

Japan Transport Research Institute

SYMPOSIUM

November 30 2016

CRUISE LINES INTERNATIONAL ASSOCIATION



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CLIA Asia
Secretary General



CRUISE LINES INTERNATIONAL ASSOCIATION

CLIA AGENDA

- State of Asia Cruise Industry
- Attractiveness of Japan as a Destination
- Looking Forward



CRUISE LINES INTERNATIONAL ASSOCIATION



STATE OF ASIA CRUISE INDUSTRY

& RESEARCH FINDINGS

August 2016



**State of Asia
Cruise Industry**



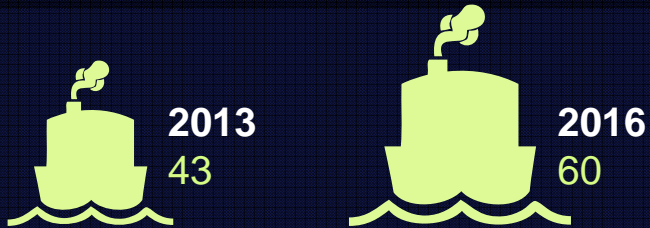
2016 Big Picture



**Asia Cruise
Trends**

Number of Cruise Ships in Asia

+12% CAGR



Number of Cruises & Voyages

+22% CAGR



Number of Operating Days

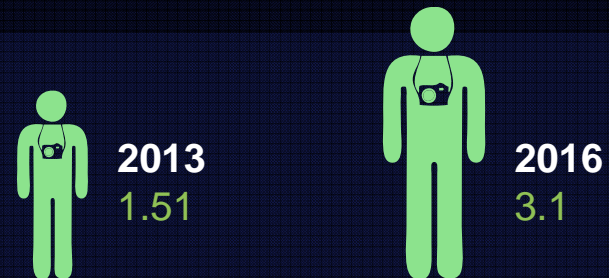
+14% CAGR



CAGR = Compound Annual Growth Rate

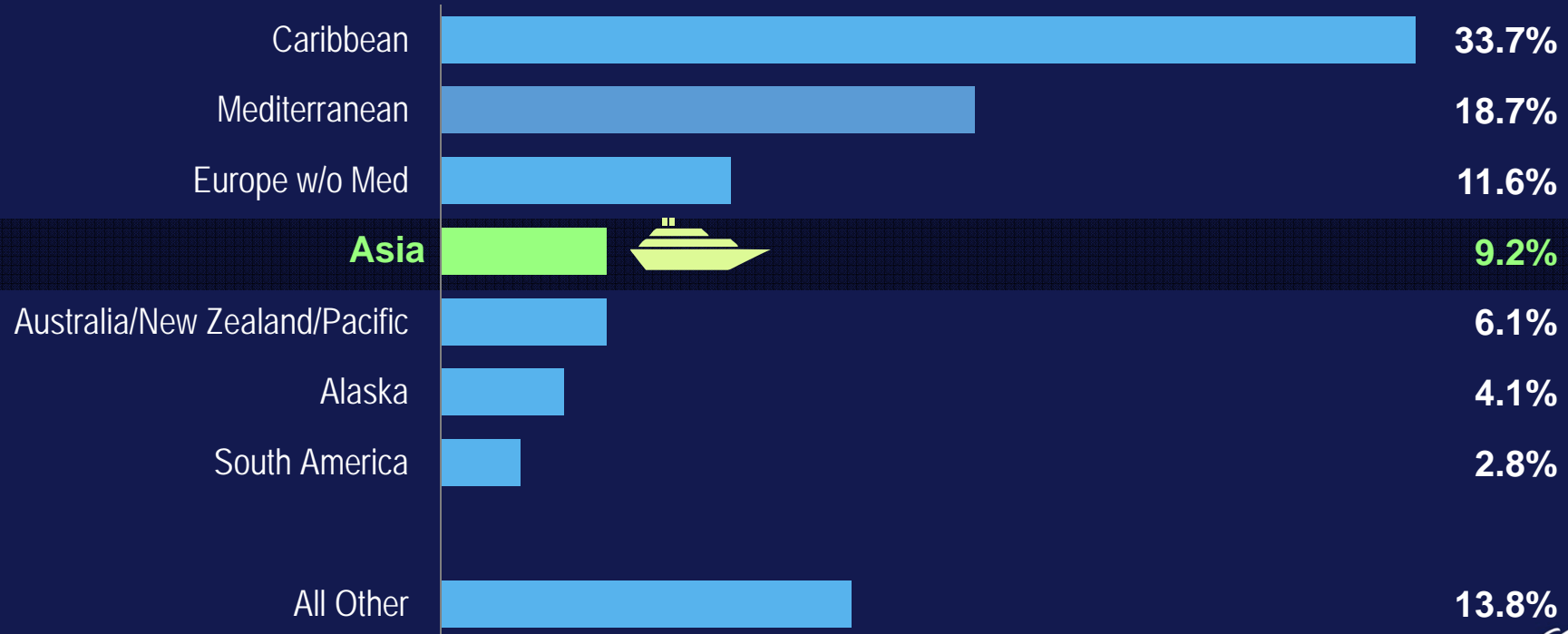
Passenger Capacity (million)

+29% CAGR



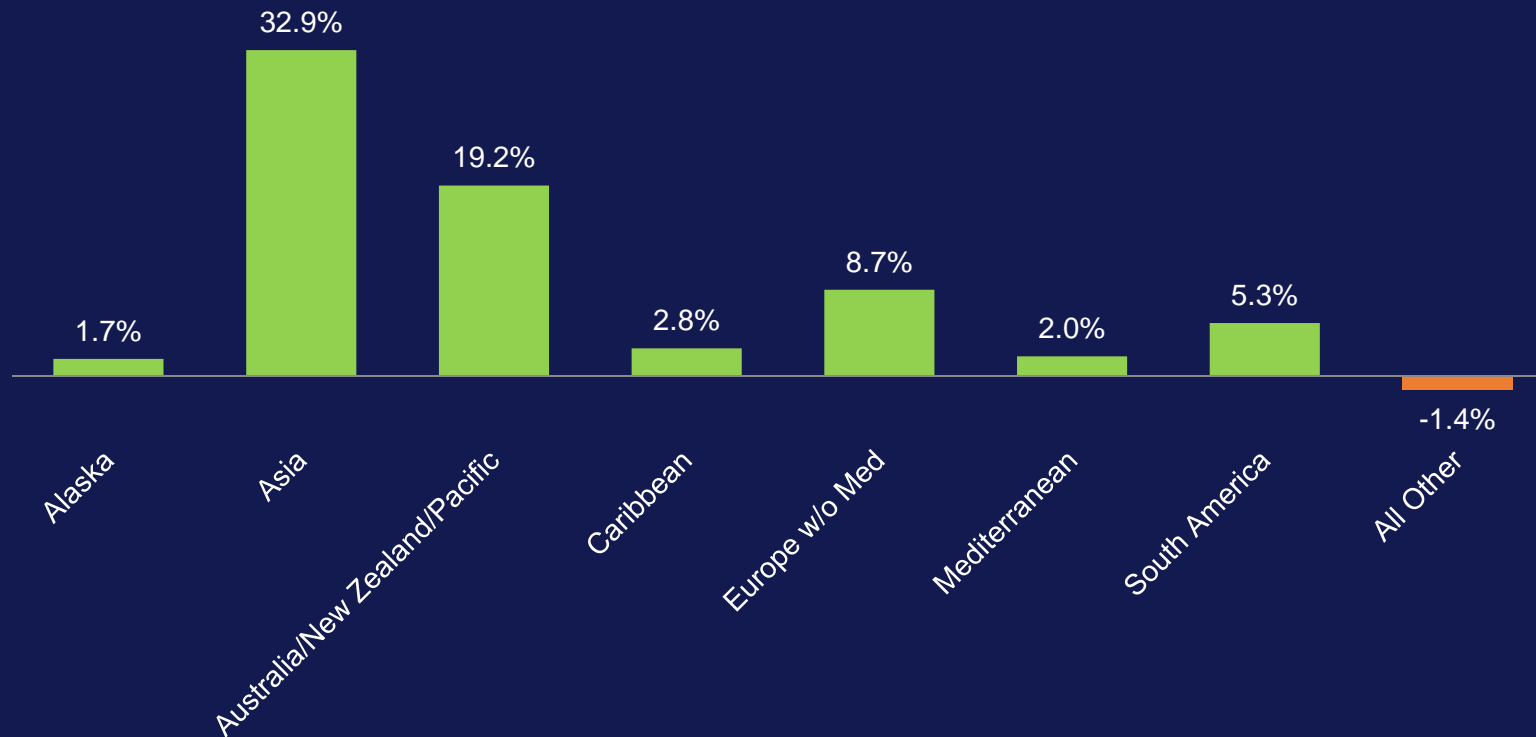
Cruise Capacity Share by Region

2016*



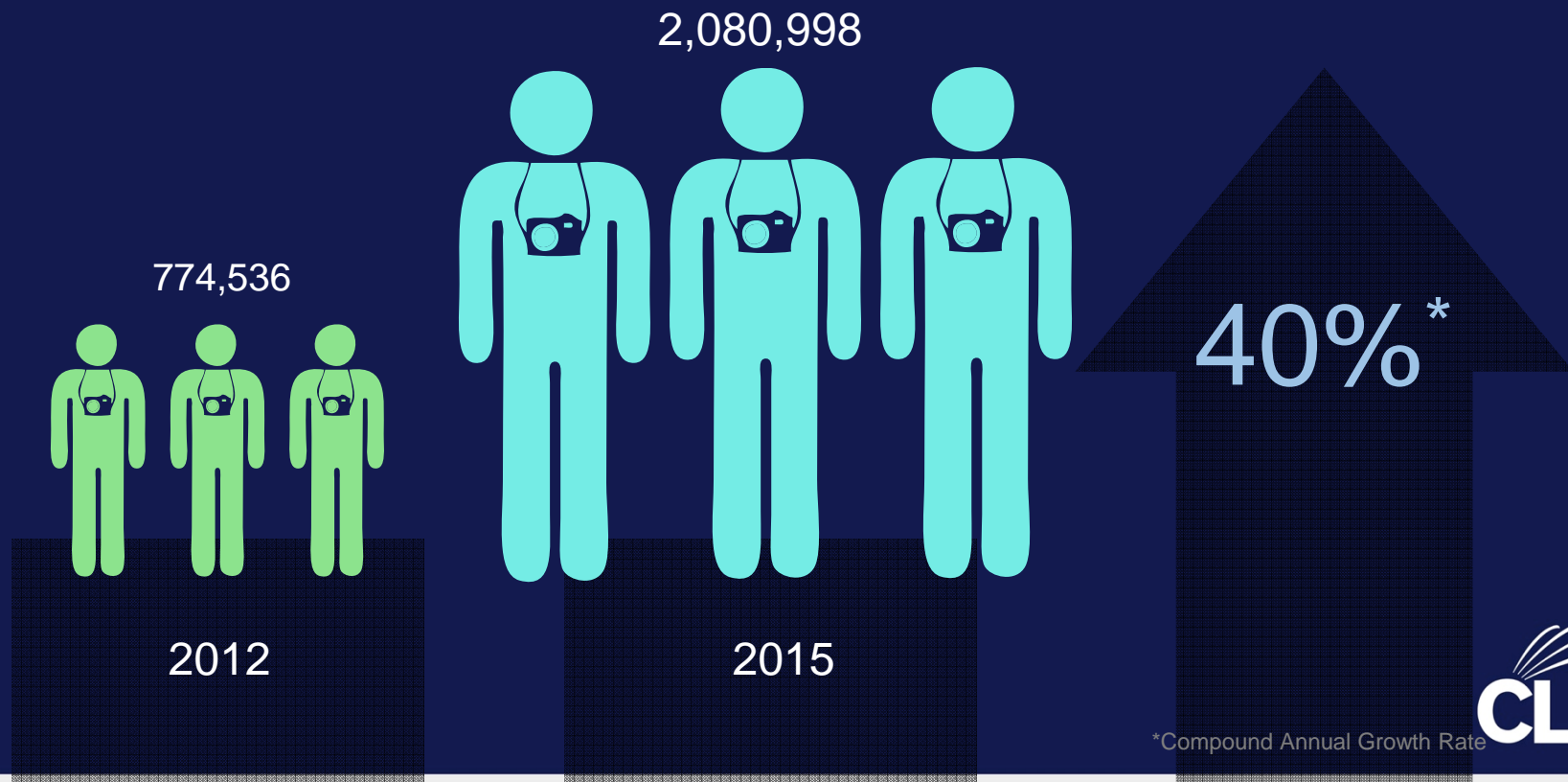
* ALBD = Available Lower Bed Days. Assumes double occupancy per cabin for sale by revenue producing operating days

Capacity Share Changes by Region (Percentage Point Change/ALBDs* 2015 vs 2016)

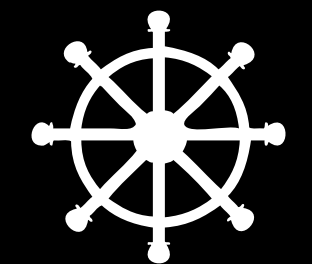


* Percentage Point Change

Passenger Source Volume – Asia



*Compound Annual Growth Rate



**2016 BIG
PICTURE**

2016 Big Picture in Asia

Active Cruise Line Brands In Asian Waters



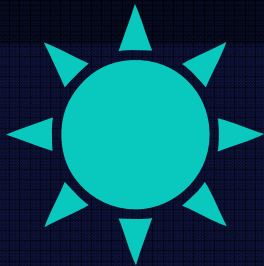
2016
31

Scheduled Port Calls in Asian Countries



2016
5,500

Asian Destinations



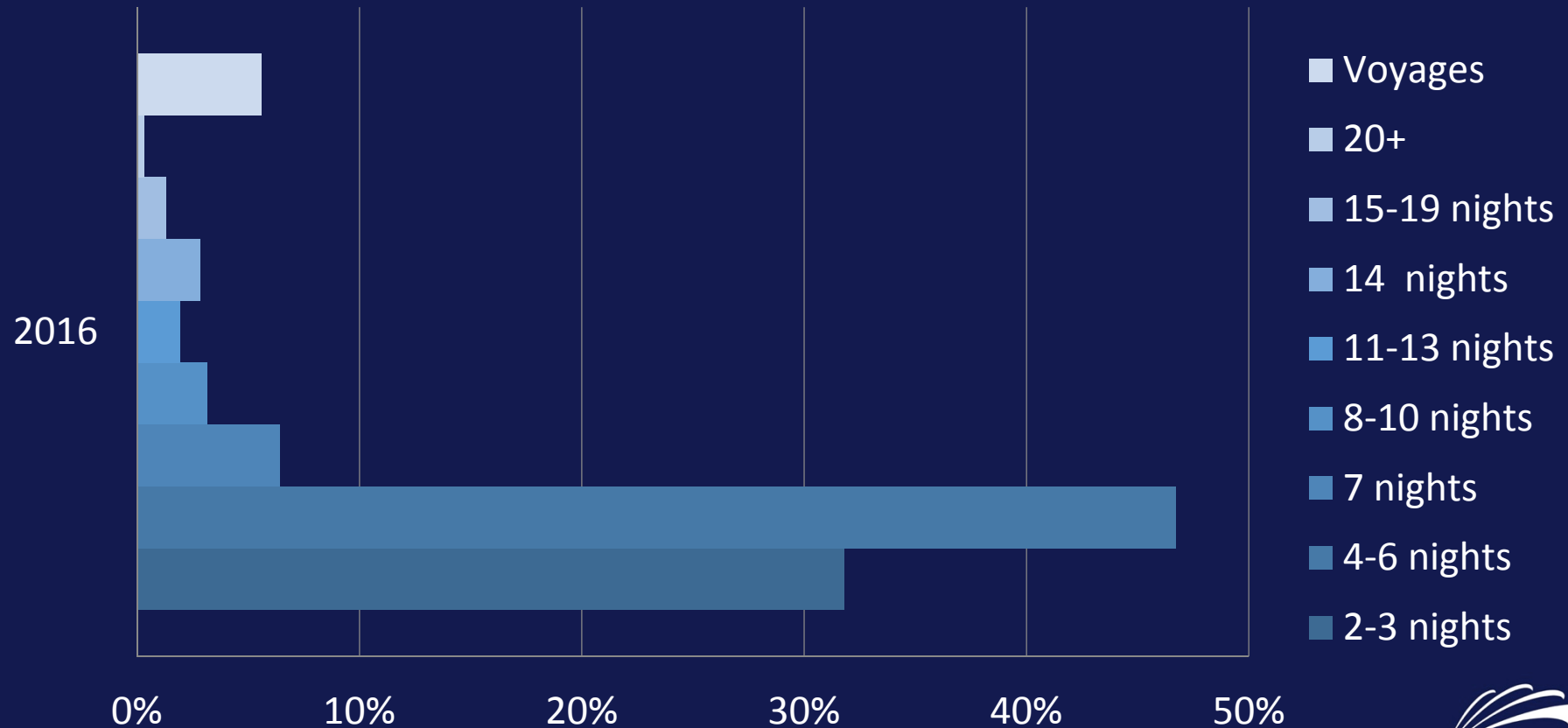
2016
204

Potential Passenger Destination Days (millions)

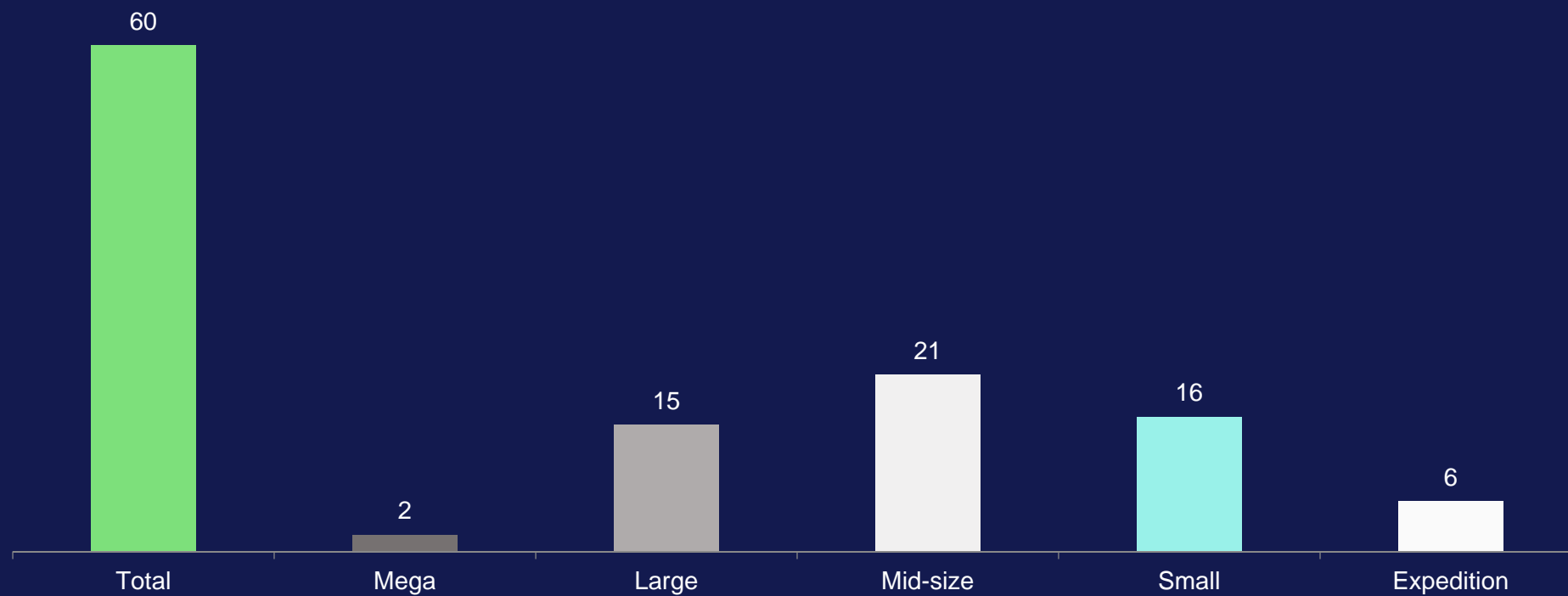


2016
10.9

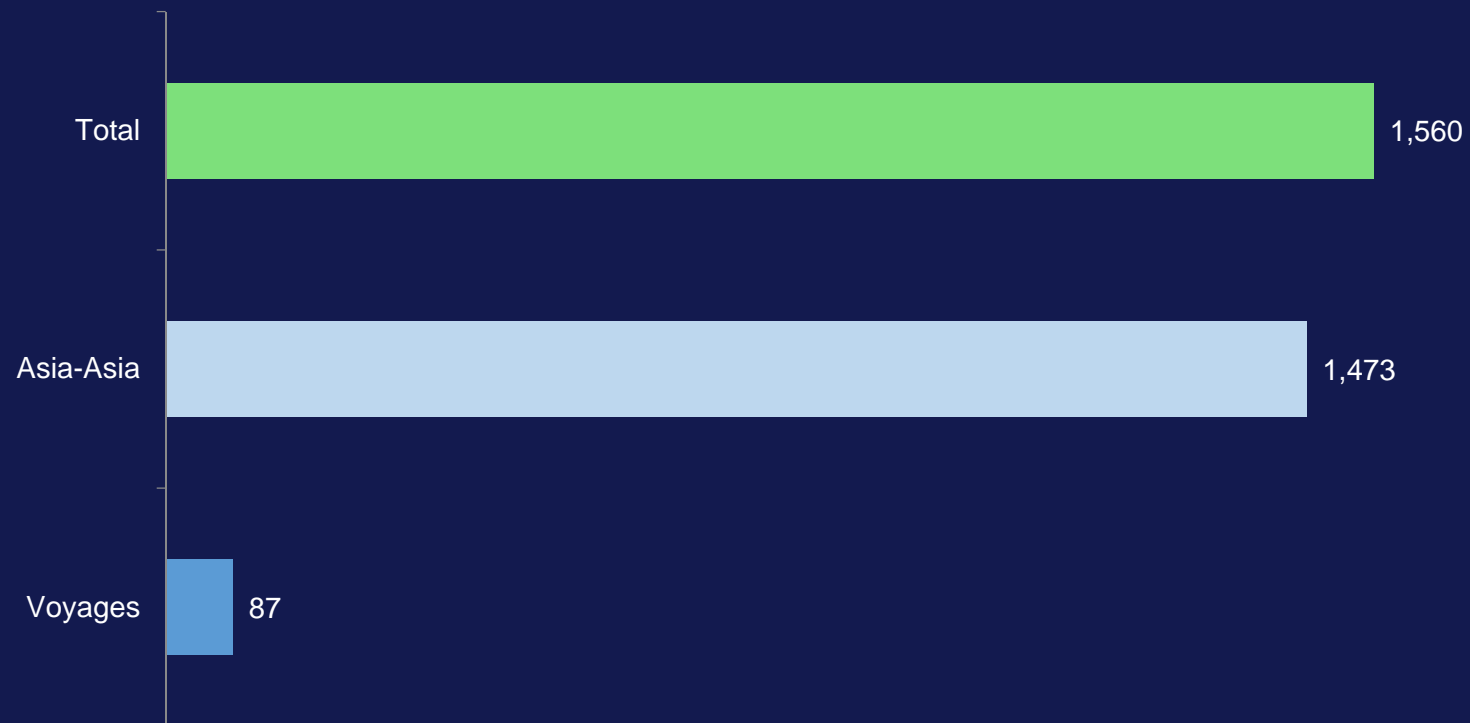
Length of Cruises & Voyages Offered 2016

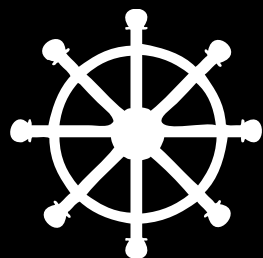


Ships in Asia by Size 2016



Cruises Offered by Type, 2016





2016 ASIA CRUISE TRENDS





Chinese Cruisers



Under 40 Cruisers



Asian Exploration



Destinations in Demand

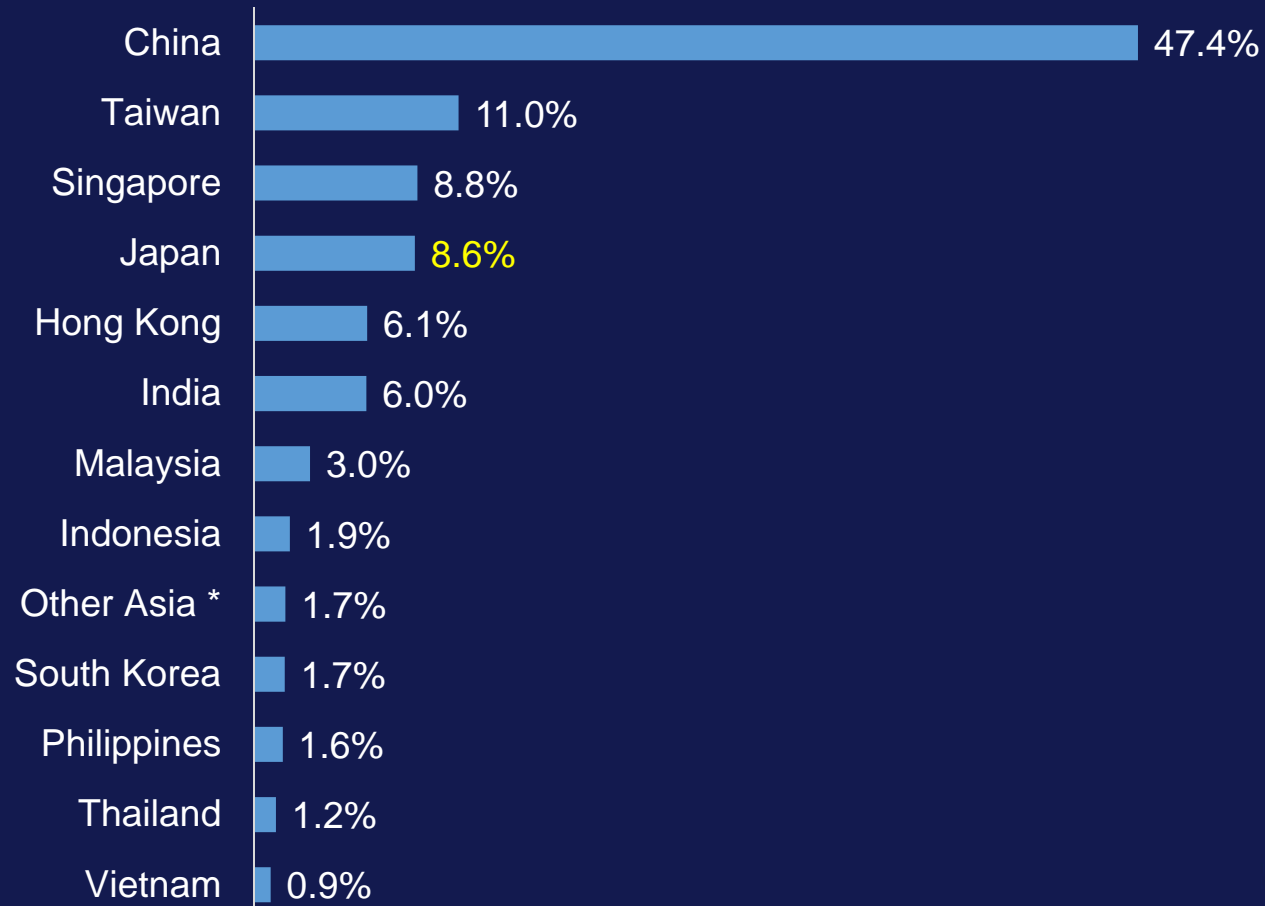


More Short Sailings



Attracting Asian Travelers

Passenger Volume by Source Market 2015

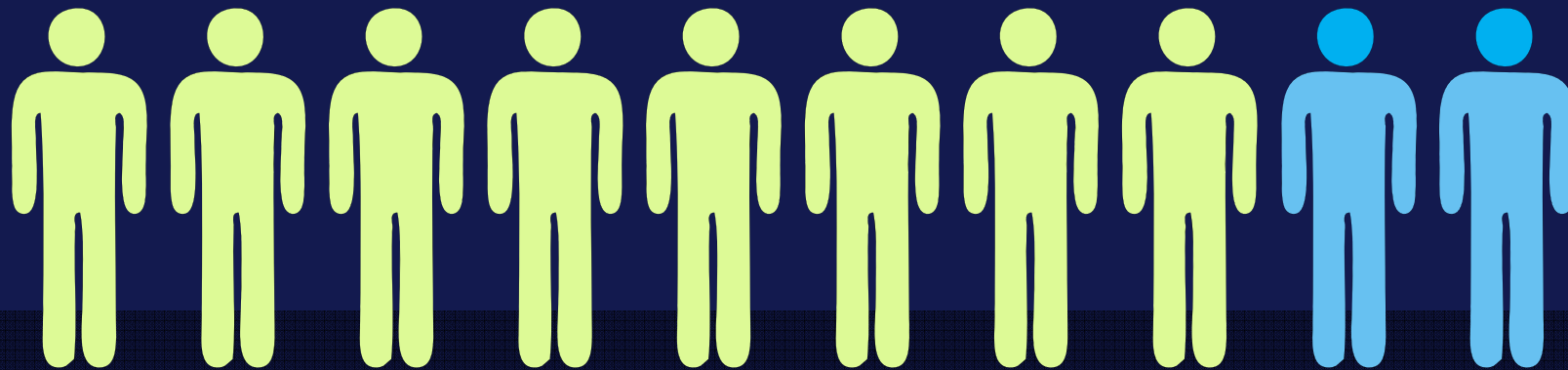


MORE THAN
4 OUT OF 10
PASSENGERS
ARE UNDER 40.



MORE THAN 8 OUT OF 10

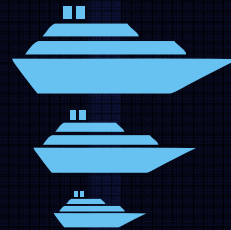
Asian passengers cruise within Asia



2013

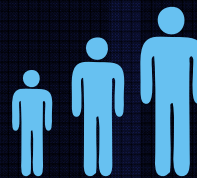
802

Asia to Asia Cruises



1.4M

passenger capacity



2016

1,473

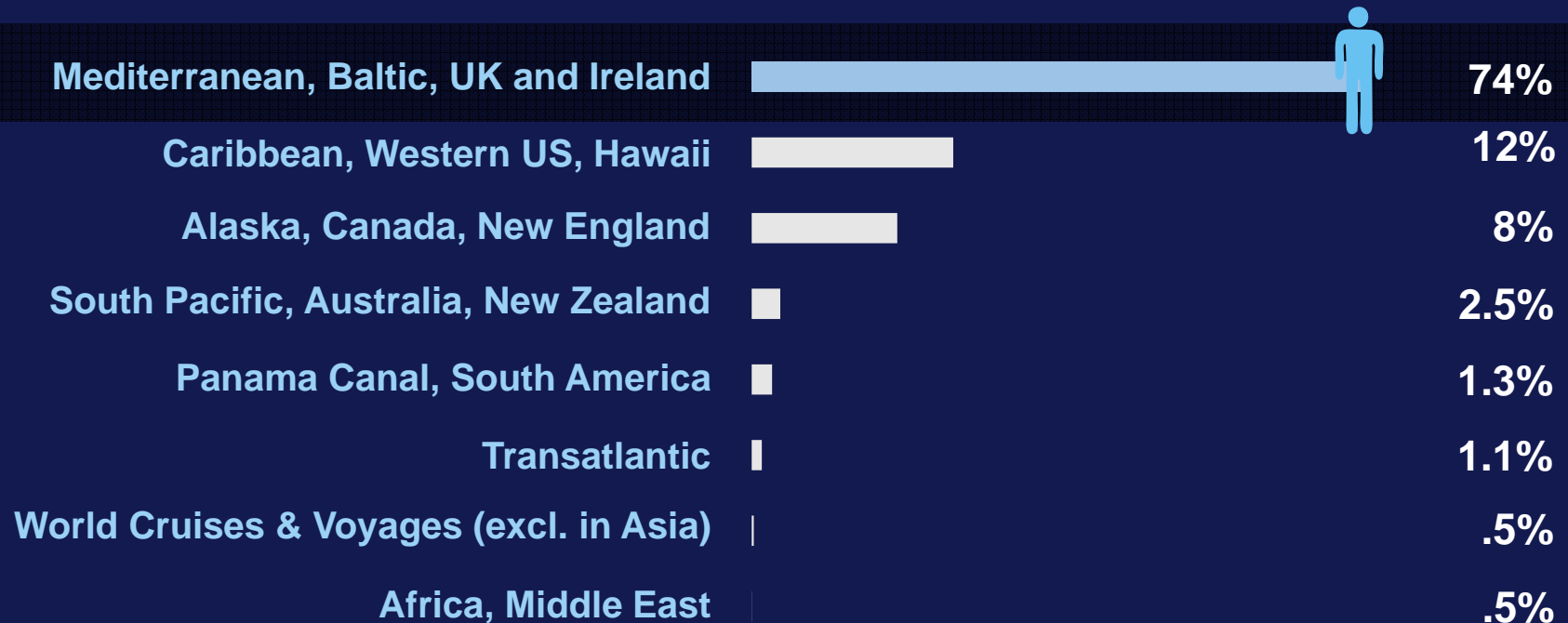
Asia to Asia Cruises

3.1M

passenger capacity

Asia Passenger Volume Beyond Asia

Share of Asian Source Passenger Volume by International Destination, 2015





204 DESTINATIONS
ACROSS
17 COUNTRIES

2016 Total Port Calls by Destination

JAPAN

1526

CHINA

850

SOUTH KOREA

745

VIETNAM

466

MALAYSIA

422

SINGAPORE

391

THAILAND

291

TAIWAN

234

HONG KONG

185

INDONESIA

172

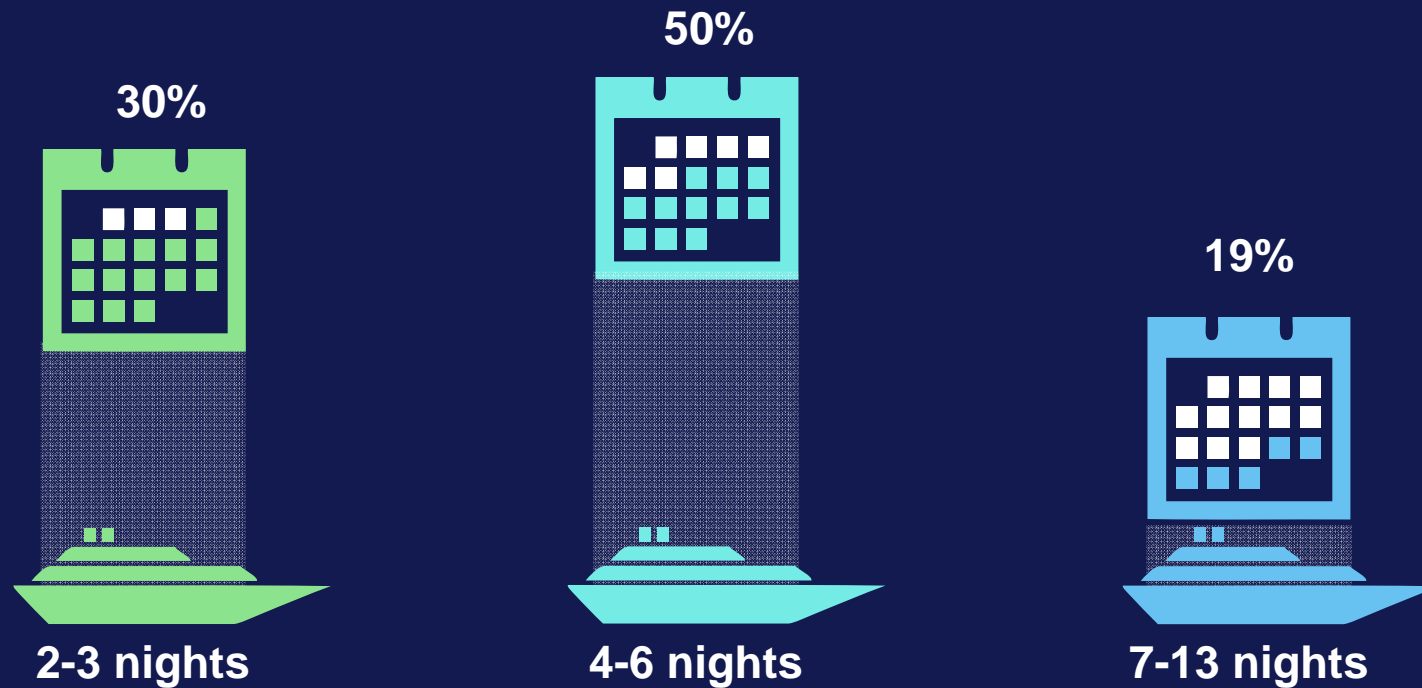
2015 Most Visited Asia Ports

Nine Most Visited



2015 SHORT SAILINGS

Asian Passengers Favor Short Duration Cruises





LUXURIOUS
EXPERIENCES



HIGH-END
SHOPPING



TRADITIONAL
MENU
OPTIONS

CONTRIBUTING SUCCESS FACTORS IN JAPAN

Contributing Factors

- More activities for entertainment and relaxation under one roof
- Off the beaten track
- Hassle-free
- Value of money

Opportunities to Improve

- Language barriers
- Lack of cultural experience

CRUISE LINES INTERNATIONAL ASSOCIATION



**World Heritage
Sites**



Cultural Experiences



**Unique Local
Offerings**



JAPAN CONSIDERATION



CRUISE LINES INTERNATIONAL ASSOCIATION



THANK YOU

CLIA CRUISE LINES
INTERNATIONAL
ASSOCIATION, INC.