



2020 Asia Market Report



With the emergence of COVID-19 in 2020, the cruise industry took immediate and aggressive action to mitigate the risk of the virus. This culminated in a global pause in operations in mid-March.

Since then, the industry developed and implemented extensive public health protocols that allowed cruising to resume in Europe, parts of Asia and the South Pacific. As a result of the extensive protocols that have been adopted by cruise lines since resumption began, the incidence rate of COVID-19 onboard cruise ships is far lower than practically any other setting—a remarkable achievement that continues to inspire cruise confidence.

As we continue to work towards resuming operations around the world, and the demand for cruise remaining high, we expect to see the passenger numbers and the growth trajectory rebound to pre-pandemic numbers in the coming years. People love to cruise, and we know that people will return to the seas, just as they will return to restaurants, bars, movie theatres, airplanes, resorts and beyond.

Regional Overview: Asia (Continued)

Passenger Volume (K)

2018	2019	2020
4,240	3,738 (-11.8% ▼)	497 (-86.7% ▼)

Average Duration, in Days

2018	2019	2020
4.3	4.2	3.9

Average Age

2018	2019	2020
45.4	46.2	46.3

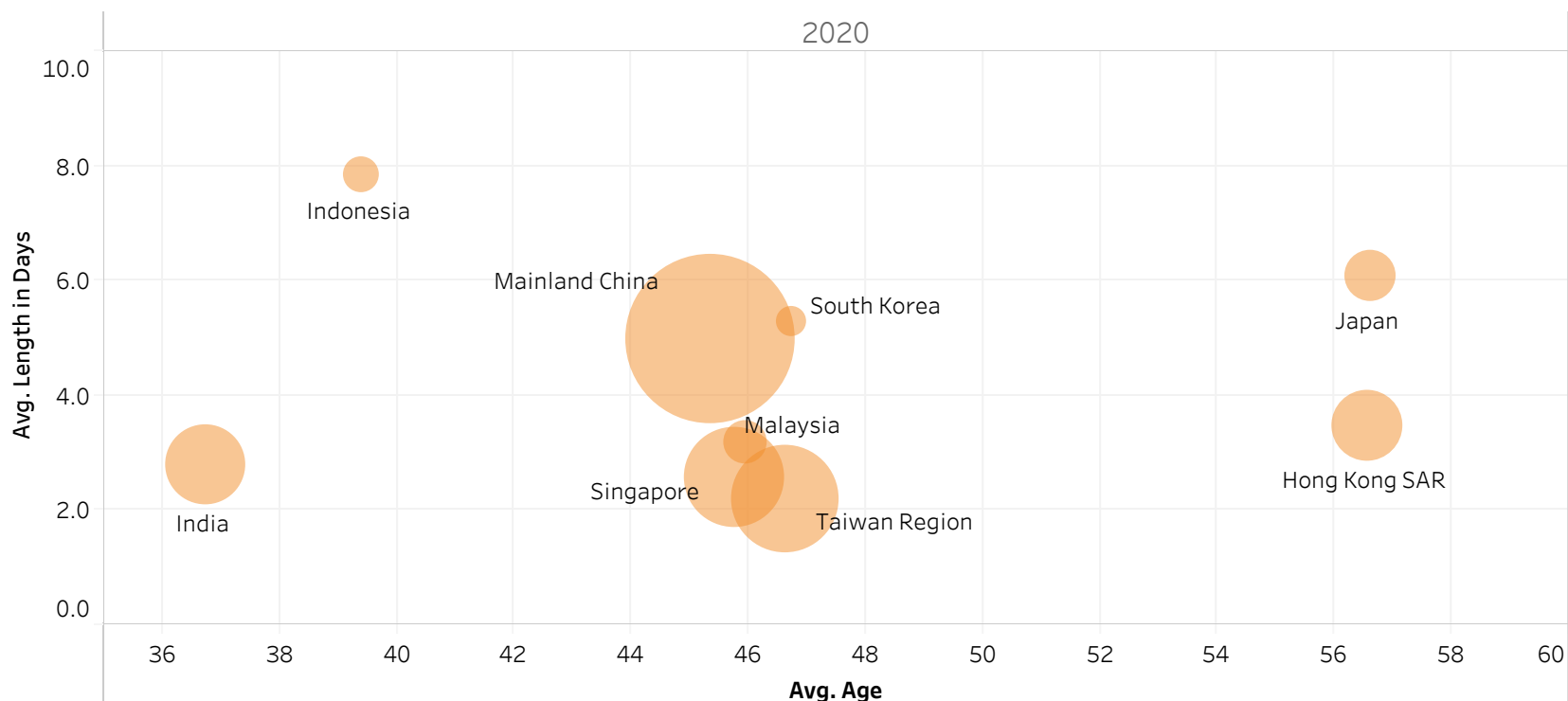
Passenger Volume (K) from Top Source Markets

	2018	2019	2020
Mainland China	2,357	1,919 (-18.6% ▼)	205 (-89.3% ▼)
Taiwan Region	391	389 (-0.4% ▼)	83 (-78.8% ▼)
Singapore	373	325 (-12.7% ▼)	72 (-78.0% ▼)
India	221	313 (41.5% ▲)	46 (-85.4% ▼)
Hong Kong SAR	250	191 (-23.4% ▼)	36 (-81.2% ▼)
Japan	266	296 (11.4% ▲)	19 (-93.7% ▼)
Malaysia	150	121 (-19.6% ▼)	13 (-88.9% ▼)
Indonesia	72	62 (-13.8% ▼)	9 (-85.2% ▼)
South Korea	44	49 (9.6% ▲)	6 (-86.7% ▼)
Vietnam	10	7 (-31.6% ▼)	
Thailand	30	20 (-34.9% ▼)	
Philippines	61	29 (-52.0% ▼)	

Passenger Share from Top Source Markets

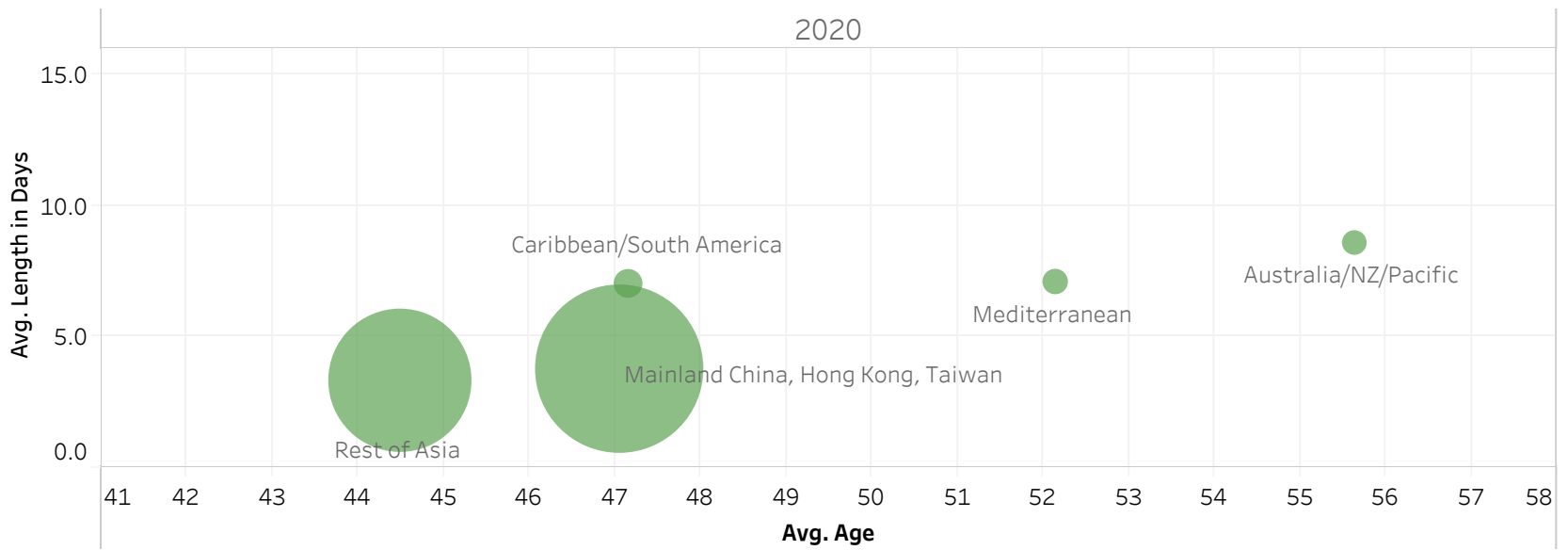
	2018	2019	2020
Mainland China	55.7%	51.4%	41.4%
Taiwan Region	9.2%	10.4%	16.7%
Singapore	8.8%	8.7%	14.5%
Hong Kong SAR	5.9%	5.1%	7.3%
India	5.2%	8.4%	9.2%
Japan	6.3%	7.9%	3.8%
Malaysia	3.5%	3.2%	2.7%
South Korea	1.0%	1.3%	1.3%
Indonesia	1.7%	1.7%	1.9%
Vietnam	0.2%	0.2%	
Thailand	0.7%	0.5%	
Philippines	1.4%	0.8%	

Average Age and Cruise Length from Top Source Markets, 2020

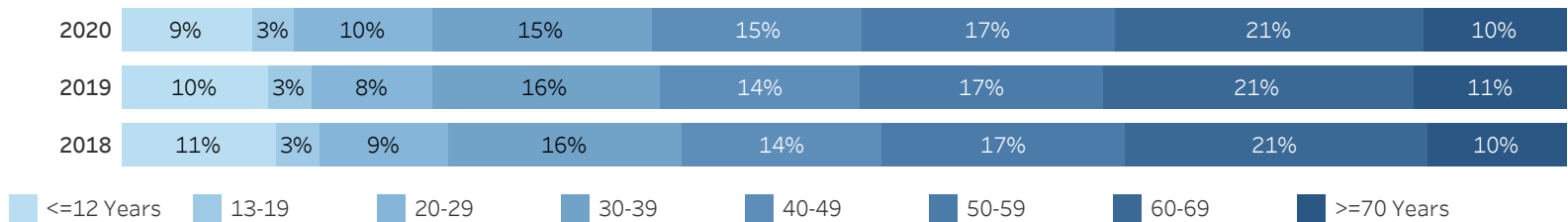


Regional Overview: Asia (Continued)

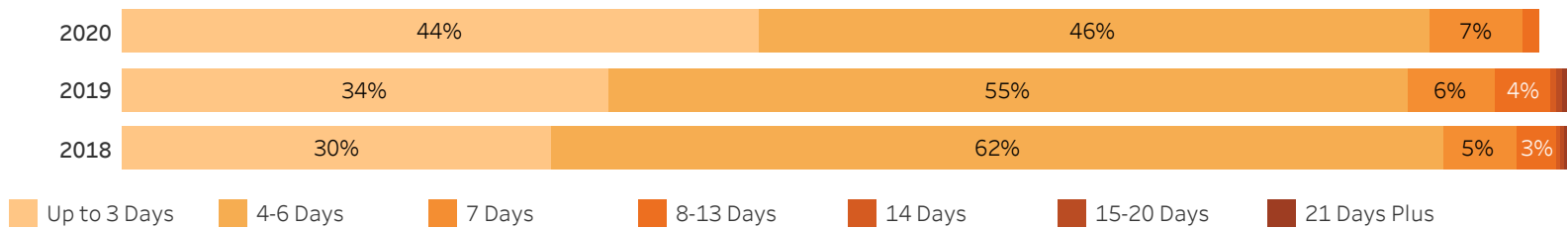
Average Age and Cruise Length by Destination / Trade Route, 2020



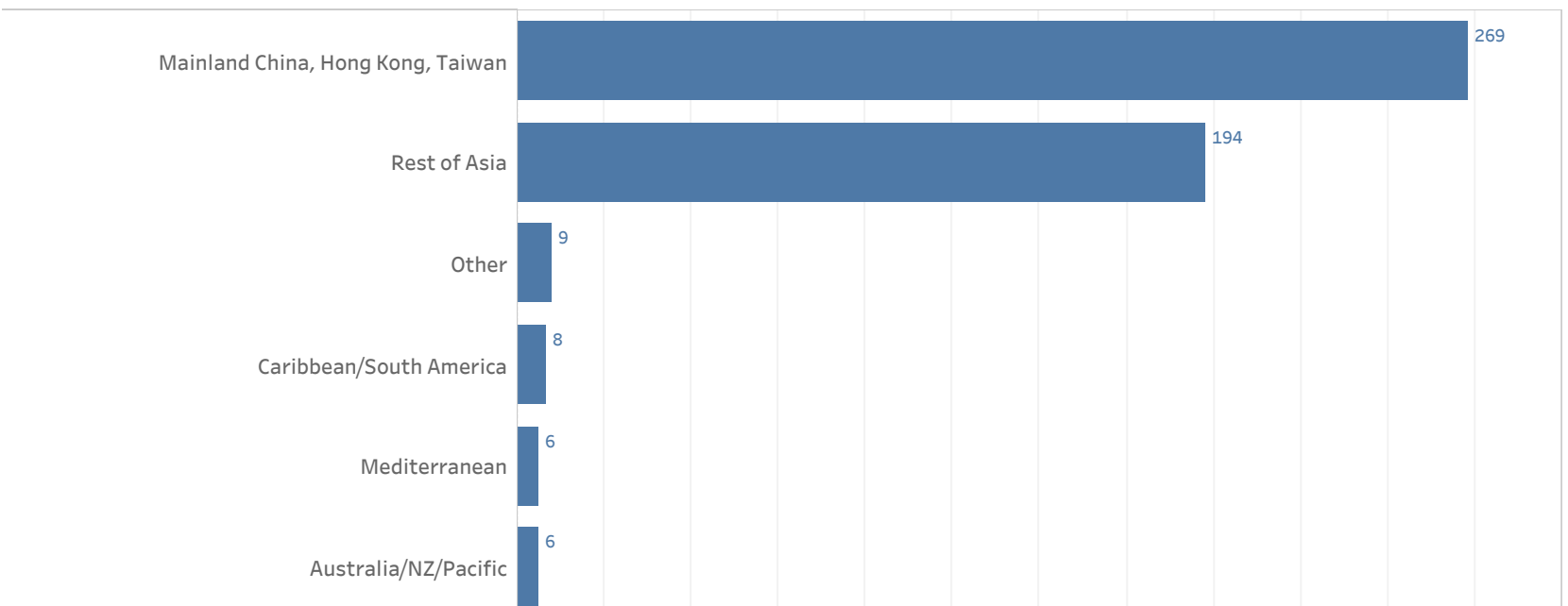
Average Passenger Age Groups



Average Cruise Duration



Volume of Passengers (K) by Destination / Trade Route, 2020
At least 4K Passengers per Destination

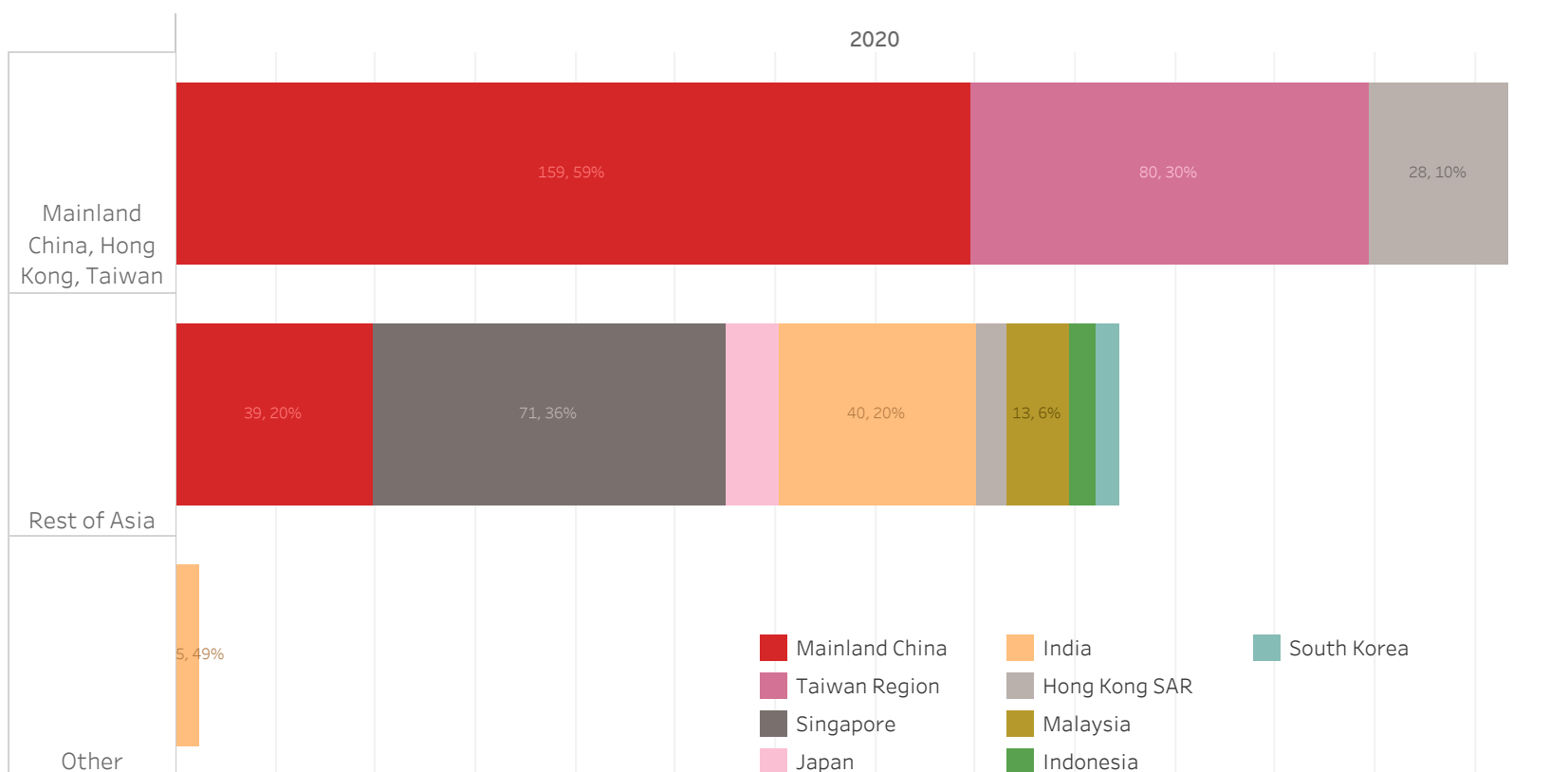


Regional Overview: Asia (Continued)

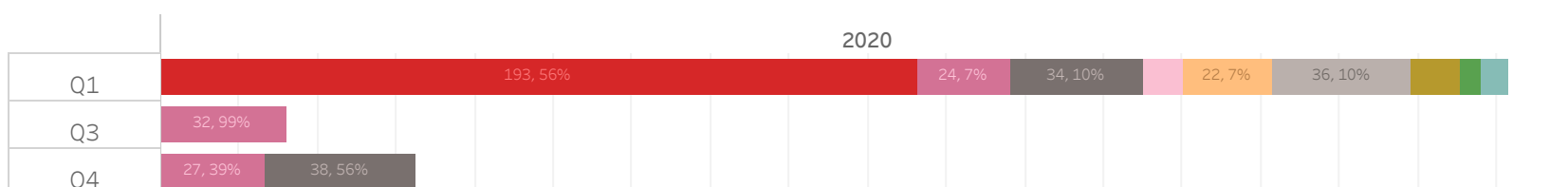
Passenger Volume (K) by Destination/Trade Route

	2018	2019	2020
Mainland China, Hong Kong, Taiwan	2,194	1,904 (-13% ▼)	269 (-86% ▼)
Rest of Asia	1,694	1,571 (-7% ▼)	194 (-88% ▼)
Other	109	18 (-83% ▼)	9 (-48% ▼)
Caribbean/South America	51	48 (-6% ▼)	8 (-84% ▼)
Mediterranean	99	89 (-10% ▼)	6 (-93% ▼)
Australia/NZ/Pacific	14	14 (0% ▲)	6 (-60% ▼)
North America	14	10 (-24% ▼)	
Expedition Destinations	10	11 (5% ▲)	
Baltics/Northern Europe	24	22 (-9% ▼)	
Alaska	23	25 (11% ▲)	
Africa/Mid-East/World Cruise/Transatlantic	4	21 (372% ▲)	

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



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



Source Market: China

Passenger Volume (K)

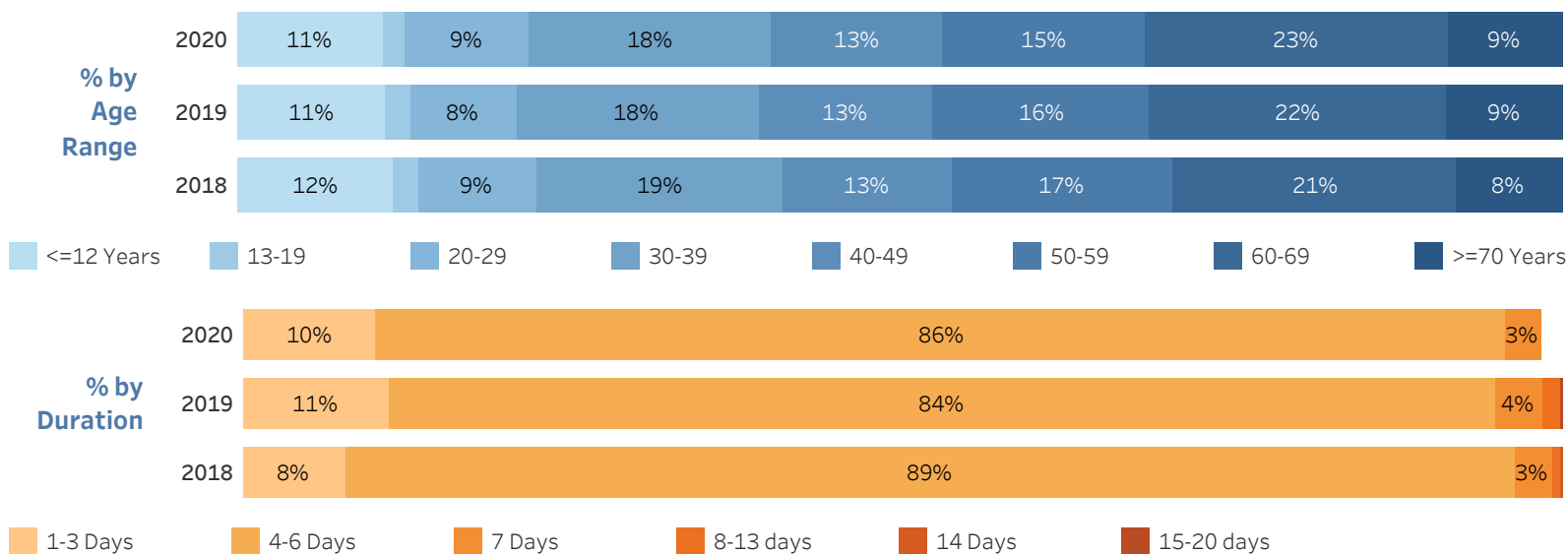
2018	2019	2020
2,357	1,919 (-18.6% ▼)	205 (-89.3% ▼)

Average Duration, in Days

2018	2019	2020
4.9	4.8	5.0

Average Age

2018	2019	2020
45	46	45



Passenger Percentages by Trade Route / Destination

	2018	2019	2020
Asia/China	95.7%	97.6%	97.0%
Central & Western Med.	0.6%	0.6%	
Caribbean/Bahamas/Bermuda	0.5%	0.5%	
Exploration Dest	0.2%	0.3%	
No Trade Identified		0.2%	
Eastern Med.	0.1%	0.2%	
Australasia	0.1%	0.1%	
Alaska	0.1%	0.1%	
Other	2.4%		
NA West Coast/Mexico/California/Pacific Coast	0.1%		



Passenger Volume & YOY Change by Age Group

	Passenger in K			Variance	
	2018	2019	2020	2019	2020
<=12 Years	254	205	21	-19%	-90%
13-19	44	35	3	-20%	-91%
20-29	193	148	18	-23%	-88%
30-39	403	335	35	-17%	-90%
40-49	277	241	25	-13%	-90%
50-59	358	302	30	-16%	-90%
60-69	466	412	44	-12%	-89%
>=70 Years	174	162	17	-7%	-90%

Passenger Volume & YOY Change by Duration

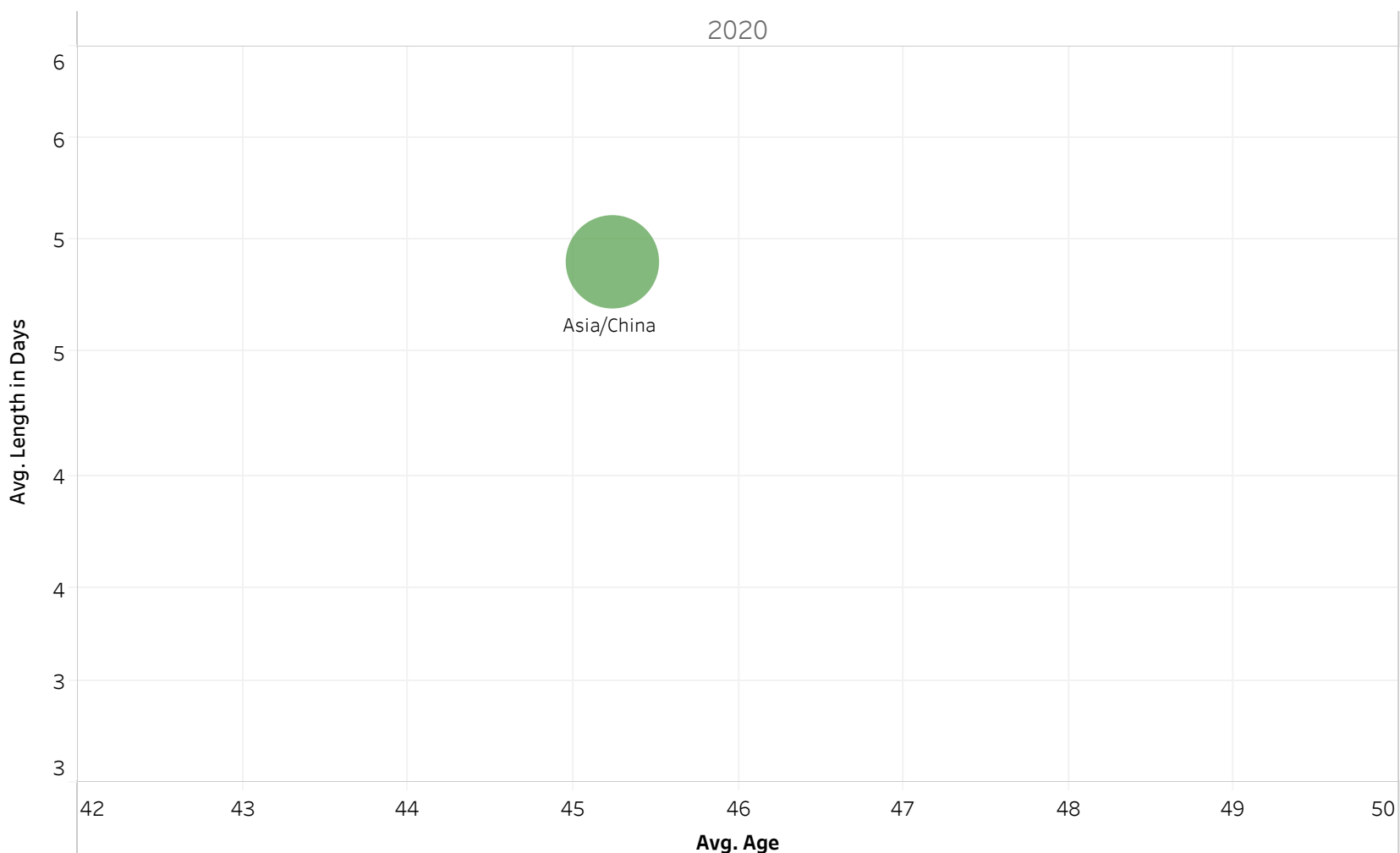
	Passenger in K			Variance	
	2018	2019	2020	2019	2020
1-3 Days	182	211	20	16%	-90%
4-6 days	2,089	1,605	175	-23%	-89%
7 Days	65	68	6	5%	-92%
8-13 Days	16	25		51%	
14 days	4	3		-26%	
15-20 days		3			

Source Market: **China** (Continued)

Passenger Volume & YOY Change by Trade Route / Destination

	Passenger in K			Variance	
	2018	2019	2020	2019	2020
Asia/China	2,256	1,874	199	-17%	-89%
Central & Western Med.	14	11		-25%	
Caribbean/Bahamas/Bermuda	12	11		-15%	
Exploration Dest	5	5		7%	
No Trade Identified		3			
Eastern Med.	2	3		52%	
Australasia	2	2		24%	
Alaska	3	2		-7%	
Other	56				
NA West Coast/Mexico/California/Pacific Coast	2				

China, Average Age and Cruise Length by Trade Route, 2020



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: Taiwan

Passenger Volume (K)

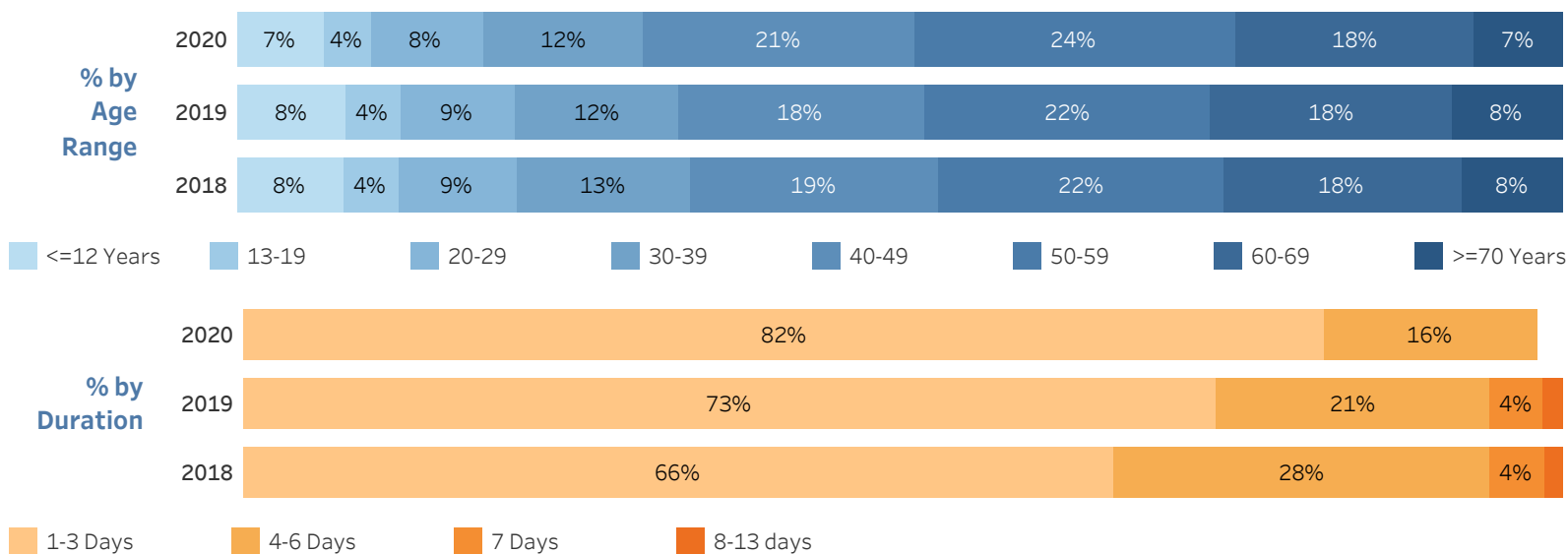
	2018	2019	2020
Passenger Volume (K)	391	389 (-0.4% ▼)	83 (-78.8% ▼)

Average Duration, in Days

	2018	2019	2020
Average Duration (Days)	2.9	2.6	2.2

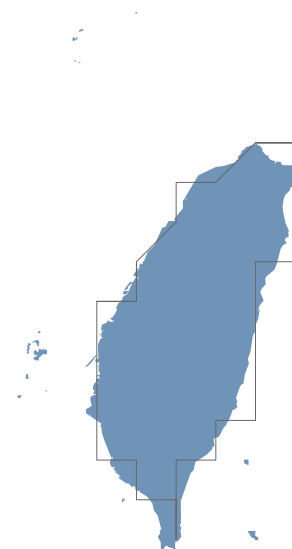
Average Age

	2018	2019	2020
Average Age	46	46	47



Passenger Percentages by Trade Route / Destination

	2018	2019	2020
Asia/China	95.8%	96.3%	97.7%
Central & Western Med.	1.2%	1.3%	
Caribbean/Bahamas/Bermuda	0.8%	0.7%	
Alaska		0.6%	



Passenger Volume & YOY Change by Age Group

	Passenger in K			Variance	
	2018	2019	2020	2019	2020
<=12 Years	31	32	5	1%	-83%
13-19	16	16	3	-1%	-81%
20-29	35	34	7	-3%	-79%
30-39	51	48	10	-5%	-79%
40-49	73	71	17	-2%	-76%
50-59	84	83	20	0%	-76%
60-69	69	71	15	2%	-79%
>=70 Years	30	32	6	8%	-83%

Passenger Volume & YOY Change by Duration

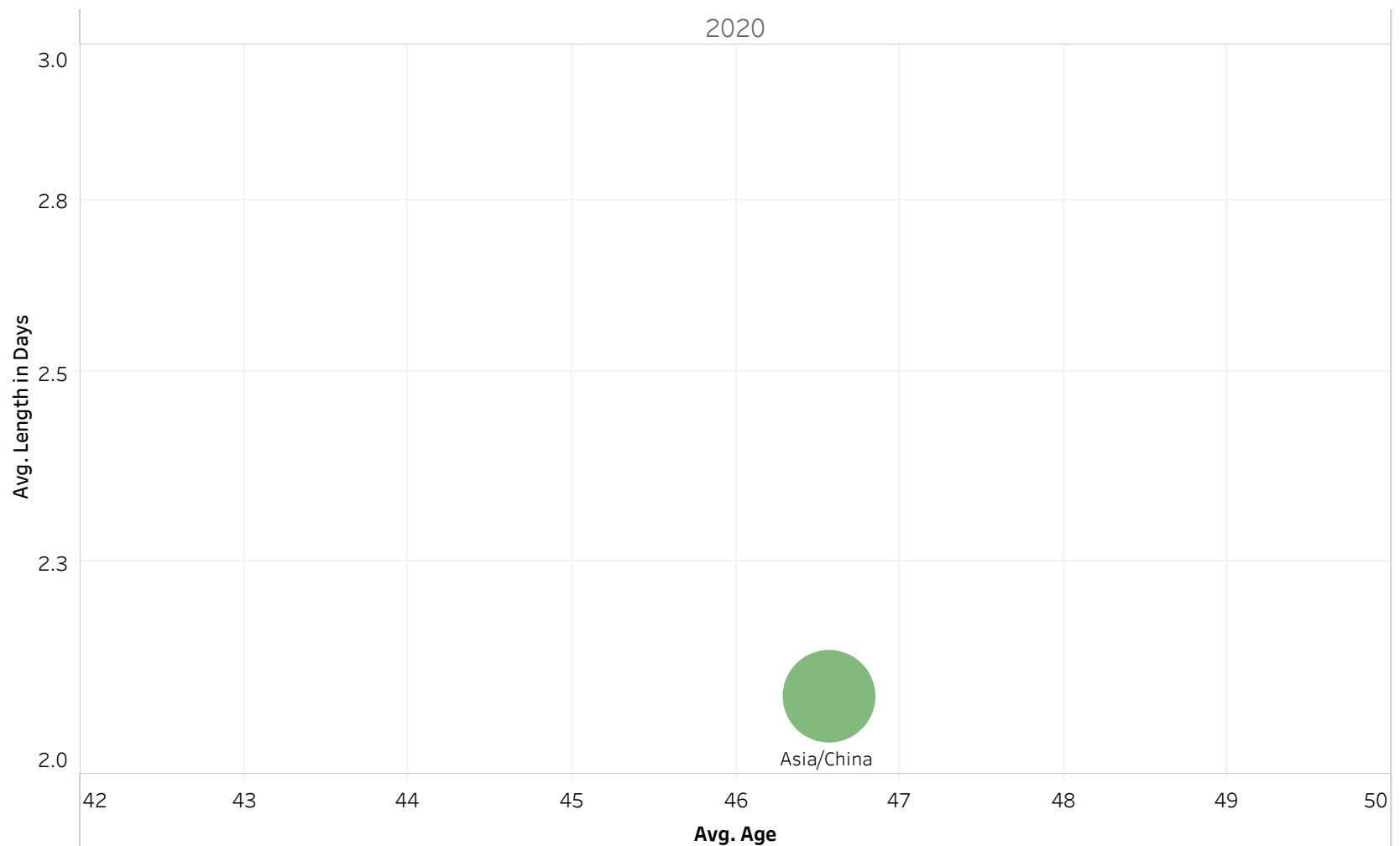
	Passenger in K			Variance	
	2018	2019	2020	2019	2020
1-3 Days	257	286	67	11%	-76%
4-6 days	111	81	13	-27%	-84%
7 Days	17	16		-6%	
8-13 Days	5	6		8%	

Source Market: **Taiwan** (Continued)

Passenger Volume & YOY Change by Trade Route / Destination

	Passenger in K			Variance	
	2018	2019	2020	2019	2020
Asia/China	375	375	81	0%	-78%
Central & Western Med.	5	5		1%	
Caribbean/Bahamas/Bermuda	3	3		-15%	
Alaska		2			

Taiwan, Average Age and Cruise Length by Trade Route, 2020



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Source Market: Singapore

Passenger Volume (K)

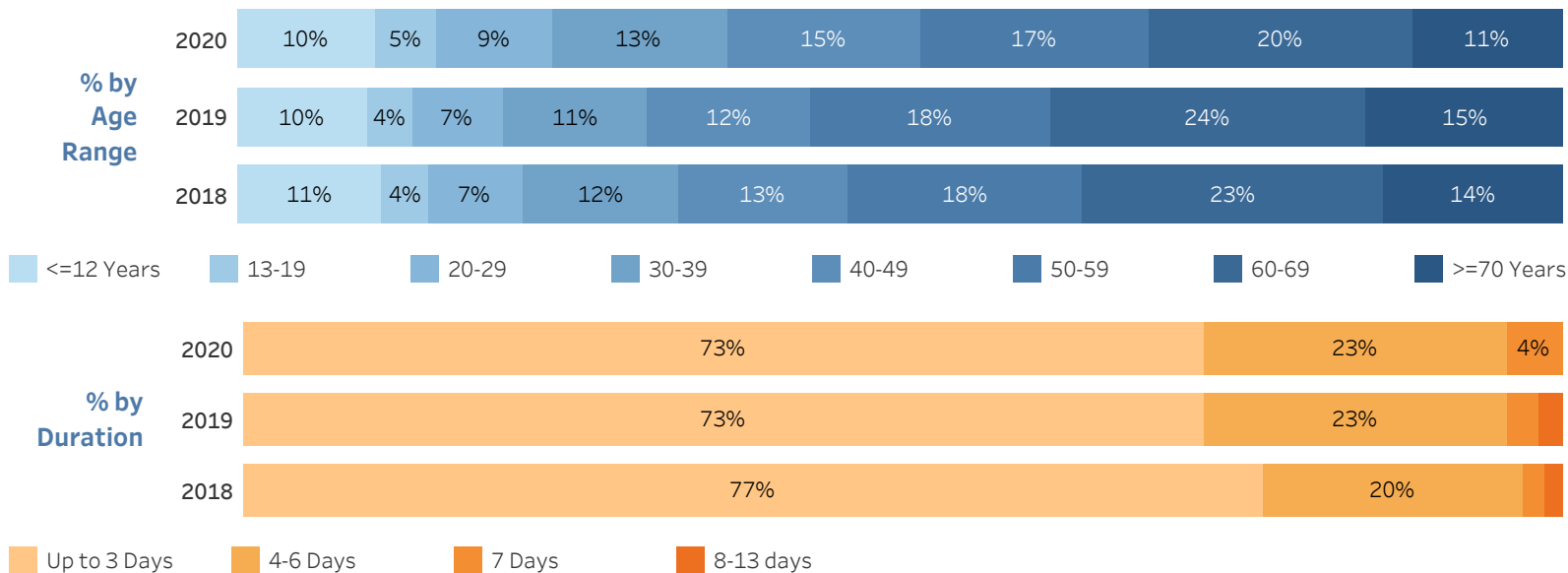
2018	2019	2020
373.0	325.4 (-12.7% ▼)	71.7 (-78.0% ▼)

Average Duration, in Days

2018	2019	2020
2.4	2.6	2.6

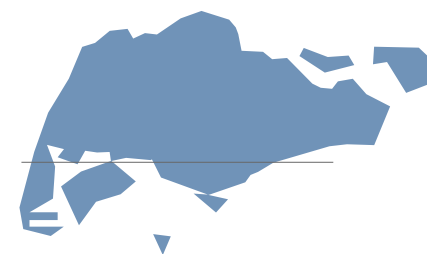
Average Age

2018	2019	2020
48	49	46



Passenger Percentages by Destination/Trade Route

	2018	2019	2020
Rest of Asia	93.9%	96.2%	98.5%
Mainland China, Hong Kong, Taiwan	0.5%	0.8%	
Alaska	0.7%	0.8%	
Mediterranean	0.9%	0.7%	
Other	2.8%		



Passenger Volume & YOY Change by Age Group

	Passenger in K			Variance	
	2018	2019	2020	2019	2020
<=12 Years	40	32	7	-21%	-76%
13-19	14	11	3	-17%	-71%
20-29	26	22	6	-17%	-71%
30-39	44	35	9	-20%	-73%
40-49	47	40	10	-16%	-74%
50-59	65	58	12	-11%	-79%
60-69	84	76	14	-9%	-81%
>=70 Years	50	48	8	-4%	-83%

Passenger Volume & YOY Change by Duration

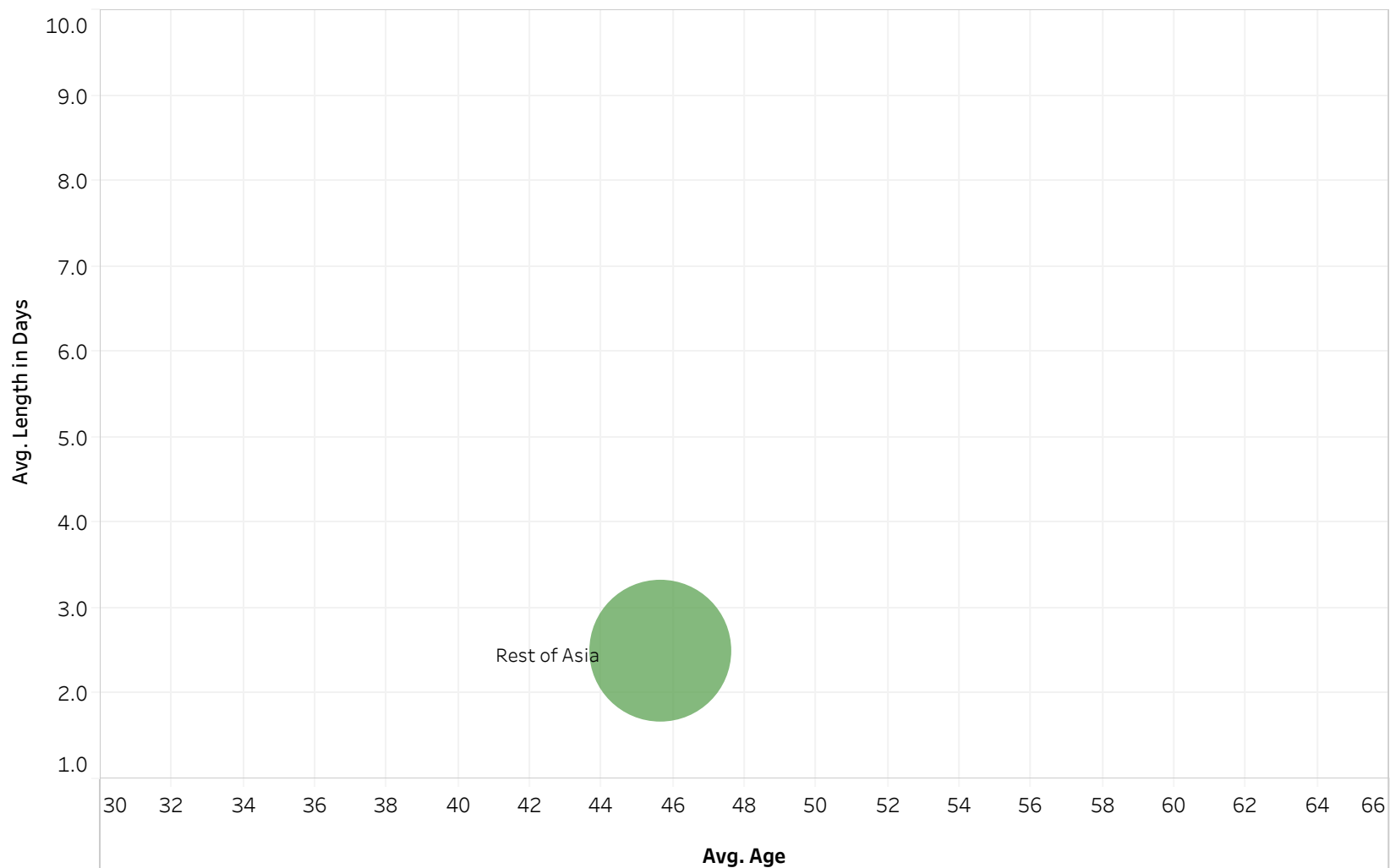
	Passenger in K			Variance	
	2018	2019	2020	2019	2020
Up to 3 Days	287	236	52	-18%	-78%
4-6 Days	73	74	16	2%	-78%
7 Days	6	8	3	20%	-61%
8-13 Days	5	6		23%	

Source Market: **Singapore** (Continued)

Passenger Volume & YOY Change by Destination/Trade Route

	Passenger in K			Variance	
	2018	2019	2020	2019	2020
Rest of Asia	350	313	71	-11%	-77%
Mediterranean	3	2		-29%	
Mainland China, Hong Kong, Taiwan	2	2		21%	
Alaska	2	3		3%	
Other	10				

Singapore, Average Age and Cruise Length by Destination/ Trade Route, 2020



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Source Market: India

Passenger Volume (K)

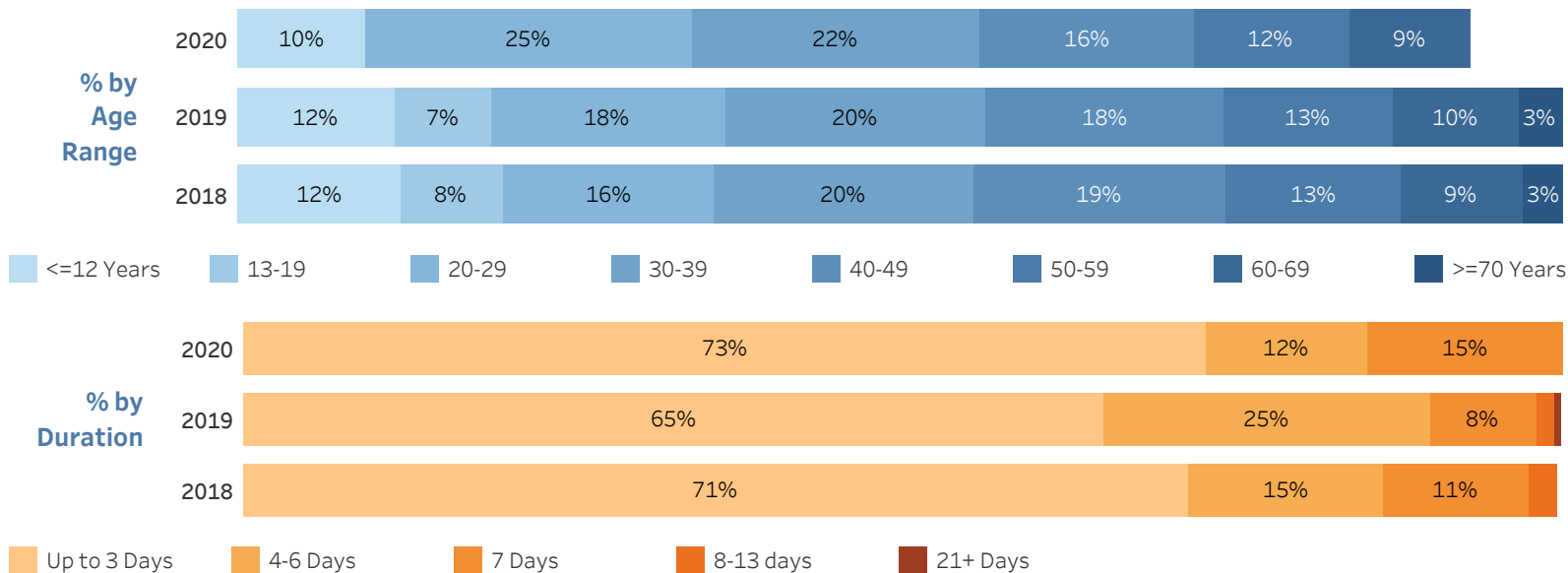
2018	2019	2020
220.9	312.6 (41.5% ▲)	45.7 (-85.4% ▼)

Average Duration, in Days

2018	2019	2020
2.9	3.0	3.9

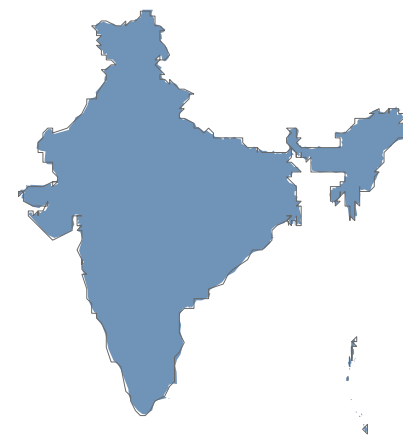
Average Age

2018	2019	2020
37	37	37



Passenger Percentages by Destination/Trade Route

	2018	2019	2020
Rest of Asia	76.2%	80.1%	86.4%
Other	2.2%	2.0%	10.1%
Mediterranean	6.2%	3.0%	
Caribbean/South America	5.6%	3.6%	
Mainland China, Hong Kong, Taiwan	3.8%	2.1%	
Baltics/Northern Europe	2.2%	1.6%	
Alaska	2.3%	1.6%	
North America	1.1%	0.5%	
Africa/Mid-East/World Cruise/Transatlantic		5.2%	



Passenger Volume & YOY Change by Age Group

	Passenger in K			Variance	
	2018	2019	2020	2019	2020
<=12 Years	27	24	2	-10%	-91%
13-19	17	15		-11%	
20-29	35	36	6	3%	-84%
30-39	43	40	5	-6%	-87%
40-49	41	37	4	-11%	-90%
50-59	29	26	3	-9%	-90%
60-69	20	20	2	-3%	-89%
>=70 Years	7	7		1%	

Passenger Volume & YOY Change by Duration

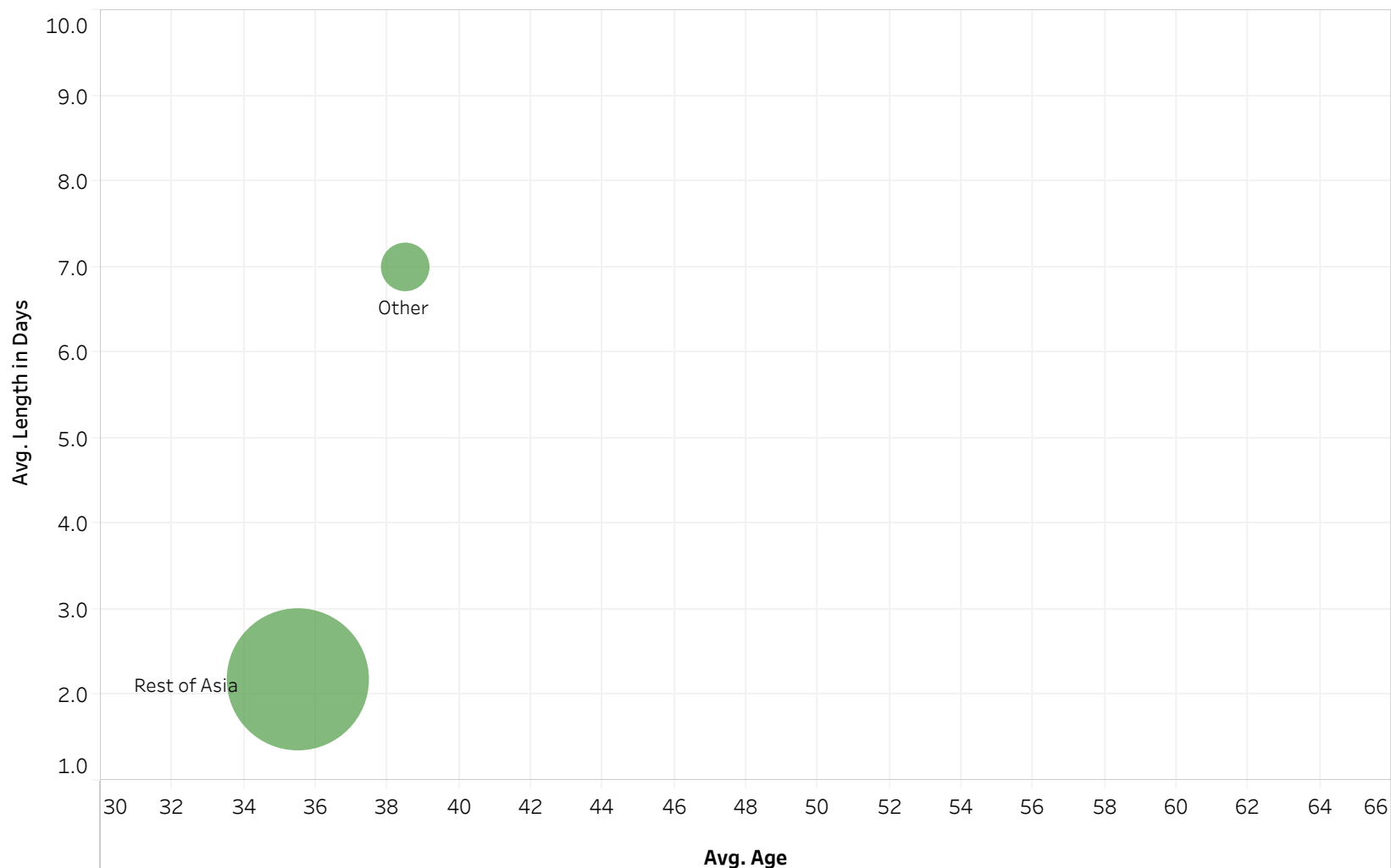
	Passenger in K			Variance	
	2018	2019	2020	2019	2020
Up to 3 Days	157	202	33	29%	-84%
4-6 Days	32	77	6	138%	-93%
7 Days	24	25	7	3%	-73%
8-13 Days	5	4		-10%	
21+ Days		2			

Source Market: **India** (Continued)

Passenger Volume & YOY Change by Destination/Trade Route

	Passenger in K			Variance	
	2018	2019	2020	2019	2020
Rest of Asia	168	250	40	49%	-84%
Other	5	6	5	28%	-26%
Africa/Mid-East/World Cruise/Transatlantic		16			
Caribbean/South America	12	11		-9%	
Mediterranean	14	9		-32%	
Mainland China, Hong Kong, Taiwan	8	7		-19%	
Alaska	5	5		2%	
Baltics/Northern Europe	5	5		1%	
North America	2	2		-30%	

India, Average Age and Cruise Length by Destination/ Trade Route, 2020



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Source Market: Hong Kong SAR

Passenger Volume (K)

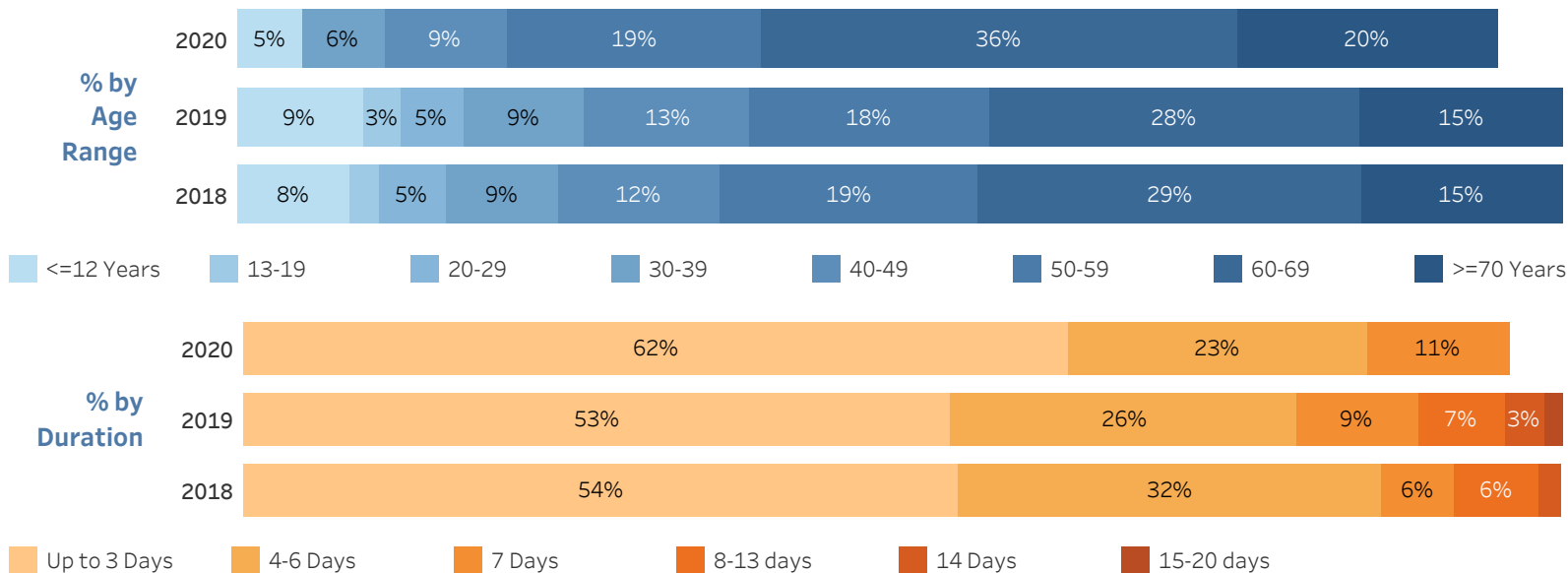
2018	2019	2020
249.6	191.2 (-23.4% ▼)	35.9 (-81.2% ▼)

Average Duration, in Days

2018	2019	2020
3.7	3.9	3.5

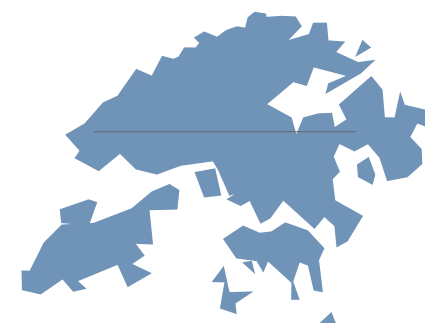
Average Age

2018	2019	2020
52	51	57



Passenger Percentages by Destination/Trade Route

	2018	2019	2020
Mainland China, Hong Kong, Taiwan	72.9%	71.1%	77.2%
Rest of Asia	10.9%	13.7%	17.0%
Mediterranean	4.3%	5.1%	
Other	6.4%	2.7%	
Baltics/Northern Europe	1.7%	2.1%	
Alaska	0.8%	1.4%	
Australia/NZ/Pacific	1.3%	1.3%	
Caribbean/South America	0.9%	1.3%	



Passenger Volume & YOY Change by Age Group

	Passenger in K			Variance	
	2018	2019	2020	2019	2020
<=12 Years	21	18	2	-15%	-90%
13-19	6	5		-6%	
20-29	12	9		-28%	
30-39	21	17	2	-20%	-87%
40-49	30	23	3	-22%	-86%
50-59	48	34	7	-30%	-80%
60-69	71	52	13	-27%	-75%
>=70 Years	37	28	7	-23%	-76%

Passenger Volume & YOY Change by Duration

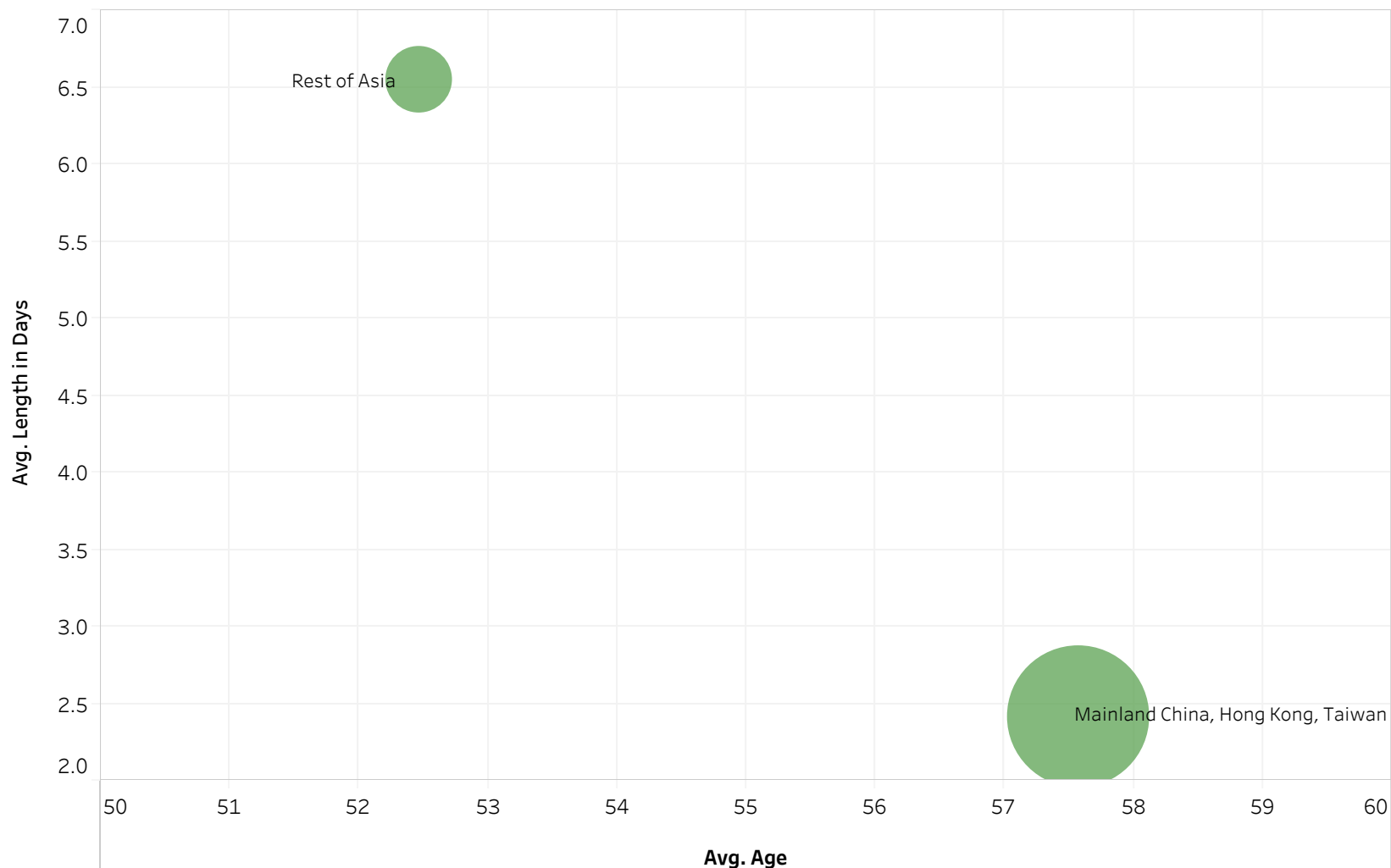
	Passenger in K			Variance	
	2018	2019	2020	2019	2020
Up to 3 Days	135	99	22	-26%	-78%
4-6 days	80	49	8	-38%	-83%
7 Days	14	17	4	24%	-77%
8-13 Days	16	12		-23%	
14 Days	4	5		33%	
15-20 Days		3			

Source Market: **Hong Kong SAR** (Continued)

Passenger Volume & YOY Change by Destination/Trade Route

	Passenger in K			Variance	
	2018	2019	2020	2019	2020
Mainland China, Hong Kong, Taiwan	182	136	28	-25%	-80%
Rest of Asia	27	26	6	-4%	-77%
Mediterranean	11	10		-9%	
Other	16	5		-67%	
Baltics/Northern Europe	4	4		-9%	
Alaska	2	3		38%	
Australia/NZ/Pacific	3	2		-23%	
Caribbean/South America	2	2		8%	

Hong Kong SAR, Average Age and Cruise Length by Destination/ Trade Route, 2020



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Source Market: Japan

Passenger Volume (K)

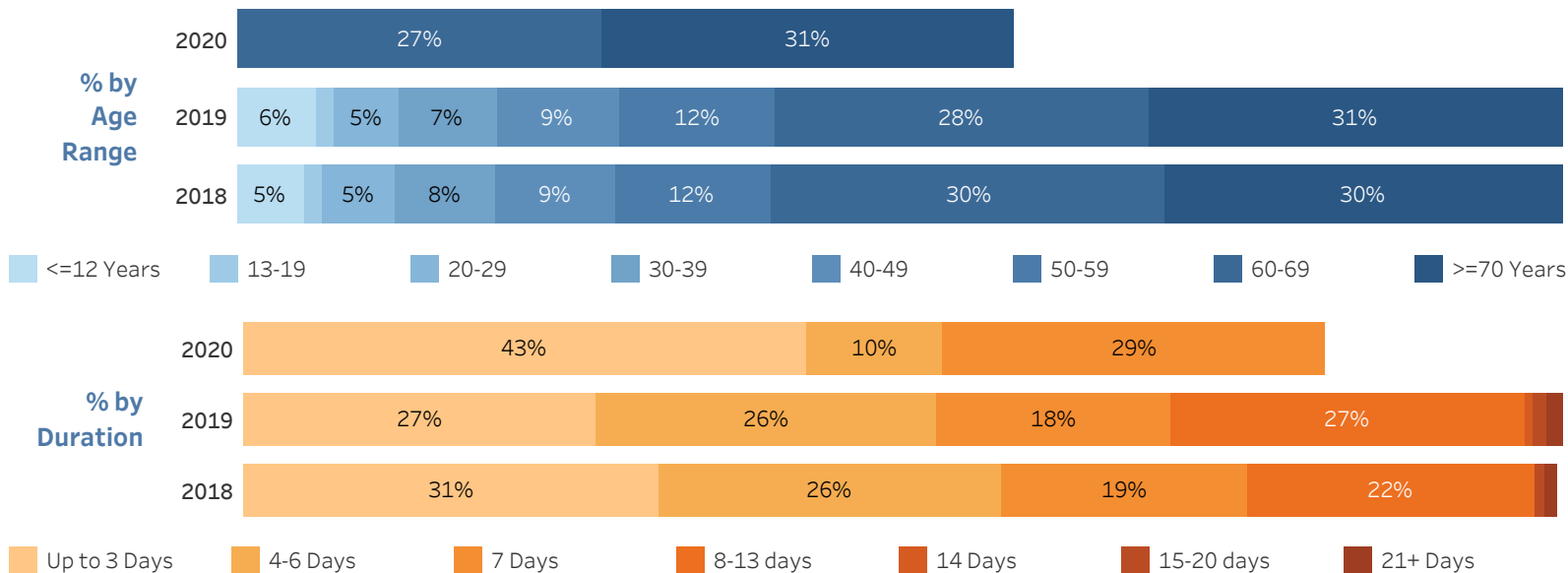
2018	2019	2020
266.2	296.5 (11.4% ▲)	18.7 (-93.7% ▼)

Average Duration, in Days

2018	2019	2020
6.9	7.5	8.1

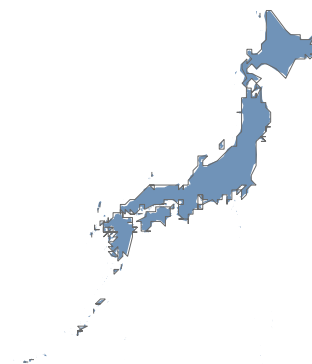
Average Age

2018	2019	2020
57	57	57



Passenger Percentages by Destination/Trade Route

	2018	2019	2020
Rest of Asia	75.6%	79.1%	56.0%
Mediterranean	11.2%	9.9%	16.4%
Caribbean/South America	3.8%	3.5%	12.8%
Other	2.3%	0.6%	-
Mainland China, Hong Kong, Taiwan	1.2%	1.9%	-
Australia/NZ/Pacific	1.2%	1.2%	-
Baltics/Northern Europe	1.4%	0.9%	-
Alaska	0.7%	0.8%	-
Hawaii	0.7%	0.6%	-
North America	0.6%	0.6%	-
Exploration Destinations	0.6%	0.6%	-
Africa/Mid-East/World Cruise/Transatlantic	0.7%	0.5%	-



Passenger Volume & YOY Change by Age Group

	Passenger in K			Variance	
	2018	2019	2020	2019	2020
<=12 Years	8	11	-	38%	-
13-19	2	2	-	14%	-
20-29	8	9	-	6%	-
30-39	12	13	-	15%	-
40-49	14	16	-	19%	-
50-59	18	21	-	19%	-
60-69	45	50	3	11%	-94%
>=70 Years	45	56	3	22%	-94%

Passenger Volume & YOY Change by Duration

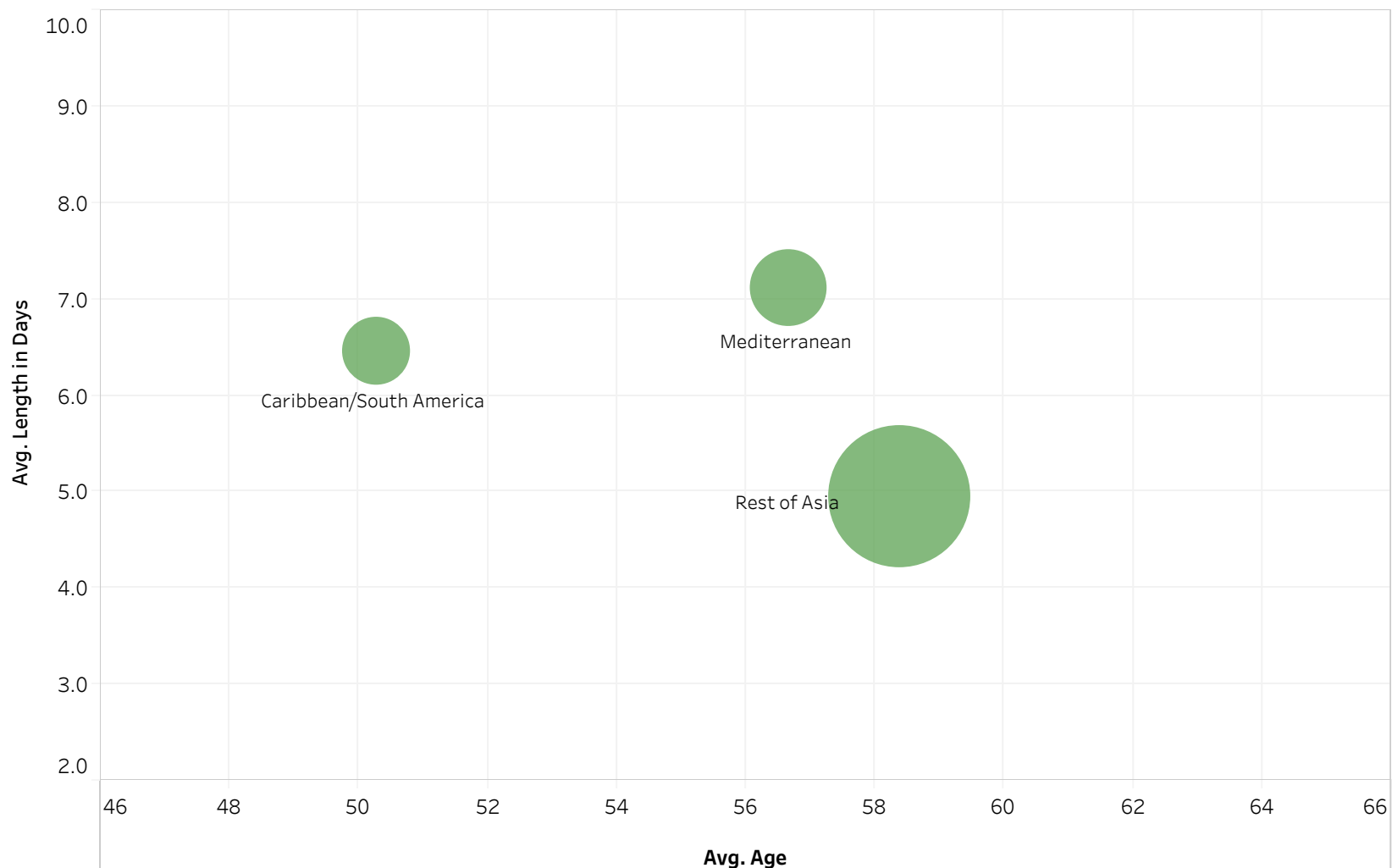
	Passenger in K			Variance	
	2018	2019	2020	2019	2020
Up to 3 Days	83	79	8	-5%	-90%
4-6 days	69	76	2	11%	-97%
7 days	50	53	5	6%	-90%
8-13 Days	58	80	-	37%	-
14 Days	-	2	-	-	-
15-20 Days	2	3	-	46%	-
21+ Days	2	4	-	58%	-

Source Market: **Japan** (Continued)

Passenger Volume & YOY Change by Destination/Trade Route

	Passenger in K			Variance	
	2018	2019	2020	2019	2020
Rest of Asia	201	234	10	16%	-96%
Mediterranean	30	29	3	-1%	-90%
Caribbean/South America	10	10	2	2%	-77%
Mainland China, Hong Kong, Taiwan	3	6		85%	
Australia/NZ/Pacific	3	3		4%	
Baltics/Northern Europe	4	3		-23%	
Alaska	2	2		12%	
Other	6	2		-72%	
Hawaii	2	2		-5%	
North America	2	2		2%	
Exploration Destinations	2	2		8%	
Africa/Mid-East/World Cruise/Transatlantic	2	2		-21%	

Japan, Average Age and Cruise Length by Destination/ Trade Route, 2020



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

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Source Market: Malaysia

Passenger Volume (K)

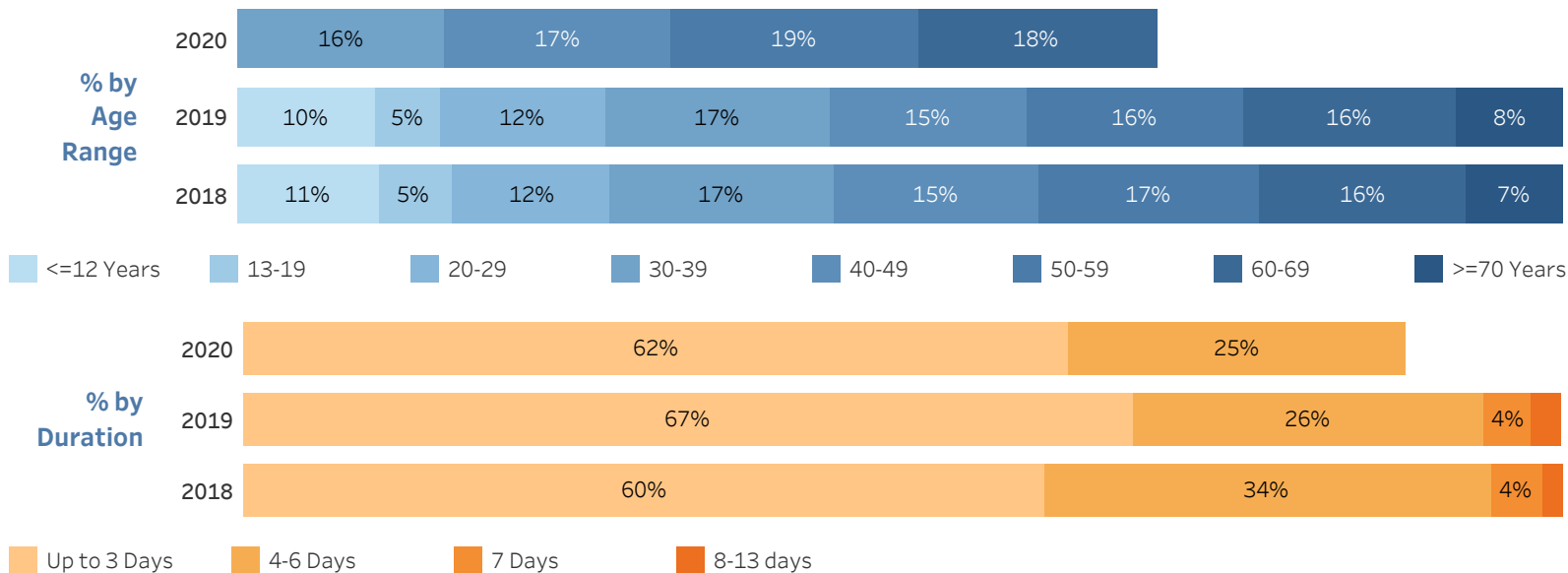
2018	2019	2020
150.2	120.7 (-19.6% ▼)	13.4 (-88.9% ▼)

Average Duration, in Days

2018	2019	2020
3.1	2.9	3.2

Average Age

2018	2019	2020
42	43	46



Passenger Percentages by Destination/Trade Route

	2018	2019	2020
Rest of Asia	89.2%	91.7%	93.6%
Other	3.3%		
Mainland China, Hong Kong, Taiwan	2.7%	2.9%	
Mediterranean	2.5%	2.1%	



Passenger Volume & YOY Change by Age Group

	Passenger in K			Variance	
	2018	2019	2020	2019	2020
<=12 Years	16	12		-22%	
13-19	8	6		-26%	
20-29	18	15		-17%	
30-39	25	20	2	-20%	-90%
40-49	23	18	2	-23%	-87%
50-59	25	20	3	-21%	-87%
60-69	23	19	2	-17%	-88%
>=70 Years	11	10		-11%	

Passenger Volume & YOY Change by Duration

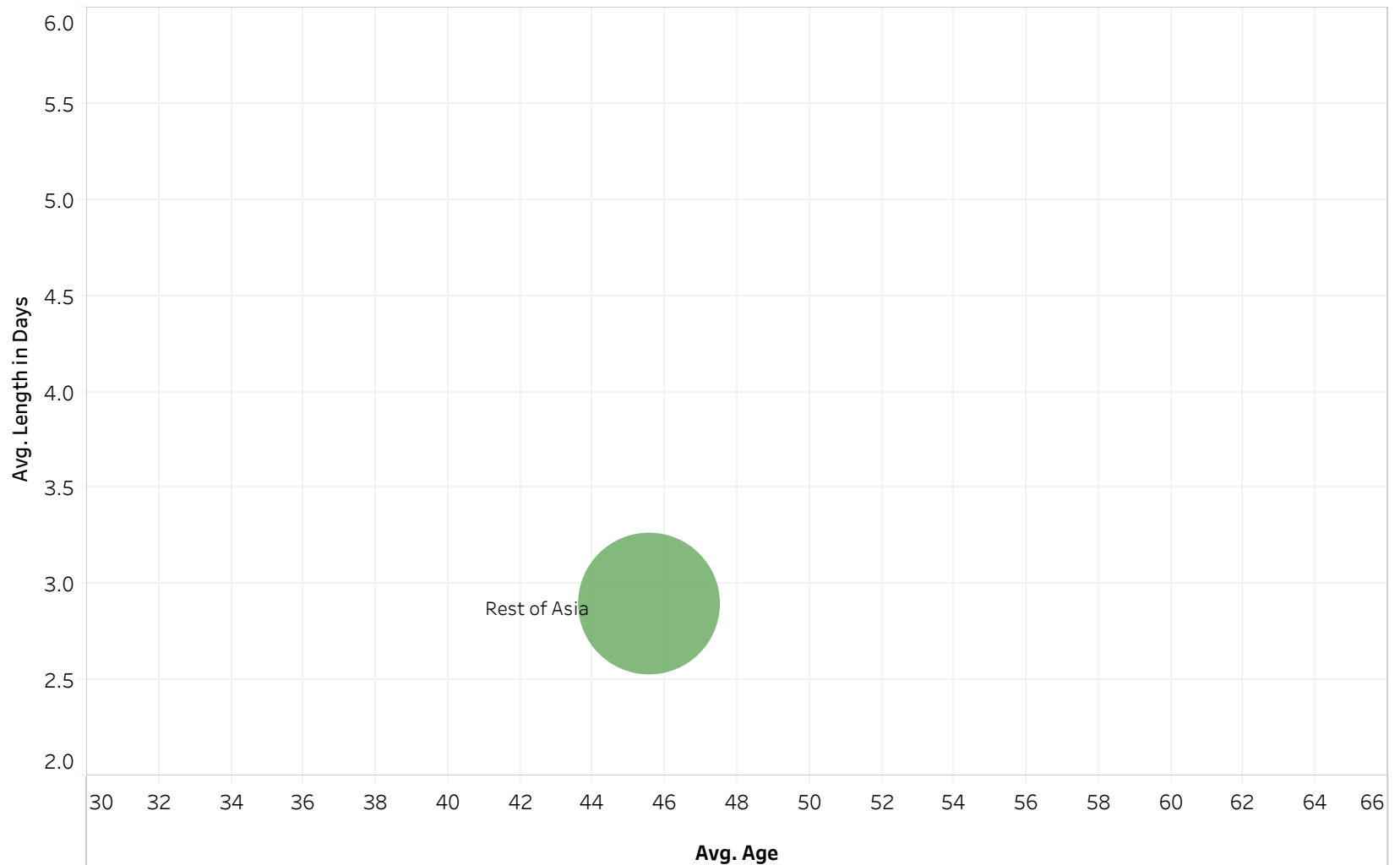
	Passenger in K			Variance	
	2018	2019	2020	2019	2020
Up to 3 Days	91	81	8	-11%	-90%
4-6 days	50	32	3	-37%	-89%
7 Days	6	4		-23%	
8-13 Days	2	3		8%	

Source Market: **Malaysia** (Continued)

Passenger Volume & YOY Change by Destination/Trade Route

	Passenger in K			Variance	
	2018	2019	2020	2019	2020
Rest of Asia	134	111	13	-17%	-89%
Mainland China, Hong Kong, Taiwan	4	4		-13%	
Mediterranean	4	3		-31%	
Other	5				

Malaysia, Average Age and Cruise Length by Destination/ Trade Route, 2020



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Source Market: Indonesia

Passenger Volume (K)

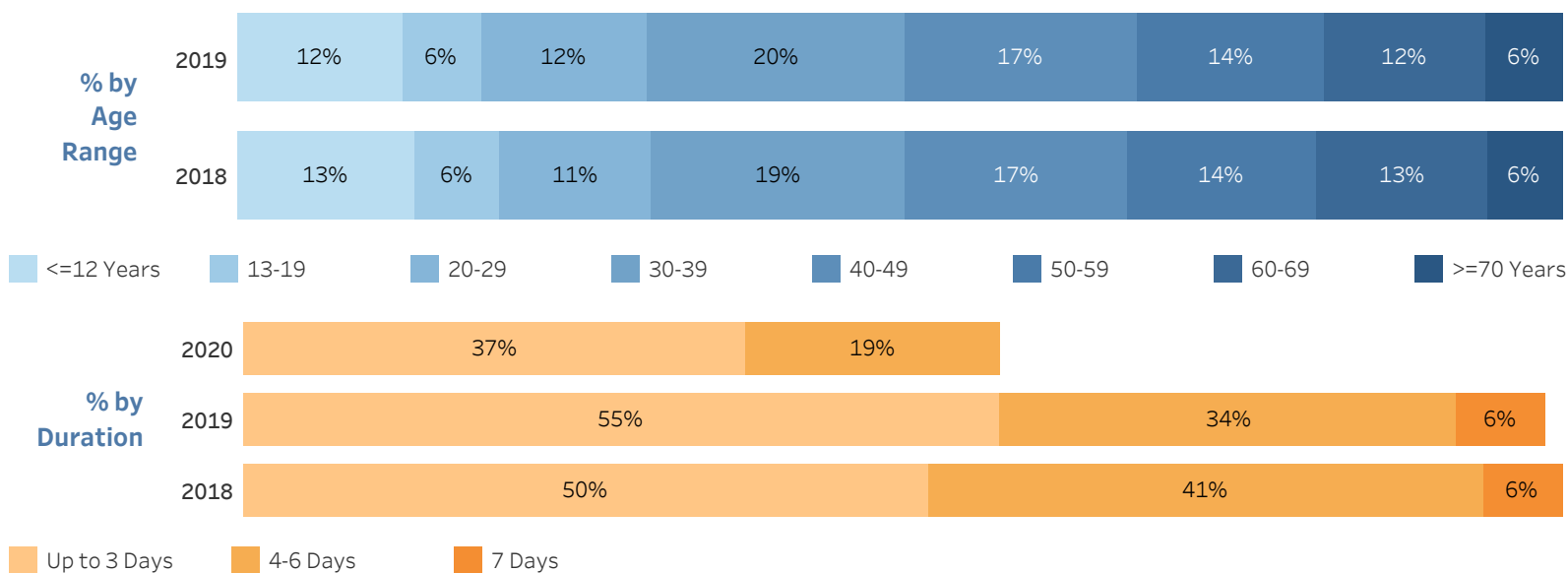
2018	2019	2020
72.1	62.1 (-13.8% ▼)	9.2 (-85.2% ▼)

Average Duration, in Days

2018	2019	2020
3.5	3.4	3.3

Average Age

2018	2019	2020
39	40	39



Passenger Percentages by Destination/Trade Route

	2018	2019	2020
Rest of Asia	80.4%	86.7%	57.4%
Other	7.6%		37.9%
Australia/NZ/Pacific		2.7%	
Mainland China, Hong Kong, Taiwan	2.7%	2.7%	
Alaska		2.6%	
Mediterranean	2.8%	2.5%	



Passenger Volume & YOY Change by Age Group

	Passenger in K		Variance
	2018	2019	2019
<=12 Years	9	8	-20%
13-19	4	4	-19%
20-29	8	8	-8%
30-39	14	12	-13%
40-49	12	11	-11%
50-59	10	9	-15%
60-69	9	7	-20%
>=70 Years	4	4	-12%

Passenger Volume & YOY Change by Duration

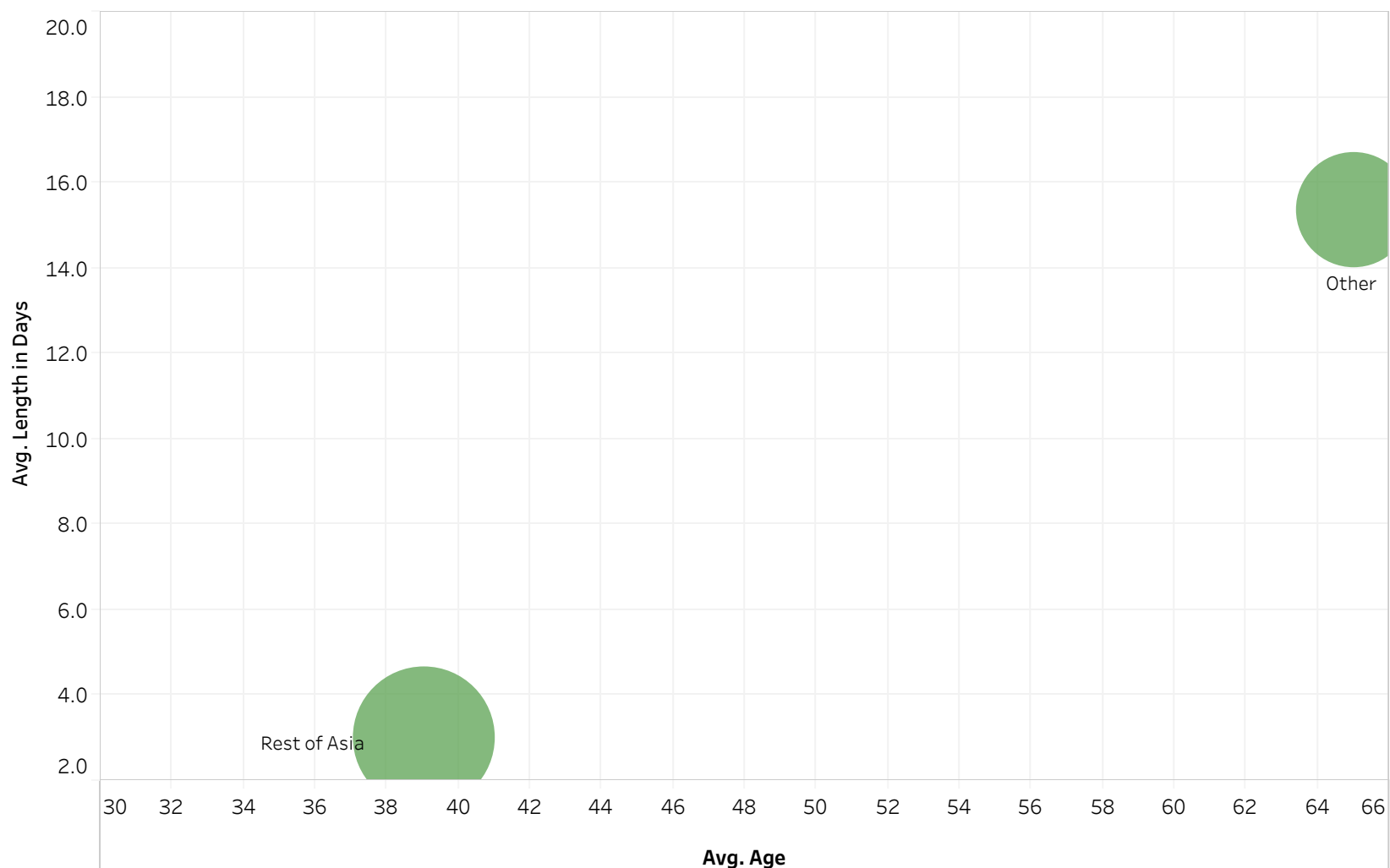
	Passenger in K			Variance	
	2018	2019	2020	2019	2020
Up to 3 Days	36	34	3	-5%	-90%
4-6 days	29	21	2	-29%	-92%
7 Days	4	4		-4%	

Source Market: **Indonesia** (Continued)

Passenger Volume & YOY Change by Destination/Trade Route

	Passenger in K			Variance	
	2018	2019	2020	2019	2020
Rest of Asia	58	54	5	-7%	-90%
Other	5		3		
Australia/NZ/Pacific		2		35%	
Mainland China, Hong Kong, Taiwan	2	2		-14%	
Alaska		2		58%	
Mediterranean	2	2		-22%	

Indonesia, Average Age and Cruise Length by Destination/ Trade Route, 2020



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Source Market: South Korea

Passenger Volume (K)

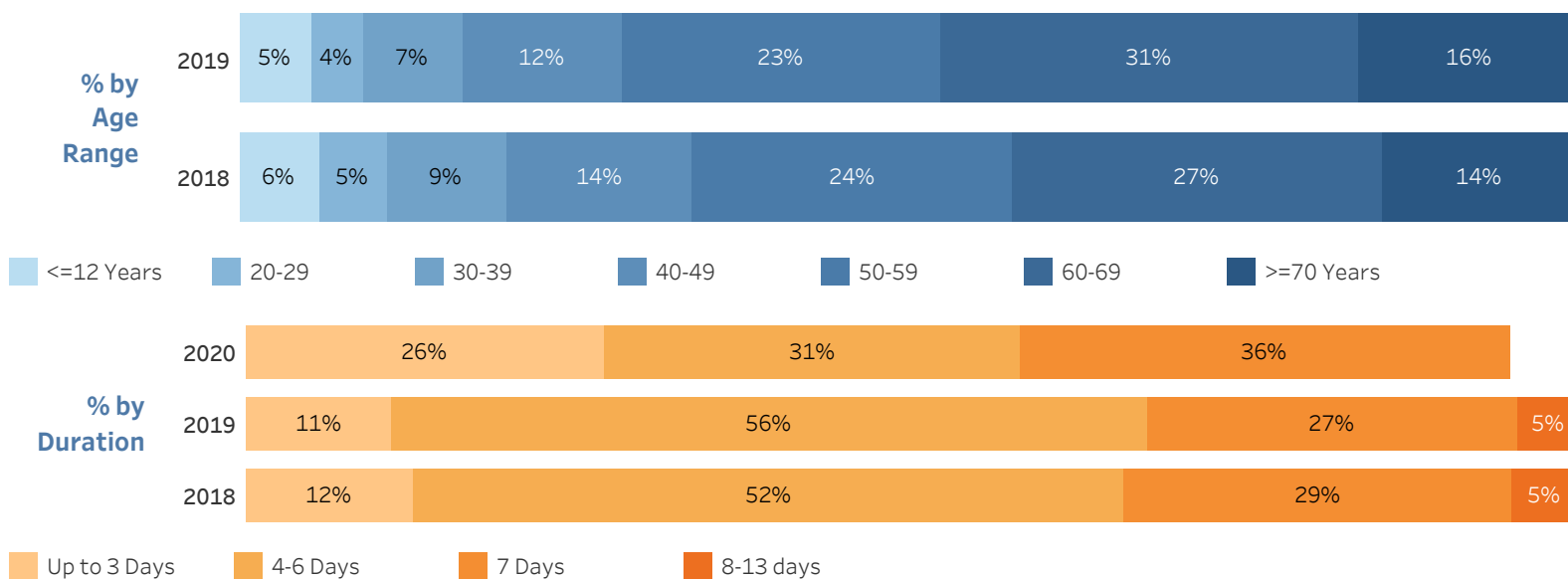
2018	2019	2020
44.4	48.7 (9.6%▲)	6.5 (-86.7%▼)

Average Duration, in Days

2018	2019	2020
5.6	5.6	5.3

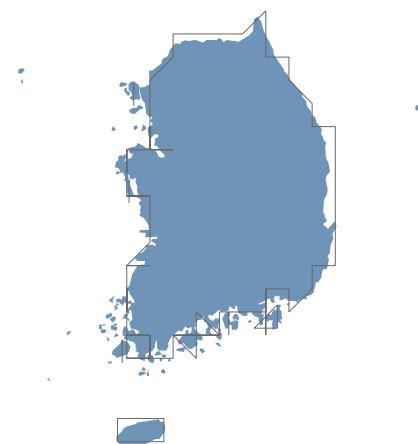
Average Age

2018	2019	2020
52	55	47



Passenger Percentages by Destination/Trade Route

	2018	2019	2020
Rest of Asia	60.2%	63.7%	69.1%
Mediterranean	12.0%	13.5%	
Alaska	5.1%	5.9%	
Caribbean/South America	5.6%	5.3%	
Mainland China, Hong Kong, Taiwan	7.7%	4.9%	
North America	3.7%		



Passenger Volume & YOY Change by Age Group

	Passenger in K		Variance
	2018	2019	2019
<=12 Years	3	3	1%
20-29	2	2	-15%
30-39	4	4	-7%
40-49	6	6	-3%
50-59	10	11	11%
60-69	12	15	27%
>=70 Years	6	8	28%

Passenger Volume & YOY Change by Duration

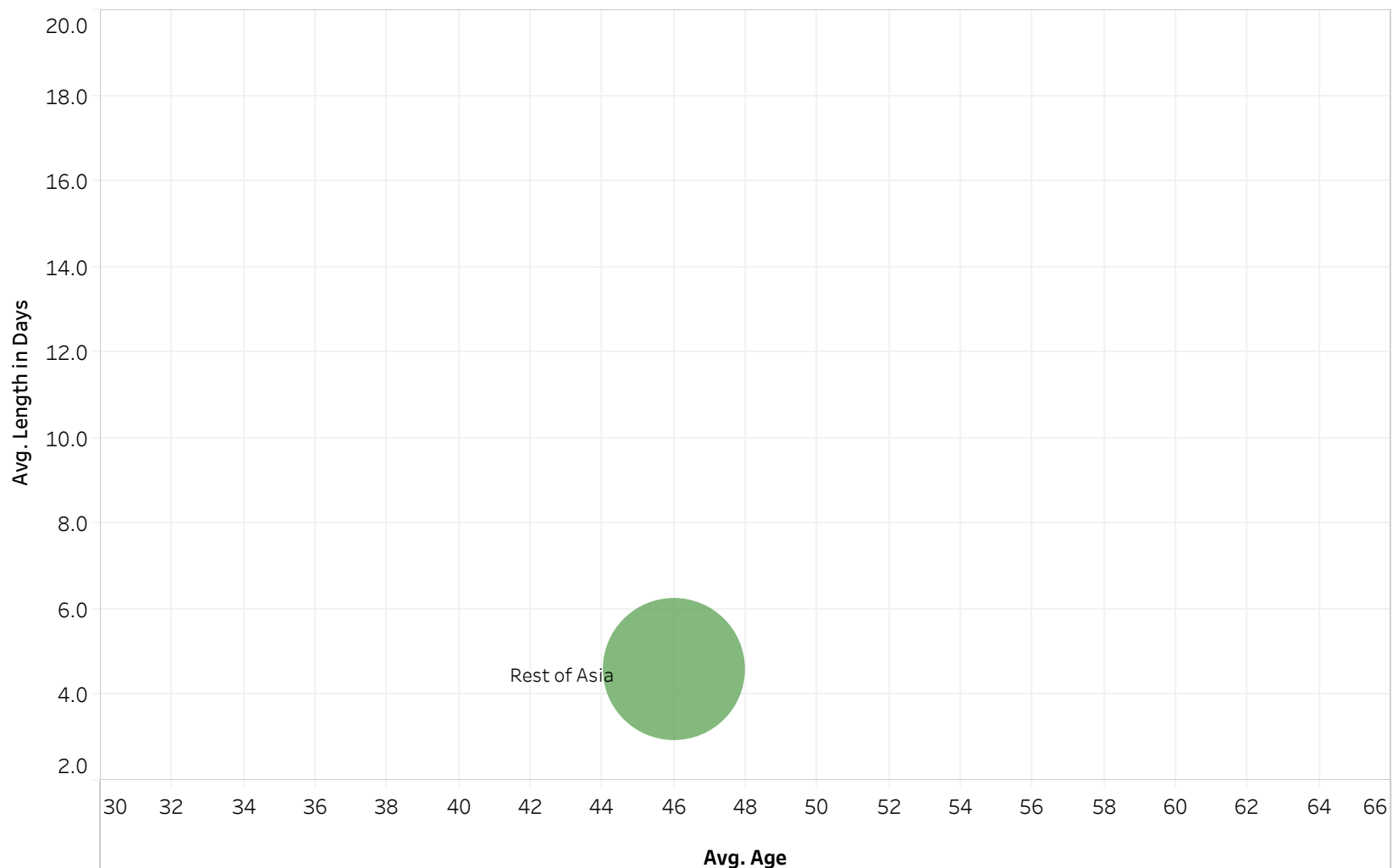
	Passenger in K			Variance	
	2018	2019	2020	2019	2020
Up to 3 Days	5	5	2	-5%	-67%
4-6 days	23	27	2	16%	-93%
7 days	13	13	2	4%	-82%
8-13 Days	2	2		5%	

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

Passenger Volume & YOY Change by Destination/Trade Route

	Passenger in K			Variance	
	2018	2019	2020	2019	2020
Rest of Asia	27	31	4	16%	-86%
Mediterranean	5	7		23%	
Alaska	2	3		27%	
Caribbean/South America	3	3		4%	
Mainland China, Hong Kong, Taiwan	3	2		-30%	
North America	2				

South Korea, Average Age and Cruise Length by Destination/ Trade Route, 2020



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GLOSSARY

- This report is based on 2020 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.

