134	111		104%	-19%	-17%
Mainland China, Hong Kong, Taiwan	5	5	4	4		2%	-25%	-13%
Mediterranean	2	4	4	3		85%	-4%	-31%
Other	8	10	5			21%	-49%	
Baltics/Northern Europe	2							

### Malaysia, Average Age and Cruise Length by Destination/ Trade Route, 2019



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# Source Market: Indonesia

## Passenger Volume (K)

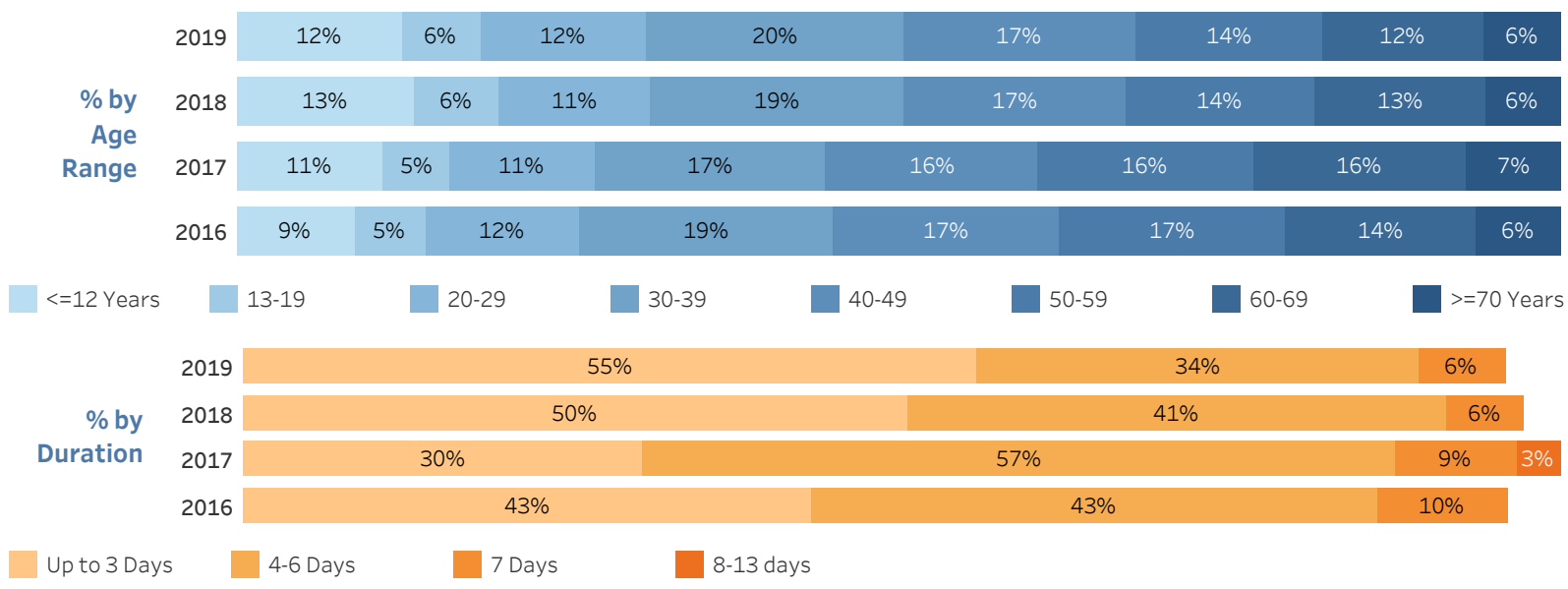
2016	2017	2018	2019
33.2	46.5 (40.2% ▲)	72.1 (54.9% ▲)	62.1 (-13.8% ▼)

## Average Duration, in Days

2016	2017	2018	2019
4.0	4.4	3.5	3.4

## Average Age

2016	2017	2018	2019
42	42	39	40



## Passenger Percentages by Destination/Trade Route

	2016	2017	2018	2019
Rest of Asia	62.1%	65.4%	80.4%	86.7%
Australia/NZ/Pacific				2.7%
Mainland China, Hong Kong, Taiwan	4.7%	4.2%	2.7%	2.7%
Alaska				2.6%
Mediterranean		3.3%	2.8%	2.5%
Other	18.1%	18.5%	7.6%	



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## Passenger Volume & YOY Change by Age Group

	Passenger in K				Variance			
	2016	2017	2018	2019	2016	2017	2018	2019
<=12 Years	3	5	9	8	71%	87%	-20%	
13-19	2	2	4	4	37%	88%	-19%	
20-29	4	5	8	8	32%	61%	-8%	
30-39	6	8	14	12	27%	69%	-13%	
40-49	6	7	12	11	33%	59%	-11%	
50-59	6	8	10	9	33%	33%	-15%	
60-69	5	7	9	7	56%	24%	-20%	
>=70 Years	2	3	4	4	58%	19%	-12%	

## Passenger Volume & YOY Change by Duration

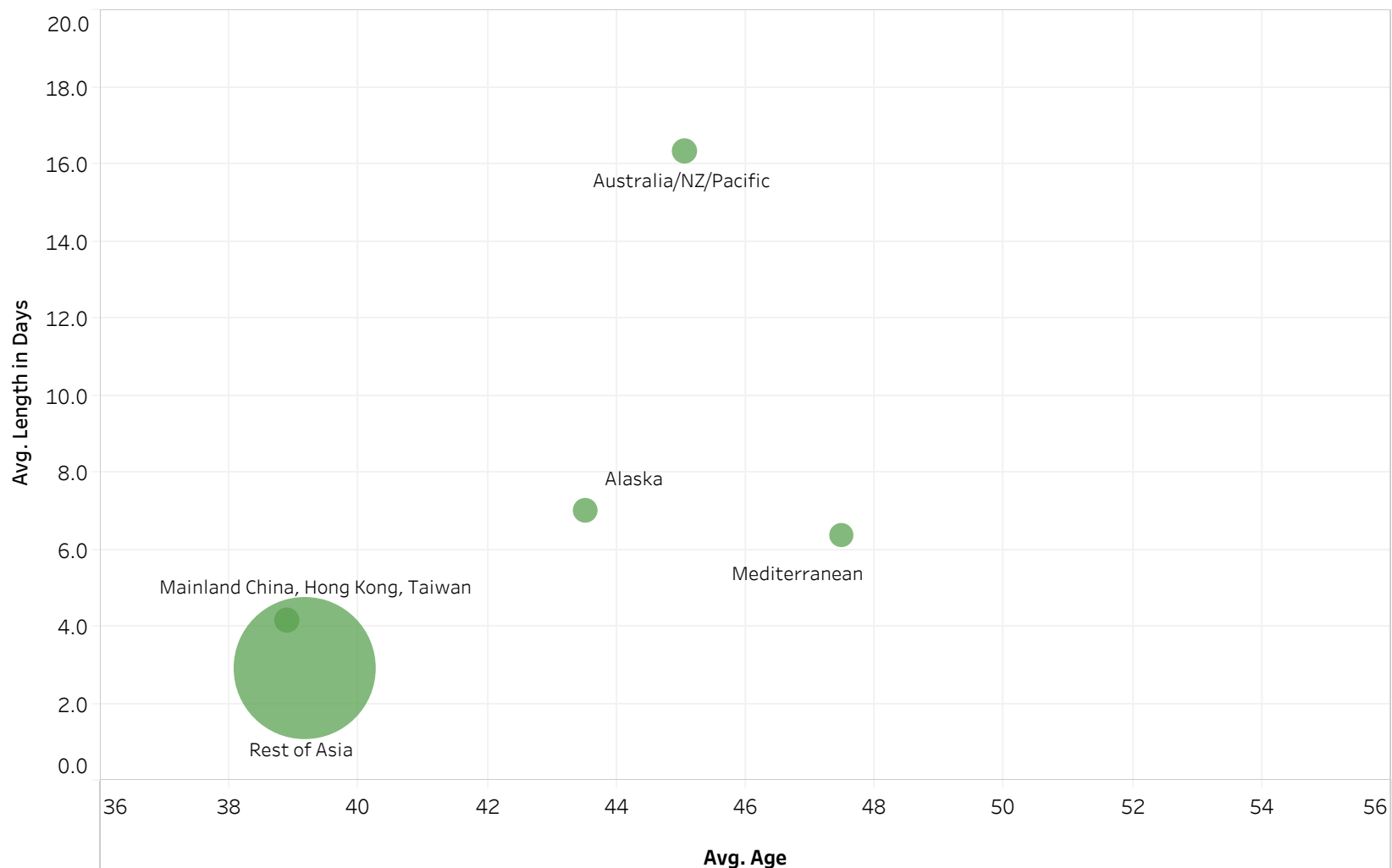
	Passenger in K				Variance			
	2016	2017	2018	2019	2016	2017	2018	2019
Up to 3 Days	14	14	36	34	-1%	158%	-5%	
4-6 Days	14	26	29	21	87%	11%	-29%	
7 Days	3	4	4	4	33%	-3%	-4%	
8-13 Days		2				12%		

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

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

	Passenger in K				Variance			
	2016	2017	2018	2019	2016	2017	2018	2019
Rest of Asia	21	30	58	54		48%	90%	-7%
Australia/NZ/Pacific				2				35%
Mainland China, Hong Kong, Taiwan	2	2	2	2		26%	0%	-14%
Alaska				2				58%
Mediterranean		2	2	2		22%	29%	-22%
Other	6	9	5			43%	-37%	

### Indonesia, Average Age and Cruise Length by Destination/ Trade Route, 2019



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# Source Market: South Korea

## Passenger Volume (K)

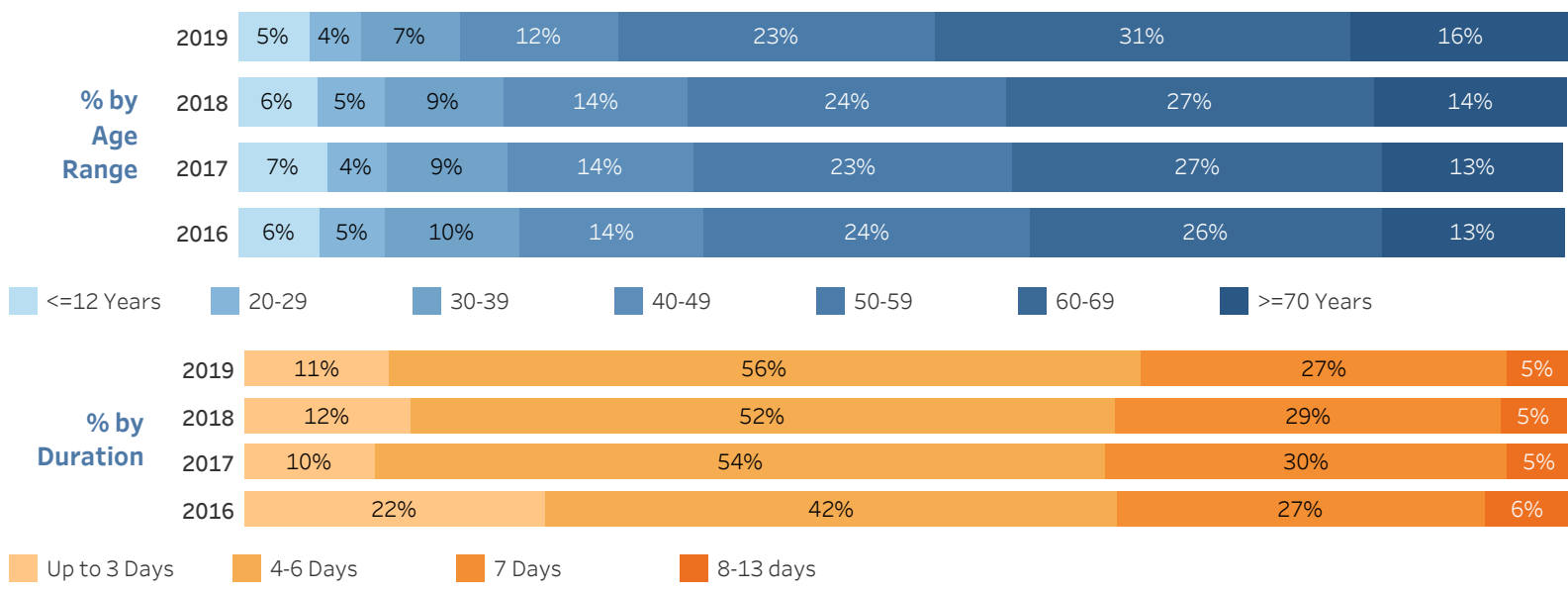
2016	2017	2018	2019
32.0	39.1 (22.2% ▲)	44.4 (13.5% ▲)	48.7 (9.6% ▲)

## Average Duration, in Days

2016	2017	2018	2019
5.3	5.7	5.6	5.6

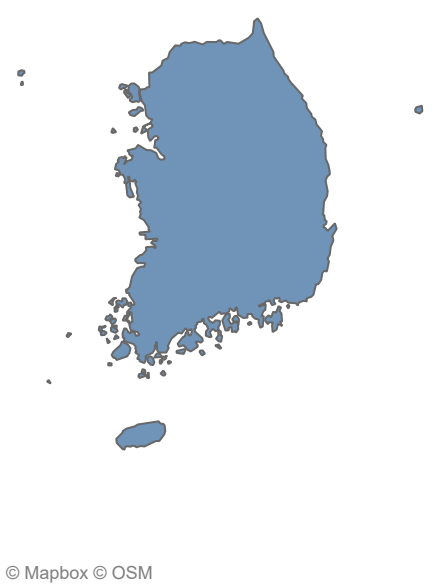
## Average Age

2016	2017	2018	2019
52	52	52	55



## Passenger Percentages by Destination/Trade Route

	2016	2017	2018	2019
Rest of Asia	23.2%	25.2%	60.2%	63.7%
Mediterranean	11.4%	11.4%	12.0%	13.5%
Alaska	5.2%	5.6%	5.1%	5.9%
Caribbean/South America	8.2%	8.5%	5.6%	5.3%
Mainland China, Hong Kong, Taiwan		4.6%	7.7%	4.9%
Other	37.7%	35.8%		
North America			3.7%	



## Passenger Volume & YOY Change by Age Group

	Passenger in K				Variance			
	2016	2017	2018	2019	2016	2017	2018	2019
<=12 Years	2	2	3	3	34%	2%	1%	
20-29	2	2	2	2	7%	30%	-15%	
30-39	3	3	4	4	8%	15%	-7%	
40-49	4	5	6	6	22%	13%	-3%	
50-59	8	9	10	11	17%	16%	11%	
60-69	8	10	12	15	27%	14%	27%	
>=70 Years	4	5	6	8	18%	23%	28%	

## Passenger Volume & YOY Change by Duration

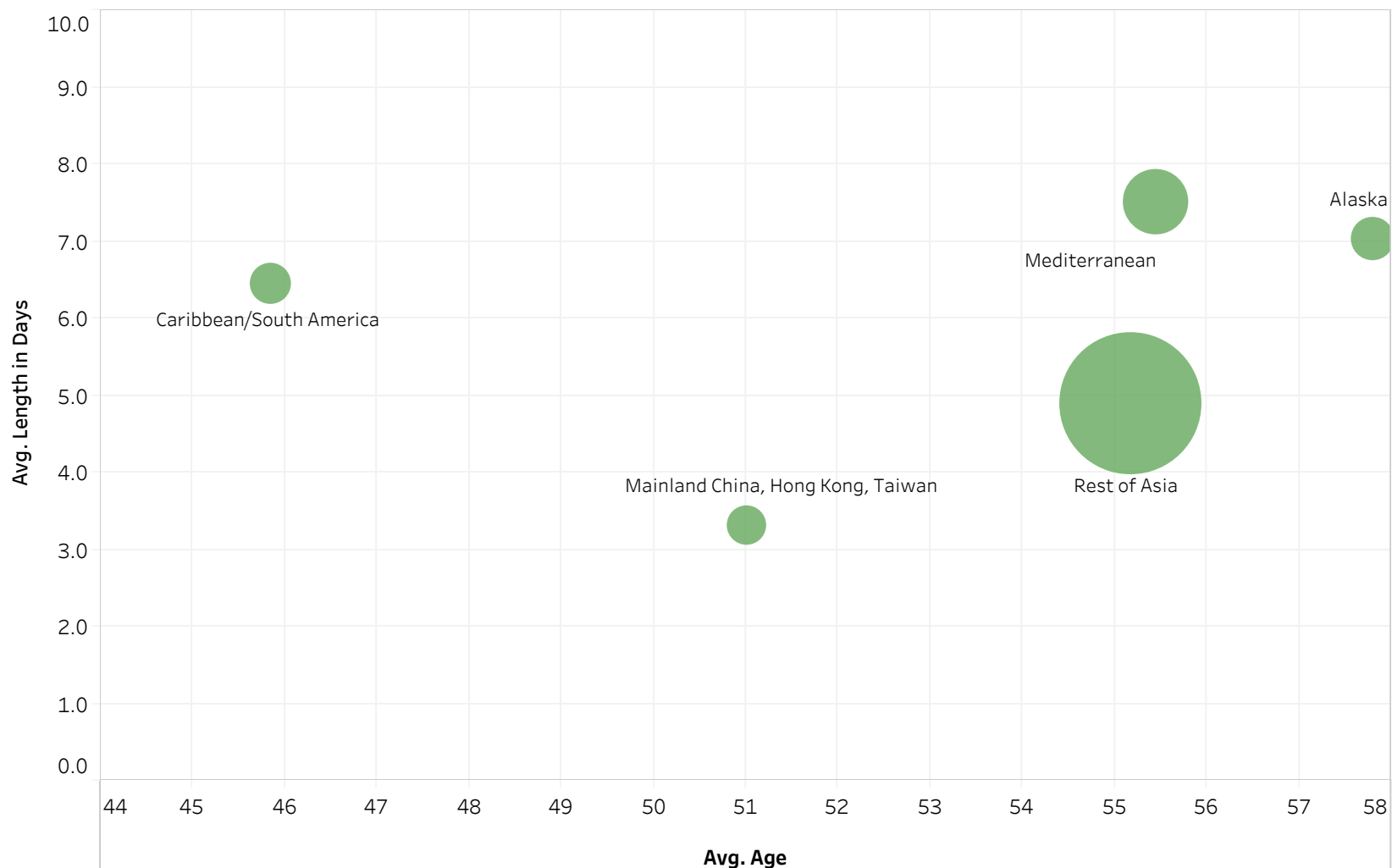
	Passenger in K				Variance			
	2016	2017	2018	2019	2016	2017	2018	2019
Up to 3 Days	7	4	5	5	-46%	45%	-5%	
4-6 Days	13	21	23	27	60%	10%	16%	
7 Days	8	12	13	13	37%	10%	4%	
8-13 Days	2	2	2	2	-4%	14%	5%	

## Source Market: **South Korea** (Continued)

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

	Passenger in K				Variance			
	2016	2017	2018	2019	2016	2017	2018	2019
Rest of Asia	7	10	27	31	32%	172%	16%	
Mediterranean	4	4	5	7	22%	19%	23%	
Alaska	2	2	2	3	33%	3%	27%	
Caribbean/South America	3	3	3	3	27%	-25%	4%	
Mainland China, Hong Kong, Taiwan		2	3	2	40%	88%	-30%	
Other	12	14			16%			
North America			2				11%	

### South Korea, Average Age and Cruise Length by Destination/ Trade Route, 2019



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# Source Market: Philippines

## Passenger Volume (K)

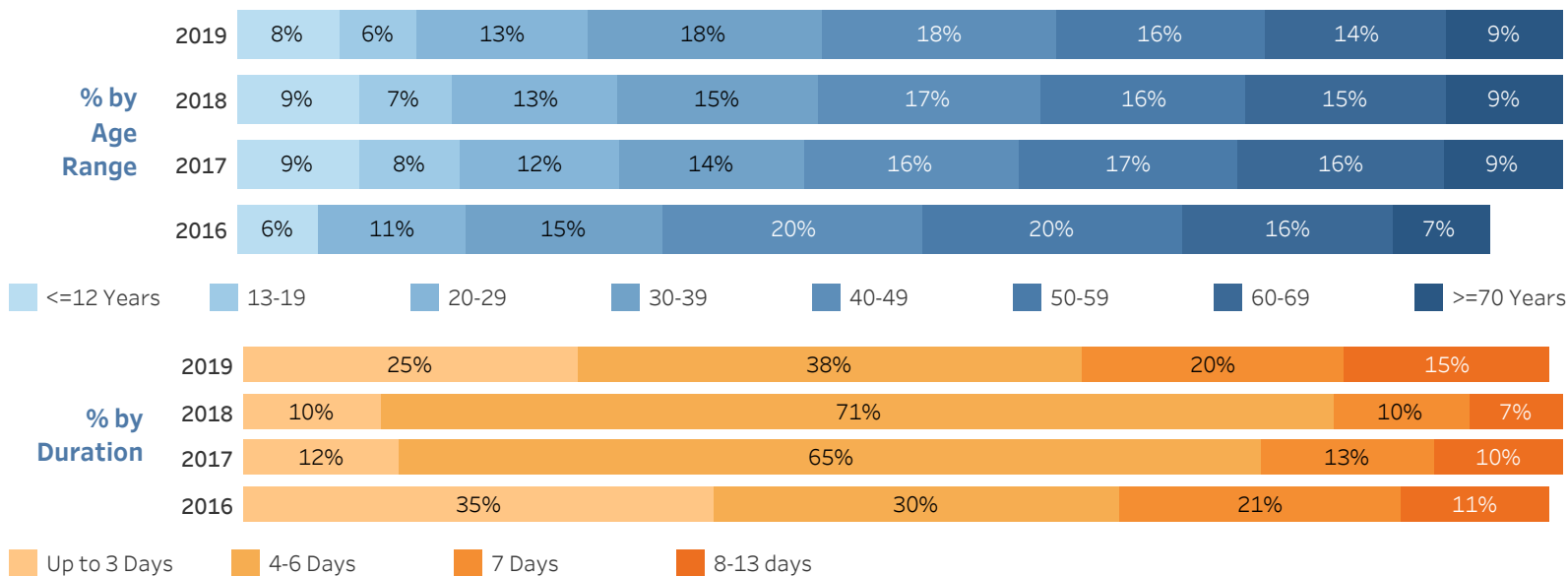
2016	2017	2018	2019
26.4	41.2 (56.1% ▲)	61.4 (49.1% ▲)	29.5 (-52.0% ▼)

## Average Duration, in Days

2016	2017	2018	2019
5.1	5.5	5.3	5.4

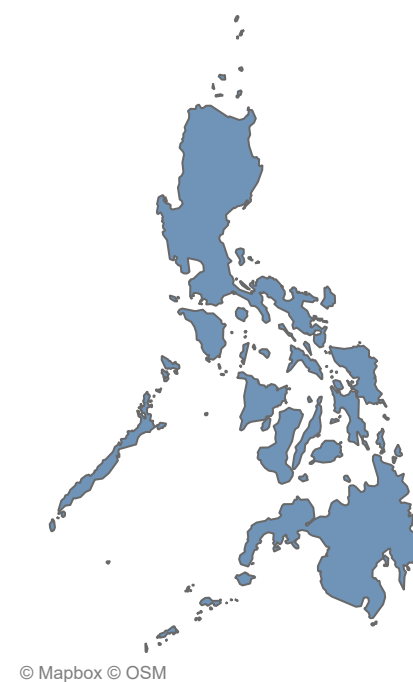
## Average Age

2016	2017	2018	2019
45	43	43	43



## Passenger Percentages by Destination/Trade Route

	2016	2017	2018	2019
Rest of Asia	35.5%	60.6%	74.2%	51.5%
Mainland China, Hong Kong, Taiwan	26.0%	8.1%	6.7%	13.0%
Mediterranean	8.3%	6.6%	5.1%	10.6%
Caribbean/South America	7.3%	4.6%	3.3%	6.0%
Alaska			2.7%	5.5%
Baltics/Northern Europe		5.3%	2.8%	5.3%
Other		7.0%		
North America	6.2%			



## Passenger Volume & YOY Change by Age Group

	Passenger in K				Variance			
	2016	2017	2018	2019	2016	2017	2018	2019
<=12 Years	2	4	6	2	###	49%	-61%	
13-19		3	4	2	###	32%	-61%	
20-29	3	5	8	4	68%	53%	-52%	
30-39	4	6	9	5	48%	60%	-46%	
40-49	5	7	10	5	28%	53%	-50%	
50-59	5	7	9	4	32%	38%	-53%	
60-69	4	6	9	4	53%	42%	-57%	
>=70 Years	2	4	5	2	94%	46%	-54%	

## Passenger Volume & YOY Change by Duration

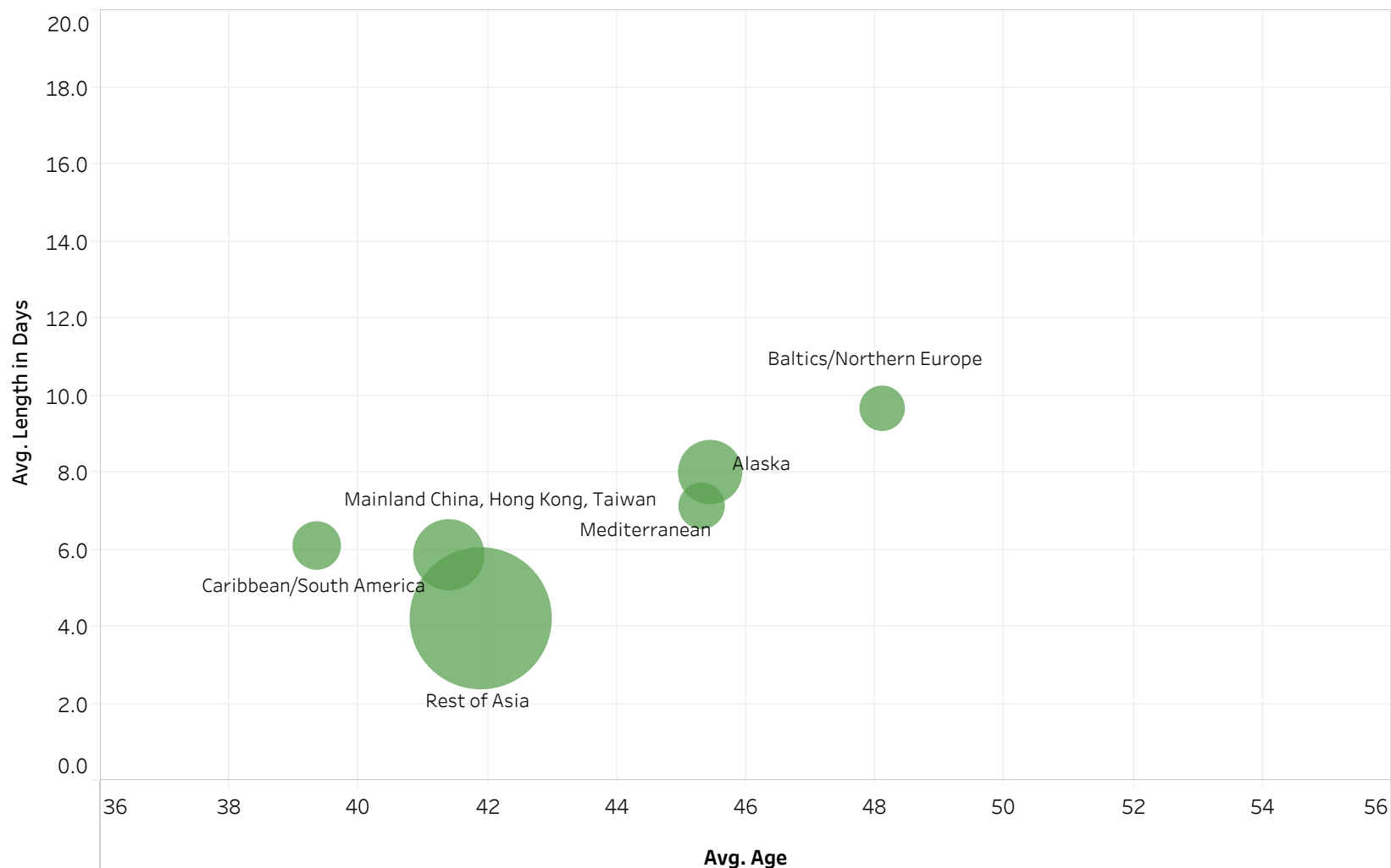
	Passenger in K				Variance			
	2016	2017	2018	2019	2016	2017	2018	2019
Up to 3 Days	9	5	6	7	-48%	32%	17%	
4-6 Days	8	27	44	11	235%	65%	-75%	
7 Days	6	5	6	6	-4%	17%	-7%	
8-13 Days	3	4	4	5	38%	9%	5%	

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

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

	Passenger in K				Variance			
	2016	2017	2018	2019	2016	2017	2018	2019
Rest of Asia	9	25	46	15		167%	83%	-67%
Mainland China, Hong Kong, Taiwan	7	3	4	4		-51%	23%	-7%
Mediterranean	2	3	3	3		24%	15%	-1%
Caribbean/South America	2	2	2	2		0%	7%	-13%
Alaska			2	2			37%	-1%
Baltics/Northern Europe		2	2	2		47%	-22%	-8%
Other		3				143%		
North America	2							

### Philippines, Average Age and Cruise Length by Destination/ Trade Route, 2019



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: Thailand

## Passenger Volume (K)

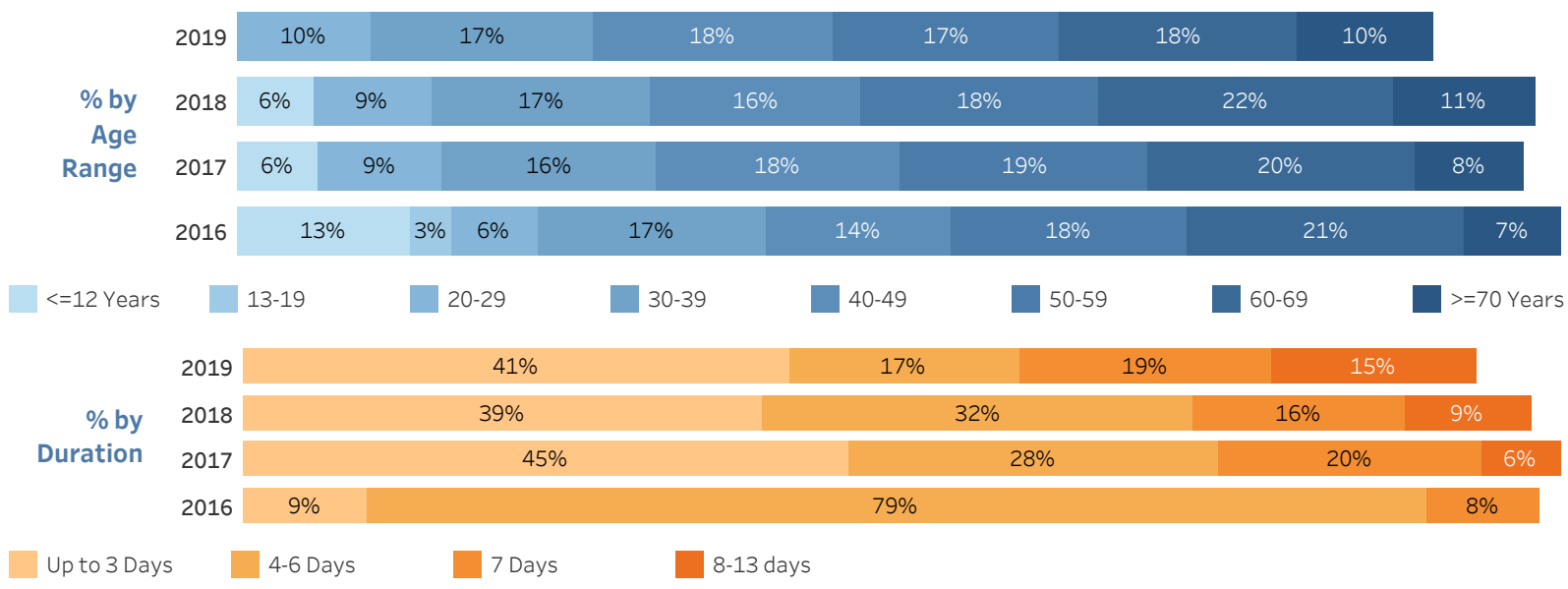
2016	2017	2018	2019
50.5	26.4 (-47.6% ▼)	30.3 (14.5% ▲)	19.7 (-34.9% ▼)

## Average Duration, in Days

2016	2017	2018	2019
5.1	4.3	4.4	4.8

## Average Age

2016	2017	2018	2019
44	47	48	46



## Passenger Percentages by Destination/Trade Route

	2016	2017	2018	2019
Rest of Asia	11.2%	48.8%	65.4%	58.5%
Mainland China, Hong Kong, Taiwan	73.8%	8.3%	7.9%	13.0%
Mediterranean	5.9%	14.6%	12.1%	12.2%
Baltics/Northern Europe	3.0%			
Other		16.6%		



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## Passenger Volume & YOY Change by Age Group

	Passenger in K				Variance			
	2016	2017	2018	2019	2016	2017	2018	2019
<=12 Years	7	2	2		-76%	3%		
13-19	2							
20-29	3	2	3	2	-23%	3%	-32%	
30-39	9	4	5	3	-51%	10%	-38%	
40-49	7	5	4	3	-31%	-7%	-30%	
50-59	9	5	5	3	-45%	3%	-42%	
60-69	11	5	6	3	-49%	18%	-51%	
>=70 Years	4	2	3	2	-42%	41%	-41%	

## Passenger Volume & YOY Change by Duration

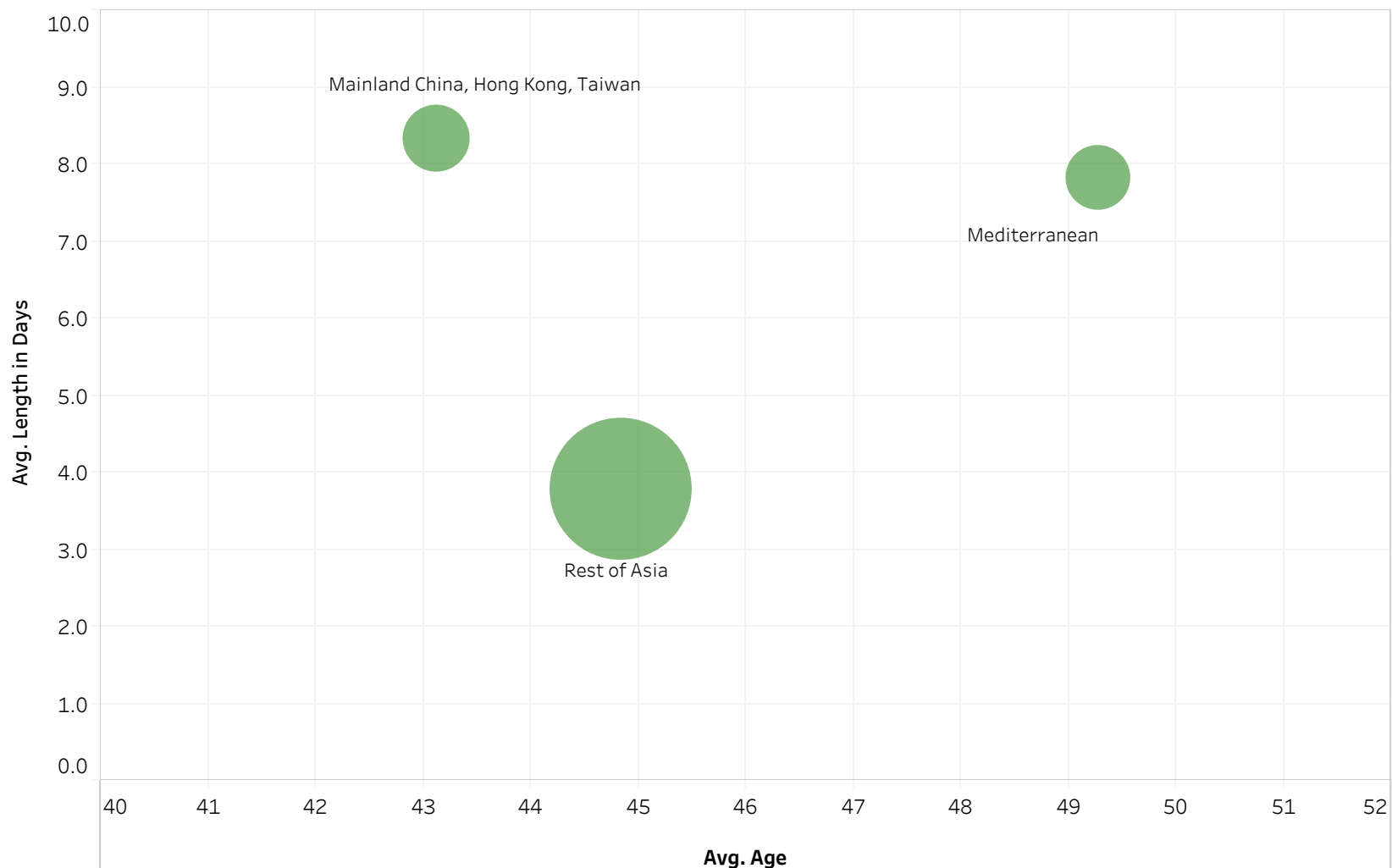
	Passenger in K				Variance			
	2016	2017	2018	2019	2016	2017	2018	2019
Up to 3 Days	5	12	12	8	154%	-2%	-31%	
4-6 days	40	7	10	3	-82%	33%	-65%	
7 Days	4	5	5	4	22%	-8%	-22%	
8-13 days		2	3	3	23%	80%	7%	

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

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

	Passenger in K				Variance			
	2016	2017	2018	2019	2016	2017	2018	2019
Rest of Asia	6	13	20	12		129%	53%	-42%
Mainland China, Hong Kong, Taiwan	37	2	2	3		-94%	9%	7%
Mediterranean	3	4	4	2		29%	-5%	-34%
Other		4				506%		
Baltics/Northern Europe	2							

### Thailand, Average Age and Cruise Length by Destination/ Trade Route, 2019



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: Vietnam

## Passenger Volume (K)

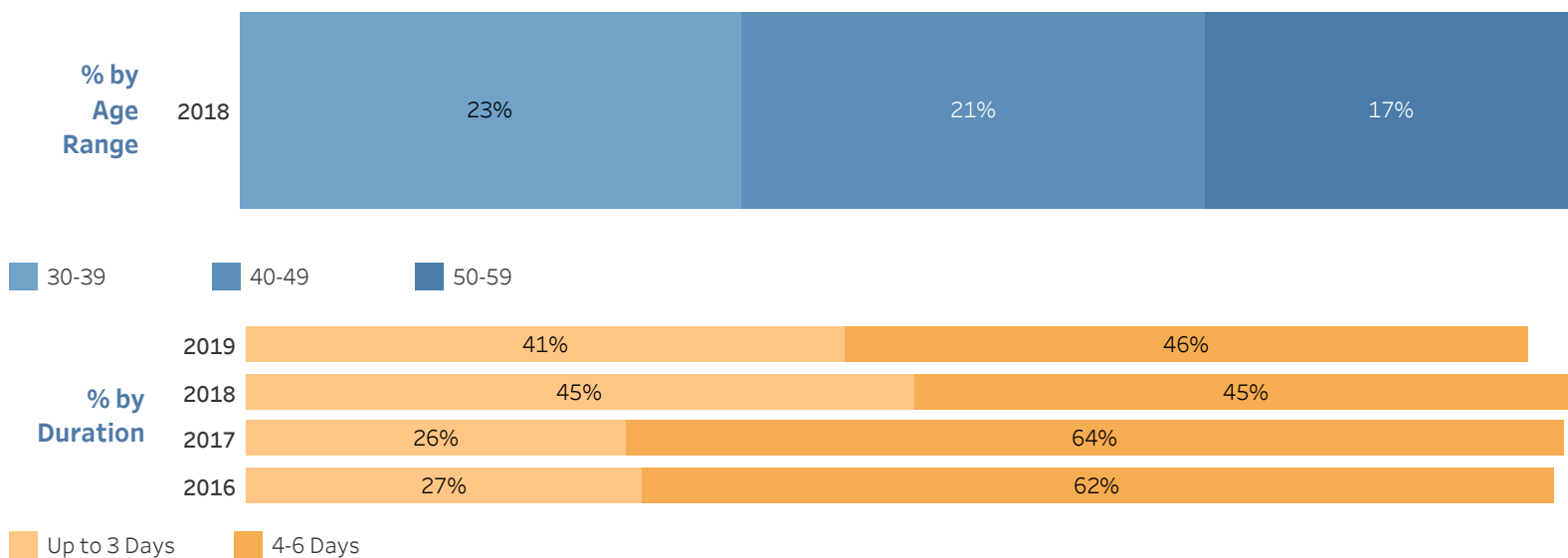
2016	2017	2018	2019
5.9	6.5 (9.4%▲)	10.0 (53.7%▲)	6.8 (-31.6%▼)

## Average Duration, in Days

2016	2017	2018	2019
4.4	4.4	3.7	4.0

## Average Age

2016	2017	2018	2019
42	42	41	41



## Passenger Percentages by Destination/Trade Route

	2016	2017	2018	2019
Rest of Asia	65.1%	72.8%	73.3%	76.8%



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## 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

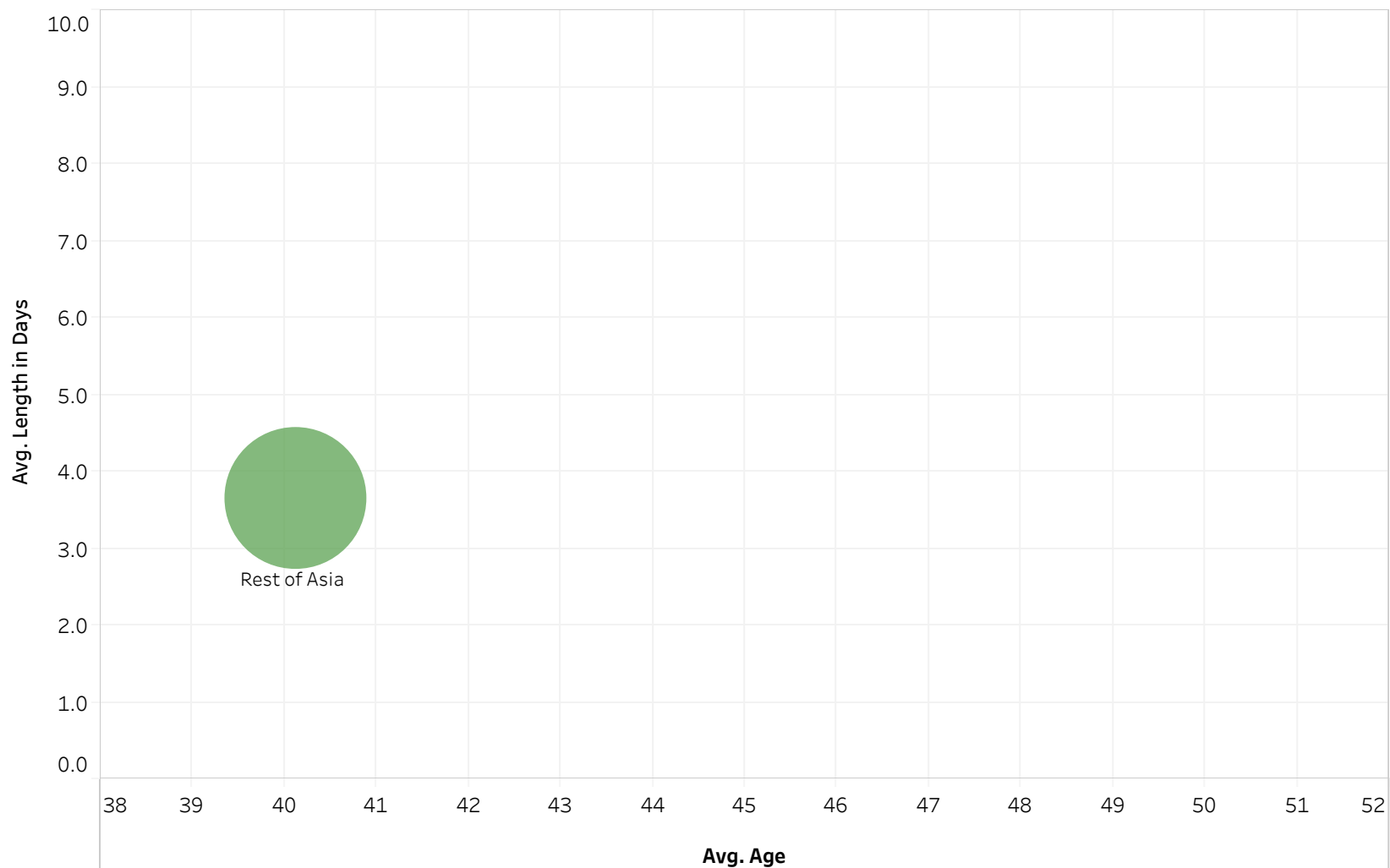
	Passenger in K				Variance			
	2016	2017	2018	2019	2016	2017	2018	2019
Up to 3 Days	2	2	5	3	5%	173%	-39%	
4-6 Days	4	4	5	3	12%	10%	-30%	

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

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

	Passenger in K				Variance	
	2016	2017	2018	2019	2016	2019
Rest of Asia	4	5	7	5	22%	-28%

### Vietnam, Average Age and Cruise Length by Destination/ Trade Route, 2019



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.

## Passenger Volume (K) for Other Source Markets

	2016	2017	2018	2019
Macau Region		2	2	2
Sri Lanka	2	2	2	2
Myanmar				2
Kazakhstan				2
Pakistan	2	2	2	2
Afghanistan	4	2		

Sum of Passenger and YOY broken down by Sail Year vs. Country Name Asia. The context is filtered on Guest\_Region, which keeps Asia. The data is filtered on Antitrust Country and Quarter. The Antitrust Country filter keeps . The Quarter filter keeps None Provided, Q1, Q2, Q3 and Q4.

