

제13회 제주국제크루즈포럼
2026 ASIA CRUISE FORUM JEJU

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제주국제컨벤션센터
2026
7.23
Thu
7.25
Sat

Host  Ministry of Oceans and Fisheries

 Jeju Special Self-Governing Province

Organizer  ICCJEJU

Partner  제주국제크루즈산업협회
Jeju Cruise Industry Association

 2026 ASIA CRUISE
LEAGUE MEMBER
ACLN

 ASIA CRUISE
LEAGUE MEMBER
KSPAL

 KSPAL
KOREAN
TOURISM
KOTRA
Korea Tourism
KOTRA

 제주대학교
JEJU NATIONAL UNIVERSITY
ISE사업단
ISE Project Team

 제주문화예술재단
Jeju Foundation for Arts & Culture

9oormthon in JEJU

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- Opening Remarks | 개회사
- Welcome Remarks | 환영사
- Congratulatory Remarks | 축하

Keynote Speech | 기조연설

Asia Cruise Nexus: A Shared Vision for Asia

아시아 크루즈 넥서스: 아시아 공동 비전

- Oliviero Morelli | 올리비에로 모렐리

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Asia Cruise Lines: Strategies and Partnerships of Global Cruise Lines

아시아 크루즈 선사: 글로벌 선사의 전략과 협력

- Michael Goh | 마이클 고
- Wendy Yamazaki | 웬디 야마자키
- Katsuya Matsui | 마츠이 카츠야
- Massimo Russo | 마시모 루소

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Asia Cruise Lines: Strategies and Partnerships of Global Cruise Lines

아시아 크루즈 선사: 글로벌 선사의 전략과 협력

- (Joe) Yung Hui, Chou | 조우용혜
- Yoichi Kitai | 기타이 요이치
- Marilyn Tham | 마릴린 탐
- Naohiko Yamaguchi | 야마구치 나오히코
- Qiu Ling | 치우 링
- Paulo Benito S. Tugbang | 파울로 베니토 투그방

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ACLN Special Day with Taiwan

ACLN 스페셜 데이 with 대만

- | | |
|-----------------------|------|
| - Wu Hsun-Feng | 우원평 |
| - Chou (Joe) Yung Hui | 조우용훤 |
| - Yang Sheng Ping | 양성평 |
| - Hsu Mu-Jou | 쉬무로우 |
| - Cheng Chih Hung | 쩡쯔훙 |
| - Liu Hsilin(Wayne) | 류시린 |
| - Lee Nan-Shan | 리란산 |

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- | | | | |
|-----------------|-----|------------------|-----|
| - KANG Hae-Sang | 강해상 | - HA Kyoung-Hee | 하경희 |
| - KIM Jong-Nam | 김종남 | - KIM Han-Ju | 김한주 |
| - YOO Jae-Heung | 유재흥 | - LEE Jae-Hyung | 이재형 |
| - KIM Yong-Woon | 김용운 | - CHOI Jae-Hyung | 최재형 |

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- | | | | |
|---------------------|---------|---------------------------|-------------|
| - Liu Hsilin(Wayne) | 류시린 | - Paulo Benito S. Tugbang | 파울로 베니토 투그방 |
| - Yurie Saitoh | 사이토 유리에 | - Hsu Chihsin | 쉬즈 신 |
| - LEE Jung-Chul | 이정철 | - Yan Guodong | 옌궈둥 |

ABOUT THE FORUM | 포럼 소개

2026 Asia Cruise Forum Jeju is an international forum that brings together global cruise lines, ports, government agencies, and tourism leaders to discuss the sustainable growth and future of the Asian cruise industry.

제13회 제주국제크루즈포럼은 아시아 크루즈 산업의 지속 가능한 성장과 미래 협력을 논의하는 국제 포럼으로, 글로벌 크루즈 선사와 기항지, 정부기관 및 관광산업 관계자가 함께하는 교류의 장입니다.

THEME | 주제

Asia Cruise 4.0: Beyond Boundaries, Connected as One

아시아 크루즈 4.0: 경계를 넘어 하나로

OBJECTIVES | 개최 목적

Strengthen cooperation for the sustainable growth of the Asian cruise industry.

아시아 크루즈 산업의 지속 가능한 성장 기반 마련

Expand partnerships among cruise lines, ports and tourism stakeholders.

크루즈 선사·기항지·관광산업 간 협력 네트워크 확대

Share future strategies through innovation, digital transformation and data-driven connectivity.

디지털 전환과 데이터 기반 미래 전략 공유

Promote business opportunities through exhibition and B2B networking.

시 및 B2B 네트워킹을 통한 비즈니스 협력 확대

PROGRAM

ENG

DAY 1 23 July 2026 (Thu)			
Time	Program		
	Tamna Hall	Lobby	
09:00-	Registration		
10:00-12:00		Exhibition 10:00-18:00	Asia Cruise Liners Hackathon
12:00-13:30	Lunch		
14:00-15:20	Opening Ceremony Keynote Speech Asia Cruise Nexus: A Shared Vision for Asia Asia Cruise Awards		
15:20-16:50	Session 1 Asia Cruise Lines: Strategies and Partnerships of Global Cruise Lines	B2B Networking Event 15:20-18:00	
16:50-17:00	Break		
17:00-18:30	Session 2 Asia Cruise Destinations: Growth Strategies for Key Asian Destinations		
18:40-20:00	Welcome Reception (5F Ocean View)		

DAY 2 24 July 2026 (Fri)			
Time	Program		
	Halla Hall	Samda Hall	Lobby
09:00-	Registration		
10:00-11:30	Korea Cruise Port Sales in Jeju		Session 3 Asia Cruise Liners Hackathon 9:30-11:30
11:30-13:00	Lunch		
13:00-14:30	ACLN Session ACLN Special Day with Taiwan		Talk Concert & Quiz Show 12:30-13:30
		Session 4 Asia Cruise Academic Part 1: Coastal Cruise Activation and Multi-Homeport Hub Strategies 13:30-15:00	Jeju Foundation for Arts & Culture Relay Performance 13:30-15:00
14:30-15:00		Break	Exhibition & B2B Networking Event 10:00-17:00
15:00-15:30			
15:30-17:30	The 12th ACLN Annual Meeting	Session 5 Asia Cruise Academic Part 2: Development and Vision of Asian Cruise Island-Hopping Routes 15:30-17:00	

DAY 3 25 July 2026 (Sat)	
Time	Program
09:00-18:00	Inspection Tour

KOR

DAY 1 7. 23. (목)			
시간	프로그램		
	탐라홀	로비	
09:00-	참가자 등록		
10:00-12:00		전시 10:00-18:00	아시아 크루즈 라이너스 해커톤
12:00-13:30	자유 오찬		
14:00-15:20	개회식 기조연설 아시아 크루즈 넥서스: 아시아 공동 비전 아시아크루즈어워즈		
15:20-16:50	세션 1 아시아 크루즈 선사: 글로벌 선사의 전략과 협력	B2B 네트워킹이벤트 15:20-18:00	
16:50-17:00	휴식		
17:00-18:30	세션 2 아시아 크루즈 목적지: 아시아 주요 목적지의 성장 전략		
18:40-20:00	네트워킹의 밤 (5F 오션뷰)		

DAY 2 7. 24. (금)			
시간	프로그램		
	한라홀	삼다홀	로비
09:00-	참가자 등록		
10:00-11:30	2026 코리아 크루즈 포트세일즈 in Jeju		세션 3 아시아 크루즈 라이너스 해커톤 9:30-11:30
11:30-13:00	자유 오찬		
13:00-14:30	ACLN 세션 ACLN 스페셜 데이 with 대만		토콘서트 및 퀴즈쇼 12:30-13:30
		세션 4 아시아 크루즈 아카데미 1부: 연안 크루즈 활성화와 다모양 거점 전략 13:30-15:00	제주문화예술재단 릴레이 공연 13:30-15:30
14:30-15:00			
15:00-15:30		휴식	
15:30-17:30	제12회 ACLN 연차총회	세션 5 아시아 크루즈 아카데미 2부: 아시아 섬 연계 크루즈 노선의 발전 방향과 비전 15:30-17:00	전시 & B2B 네트워킹 이벤트 10:00-17:00

DAY 3 7. 25. (토)	
시간	프로그램
09:00-18:00	인스펙션 투어

Keynote Speech | 기조연설

Asia Cruise Nexus: A Shared Vision for Asia

아시아 크루즈 넥서스: 아시아 공동 비전

Oliviero Morelli | 올리비에로 모렐리

President, South Korea,

Japan & South-East Asia Cruise Division, MSC Cruises

MSC 크루즈 한국·일본·동남아시아 크루즈 사업부 사장

Asia Cruise 4.0: Beyond Boundaries, Connected as One

Biography

President of MSC Cruises for Japan, South Korea, and Southeast Asia, leading the company's cruise business across the region. Since joining the shipping industry in 2001, he has held key leadership positions with MSC Cruises in the UK, Ireland, and Japan, driving market expansion in Japan and leading the successful growth of international cruising.

Key Career

President, MSC Cruises Japan, South Korea & Southeast Asia (2024-Present)

Former President, MSC Cruises Japan

Former Product & Operation Director, MSC Cruises UK & Ireland

Former President & Chairman, Italian Chamber of Commerce in Japan (2019-2021)

약력

MSC 크루즈 일본·한국·동남아시아 지역 사장으로 아시아 시장의 크루즈 사업을 총괄하고 있다. 2001년 해운업계에 입문한 이후 MSC 크루즈 영국·아일랜드와 일본 법인에서 주요 경영직을 역임했으며, 일본 크루즈 시장 확대와 국제 크루즈 재개를 이끌며 아시아 크루즈 산업 발전에 기여했다.

주요 경력

현) MSC 크루즈 일본·한국·동남아시아 지역 사장 (2024~)

전) MSC 크루즈 일본 사장

전) MSC 크루즈 영국·아일랜드 Product & Operation Director

전) 일본 이탈리아상공회의소 회장 (2019-2021)





Asia Cruise 4.0
Beyond Boundaries, Connected as One

Oliviero Morelli
President
South Korea, Japan, South-East Asia
Cruise Division of MSC Group

JEJU
23rd July 2026

Asia Cruise Market Overview

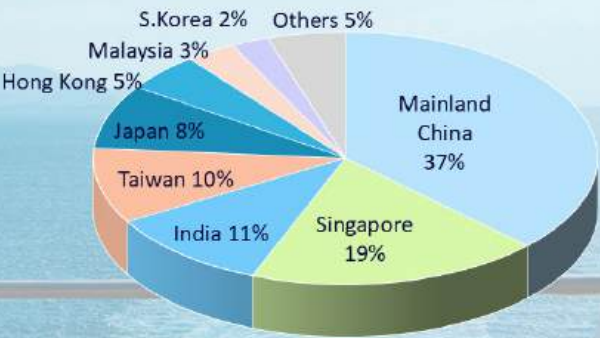
Source: CLIA, Asia Market Report 2025

Passenger volume by year (K passengers)

2022	2023	2024	2025
791	1,802 +127%	2,632 +46%	3,082 +17%

Market	Passenger Volume (K) in 2025 (%YoY)
Mainland China	1,145 (23% ▲)
Singapore	580(0.7% ▲)
India	325 (5.4% ▲)
Taiwan Region	296 (49.8% ▲)
Japan	254 (12.1% ▲)
Hong Kong SAR	150 (1.4% ▲)
Malaysia	99 (15.0% ▲)
South Korea	73 (34.4% ▲)

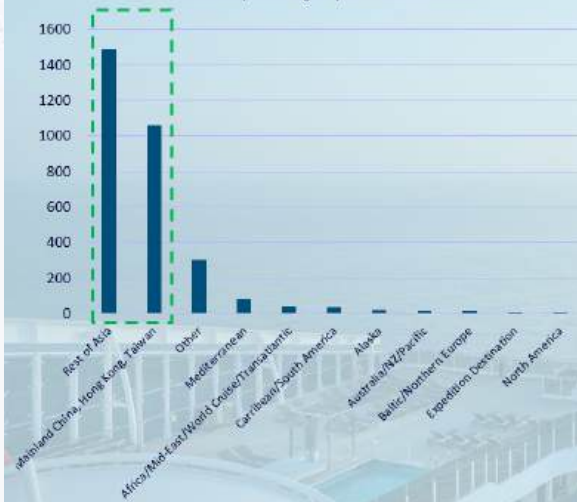
Passenger Volume (K) by market



Cruise lines are significantly expanding capacity in Asia, deploying more ships, introducing longer seasonal homeporting (particularly in Japan) and investing in new itineraries across both Northeast and Southeast Asia

Key Traveler Trends

Volume of Guests (K) by Destination / Trade Route, 2025
At least 4 K passenger per Destinations



Source: CLIA, Asia Market Report 2025

Avg Age & Cruise Length from Top Source Markets
Bubble size indicates relative passenger volume



- Cruise duration remains short, at around 4 days on average
- Japan is a **relatively mature** market
- Southeast Asia and India are **younger and expanding**

3

MSC Bellissima - Demographics

Tokyo Depts.

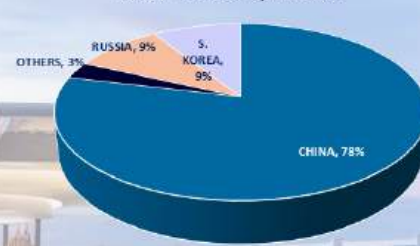
2026 Guests by market



KOR GUESTS +5%
INTL GUESTS +3%
YoY compared

Shanghai Depts.

2026 Guests by market



KOR GUESTS +9%
INTL GUESTS +2%
YoY compared

Naha/Keelung Depts.

2026 Guests by market



KOR GUESTS +2%
INTL GUEST +2%
YoY compared

The last year has seen a steady increase of International guests fueling the demand for Asian itineraries, confirming the excitement to sail in the region

4

Future Forecast - Asian Cruise Market

Market Outlook

- Asia could exceed its 2019 passenger level in 2027

Asia Forecast Assumptions



Baseline Demand

- Asian cruise passengers reached 3.08 million in 2025
- Market remained until now below 2019 peak levels



Supply Outlook

- Additional capacity entering Asia
- New deployment in Singapore
- Continued expansion of cruise operations in Japan
- Further interest to luxury cruiselines



Infrastructure Investment

- Ongoing port development across South Korea, Singapore, Japan and ASEAN
- Increasing Government support for cruise tourism



Recovery Pattern

- Asia remains the fastest-growing cruise region globally
- Recovery continues from a lower base than North America and Europe



Asia is transitioning from a recovery story to a structural growth story

MLN guests



Sources: CLIA Asia Source Passenger Market Report (2025/2026), CLIA Asia Market Portal, Singapore Tourism Board, The Maritime Executive, U.S. International Trade Administration (Japan Cruise Market)

How AI is Transforming Cruises



AI-Driven Personalization

- Multilingual, 24/7 guest interaction (MSC Concierge)
- Real-time information, bookings, and tailored recommendations
- Data-driven personalization across the entire guest journey



Operational Performance & Business Efficiency

- Supports more informed decision-making across operations
- Helps improve planning, coordination, and resource allocation
- Can contribute to more efficient and resilient operating models



Data-Driven Continuous Improvement

- Uses analytics to better understand guest needs
- Improves responsiveness to feedback and service recovery
- Enables a seamless journey from booking to onboard and beyond

The Evolution of the Asian Cruise Industry



Asia Cruise 1.0

Cruising was primarily viewed as a mode of transportation, focused on port calls and passenger movements



Asia Cruise 2.0

Cruising evolved into a tourism product, with packaged itineraries and shore excursions



Asia Cruise 3.0

The industry experienced rapid growth, driven by larger ships and the expansion of homeports



Asia Cruise 4.0

Refers to a new era in which the Asian cruise industry moves beyond national boundaries and forms a digitally connected value chain

The Nexus of Cruise Industry Value Chain





Our Way Forward



Asia as a destination is entering a long-term growth phase, supported by the **Nexus** of improving accessibility, expanding infrastructure, increasing deployment by global cruise brands and growing consumer interest in immersive, multi-country travel experiences

• A connected regional ecosystem

• A high-value experience industry

• A data-driven platform business

Technology and AI make it easier than ever to stay connected and access information, *yet our industry is built on people.*

That's why coming together, meeting face to face and exchanging insights during events like this **Asia Cruise Forum Jeju** remains priceless

제13회 제주국제크루즈포럼
2026 ASIA CRUISE FORUM JEJU

8



MSC



Explora

Session 1 | 세션 1

Asia Cruise Lines: Strategies and Partnerships of Global Cruise Lines

아시아 크루즈 선사: 글로벌 선사의 전략과 협력

Michael Goh | 마이클 고

President, StarDream Cruises

스타드림크루즈 사장

CHARTING THE FUTURE OF CRUISE TOURISM IN ASIA A Cruise Line Perspective

Biography

President of StarDream Cruises, leading the company's growth and brand strategy across Asia. With more than 30 years of experience in the cruise, hospitality, travel, and tourism industries, he has held senior leadership positions with Star Cruises, Dream Cruises, and Crystal Cruises, successfully leading the post-pandemic restart of Dream Cruises in Singapore and the launch of the StarDream Cruises brand in 2025.

Key Career

President, StarDream Cruises (2025-Present)

President, Resorts World Cruises (2022-2025)

President, Dream Cruises (2019-2022)

Senior Vice President, International Sales, Genting Cruise Lines

Vice President, Sales & Marketing / General Manager, Star Cruises Singapore

약력

스타드림크루즈 사장으로 아시아 크루즈 시장의 성장과 브랜드 전략을 총괄하고 있다. 30년 이상의 크루즈·호텔·관광산업 경력을 바탕으로 Star Cruises, Dream Cruises, Crystal Cruises 등에서 글로벌 영업과 브랜드 성장을 이끌었으며, 팬데믹 이후 싱가포르에서 드림크루즈의 운항 재개와 2025년 StarDream Cruises 브랜드 출범을 주도했다.

주요 경력

현) 스타드림크루즈 사장 (2025~)

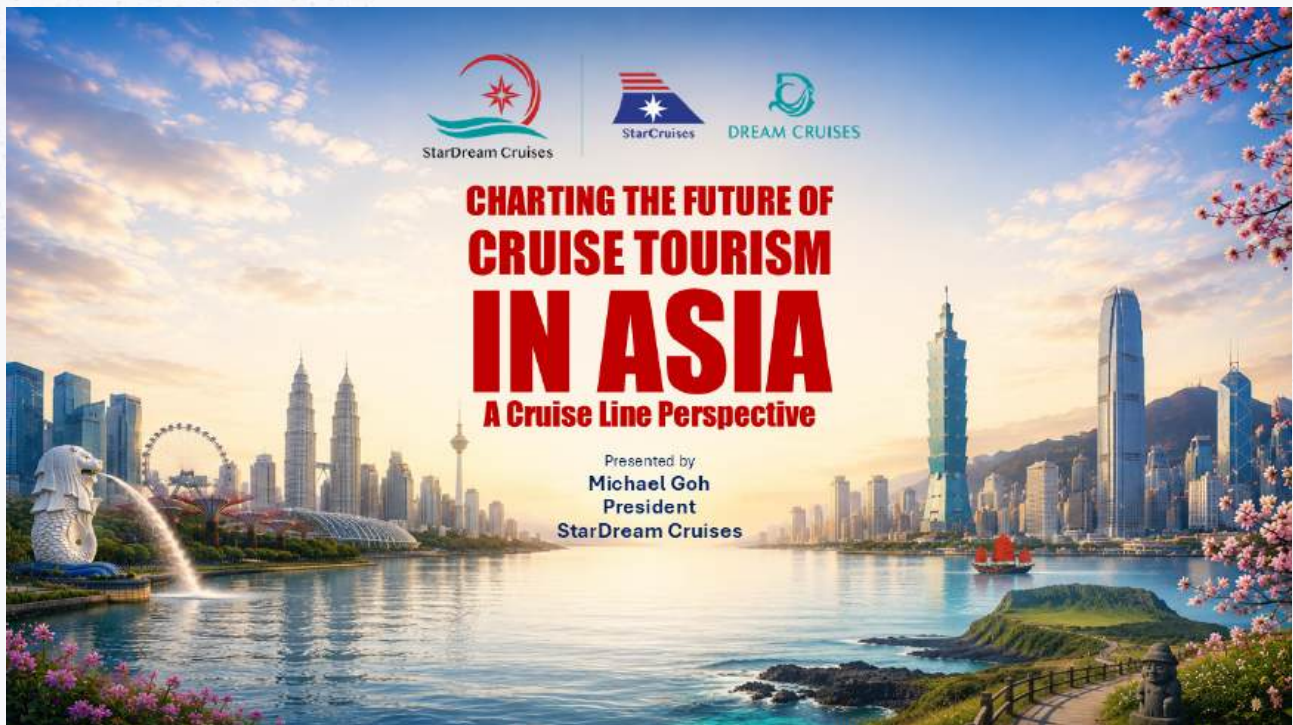
전) 리조트월드크루즈 사장 (2022~2025)

전) 드림크루즈 사장 (2019~2022)

전) Genting Cruise Lines 국제영업 수석부사장

전) Star Cruises 영업·마케팅 부사장 / 싱가포르 지사장





SNAPSHOT: CRUISE INDUSTRY LANDSCAPE

In Asia, China is leading (domestic revival),
followed by Singapore, India & Taiwan in 2025



* Source CLIA 2026



FROM THE BRIDGE:

**A CRUISE OPERATOR'S
VISION FOR ASIA'S
FUTURE.**





GENTING DREAM



Resort-style ship with diverse activities

Expansive flagship (3,000+ guests)

The Palace - broader range of suites & private amenities

Homeported Singapore year-round, sailing SEA



STAR NAVIGATOR

STAR VOYAGER



Mid Size Ships with curated activities

More intimate ships (up to 2,000 guests)

The Palace – exclusive suites with personalized amenities

Southeast & East Asia cruises – regional pathfinders



StarDream Cruises

StarCruises DREAM CRUISES

KNOW OUR GUESTS. SHAPE BETTER EXPERIENCES. DELIVER SATISFACTION.

The Modern Cruise Guest. What Experience Will I Have?

- **Experiential: Authentic Experiences**
Thematic / (Multi-Gen) Family / Onboard Cultures
- **Flexible Itineraries. Amazing Destinations**
2-7 Night Itineraries / Local Cultures
- **Food Discovery**
- **World-Class Asian Hospitality**





StarDream Cruises



StarCruises



DREAM CRUISES

NOT JUST ONE THEME

A WORLD OF ENDLESS EXPERIENCES & CULTURES OF ASIA

EVERY AGE. EVERY MOMENT

GLOBAL BRANDS

Elevated Onboard Experiences



The Smurfs
Dream @Sea



Pandora Holiday
Collection at Sea



It's the Ship



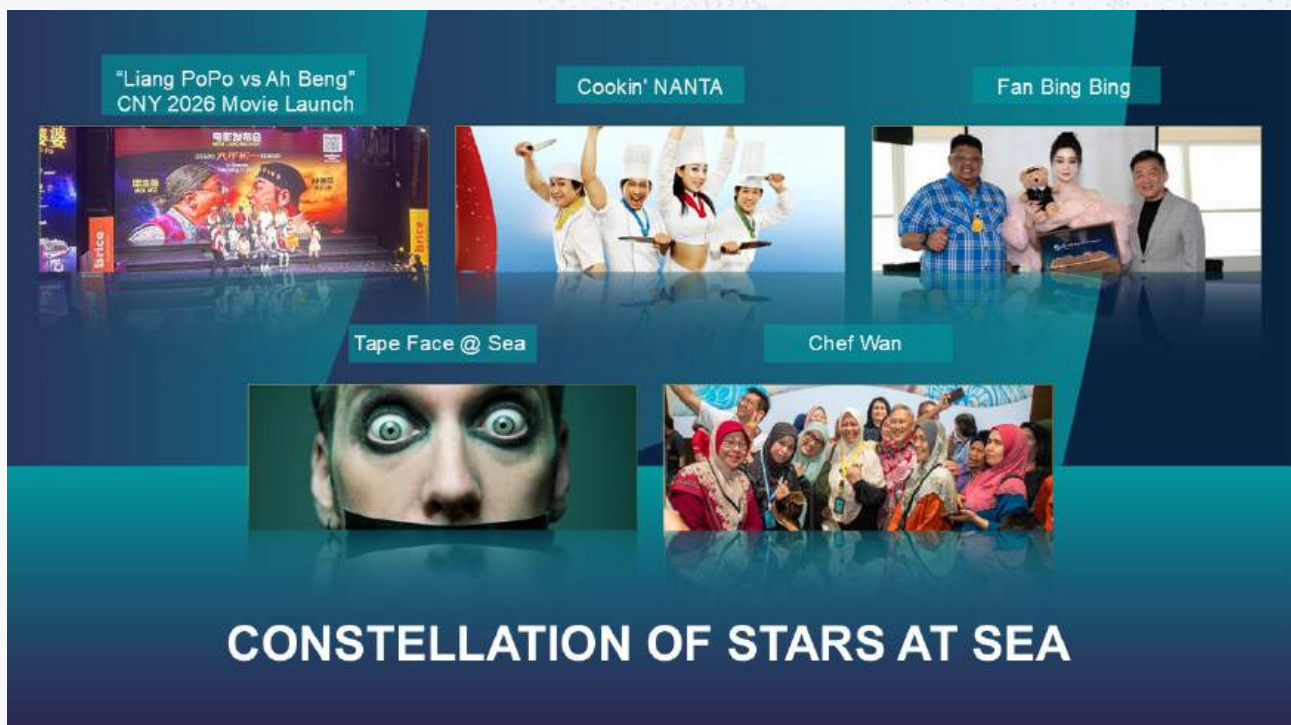
Under Armour
Fitness@Sea



Lego Buildcation



Flying Pigeon
Cycle Cruise









Dream Cruises 10th Anniversary

French Papa Netflix Culinary Wars Chef	Amotti Winner of Physical 100 Season 2 & Physical Asia	KIIRAS K-Pop Group
"Founding Dreams" Theme 3 – 5 May 2026	Celebrate the Dream" Theme 26 – 28 Jul 2026	"Dream Lives On" Theme 25 – 27 Oct 2026





IN COLLABORATION WITH BROADWAY ASIA
INTERNATIONAL

Forever Broadway

A world-premiere musical dance
spectacular, debuting exclusively aboard
Genting Dream.



ASIA AWAITS. WE TAKE YOU THERE.

Asia's Destination Cruise Specialist - Connecting You to the Best of Asia's Destinations.

Because the best cruises take you somewhere.



VIETNAM

Con Son
Nha Trang
Ho Chi Minh
Ha Long Bay
Da Nang

PHILIPPINES

Boracay
Coron
Puerto Princesa
Laoag
Manila



GCC

Khasab
Muscat
Dubai
Doha
Sir Bani Yas

KOREA

Busan
Jeju

THAILAND

Bangkok
Phuket
Ko Samui

MALAYSIA

Penang
Melaka
Kuala Lumpur
Port Dickson
Redang
Tioman
Pangkor

OVER
50
PORTS
& counting!

INDONESIA

Lombok
Bali
Jakarta
Surabaya
Medan
Bintan

SINGAPORE

JAPAN

Kagoshima
Nagasaki
Kochi
Naha
Tokyo
Osaka
Fukuoka
Ishigaki
Kumamoto
Miyakojima
Shimizu

TAIWAN

Kaohsiung
Keelung
Penghu

CHINA

Sanya
Xiamen

HONG KONG





**OPERATING ACROSS
ASIA
REQUIRES DIFFERENT
STRATEGIES.**
TWO ENGINES OF GROWTH

A CASE STUDY:

**SINGAPORE
HOMEPORT**
[SOUTHEAST ASIA]

**KEELUNG
[TAIWAN]
HOMEPORT**
[NORTHEAST ASIA]



GUEST SATISFACTION STARTS WITH UNDERSTANDING DIFFERENT ASIAN MARKETS

SINGAPORE HOMEPORT

- **INTERNATIONAL CRUISE HUB**
Domestic & Fly-Cruise
- **MULTI-CULTURAL AUDIENCE**
- **GROWING MIDDLE-CLASS**
- **SHORT CRUISE MARKET**
- **YEAR-ROUND DEPLOYMENT**

KEELUNG (TAIWAN) HOMEPORT

- **DOMESTIC & REGIONAL FAMILIES**
- **CULTURALLY CONSISTENT / UNIFORM**
- **MATURE OUTBOUND**
- **SHORT TO MID CRUISE MARKET**
- **YEAR-ROUND DEPLOYMENT**





**PARTNERSHIPS
WILL SHAPE THE NEXT
CHAPTER**

**NO SINGLE STAKEHOLDER BUILDS
CRUISE TOURISM ALONE**







**LOOKING
AHEAD**

3 TAKEAWAYS

GUESTS SATISFACTION REMAIN OUR NORTHSTAR.

**CULTURAL DIFFERENTIATION WILL DEFINE ASIA'S CRUISE
IDENTITY.**

**COLLABORATION WILL UNLOCK SUSTAINABLE GROWTH
ACROSS ASIA.**



THANK YOU.

Session 1 | 세션 1

Asia Cruise Lines: Strategies and Partnerships of Global Cruise Lines

아시아 크루즈 선사: 글로벌 선사의 전략과 협력

Wendy Yamazaki | 웬디 야마자키

Regional Vice President, Government Relations (Asia),

Royal Caribbean Group

로열캐리비안 그룹 아시아 지역 정부관계 부문 부사장

Asia Cruise 4.0 Reshaping the Market Together

Biography

Regional Vice President, Government Relations (Asia) at Royal Caribbean Group, leading engagement with governments, regulators, and industry stakeholders across the Asia-Pacific region. Brings more than 20 years of experience in financial services, international markets, and regulatory policy, with previous leadership roles at the London Stock Exchange Group, the Monetary Authority of Singapore, and the Asian Development Bank.

Key Career

Regional Vice President, Government Relations (Asia), Royal Caribbean Group

Director, Government Relations & Regulatory Strategy, London Stock Exchange Group

Deputy Director, Monetary Authority of Singapore

Asian Development Bank

약력

로열캐리비안 그룹(Royal Caribbean Group) 아시아 지역 정부협력 총괄 부사장으로 아시아-태평양 지역의 정부, 규제기관 및 산업 관계자와의 협력을 총괄하고 있다. 금융서비스, 국제시장 및 규제정책 분야에서 20년 이상의 경력을 보유하고 있으며, 런던증권거래소그룹(London Stock Exchange Group), 싱가포르 통화청(Monetary Authority of Singapore), 아시아개발은행(Asian Development Bank) 등에서 주요 리더십을 수행하며 국제 정책 및 대외협력 분야의 전문성을 쌓아왔다.

주요 경력

현) 로열캐리비안 그룹 아시아 지역 정부협력 총괄 부사장

전) 런던증권거래소그룹 정부협력 및 규제전략 디렉터

전) 싱가포르 통화청 부국장

전) 아시아개발은행 근무



ROYAL CARIBBEAN GROUP



Asia Cruise Forum · Jeju 2026

Asia Cruise 4.0: Reshaping the Market Together

Evolving Strategies, New Cooperation Models,
and the Path to an Enduring Asian Cruise Value Chain

Wendy Yamazaki
Regional Vice President
Government Relations (Asia)



Royal Caribbean Group



A Market at an Inflection Point

Asia's cruise industry is recovering at scale – but the next phase of growth demands a fundamentally different playbook.

- Asia generated **3.08 million cruise passengers** across 12 principal source markets in 2025, up **17.1% year-on-year** – healthy growth on an increasingly large base
- Mainland China leads with **1.145 million passengers** (37% of Asia share), up 23%; India ranks third with 325,000 passengers; Singapore second-largest at 580,000
- Asia Pacific cruise tourism projected at **12.6% CAGR through 2031**, with Southeast Asia the fastest-growing sub-region
- Yet the region still sits **18% below 2019 passenger volumes** – the headroom is immense, and the window to shape growth intelligently is now



Three Forces Transforming Asian Cruise

Digital disruption, port infrastructure demands, and a new type of traveler are converging to rewrite the rules of the Asian cruise market.



Force 01

Digital Transformation

Mobile-first booking dominates Asia-Pacific. Platforms like Trip.com and WeChat redefine how passengers discover and book cruises – meeting travelers where they already are.



AI in Deployment

Cruise lines increasingly model demand, optimize itineraries, and time port calls with AI – turning booking and search data into deployment decisions.



75% of APAC travelers use AI in travel planning vs. 64% globally



Force 02

Port Infrastructure Readiness

Asian ports face increasing pressure to modernize for the current fleet. Terminal capacity, berth readiness, and shore-side power are conditions of deployment – not aspirations. Biometric processing – mirroring airport e-gates – is fast becoming the benchmark for seamless, high-volume embarkation.



Biometric and smart-port upgrades shifting from pilot to baseline expectation



Force 03

Rise of the FIT Traveler

Asia-Pacific travelers prioritize authentic local experiences, flexible itineraries, and food discovery over structured group tours. Demand for personalization is reshaping excursion and port product design.



60% of APAC travelers prioritize food-related attractions



Royal Caribbean Group | Asia Cruise Forum Jeju 2026 | July 2026

Royal Caribbean Group



The Central Question

Who will reshape the Asian cruise market together, and how?

Asia's cruise future is **co-authored** – by cruise lines, governments, ports, and tourism stakeholders acting **in concert**



Cruise Lines Itinerary & Deployment

Deployment decisions are shaped by policy certainty, infrastructure quality, and destination product – not ships alone. Predictability enables long-term investment.



Governments Policy & Frameworks

Cruise growth is a policy outcome, not just a commercial one – visa frameworks, inter-agency coordination, and tourism positioning directly affect passenger volumes.



Ports Infrastructure & CIQ

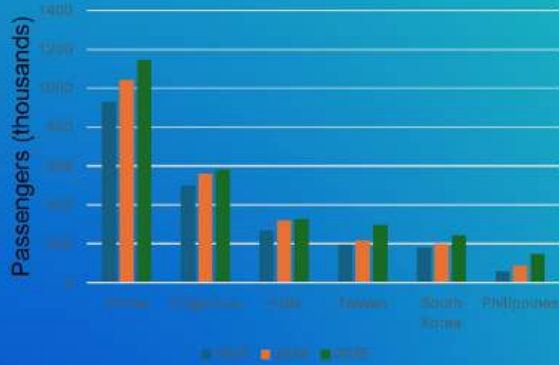
CIQ efficiency, port readiness, and berth capacity determine whether a destination is included or passed over in annual deployment planning.



Tour Operators Experience & Product

Shifting FIT demand requires a re-imagining of excursion products – from coach tours to curated, flexible, culturally immersive experiences discoverable before boarding.

Asia Cruise Passenger Volumes by Key Market (thousands)



Sources:

ASIA MARKET REPORT - [cruisings.org](https://www.cruisings.org)

Asia | Cruise Lines International Association

Asia as a Long-Term Growth Market

Asia's cruise growth is a structural shift driven by demographics, rising incomes, and deepening cultural appeal – not a cyclical rebound.

- **Taiwan +49.8%** in 2025 (297K pax, 4th in Asia); **South Korea +34.4%**; **Philippines +70%**
- Southeast Asia projected at **13.6% CAGR** – fastest-growing cruise sub-region globally, driven by port development and rising middle-class demand
- Singapore achieved record **13.9% penetration** (2023); India reached **374,000 passengers** – nearly 3x its 2019 volume
- CruiseWorld Asia 2025 confirmed demographic shifts, new ships, and evolving infrastructure converging for a **disproportionate share** of global cruise growth
- A **generational opportunity** – requires coordinated, sustained investment from all stakeholders, not short-term transactional relationships

The Infrastructure Imperative

Across Asia, infrastructure and policy readiness are the precondition for cruise growth – not a follow-on to it.



18-24 Month Planning Lead Time

Cruise lines plan itineraries 18-24 months ahead. Berth depth, gangway compatibility, and terminal capacity directly determine whether a port is included in deployment. AI-driven demand forecasting now feeds these long-range plans – sharpening berth and capacity bets well before the 18-24 month window closes.

CIQ Innovation

Jeju Terminal deployed 38 automated immigration checkpoints for high-volume days. Incheon is being developed as a Fly & Cruise hub, with 10 fly-cruise departures in 2025.

Pan-Asia Terminal Capacity

Capacity is scaling region-wide: Singapore's Marina Bay Cruise Centre takes mega-ships up to ~220,000 G1; Hong Kong's Kai Tak clears about 3,000 passengers per hour across two 360 m berths; Shanghai's Wusongkou moves up to 38,000 passengers a day across four berths; and Japan's Yokohama anchors Tokyo Bay with three cruise terminals.

USD 13.2B Investment by 2033

Global cruise port development is projected to grow from USD 7.4 billion in 2024 to USD 13.2 billion by 2033, with Asia at the center – the region carried 2.6 million cruise passengers in 2024, up 13% year on year. Ports that invest proactively attract deployment; those that wait risk being deprioritized.

Unlocking the CIQ Bottleneck

Fragmented, inconsistent CIQ procedures remain one of the single greatest obstacles to unlocking Asia's cruise potential – and fixing this requires government leadership.

⚠ The Challenge

- **Dissimilar visa and immigration procedures** across Asian markets remain the major challenge – with differing port-to-port regulations within a single country adding friction
- Lack of transparency, consistency, and predictability – **not just across the region, but even within a country**

"What would be useful is transparency, consistency and predictability – not just across the region, but even within a country."

– Wendy Yamazaki, RCG Regional VP Government Relations Asia

✅ The Path Forward

- The **Asia Cruise Cooperation (ACC)** – comprising Hong Kong, Hainan, Xiamen, Taiwan, Philippines, and South Korea – is pursuing government-to-government dialogue to standardize CIQ and visa access
- Best-practice solutions: **pre-arrival data sharing (API/BRI)**, single-window data transmission platforms, biometric e-gates, and coordinated border management frameworks

★ A **"Schengen-equivalent" for Asia** remains a long-term aspiration – but near-term **transparency and predictability** in CIQ processes can deliver immediate commercial impact for all stakeholders



A concrete model: airport-style biometrics

Changi (Singapore) and Incheon (Korea) already clear passengers with passport-free facial-recognition e-gates – the same flow can move cruise guests through CIQ faster and more consistently.

Royal Caribbean Group | Asia Cruise Forum, Jeju, 2026 | July 2026



FIT Traveler Shift

The FIT Revolution: A New Passenger, New Demands

The fastest-growing cruise passenger segment in Asia does not want a tour bus – they want a story.

FIT demand is accelerating across Asia's top source markets – Chinese, Indian, and Southeast Asian travelers favor flexibility, digital self-service, and authentic local experiences over structured group products.

60% of Asia-Pacific travelers prioritize food-related attractions; travelers seek cultural immersion, hidden gems, and local connections – cruise excursion products must evolve accordingly.

AI-driven itinerary planning is mainstream in Asia: 95% of Asia-Pacific consumers are excited about AI in travel, and 75% have already used AI tools – highest adoption globally.

• **Average cruise duration in Asia is 4.1 days**, reflecting a preference for shorter, flexible voyages with multiple port touchpoints.

• For tour operators: the product shift is from **volume-based coach tours to curated, bookable, flexible shore experiences** that can be discovered and purchased digitally before boarding.

Royal Caribbean Group | Asia Cruise Forum, Jeju, 2026 | July 2026

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What Cruise Lines Need From Partners

Deployment decisions are commercial and policy-driven – cruise lines need predictability, product quality, and partnership, not just a berth.



From Governments

- Stable, predictable visa and entry frameworks; inter-agency coordination on cruise tourism policy
- Clear positioning of cruise as a national tourism priority
- Incentive structures that reward committed long-term operators



From Ports

- Modern berth and power infrastructure; efficient, scalable CIQ processing
- Flexible and fair berth allocation; competitive and transparent fee structures
- Investment in handling larger vessel classes



From Tour Operators

- FIT-compatible, digitally bookable, culturally authentic shore experiences
- Local DMC partnerships that can deliver at scale
- Real-time availability and flexible cancellation policies



From Tourism Bodies

- Destination marketing co-investment and joint promotion campaigns to source markets
- Data sharing on visitor flows and spending patterns
- Participation in joint promotion campaigns to source markets

When these elements align, deployment follows – and sustainable, long-term partnerships replace transactional, season-by-season negotiations.



New Cooperation Models in Action

Across Asia, pioneering models of public-private cruise cooperation are already demonstrating what is possible.



Korea

Policy-Led Infrastructure Sprint

- Government target of 2 million cruise tourists by 2027; 7 themed ports with differentiated positioning
- Jeju deployed 38 automated immigration checkpoints; Incheon developed as Fly & Cruise hub
- Inter-agency coordination: Ministry of Oceans & Fisheries, Korea Tourism Organization, and port authorities

2M

cruise tourist target by 2027



Singapore

Strategic Homeport Model

- Singapore Tourism Board confirmed 15.9% cruise growth; record 817,000 passengers — 2.5x 2019 levels
- Multiple cruise lines homeports program — signals long-term confidence in strategic partnership
- Record 13.9% cruise penetration — highest in Asia — underpinned by sustained tourism board co-investment

817K

passengers — 2.5x 2019 volumes



China

Visa Facilitation as Market Catalyst

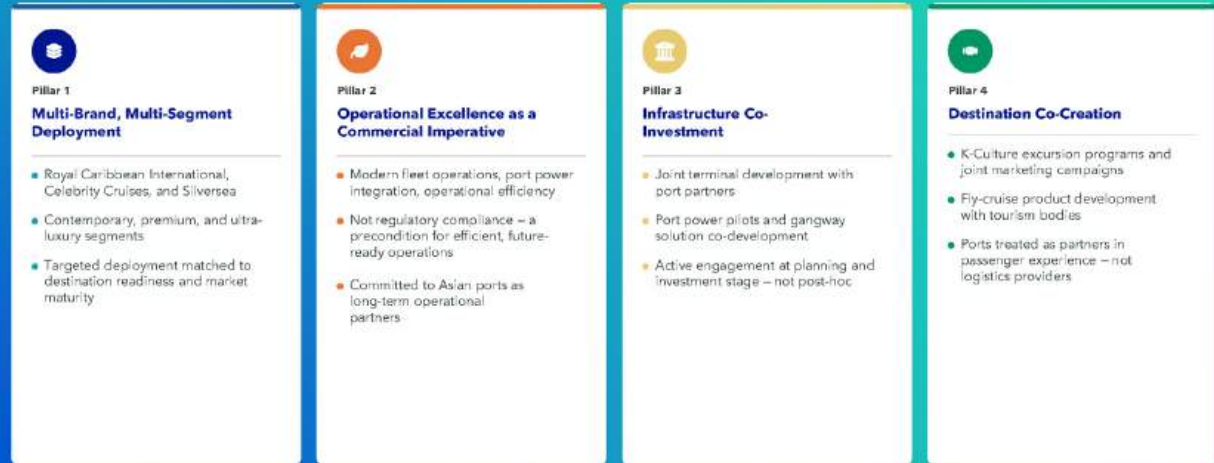
- National Immigration Administration introduced 15-day visa-free access for cruise passengers
- Drove 23% passenger growth in 2025 — Mainland China now leads Asia with 1,145 million passengers
- Estimated CNY 550 billion economic contribution to Chinese economy projected by 2035

+23%

passenger growth driven by visa-free policy

RCG's Approach: Long-Term, Committed, Co-Created

RCG's engagement in Asia is not about port calls – it is about building an enduring value chain where every stakeholder wins.



RCG's long-term commitment to Asia is grounded in commercially sound, mutually beneficial partnership – not opportunistic deployment that retreats when conditions change.

Source: RCG's Asia Pacific Cruise Forum, 14-15 May 2024

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Toward a Shared Framework: The Four Pillars of Partnership

An enduring Asian cruise value chain requires a structured framework built on **four interdependent pillars** – and every stakeholder in this room has a role to play.



This framework is **not aspirational** – it is **operational**. The question is which partnerships will bring it to life.

Source: RCG's Asia Pacific Cruise Forum, 14-15 May 2024

Royal Caribbean Group





The Invitation

A call to Action

Asia's cruise future will not be inherited – It will be built, deliberately, by the people in this room.

- The forum's theme – **"Beyond Boundaries, Connected as One"** – captures what is required: an industry that transcends national borders to form a regional value chain where tourism, culture, and technology are inseparable
- The fastest-growing cruise sub-region in the world is the one we all operate in – infrastructure gaps, CIQ inefficiencies, and FIT demand shifts are not one country's problem; they are the shared agenda for this industry
- RCG's commitment: long-term partnership focused on durable, commercially sound growth – investing in destinations, developing products collaboratively, and supporting the policy frameworks that make Asia cruise-ready

"Who will reshape the Asian cruise market together, and how?" – We will, by choosing to act as partners rather than competitors for a finite resource. We look forward to the conversation.

Royal Caribbean Group | Asia Cruise Forum Jeju 2026 | July 2026

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ROYAL CARIBBEAN GROUP



Asia Cruise Forum · Jeju 2026

Thank You

Beyond Boundaries, Connected as One – let's build Asia's enduring cruise future together.



Royal Caribbean Group



Session 1 | 세션 1

Asia Cruise Lines: Strategies and Partnerships of Global Cruise Lines

아시아 크루즈 선사: 글로벌 선사의 전략과 협력

Katsuya Matsui | 마츠이 카츠야

Operation General Manager (Captain), R-YACHT Co., Ltd.

R-YACHT 운항부 부장 선장

The dawn of a new breeze, defined by yacht style

Biography

Former captain of Pacific Venus with more than 30 years of maritime experience. Has promoted sustainable cruising and port development through extensive expertise in Asian waters and the cruise industry. Currently serves as Operation General Manager (Captain) of R-YACHT Co., Ltd.

Key Career

Operation General Manager (Captain), R-YACHT Co., Ltd.

Former Captain, Pacific Venus

약력

30년 이상의 항해 경력을 보유한 전 퍼시픽 비너스(Pacific Venus) 선장이다. 아시아 해역과 크루즈 산업에 대한 풍부한 경험을 바탕으로 지속가능한 크루즈와 기항지 개발에 기여했으며, 현재 R-YACHT Co., Ltd.의 운항부 부장 선장으로 크루즈 운영과 신규 선박 개발을 총괄하고 있다.

주요 경력

현) R-YACHT Co., Ltd. 운항부 부장 선장

전) 퍼시픽 비너스(Pacific Venus) 선장





SEFU

R YACHT CO.,LTD.

~ The dawn of a new breeze, defined by yacht style~

R YACHT CO., LTD.



SEFU

- 01 THE SHIP**
- 02 CONCEPT**
- 03 NAVIGATION AREA**
- 04 OPERATIONAL ADVANTAGE**
- 05 MODEL COURSE**

01. CRUISE SHIP 'SEFU' 瀬風



NAME: SEFU
LOA: 117.3m
Bread: 19m
Draft: 4.65m
Gross Tonnage: 9530トン
No. of Cabin: 60
Passenger: 120 Persons
Crew: 105 Persons
Nav Speed: 15knots (27km/h)
Navigation Area: Ocean Going
Delivery: Year 2027
Operator: R Yacht Co.,Ltd.
Shipyard: West Sea Shipyard, Portugal
Designer: Gwenael Nicolas (Curiosity Japan)

SEFU

～ The dawn of a new breeze, defined by yacht style～



02. CONCEPT

Japan's First Yacht-Style Cruise Ship

SEFU represents a new category of luxury travel in Japan: a yacht-style boutique cruise ship designed to combine private comfort with exceptional hospitality.

Her itineraries focus on destinations in-accessible to larger cruise ships, including the islands of the Seto Inland Sea and the remote archipelagos of Okinawa.

At the stern, SEFU features a marina—an unprecedented feature on a newly built Japanese cruise ship—allowing guests to enjoy direct access to the sea, watersports, and exclusive shore experiences. Guests can explore secluded islands and hidden coves via small craft, creating a cruise experience that feels far closer to private yachting than traditional cruising

*Yacht-style cruise ships within the cruise ship category, these are small luxury vessels carrying approximately 100 to 150 passengers that offer the highest level of personalized service in a luxurious setting that makes guests feel as if they were the owners of a mega-yacht (large motor cruiser). This type of cruise is commonly found in French Polynesia and along the Mediterranean coast.



04. NAVIGATION AREA

Destinations Designed for Yacht-Style Cruising

SEFU's itineraries are carefully planned to maximize the advantages of a yacht-style vessel.

Rather than following fixed routes, we operate in the most favorable cruising regions according to the season. During periods when open-ocean conditions may be less comfortable, SEFU cruises protected waters such as Japan's Seto Inland Sea.



DESIGNER



GWENAEL NICOLAS

1966 Born in Brittany, France
1998 CURIOSITY Co., Ltd. was
established

2004 Received an honorary master's degree
from E.S.A.G. Paris.

He continues to create innovative works
across a wide range of fields, from spatial
design, product design, and interior design to
branding, and is committed to creating new
design identities in collaboration with a
diverse range of clients, including luxury
hotels, large-scale commercial facilities, and
high-end brands.



GINZA SIX



FENDI PARIS



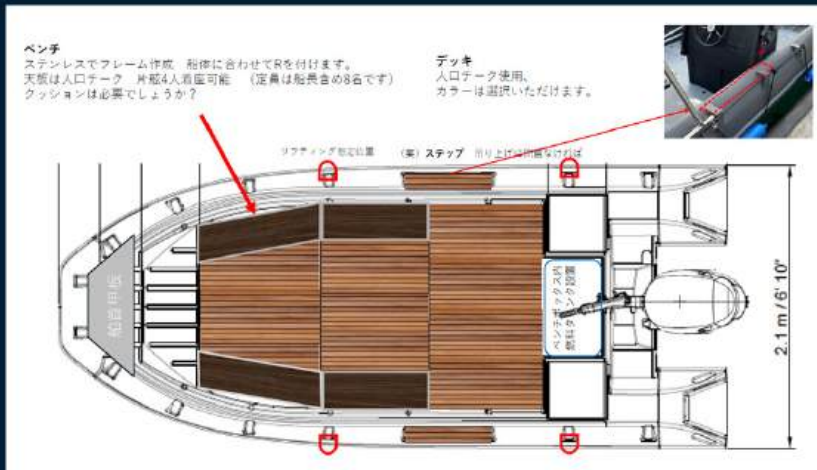
フォーシーズンズホテル大阪
Four Seasons Osaka

SEFU

SEFU Operational advantages

R YACHT CO., LTD.

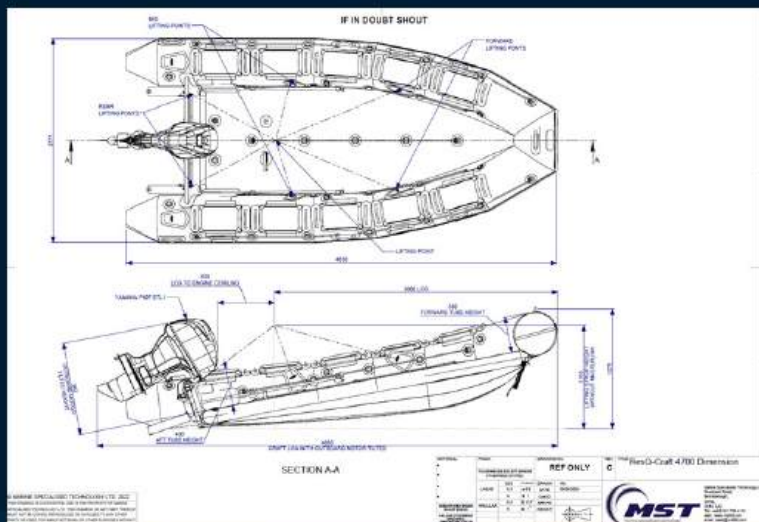
Landing toward beautiful scenery aboard a specially customized Small Boat



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CONFIDENTIAL INFORMATION

Demonstrate professionalism Safety, Landing Support, and Services with a Specially Designed Utility Boat



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CONFIDENTIAL INFORMATION

Floating aft platform and beach club, crafted into your own exclusive hideaway on the sea



Long after night has fallen, the aft beach club invites guests to experience pleasures found only aboard a yacht.



Transform uninhabited beaches and isolated hidden frontiers into one-of-a-kind party venues—only with SEFU.”



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With underwater drones and wide screen, we offer a virtual seabed exploration experience, allowing guests to discover breathtaking coral seas while sipping cocktails.



Underwater Drone
CHASING M2 PRO

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With over 50,000 kilometers of coastline, Japan ,Korea and Taiwan coast offers limitless destinations for yacht-style cruising.



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15

Korea: A Model Yacht-Style Itinerary **THE ARCHIPELAGO OF KOREA**

**VISITING UNKNOWN SECRET BEAUTIES OF
SOUTHERN ISLANDS AND INLETS IN KOREA**

THEME

Discovering the Hidden Beauty of Southern Korea

The Dadohae haesang National Park extends from Hongdo Island in Sinan County to Yeosu and encompasses one of the world's most spectacular island seascapes.

Together with the adjacent Hallyeo haesang National Park, it forms a vast network of islands, channels, and protected waters that many Koreans consider a once-in-a-lifetime destination.

The region is also renowned for its seafood, agricultural products, and distinctive culinary culture, making it one of Korea's finest gastronomic destinations.

THE ARCHIPELAGO OF KOREA

MODEL COURSE (There are many options)

Day 1 DEP HAKATA , JAPAN

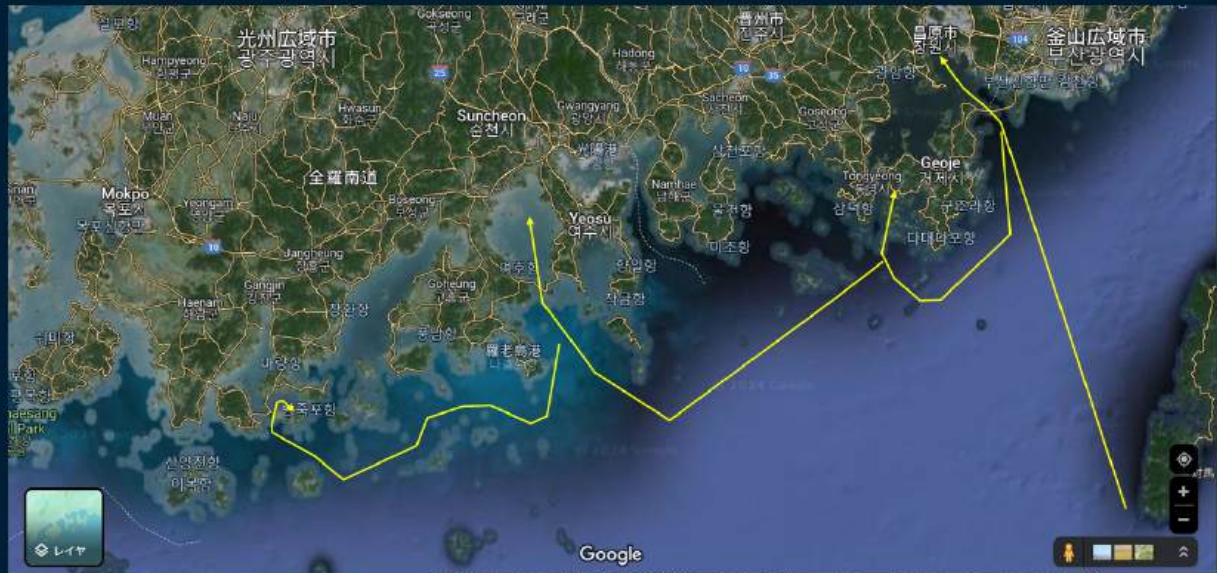
Day 2 MASANG (Inward)

Day 3 TONGYEONG

Day 4 HO SEONG-JANG-DO

Day 5 AM CHEONGSANGDO PM WANDO (Outward)

Day 6 HAKATA , JAPAN



Day2-3 South Gyeongsang Province

After completing immigration formalities in Masan, guests embark on a journey through Hallyeohaesang Marine National Park, enjoying island-hopping among some of Korea's most scenic coastal landscapes.



TONGYEONG

Tongyeong is a picturesque harbor city overlooking the Hallyeo Strait. Visitors can enjoy water sports, hiking on Mount Mireuk, excursions to nearby islands, and a vibrant cultural scene highlighted by Tongyeong International Music Festival.

Known for its seafood, maritime heritage, and artistic traditions, Tongyeong is one of Korea's most charming coastal destinations.



Hallyeosudo Marine Park

Hallyeo haesang National Park, established in 1968 as Korea's first marine national park, covers more than 535 square kilometers, approximately 76% of which is marine environment. Its combination of sea, islands, and dramatic coastal scenery attracts more than one million visitors annually.

SOMAEMULDO



BIJINDO



Day4-5 South Jeolla Province

The heart of Dadohaehaesang National Park offers a rich blend of natural beauty, slow-life culture, and exceptional cuisine.



HO SEONG-JANG-DO

This area is famous for its dramatic tidal landscapes and UNESCO-recognized tidal flats. Accessible only by Zodiac boats at certain tidal conditions, visitors can experience a unique ecosystem, spectacular scenery, and breathtaking views over Korea's largest tea plantations.



CHEONGSANGDO

Located off the coast of Wando, Cheongsando is celebrated for its blue seas, terraced fields, stone walls, and traditional island culture.

In 2007, it became Asia's first designated Slow City, symbolizing a sustainable and relaxed way of life.



WAN DO

Wando serves as an important maritime gateway to Jeollanam-do Province. The region is famous for premium oysters and abalone, while also offering beautiful forests and wellness programs including sound therapy, seaweed therapy, mud therapy, and thalassotherapy.



OUTLAYING ISLAND

Beyond these destinations, the national park contains countless lesser-known islands, hidden anchorages, and extraordinary natural landscapes that are ideally suited to yacht-style exploration.



SEFU

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Session 1 | 세션 1

Asia Cruise Lines: Strategies and Partnerships of Global Cruise Lines

아시아 크루즈 선사: 글로벌 선사의 전략과 협력

Massimo Russo | 마시모 루소

Vice President, South Korea,

Japan & South-East Asia Cruise Division, MSC Cruises

MSC 크루즈 한국·일본·동남아시아 크루즈 사업부 부사장

Korea Cruise Council:

Korea & Japan Cruise Market Development

Biography

Vice President and Board Member of MSC Cruises Japan & Korea, leading the company's business strategy and operations across the region. With nearly 20 years of experience in the cruise industry, he has held key operational and leadership roles within MSC Cruises, including leading the deployment of three MSC cruise ships as floating hotels during the FIFA World Cup Qatar 2022, and now drives the company's growth strategy and stakeholder partnerships across Japan, Korea, and Southeast Asia.

Key Career

Vice President & Board Member, MSC Cruises Japan & Korea (2024-Present)

Former Director of Operations, MSC Cruises Japan

Former Operations Manager, MSC Cruises Italy

Project Lead, MSC Floating Hotels for FIFA World Cup Qatar 2022

약력

MSC 크루즈 일본·한국 지역 부사장이자 이사회 임원(Board Member)으로 일본과 한국 시장의 사업 전략 및 운영을 총괄하고 있다. 약 20년간 MSC 크루즈에서 다양한 운영 및 경영 리더십을 수행했으며, 2022년 FIFA 카타르 월드컵 플로팅 호텔 프로젝트를 성공적으로 이끌고 현재 일본·한국·동남아시아 시장의 성장 전략과 대외 협력을 주도하고 있다.

주요 경력

현) MSC 크루즈 일본·한국 지역 부사장 및 이사회 임원 (2024~)

전) MSC 크루즈 일본 운영총괄 디렉터

전) MSC 크루즈 이탈리아 운영관리자

전) FIFA 카타르 월드컵 MSC 플로팅 호텔 운영 총괄 (2022)





Explora

MASSIMO RUSSO

VICE PRESIDENT
SOUTH KOREA AND JAPAN

Korea Cruise Council:

Korea & Japan Cruise Market
Development



MSC



Asia

The Next Growth Engine

◆ Development of the Korea & Japan Homeport Cruise Business ◆

2026 ASIA CRUISE FORUM JEJU • July 23rd, 2026

MSC Group Overview

A global leader with a family heritage and a diversified portfolio



Founded in 1970
by Gianluigi Aponte



Headquartered
and registered in
Geneva, Switzerland



The MSC Group is
privately owned by
the Aponte family



More than
200,000 employees
across **155 countries**
globally

CARGO DIVISION



PASSENGER DIVISION

CRUISE DIVISION



FERRY DIVISION



RAIL DIVISION



OTHER ENTITIES



THE CRUISES DIVISION

Two Brands. Three Segments. Strong Growth.

MSC



THE CONTEMPORARY BRAND

Fleet of 23 modern ships, operating across five continents. A further 10 ships are due to launch by 2033.

TWO COMPLEMENTARY BRANDS SERVING THREE SEGMENTS



MSC YACHT CLUB

MSC CRUISES' EXCLUSIVE PRODUCT
MSC Yacht Club – all-inclusive “ship within a ship” concept” caters to premium segment.

Explora



THE LUXURY BRAND

Offers refined yet effortless luxury with an incredible richness of experiences.

Explora launched in 2023 and Explora II launched in 2024. A further 4 ships are due to launch by 2028.

MSC CRUISES

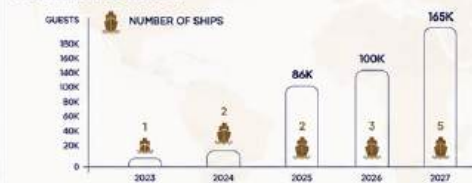
Guest evolution



114%
Guests growth
vs. 2019

EXPLORA JOURNEYS

Guest evolution



Explora
JOURNEYS



Japan Market

A Mature Market Ready for Its Next Evolution



Market Characteristics

- 01 Mature & Highly Structured Market
- 02 Strong Distribution Network
- 03 High Purchasing Power
- 04 Premium Travel Demand



Current Market Dynamics

- 01 Traditional travel distribution remains a key driver
- 02 Groups Operations continue to play an important role
- 03 Growing interest in regional & homeport itineraries



Key Message:

Japan doesn't need to discover cruising.
The next challenge is making cruising part of everyday travel choices.



Korea Market Update

Strong Momentum, Clear Progress



Interporting from Busan

Now operating interporting cruises from Busan



+145%

increase of Korean guests

+120%

of calls in Korean ports



Commercial localization

Local partnerships and dedicated resources



Top 5 Nationality Onboard

Korean guests now rank among MSC's Top 5 nationalities in Asia.

Strong demand and growing loyalty



Key Message:

Korea is moving rapidly from an outbound source market toward a credible homeport market.



What Makes a Successful Homeport?

A homeport is an ecosystem that must deliver a seamless experience for guests, partners and the destination.



1. Sufficient Local Demand

A strong and sustainable base of local guests that ensures year-round viability.



2. Air Connectivity

Direct and efficient air links with key source markets, convenient timings and competitive fares.



3. Efficient Terminal & Border Procedures

Smooth embarkation and disembarkation processes with modern terminals and efficient procedures.



4. Strong Travel Trade

Engaged travel partners who create awareness, drive sales and deliver exceptional service.



5. Localized Onboard Product

Culturally relevant experiences, cuisine, entertainment and service that make guests feel at home from the start.



6. Government & Destination Support

Visionary leadership, supportive policies and collaborative marketing to grow cruise tourism together.



BUSAN: New embarkation port

Starting in 2026



NEW EMBARKATION PORT

Busan, South Korea



SUMMER AND WINTER CRUISES

August, September,
January, February



MORE CHOICE

for Korean & International
cruise guests

OUR ITINERARY HIGHLIGHTS



STRONG MARKET MOMENTUM

Korea cruise market continues
to grow with strong demand



BUSAN'S STRATEGIC POSITION

Gateway to Northeast Asia,
well connected by air and sea



PARTNERING FOR SUCCESS

Close collaboration with local
partners and stakeholders



MORE DISCOVERIES AHEAD

Delivering exceptional
experiences for every guest

**WE ARE PROUD TO BRING MSC BELLISSIMA TO BUSAN.
TOGETHER, LET'S GROW CRUISING IN KOREA.**



Session 2 | 세션 2

Asia Cruise Destinations: Growth Strategies for Key Asian Destinations

아시아 크루즈 목적지: 아시아 주요 목적지의 성장 전략

(Joe) Yung Hui, Chou | 조우용혜

Chairman, Taiwan International Ports Corporation (TIPC)

대만국제항만공사(TIPC) 회장

The dawn of a new breeze, defined by yacht style

Biography

Chairman of Taiwan International Ports Corporation (TIPC), leading the development of Taiwan's port and cruise industries. Brings extensive experience in transportation, tourism, and public administration, having previously served as Director General of the Tourism Administration, Taiwan Railways Administration, and Railway Reconstruction Bureau under the Ministry of Transportation and Communications.

Key Career

Chairman, Taiwan International Ports Corporation (TIPC)

Director General, Tourism Administration, MOTC

Chairman, China Engineering Consultants, Inc.

Director General, Taiwan Railways Administration, MOTC

Director General, Railway Reconstruction Bureau, MOTC

약력

대만국제항만공사(TIPC) 회장으로 대만의 항만과 크루즈 산업 발전을 이끌고 있다. 교통·물류 및 관광 분야에서 풍부한 행정 경험을 바탕으로 대만 교통부 관광국장, 철도청장, 철도개선국장 등을 역임하며 국가 교통·관광 정책과 항만 인프라 발전에 기여했다.

주요 경력

현) 대만국제항만공사(TIPC) 회장

전) 대만 교통부 관광국장

전) China Engineering Consultants, Inc. 회장

전) 대만 교통부 철도청장

전) 대만 교통부 철도개선국장



2026 ASIA CRUISE FORUM JEJU



Discover the Allure of Cruising from Taiwan

Chairman | (Joe) Yung-Hui Chou, Ph.D
Taiwan International Ports Corporation, Ltd.



Agenda

01. Seeing Taiwan
02. Charming Taiwan
03. Branded Taiwan

01 SEEING TAIWAN



00 00 00 00 00

Post-Pandemic Travel Trends

**Passenger
Demand**

Immersive Local
Culture & Nature

**Industry
Supply**

Shift in Business &
Service Models

**Sustainable
Tourism**

Rising Consumer
Demand for
Sustainability

It's no longer about **WHERE** to go, but **WHAT** to experience

PURPOSE-DRIVEN TRAVEL

Overview of Taiwan's Cruise Industry



2025

Passenger Throughput

1.15M

Port of Calls

285

Cruise Lines

28

Foreign Passenger

470K

Fly-Cruise Passenger

60K



3

Overview of Taiwan's Cruise Industry



2026

Passenger Throughput

1.15M estimated

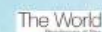
Port of Calls

304 estimated

Cruise Lines

32 estimated

A More Global and Diversified Cruise Market



4

Taiwan: Perfectly Positioned Port Cluster



5 Key Strengths for Cruise

- * Strategic Geographical Location
- * Highly Convenient Transport Network
- * Rich & Diverse Tourism Resources
- * Warm & Welcoming Hospitality
- * Advanced Port Infrastructure & Services-

Asia's 3rd international port cluster to offer Shore Power (OPS): Port of Kaohsiung, Port of Keelung (2027)

5

Taiwan Port Cluster



2 Cruise Hubs (Turnaround + Transit)
5 Destination Ports (Transit)

6



Port of Keelung

TIPC

Keelung Port West Cruise Terminal

- Pier Length: 544.5m
- Pier Depth: -11m
- Capacity: 250,000GRT

Keelung Port East Cruise Terminal

- Pier Length: 558.3m
- Pier Depth: -9m
- Capacity: 150,000GRT





10

Port of Kaohsiung



Kaohsiung Port Cruise Terminal (No.20)

- Pier Length: 726m
- Pier Depth: -10m
- Capacity: 250,000GRT



Kaohsiung Port Penglai Cruise Terminal (No. 9)

- Pier Length: 442m
- Pier Depth: -10m
- Capacity: 150,000GRT



12

Taiwan Port Cluster

Destination Port



Port of Penghu

Island Paradise of the Taiwan Strait



Port of Anping(Tainan)

Gateway to Taiwan's Heritage



Port of Taichung

Culture, Creativity and Urban Charm



Port of Suao

Scenic Gateway to Taiwan's Northeast Coast

Port of Hualien

Where Mountains Meet the Sea



7

Port of Penghu

A Premier Emerging Port

- Extension of Pier No.1 to accommodate cruise ships of up to 150,000GRT
- Penghu International Cruise Terminal (No.1) scheduled for completion by **End of 2026**



8

2026 Preferential Scheme



Maiden Voyage



Multi-Port Itineraries



Fly-Cruise Expansion



Loyalty Incentives

Free/Discount
Passenger Service Charge

Cruise Lines
Loyalty Incentives

Incentives for Foreign
Passengers

Additional Incentives
Provided by TTA
(Taiwan Tourism Administration)



*Applicable incentives vary across different ports

14

Innovating for Sustainable Port Evolution



Transforming through innovation, we empower our organization to drive digital and low-carbon growth for resilient, sustainable ports.



15

Smart Port Strategic Blueprint



Deploying Port Digital Twins integrated with real-time IoT data to simulate operations, enhance smart decision-making, and boost predictive risk management.



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02 CHARMING TAIWAN



Eco-Adventure



Gastronomy Tourism

**53 Michelin-Starred
Restaurants Across 7 Cities**

❁❁❁ **3 Restaurants**

❁❁ **7 Restaurants**

❁ **43 Restaurants**

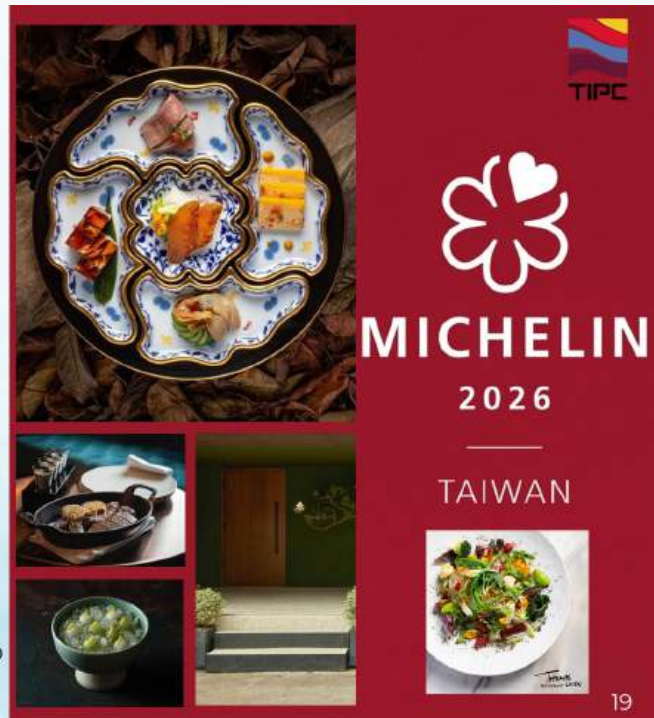
❁ **2 Restaurants**

👤 **144 Bib Gourmand**

Taipei area: 49 Michelin-Starred/ 23 Bib

Taichung: 7 Michelin-Starred/ 23 Bib

Kaohsiung/Tainan: 4 Michelin-Starred/ 54 Bib



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Spiritual JOURNEYS IN TAIWAN

Finding Peace Within Sacred Spaces



Chung Tai Chan Monastery



Port of Taichung



Port of Keelung



Dharma Drum
Mountain World
Center for Buddhist
Education

Fo Guang Shan
Buddha Museum



Port of Kaohsiung



Port of Hualien



Hualien Tzu Chi
Jing Si Hall

Taiwan's Buddhist temples offer a sanctuary of stillness amid the modern world. From the mountain monasteries of Fo Guang Shan to the tranquil halls of Dharma Drum, each temple invites visitors to pause, breathe, and reconnect with inner calm.

20

Taiwan: A Globally Acclaimed Destination



Traveller Review Awards 2026

2026's Most Welcoming Cities on Earth: Magong, Taiwan



Global Traveler-Leisure Lifestyle Awards

Best Leisure Destination in Asia 2024



Global Muslim Travel Index(GMTI)

Ranked 3rd Globally among Non-OIC Destination



Asia-Pacific Sustainability Action Awards(APSAA)

21

Taiwan: A Globally Acclaimed Destination



Green Destinations Top 100 Stories

Taiwan Secures 9 Spots (Including 6 from National Scenic Area Administrations)



Zhuangwei Sand
Dune Travel Park

Nature & Landscape

Protecting Green Sea
Turtles in Penghu



Nature & Landscape

Fugang Geopark



Destination Management



Business & Marketing

Partnering with Sun
Moon Lake –
Sustainable Tourism

22

Seamless Connectivity



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03 BRANDED TAIWAN



00 00 00 00 00

TAIWAN: WAVE OF WONDER



TAIWAN

WAVES OF WONDER

TAIWAN LOGO

- Scenic Synergy: Integrating Taiwan's iconic mountains, vast oceans, and winding routes.
- Core Theme Alignment: Echoing the national campaign: "Enjoy Mountains, Embrace Oceans, and Journey Around the Island."

WAVE OF WONDER SOLGAN

- Showcasing a land of vibrant culture and limitless charm, bringing continuous surprises to global travelers.

Infinite Charm, Boundless Surprises

25

TAIWAN Hi
Marine Highway

Leisurely Bay Wonders

10+ Offshore Islands of Taiwan

Little Kinmen

Beigan Island

Dongju Island

Guishan Island

Yuong Island

Green Island

Qimei Island

Jibei Island

Xiaoliuqiu

Orchid Island

26

Taiwan Cruise Development



5 Strategies



Overseas Expansion

Promote Fly-Cruise & multi-homeport routes with national co-branding.



Global Events

Anchor in Taiwan to lead Asia-Pacific port alliances.



Port-City Synergy

Optimize CIQS & excursions, launch "One Port, One Feature" branding.



Talent & Structure

Establish a cross-ministerial industry collaboration platform.



Targeted Management

Leverage BI analytics & proactive CRM to maximize marketing impact.



3 Key Highlights in 2026



Dual Homeports

MSC Bellissima homeport at Keelung & Kaohsiung



Ships Berthing

Keelung:

3 ships berthed at two cruise terminals

Kaohsiung:

Dual ships berthed at two cruise terminals



Market Expansion

6 Maiden voyages

Expanding luxury and diverse passenger demographics

27



TAIWAN CRUISE PORT DEVELOPMENT: THE 2027–2031 STRATEGIC VISION



HARDWARE & GREEN TRANSFORMATION

US\$22.3M Keelung Pier E4&E5 Reconstruction



By 2027
**US\$22.3M
Pier E4&E5
Reconstruction**
Modernizing 50-year-old piers to support advanced cruise berthing and commercial growth.

Low-Carbon Shore Power Infrastructure

Investing NT\$411M to reduce vessel emissions at Keelung and Kaohsiung cruise terminals.

NT\$ 1.123 Billion:
Hardware & Shore Power
(Keelung & Kaohsiung)



Optimized Passenger Experience

Streamlining customs processes and spatial layouts to significantly reduce traveler wait times.

WATERFRONT COMMERCIAL GROWTH

US\$781M Projected Private Investment

Developing Kaohsiung's "Asia New Bay Area" into a premier waterfront tourism and business corridor.



Through 2029

Keelung "Golden Corridor" Planning

Converting Pier 4–7 into a startup and cruise recreation zone. (NT\$ 9.5 Million)



28

Cruise Tourism Three Key Priorities for Sustainable Transformation



Environmental

- **LNG Fuel Adoption:** Reducing ship emissions.
- **Advanced Treatment:** Upgrading waste & wastewater systems.
- **OPS Integration:** Utilizing Onshore Power Supply during port calls.
- **Low-Carbon Routing:** Designing eco-friendly itineraries.

Social

- **Capacity Management:** Maintaining high tourism quality.
- **Health & Safety:** Strengthening onboard epidemic protocols.
- **Port-City Synergy:** Promoting sustainable urban tourism.
- **Community Balance:** Harmonizing tourism with local life.

Governance

- **Green Incentives:** Attracting eco-friendly cruise lines.
- **Smart Clearance:** Enhancing the passenger experience.
- **Green Infrastructure:** Building eco-certified, smart terminals.
- **Global Collaboration:** Driving international partnerships & investment.



29

Sustainable Cruise Tourism in the AI Era



AI is beyond efficiency — it drives sustainability. Under AI + ESG, modern ports transform from traditional terminals into smart green hubs.

KEY STRATEGY



Asia-Pacific Positioning

Keelung & Kaohsiung dual cores connecting with international global cruise routes.



AI & Sustainability

Green operations: port energy management, carbon footprint tracking, smart clearance.



Fly-Cruise Integration

Diverse arrivals: attracting international tourists to Taiwan via air-sea packages.

VISION: Ports as convergence hubs for logistics and people —

integrating port areas with scenic attractions to drive port-city co-prosperity.

30



Connecting with the World

Sailing into a Shared Future



*Thank
you!*

Welcome to Taiwan

Session 2 | 세션 2

Asia Cruise Destinations: Growth Strategies for Key Asian Destinations

아시아 크루즈 목적지: 아시아 주요 목적지의 성장 전략

Yoichi Kitai | 기타이 요이치

Deputy Director-General, Port and Harbor Promotion Office,
Ishikawa Prefectural Government (Kanazawa Port Authority)
이시카와현청 가나자와항만청 항만진흥실 부국장

One of Asia's Emerging Cruise Destinations

Biography

Deputy Director-General of the Port and Harbor Promotion Office, Ishikawa Prefectural Government, overseeing cruise promotion and port operations at Kanazawa Port. Brings more than 30 years of experience in local government administration, contributing to regional development through port management, airport development, tourism promotion, and regional marketing.

Key Career

Deputy Director-General, Port and Harbor Promotion Office, Ishikawa Prefectural Government
Cruise Business Promotion & Port Operations, Kanazawa Port
Port Management, Airport Development & Tourism Promotion

약력

이시카와현청 항만진흥실 부국장으로 가나자와항의 크루즈 유치와 항만 운영을 총괄하고 있다. 30년 이상의 지방행정 경험을 바탕으로 항만 관리, 공항 건설, 관광 진흥 및 지역 마케팅을 추진하며 가나자와항의 국제 크루즈 경쟁력 강화에 기여하고 있다.

주요 경력

현) 이시카와현청 항만진흥실 부국장
가나자와항 크루즈 유치 및 항만 운영 총괄
항만 관리, 공항 건설 및 관광 진흥



Kanazawa Port

— One of Asia's Emerging Cruise Destinations —



Discover Kanazawa



Centrally located on Japan's west coast

Short distance to neighboring countries such as South Korea and China.



Access to Kanazawa



JR Kanazawa Train Station and Komatsu Airport are gateways to/from Tokyo and other major cities in Japan.

From **Osaka**

2 hours

From **Nagoya**

2.5 hours

From **Tokyo**

2.5 hours

Kanazawa

Osaka

Nagoya

Tokyo

From **Tokyo**
(Haneda ↔ Komatsu)

1 hours



JR Kanazawa Train Station



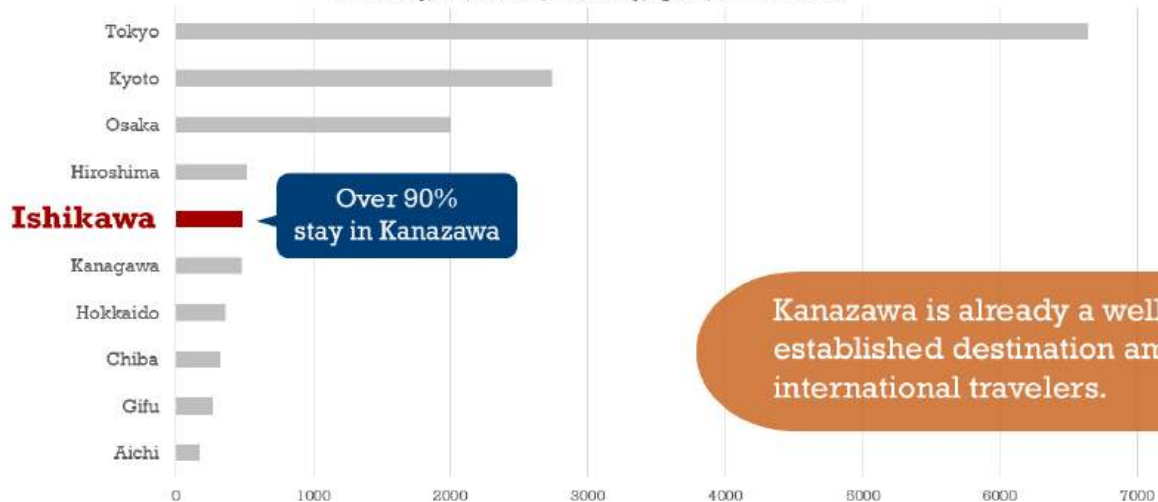
Airports in Ishikawa

Kanazawa as a Leading Tourism Destination



Overnight Stay Destinations by Prefecture (2024)

from Italy, UK, France, Germany, Spain, and Australia



Kanazawa is already a well-established destination among international travelers.

Source: Ishikawa Prefecture based on JNTO "Overnight Stay Travel Statistics Survey" (2011-2024).

- **“A taste of authentic Japan”**

(Source: **National Geographic's** *25 Best Places in the World to Travel to in 2025*)

The Only Selected City in East Asia

- **“Traditional crafts and award-winning sake”**

(Source: **BBC Travel's** *20 Best Places to Travel in 2026*)

- **“Kanazawa's rich history and culture ranges from geisha districts to a 16th-century castle”**

(Source: **Trip Advisor's** *Travelers' Choice Awards Best of the Best Destinations*)



Kanazawa Port: A Highly Attractive Port of Call

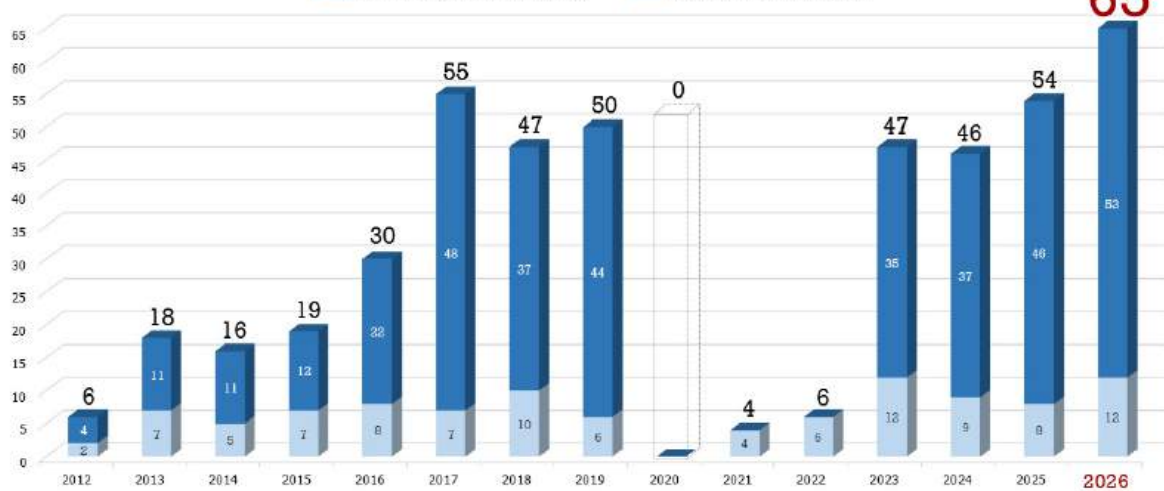


Kanazawa Port Call Trends



Cruise ship calls at Kanazawa Port

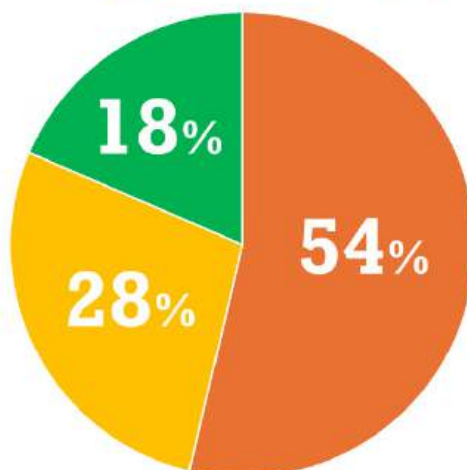
International Cruise Lines Japanese Cruise Lines



Calls by Cruise Market Segments (2025)



Contemporary Premium Luxury & Expedition



Calls at Kanazawa Port (2025)



Nippon Maru
22,472t / 392pax



ASUKA III
52,200t / 744pax



Le Jacques Cartier
9,988t / 184pax



Hanseatic Inspiration
15,651t / 230pax



MSC Bellissima
171,598t / 4,386pax



Costa Sereza
114,261t / 2,930pax



Diamond Princess
115,906t / 2706pax



Scenic Eclipse II
17,592t / 228pax



Silver Whisper
28,258t / 392pax



Silver Muse
40,791t / 596pax



Silver Nova
55,051t / 728pax



Azamara Pursuit
30,277t / 702pax



Heritage Adventurer
8,445t / 140pax



Norwegian Spirit
75,904t / 2,032pax



Vesterdam
82,350t / 1,954pax



AIDAstella
71,304t / 2,194pax

Sample Cruise Itineraries



Transit Route connecting North America and Asia



Source: iCruise website (accessed July 2026)

Japan Circumnavigation Cruise



Source: Silverseas Cruises website (accessed July 2026)

Why Kanazawa Port?



1. Port Infrastructure

- Three wharves
- Kanazawa Port Cruise Terminal

2. Seamless Access

- 20-minute journey to Kanazawa highlights

3. Diverse Experiences

- Living Heritage
- Modern Elegance
- Cultural Immersion
- Culinary Artistry

4. Gateway to Kanazawa and Beyond

- World Heritage Sites
- Natural Scenery
- Renowned Hot Springs



Why Kanazawa Port?



1. Port Infrastructure

- Three wharves
- Kanazawa Port Cruise Terminal



2. Seamless Access

- 20-minute journey to Kanazawa highlights

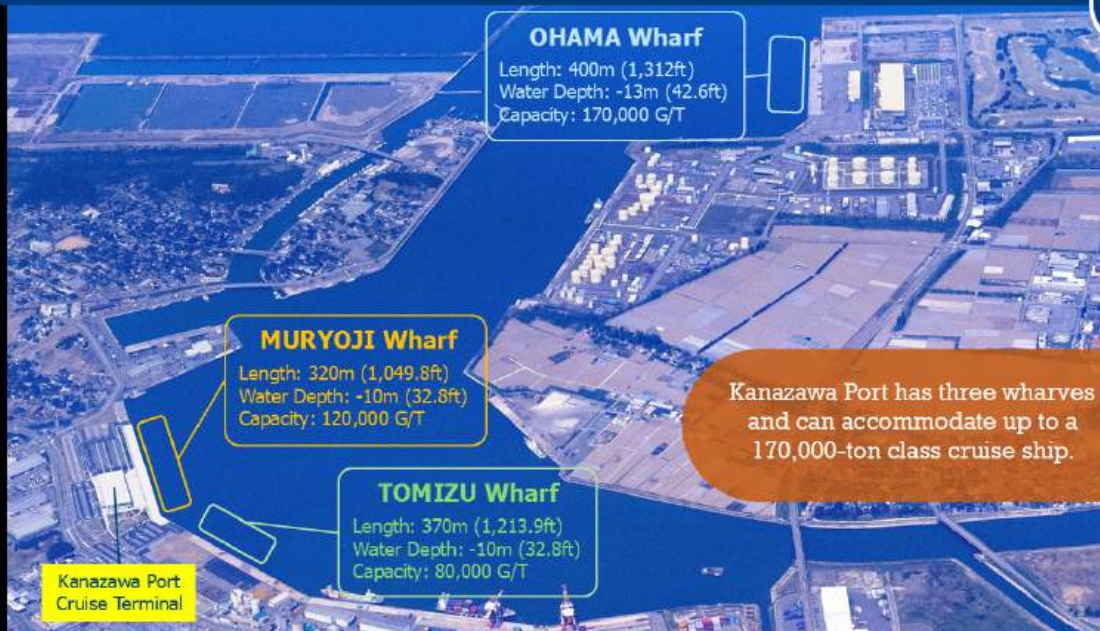
3. Diverse Experiences

- Living Heritage
- Modern Elegance
- Cultural Immersion
- Culinary Artistry

4. Gateway to Kanazawa and Beyond

- World Heritage Sites
- Natural Scenery
- Renowned Hot Springs

1. Infrastructure: Port facilities for passenger ships



1. Infrastructure: Kanazawa Port Cruise Terminal



Kanazawa Port Cruise Terminal (2020 ~)



CIQ Area



Waiting Area

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2. Seamless Access



Major tourist attractions are within a radius of 5km (3.1mi) from port.



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- 20-minute journey to Kanazawa highlights

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- Cultural Immersion
- Culinary Artistry

4. Gateway to Kanazawa and Beyond

- World Heritage Sites
- Natural Scenery
- Renowned Hot Springs



3. Living Heritage: History & Culture



Kanazawa Castle Park



Kenrokuen Garden



Higashi Teahouse District



Nagamachi Samurai District

3. Modern Elegance: Art & Architecture



21st Century Museum of Contemporary Art



© D.T. Suzuki Museum

3. Cultural Immersion



Gold Leaf



Kaga-Yuzen
Dyeing



Tea Ceremony

3. Culinary Artistry①: Omicho Market



3. Culinary Artistry②: Kaga Cuisine



Why Kanazawa Port?



1. Port Infrastructure

- Three wharves
- Kanazawa Port Cruise Terminal

2. Seamless Access

- 20-minute journey to Kanazawa highlights

3. Diverse Experiences

- Living Heritage
- Modern Elegance
- Cultural Immersion
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4. Gateway to Kanazawa and Beyond

- World Heritage Sites
- Natural Scenery
- Renowned Hot Springs

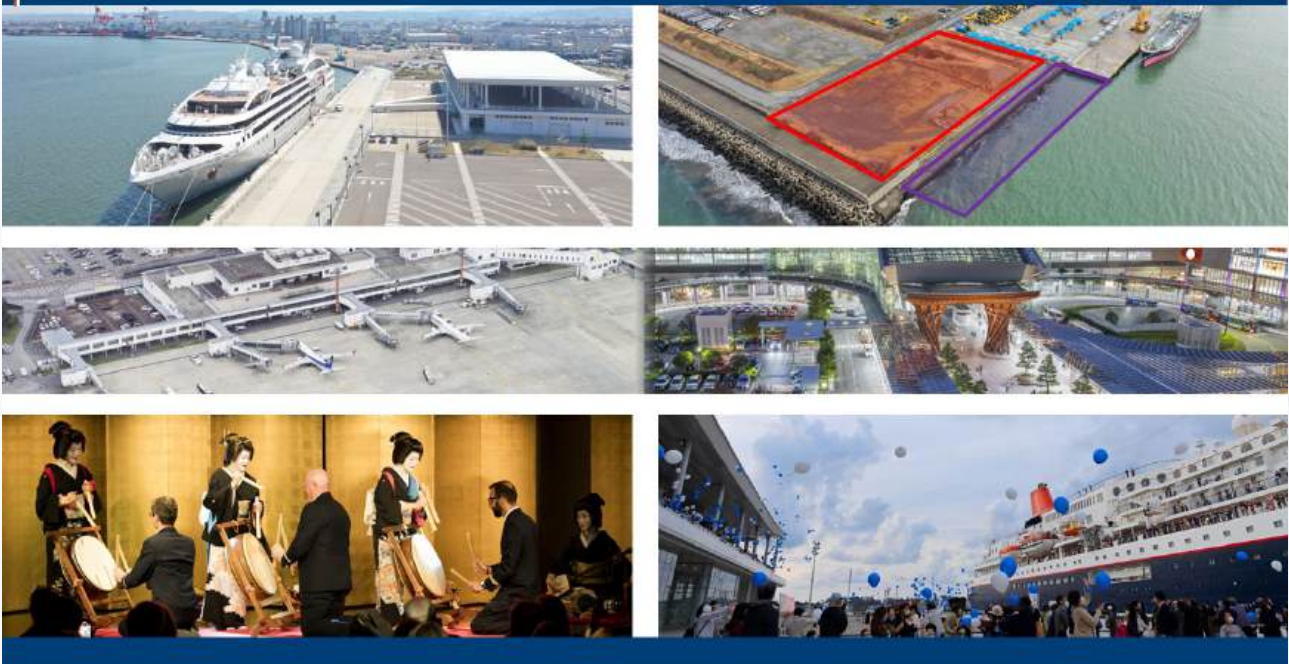


4. Gateway to Kanazawa and Beyond

Explore popular nearby destinations on a day trip.



Strategic Initiatives



Strategic Initiatives

1. Luxury Cruise Positioning

- Aligning port capacity and high-value travel demand

2. Enhancing Port Capacity

- Muryoji Wharf upgrade (130,000 G/T class)
- Ohama Wharf expansion and extension

3. Advancing Turnaround Cruises

- Excellent rail and air connectivity for easy access to Kanazawa Port

4. Promoting Overnight Calls

- Curated night-time cultural and dining experiences, *geisha* performances onboard/ashore

5. Ensuring Repeat Calls

- Regional exploration opportunities and continuously evolving travel experiences

A Heart-warming Welcome from the Community



Kaga Yuzen Ambassadors

The Kanazawa Cruise Welcome Club

established in 2013 has over 9,000 members.

They visit the port for welcome and send-off events for cruise ships.





See you in Kanazawa!



Session 2 | 세션 2

Asia Cruise Destinations: Growth Strategies for Key Asian Destinations

아시아 크루즈 목적지: 아시아 주요 목적지의 성장 전략

Marilyn Tham | 마릴린 탐

General Manager, Mega Events, MICE & Cruise,

Hong Kong Tourism Board (HKTB)

홍콩관광청 메가 이벤트·MICE·크루즈 부문 총괄 매니저

Hong Kong Asia's Cruise Hub

Biography

General Manager of Mega Events, MICE & Cruise at the Hong Kong Tourism Board (HKTB), leading strategies for mega events, the MICE industry, and cruise tourism. Has extensive experience in tourism marketing, destination branding, and global sales through leadership roles at HKTB and Hong Kong Disneyland.

Key Career

General Manager, Mega Events, MICE & Cruise, Hong Kong Tourism Board (HKTB)

Head of Global Sales Distribution Marketing, Hong Kong Disneyland (HKDL)

Tourism Marketing & Destination Branding, Hong Kong Tourism Board

약력

홍콩관광청(HKTB) 메가 이벤트·MICE·크루즈 부문 총괄 매니저로 메가

이벤트 유치와 MICE 산업 및 크루즈 관광 전략을 총괄하고 있다.

홍콩관광청과 홍콩디즈니랜드(HKDL)에서 관광 마케팅, 목적지 브랜드 개발

및 글로벌 세일즈 분야의 풍부한 경험을 쌓으며 홍콩 관광산업과 크루즈 산업

발전을 이끌고 있다.

주요 경력

현) 홍콩관광청 메가 이벤트·MICE·크루즈 부문 총괄 매니저

전) 홍콩디즈니랜드(HKDL) 글로벌 세일즈·유통마케팅 총괄

전) 홍콩관광청 관광 마케팅 및 목적지 브랜드 개발

전) 대만 교통부 철도개선국장



Session 2 | 세션 2

Asia Cruise Destinations: Growth Strategies for Key Asian Destinations

아시아 크루즈 목적지: 아시아 주요 목적지의 성장 전략

Naohiko Yamaguchi | 야마구치 나오히코

Deputy Director General, Japan Cruise Research Institute,
Waterfront Vitalization and
Environment Research Foundation (WAVE)

일본 크루즈연구소 부소장 (WAVE 해안공간활성화·환경연구재단)

Asia Cruise Destinations (Japan)

Biography

Joined Mitsui O.S.K. Lines, Ltd. (MOL) in 1981 and retired as Senior Staff Officer in 2024 after a 43-year career. Held leadership positions in Tokyo, Miami, and London, including President of Mitsui O.S.K. Lines Cruise (MOLC) and Chairman of the Japan Overseas Passenger Lines Association (JOPA). Currently serves as Deputy Director General of the Japan Cruise Research Institute under the Waterfront Vitalization and Environment Research Foundation (WAVE), specializing in Japan's cruise industry and cruise ports.

Key Career

Deputy Director General, Japan Cruise Research Institute, Waterfront Vitalization and Environment Research Foundation (WAVE)

President, Mitsui O.S.K. Lines Cruise (MOLC) (2016-2022)

Chairman, Japan Overseas Passenger Lines Association (JOPA) (2016-2019)

Senior Staff Officer, Mitsui O.S.K. Lines (MOL)

약력

1981년 미쓰이 O.S.K. 라인(MOL)에 입사해 2024년 수석전문위원(Senior Staff Officer)으로 퇴임했다. 43년간 도쿄, 마이애미, 런던 등에서 다양한 업무를 수행했으며, MOL 크루즈(MOLC) 사장과 일본해외여행선협회(JOPA) 회장을 역임했다. 현재 WAVE 해안공간활성화·환경연구재단 산하 일본크루즈연구소 부소장으로 일본 크루즈 산업과 크루즈항 연구를 수행하고 있다.

주요 경력

현) 일본크루즈연구소 부소장, WAVE 해안공간활성화·환경연구재단
전) 사장, Mitsui O.S.K. Lines Cruise (MOLC) (2016-2022)
전) 회장, 일본해외여행선협회(JOPA) (2016-2019)
전) 수석전문위원(Senior Staff Officer), Mitsui O.S.K. Lines (MOL)



2026 Asia Cruise Forum JEJU

July 23 at ICC Jeju
Asia Cruise Destinations (Japan)

Japan Cruise Research Institute
Deputy Director General
Waterfront Vitalization and Environment Research
Foundation (WAVE), JAPAN
Naohiko Yamaguchi

Who we are, Japan Cruise Research Institute

みなとから未来へ

みなと総研

Waterfront Vitalization and
Environment Research Foundation

wave



クルーズ総合研究所

JAPAN CRUISE RESEARCH INSTITUTE

Established in 2014 within WAVE as an inhouse group specializing in research on cruise business.

In 2017, it became Japan's first institutional organization specializing in cruise sector.

Main activities and past studies

- Research project commissioned by Government
- Research project commissioned by Local Governments
- Development of academic and research collaboration with neighboring countries
- Sending speakers in major international cruise conferences like Seatrade and ACFJ
- Conducting domestic seminars and orientation forum for people in the cruise business
- Publishing books and reports
- Sharing industry news in Web. site.

クルーズニュース | 一般財団法人みなと総合研究財団[WAVE]
(https://www.wave.or.jp/cruise/cruisenews_index.html)



Recent research themes

- Updating statistics on cruise ships calling at Japanese ports
- Analysis on how to balance between “over tourism” and economic benefit
- Designing ideal cruise terminals for sustainable growth
- Research on advanced cases in overseas to play a role of regional hub port



Contents

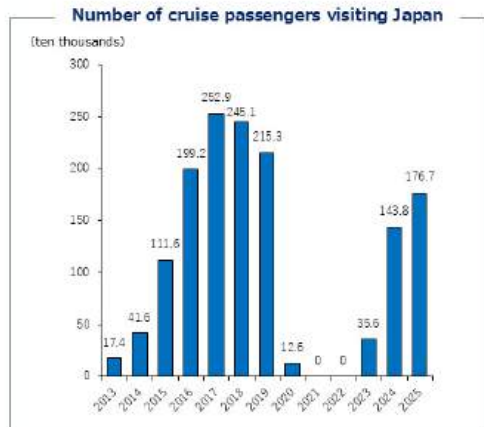
1. Quick overview of cruise port status
2. Emerging concerns at ports of call in Japan
3. Regional brands and operation play a key role to create new market in the East Asia
4. In order to realize prosperous cruising area in the East Asia

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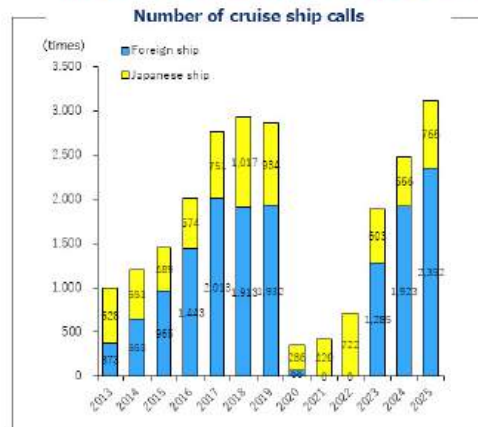
1. Quick overview of cruise port status
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Cruise passengers and ships calls to Japan

The number of cruise passengers visiting Japan in 2025 was **1,767,000**, two thirds of the peak, and the number of port calls to Japanese ports was **3,117** which **has recovered the level of pre-Pandemic**.



Note: Approximate number of foreign arrivals based on the Immigration and Immigration Control Agency's tally (excluding crew members). Foreign passengers on cruise ships calling at more than one port in a single cruise are also recorded as one entry (rather than duplicated at each port).



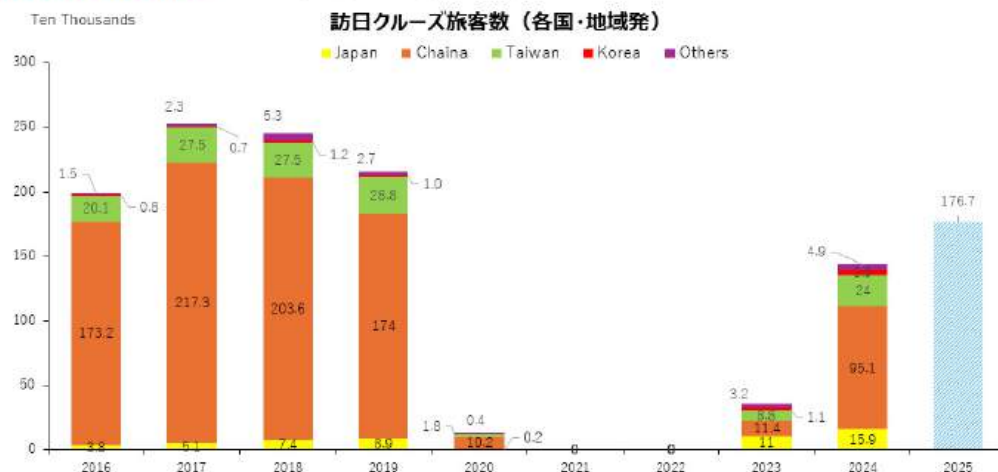
Note: Figures for 2013-2025 were prepared by the Port Authority based on interviews with port managers. (Preliminary figures for 2025).

Source: Ministry of Land, Infrastructure, Transport and Tourism

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Cruise visitors to Japan by cruise origins

Japanese market is shifting from heavy dependence on China-originated cruises toward **a more diversified structure**, including Japan-originated products.



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Homeporting opens a new cruise style in Japan

Cruising around Japan with calls in Korea/Taiwan

- Originally developed for Japanese and became popular with TV Shopping company's charters.
- **Recently more inbound tourists are joining these cruises to visit rural area of Japan.**

【Japan oriented cruises increase】



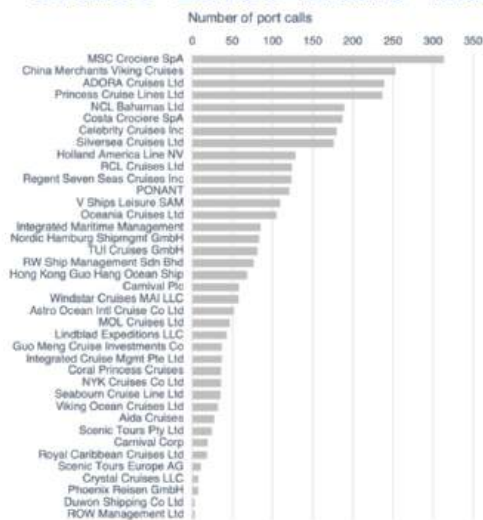
Source: MSC Cruise HP



Source: Japanet HP

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Cruise Lines Make multiple calls at Japanese Ports



Number of calls at Japanese ports are more than number of cruise ships, meaning that **they make multiple calls in one coastal leg.**



Adora Magic City



MSC Bellissima



Diamond Princess



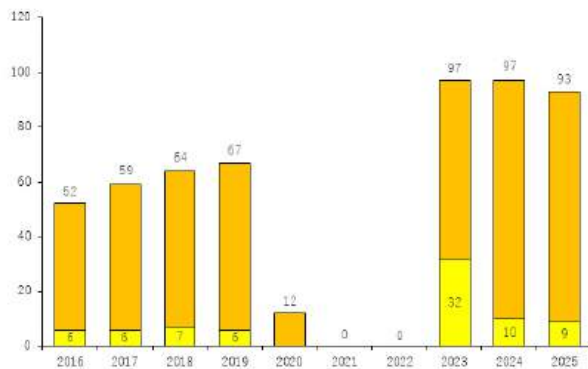
Luminara

Copyright (C) 2025 Central Consultant Inc.

Source: Based on AIS data (Only when operating on international cruises from 2023 through 2025)

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Cruise ships calls at 93 ports in Japan



The number of ports which accepted international cruise ships has recorded 93 in 2025.

Among which, 9 were for the first time, at local ports including fishery harbors in remote islands.



Photos: Tender boat from Nippon Maru of MOLC at OKI and people landing at SAKITSU from Le Jacques Carlier © PONAN - Amakusa City HP

Contents

1. Quick overview of cruise port status vs Government target
2. Emerging concerns at ports of call in Japan
(Over-tourism, secondary traffic, environmental concern and local spendings)
3. Regional brands and operation play a key role to create new market in the East Asia
4. In order to realize prosperous cruising area in the East Asia

Secondary Transportation Challenges at Ports of Call

- Some ports located far from city center, causing challenge in bringing people to city center. Typical issues are shortage or lack of public transportation, luggage handling, and payment methods. Improvement could lead bigger spending by passengers or/and crew.



Photos: Cruise Berth of ISHIGAKI (left) and Information desk at OSAKA (center), Buses line-up at Kochi (right)

Just as images

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Environmental concerns

- Challenge to the carbon neutral porting (how to secure, green or blue fuels)
- Cleaner emission (banning of SOX, NOX and other particles)
- Waste disposal (gray waters, compacting and recycling)
- Bio-contamination prevention (clean bottoms and ballast water treatment)



Photos: Shore Power supply (Left) and LNG bunkering at FUKUOKA © KEYS Bunkering West Japan KK

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Frictions with local communities

- Littering garbage
- Entering private property / taking photos without permission
- Buying up daily materials for locals



(Solution)

- Respecting different culture and customs
- Reminder of good manners and local rules before disembarkation or on tour buses.
- Understanding each other to make friends !



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Are Cruise Passengers spending enough at ports of call?

【Spending per person in one trip】

	Spending per trip per person (2019年)		Spending per trip per person (2024年)	
		Shopping		Shopping
Inbound in general	15.9万円	5.3万円	23.9万円	6.6万円
Cruise Pax	3.9万円 *	3.8万円	3.7万円 *	3.4万円

* Reported spending by cruise passengers appears low, but official figures may not fully capture onboard-sold shore excursions, which usually involve local buses, guides, and interpreters and meals.

【Comparison among counties】



Source: Japan Tourist Agency/JNTO
Unit: JPY

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New tonnage joining Japanese cruise companies



Shipping Company Name	NYK CRUISES		MOL CRUISES		R-Yacht (RYOBI HOLDINGS)	ORIENTAL LAND CRUISES
Name of ship	ASUKA II	ASUKA III	MITSUI OCEAN FUJI	MITSUI OCEAN SAKURA	SEFU	TBN
Gross ton	50,444	52,265	32,477	32,477	9,000~10,000	144,000
Capacity	872	680	458	458	120	4,000
Reference	Completed in 1990 and purchased in 2005	Completion and in service 2025	Purchased in 2023 Launching service in 2024	Purchased in 2025 Launching in service 2026 under Japan Flag	2027 in service	2028 in service Disney Cruise with homeport at Tokyo

According to Each company's website

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Transition of cruise market in Japan and its prospect



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Cruise industry in China

Chinese cruise population has marked 2,397K in 2017, and now still in the way of recovery. However, firm steps toward establishing national cruise industry are identified in such area as shipbuilding, cruise operators, supporting business and cultural creations.

Adora Mediterranea



Adora Magic City / Adora Flora City



Oriental Ideal



Oriental Dream



Source: HPs of cruise co

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Cruise industry in Korea

Korean market is basically inbound driven with nine beautiful ports including Busan, Incheon and Jeju, but there is an ambition to have domestic cruise lines.



Panstar Miracle (22,160GRT, Ro/Pax 355pax Busan/Osaka regular route)

Eastern Venus (26,594GRT, 720pax) — started in 2024 for irregular service



Notable promotion by Incheon Port Authority to induce international cruise lines for fly & cruise taking advantage of its location and access to International Airport and metropolitan Seoul city.
Also Jeju plays a key role as both connector and destination in the middle of Asian cruise itineraries.

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Cruise market in Taiwan

Star Navigator



Taiwan's source market is also underway of recovery from pre-COVID peak record, and 198K recorded in 2024. Meanwhile inbound (foreign) pax reach 360K in 2025.

Having dual homeports, Keelung & Kaohsiung, passenger throughput in 2025 recorded 1.13M by 297 callings, consisting of 167 for turnaround and 130 for transit calls.



Port Keelung

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Contents

1. Quick overview of cruise port status vs Government target
2. Emerging concerns at ports of call in Japan
3. Regional brands and operation play a key role to create new market in the East Asia
4. In order to realize prosperous cruising area in the East Asia, key words;

Collaboration, not rivalry, connected as One with multi-directional traffics.

Northeast Asia as prosperous cruising area

The future of cruising in the North East Asia depends not on rivalry among ports, but on connected itineraries, diversified source markets and shared regional branding.

菱达邮轮（上海）・菱达鹿都号

2026年12月13日（周日） - 2026年12月18日（周五）

上海-那霸(冲绳市)-西归浦市(济州岛)-上海-6天5晚



日期	国家/城市
第1天(12月13日)	中国·上海
第2天(12月14日)	海上巡游
第3天(12月15日)	日本·那霸
第4天(12月16日)	海上巡游
第5天(12月17日)	韩国·西归浦市
第6天(12月18日)	中国·上海

中国・携程旅行的ホームページから
From the website of China's Ctrip (cruise.ctrip.com)

飛んでクルーズ沖縄グランドプランI
Societas (Societas) (Societas) (Societas)

The advertisement includes a scenic view of Okinawa's coastline and a detailed itinerary for the Mitsui Ocean Cruises Fly Cruise OKINAWA series 2025. The itinerary lists various ports of call, including Shanghai, Okinawa, Jeju Island, and back to Shanghai, along with the ship name and departure dates.

Mitsui Ocean Cruises Fly Cruise OKINAWA series 2025

Thank you very much



Session 2 | 세션 2

Asia Cruise Destinations: Growth Strategies for Key Asian Destinations

아시아 크루즈 목적지: 아시아 주요 목적지의 성장 전략

Qiu Ling | 치우 링

Deputy Director, Shanghai International Cruise Business Institute

상하이국제크루즈비즈니스연구소 부소장

A Study on the Interconnected Development of Cruise Port Cities in Asia

Biography

Deputy Director of the Shanghai International Cruise Business Institute and Professor at the School of Management, Shanghai University of Engineering Science. Specializes in cruise economy and tourism industry research, contributing to tourism policy, cruise development, and industry planning in China.

Key Career

Deputy Director, Shanghai International Cruise Business Institute
Professor, School of Management, Shanghai University of Engineering Science
Vice President, China Cruise Yacht & Ship Association
Deputy Editor-in-Chief, Cruise Industry Review

약력

상하이국제크루즈비즈니스연구원 부원장이자 상하이공정기술대학교 경영대학 교수로 크루즈 경제와 관광산업 분야를 연구하고 있다. 중국 크루즈 산업과 관광 표준화 분야에서 활발히 활동하며 관광산업 발전과 크루즈 경제 연구를 수행하고 있다.

주요 경력

현) 상하이국제크루즈비즈니스연구원 부원장
현) 상하이공정기술대학교 경영대학 교수
현) 중국관광자동차·크루즈협회 크루즈·요트분회 부회장
현) 국제학술지 Cruise Industry Review 부편집장



A Study on the Interconnected Development of Cruise Port Cities in Asia

Dr. Qiu Ling

Professor, School of Management Studies,
Shanghai University of Engineering Science (SUES)
President and Deputy Director of Shanghai
International Cruise Business Institute (SICBI)

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01 Overall Situation



02 Opportunities and Challenges



03 Shanghai's Positioning and Measures



04 Three Initiatives



01

Overall Situation



A Significant Increase in Asia-Pacific Transport Capacity

47 %

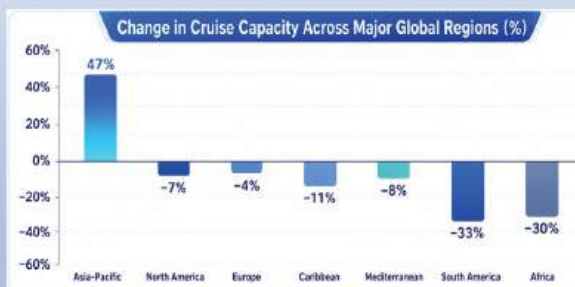
Year-on-year growth in Asia-Pacific transport capacity

37.2 million passengers

Global ocean cruise passenger volume in 2025

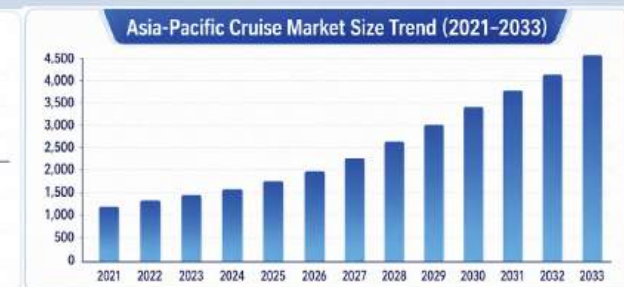
3 million passengers

Asia cruise market passenger volume in 2025



➤ The Asian market has currently recovered to only about 71% of its 2018 peak level.

➤ The average cruise itinerary for Asian passengers is approximately 4 days.



➤ The global average cruise itinerary is approximately 7 days.

➤ The Asia-Pacific region has become the **core growth engine** for global cruise transport capacity deployment.

Major Cruise Routes in Asia

Cruise lines	Cruise ship(s)	Major homeport(s)	Voyage volume	Deployment characteristics
Adora Cruises	Adora Magic City, Costa Mediterranean, and Adora Flora City	Shanghai, Guangzhou, Nansha, Xiamen, and Port Klang	A combination of multiple short-haul and medium-to-long-haul itineraries	China's home-grown large cruise ships will operate short-haul Japan-Korea routes, with extended long-haul itineraries into Southeast Asia
Orient International Cruise	Dream	Shanghai	A planned total of 34 ship visits in 2026	Short-haul operations in Northeast Asia
MSC Cruises	MSC Bellissima	Shanghai	In 2027, 26 homeport sailings and 2 repositioning sailings are planned.	Strengthening the Chinese mainland homeports and ensuring coverage of major holidays
Royal Caribbean Cruises	Spectrum of the Seas	Shanghai and Hong Kong of China	56 sailings planned for 2027-2028	Dual-homeport core strategy, balancing both short-haul and long-haul routes
Costa Cruises	Costa Serena	Hong Kong of China, Tokyo, Singapore	Routes of 9- to 14-day itineraries	Parallel Northeast Asia and Southeast Asia routes
Astro Ocean Cruise	Piano Land	Hong Kong and Xiamen of China	Short-haul near-coastal routes combined with 13-day/12-night long-haul itineraries	China's domestic cruise lines extend into Southeast Asia, connecting Manila, and Ho Chi Minh City.
StarCruises	Star Voyager	Hong Kong	2026	With Hong Kong as the core homeport, differentiated short-haul round-trip sailings to Xiamen and Sanya are deployed

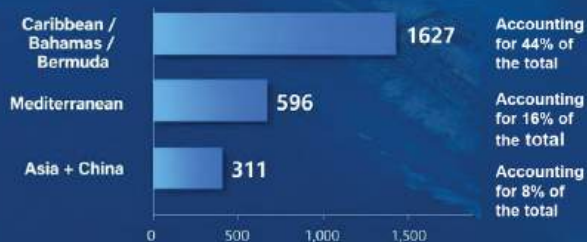
Major Cruise Routes in Asia

Cruise lines	Cruise ship(s)	Major homeport(s)	Voyage volume	Deployment characteristics
StarCruises	Star Navigator	Taiwan of China	Routes of 3- to 6-day itineraries	Northbound itineraries to Japan and southbound itineraries to Southeast Asia
Disney Cruises	Disney Adventure	Singapore	3- to 4-night round-trip itineraries	Asia's first ship of Disney Cruises, designed for family vacations
Royal Caribbean Cruises	Ovation of the Seas	Singapore	Eight sailings in the first quarter of 2026	Deployments are carried out in the Southeast Asia region
Princess Cruises	Three vessels, including the Diamond Princess	Singapore and Tokyo	96 sailings planned for 2027-2028	Singapore is further expanded as a homeport, and the Japan cruise season is strengthened.
Dream Cruises	Genting Dream	Singapore	2- to 5-night round-trip itineraries	Singapore as a year-round homeport, covering Malaysia, Indonesia, and Thailand
Mitsui Ocean Cruises	Mitsui Ocean Sakura	Yokohama, Tokyo, Kobe, etc.	29 sailings in the inaugural season	Japan's domestic short-haul vacation market
Azamara	Azamara Pursuit	Asia-wide multi-port combinations	33 sailings in 2028	Launching the first full Asia cruise season, offering an immersive experience

Route Map Upgrade: The Caribbean Remains Firmly in First Place, While Asian Routes Surge

Comparison of the global cruise destination landscape and itinerary characteristics in 2025

Passenger volume by major destinations (unit: 10,000 passengers)



Passenger Growth Rates in Major Regions (%)



Destination landscape

- The Caribbean remains the world's strongest cruise destination, while Asia's homeport itineraries are entering a phase of accelerated growth.

Capacity concentration ratio

- North America: highly concentrated
- Europe: balanced multi-port distribution
- Asia: concentrated in a small number of homeports

Voyage characteristics

- North America: high-frequency repeat sailings
- Europe: pronounced seasonality
- Asia: the highest share of short-duration sailings

Spillover consumption from port cities

- 64% of passengers stay one night or more before or after embarkation, driving cultural and tourism spending in port cities

Key Characteristics of Asia's Three Major Cruise Sub-regions

Northeast Asia

- Shanghai, Japan, South Korea, and Taiwan focus on high-frequency short-haul sailings centered on urban sightseeing, typically operated as Japan-Korea combination itineraries.



Southeast Asia

- Singapore, Malaysia, Thailand, and Vietnam emphasize island-resort vacations, family-friendly leisure, and fly-cruise products.



Greater Bay Area

- Hong Kong of China, Guangzhou Nansha, and Shenzhen draw on their roles as international gateways, the strong South China market, and integrated cross-border consumption dynamics.



Singapore: An International Hub and a Gateway Linking Southeast Asia

The region's hub function continues to strengthen.

- In 2025, the two main ports received **375 ship visits**, and recorded a passenger throughput of **2.005 million**, maintaining its position as a major cruise hub.

Key feature: An aviation-hub-driven cruise homeport

- Changi Airport's annual passenger throughput: nearly **70 million**
- Fly-Cruise mode adopted



Type	Representative Cruise Ship / Brand	Route Destinations	Itinerary Features
Southeast Asia Short-Haul Leisure Cruises	Dream Cruises "Genting Dream"	Kuala Lumpur, Malacca, Penang, Phuket, Redang Island, Bali, etc.	Primarily 2- to 5-night sailings
Southeast Asia Multi-Country Cruises	Princess Cruises "Diamond Princess", etc.	Kuala Lumpur, Ha Long Bay, Ho Chi Minh City, etc.	Themed sailings for Christmas, Chinese New Year, Valentine's Day, etc.
Asian Regional Medium- to Long-Haul Cruises	Multiple Princess Cruises deployments	Destinations across Japan, South Korea, and Southeast Asia	2027-2028 season plan: 96 voyages, 61 itineraries, and 55 destinations
No-Destination Themed Cruises	Disney Cruise Line "Disney Adventure"	No traditional ports of call	3- to 4-night at-sea vacations

Shanghai: Leading through Core Local Development and International Interconnectivity



Its position as a national industry leader continues to strengthen

In 2025: Number of received cruise ship visits: **270**
Passenger throughput: **1.82 million**

International brands and home-grown cruise ships are clustering together

MSC Cruises MSC Bellissima	Connecting Fukuoka, Kagoshima, Busan, and other Japan-Korea destinations
Royal Caribbean Spectrum of the Seas	Covering 20 popular Asian destinations, including Tokyo, Osaka, Mount Fuji, Nagoya, and other key destinations
Adora Magic City Dream of Orient International Cruise	Operating short-haul products to Jeju, Busan, Seoul, and other Korean destinations

Linking the Yangtze River Delta with Japan, Korea, and Southeast Asia

- Domestically, it leverages the Yangtze River Delta market to strengthen the integrated flow of "high-speed rail to port, urban consumption, and cruise travel."
- Internationally, it builds on short-haul Japan-Korea routes and gradually extends into the Southeast Asia cruise network.

Hong Kong of China is Shifting From a Single-point Recovery toward Building an International Cruise Hub

Route Deployment Recovery

- Nearly 190 cruise ship calls have been made at the port throughout 2025, a year-on-year increase of 26%.
- Royal Caribbean's Spectrum of the Seas will use Shanghai and Hong Kong as dual core homeports. For the 2027-2028 season, it plans to launch 56 routes covering 22 popular destinations across Asia.



Coordination in the Greater Bay Area

- Hong Kong, Shenzhen, and Guangzhou are advancing "three-port coordination," with the Greater Bay Area cruise cluster taking shape.
- Free-port policies and advantages in attracting international visitors

Guangzhou Nansha is Entering the Era of Major Homeports for Large Cruise Ships



- Capable of accommodating the world's largest cruise ships

- Annual capacity of **750,000** passengers

- Fiscal allocations for cruise development in 2025 A dedicated cruise-development fund of RMB 15 million in 2025

Advantages

In the future, a comprehensive system will emerge, integrating homeport organization, itinerary operations, onboard supply services, high-end maritime functions, talent development, and urban consumption conversion.

Comprehensive system construction

The Adora Flora City will be delivered in 2026 and depart from Guangzhou Nansha. In its inaugural season, it will launch the "Southeast Asia Cultural Voyage" and the six-nation Southeast Asia "Maritime Silk Road Discovery Journey."

Core homeport for home-grown large cruise ships

02

Opportunities and Challenges



Opportunities



1. Transport capacity return

- Asia-Pacific cruise transport capacity is expected to grow by roughly 47% year on year in 2026
- The Disney Adventure will be deployed long-term in the Asian market for at least five years.
- Japan Disney Cruises was formally established, in which Oriental Land Cruise Co., Ltd. holds the rights to use Disney characters and the full suite of Disney's well-known brands.

Opportunities



2. Market recovery

In 2025, Asia's cruise passenger capacity reached 3 million passengers, surging 15% year on year—the fastest growth globally. Markets such as China, Singapore, and Japan continued to recover steadily, positioning Asia as a core growth pole for the future.



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Opportunities

3. Policy liberalization

In recent years, with the introduction of transit visa-free policies, cruise group visa-free entry, streamlined port-clearance procedures, and progressively optimized regional visa arrangements, the space for route coordination among ports such as Shanghai, Hong Kong, Singapore, Busan, and Yokohama has continued to expand.



Opportunities



4. New route development and consumption upgrading

- The opening of new routes is reshaping the structure of the Asian cruise network, creating fresh growth opportunities for the cruise industry.
- The scope for shore-side consumption continues to broaden.
- Consumption patterns are upgrading from sightseeing-oriented to experience-driven and multi-layered.

Challenges



1. Current structure of cruise routes

The current route structure remains relatively uniform, dominated by short round-trip itineraries. Cross-regional long-haul routes, multi-homeport loop itineraries, and in-depth routes remain insufficient.



2. Shore-side experiences need further enhancement

There are many sightseeing-oriented activities, while cultural experiences, nighttime consumption, and themed products remain insufficient.



3. Weak port-city consumption linkage

The connection between terminals, transportation, commercial districts, scenic attractions, duty-free facilities, and events remains insufficiently smooth, and the consumption chain, along with the benefit-sharing mechanisms, still needs to be fully integrated.

Challenges



4. Coordination needed in clearance rules

Service standards for visas, immigration inspection, baggage handling, payment, and tax refunds still require further optimization. Customs-clearance facilitation and overall passenger experience need to be improved.



5. Insufficient information sharing and emergency coordination

Mechanisms for sharing passenger-flow, route, weather, safety, and emergency-response information remain incomplete, and cross-regional coordination as well as risk-response capabilities need to be strengthened.

03

Shanghai's Positioning and Measures



Shanghai's Urban Positioning and Functional Role in Cruise Development



Shanghai's Advantages

Advantages	Specific manifestations	National leadership
Three-port coordination framework	Coordinated development of hub ports, headquarters ports, and manufacturing ports	The only city in China that simultaneously possesses all three major functions
Supported by the Yangtze River Delta hinterland	A vast market of 230 million people, underpinned by a fully developed industrial support system	The most economically advanced region in China, distinguished by exceptionally strong consumer purchasing power
Policy and institutional innovation	China's first local cruise legislation and multiple pilot programs	A distinct competitive edge in pioneering and experimenting with institutional innovation
Industrial talent base	A strong shipbuilding industrial base and a rich pool of specialized talents	A dual-engine model driven by the shipbuilding industry and modern services
Data share	From 2006 to 2025, the port received over 18 million cruise passengers, accounting for more than 60% of the national total.	Market maturity and consumer spending power consistently rank among the highest in China
Large cruise ship construction	Adora Magic City and Adora Flora City "2 firm vessels + 1 optional vessel"	Shanghai is the only city in China capable of building aircraft carriers, large LNG carriers, and large cruise ships at the same time.

Shanghai's Innovative Measures

Several Provisions of Shanghai Municipality on Promoting the Development of Cruise Economy

- Construction of China's cruise tourism development demonstration zones
- Multi-port calling routes and routes of Cruise to Nowhere
- Coordinating the integrated development of culture, tourism, commerce, sports, and exhibitions around the port area

Action Plan for Supporting and Safeguarding the High-Quality Development of Shanghai's Cruise Industry (2026-2028)

A three-year action plan is about to be released.

Shanghai is committed to building itself into China's primary gateway for inbound tourism.

Driven by the continued growth in international cruise port of call and sailing volumes, Shanghai's cruise terminals handled over 120,000 inbound and outbound foreign travelers in 2025, an increase of more than 80% compared with 2024.



Route Innovation

- **Multi-port calling routes:** Routes that consecutively call at two or more coastal ports within China
- **Multi-port calling routes in China:** On January 18, 2020, Astro Ocean Cruise's Piano Land set sail on the "Shanghai-Zhoushan-Okinawa-Shanghai" route.



- **Cruise to Nowhere:** Sailings that remain entirely in international waters without calling at any specific port.
- **China's first Cruise to Nowhere:** On June 6, 2026, the Adora Magic City operated a 3-day/2-night voyage; three additional sailings will follow in December 2026.

- **Multi-homeport itineraries:** Routes that call at two or more homeports
- **MSC Bellissima:** Winter-Spring 2026 season, Shanghai-Busan dual-homeport deployment
- **Royal Caribbean's Spectrum of the Seas:** 2027-2028 season, dual-homeport deployment between Shanghai and Hong Kong



Academic Innovation

1. Research on deepening Shanghai's "three-port coordination" cruise development model and pathways for building an Asia-Pacific regional hub in the opening phase of the 15th Five-Year Plan

2. Cruise route dynamic adjustment capabilities and operational strategies under conditions of uncertainty

3. Research on enhancing Shanghai's cruise consumption capacity and fostering cross-industry innovation

4. Research on optimizing the pathway for establishing Shanghai as China's first entry point for inbound cruise tourism

5. Research on the strategic pathway for advancing Shanghai's development as an "International Cruise Industry Innovation Center"



04

Three Initiatives



Promoting Joint Marketing among Asian Cities



Enhancing the image of the Asian cruise industry

- Enhancing the **international influence** of Asian cruise brands
- Enhancing **awareness and recognition** of high-end cruise tourism destinations
- Upgrading the overall **regional image and attractiveness**

Joint product launch

- Joint multi-port release of cruise season products
- Development of **cross-border combined cruise route** products
- Coordinated launch of regionally joint **themed cruise itineraries**

Regional integrated promotion

- Shifting from single-point promotion to **integrated regional promotion**
- Strengthening integrated **online-offline** joint marketing
- Integrated promotion framework for international markets

Expanding Multi-homeport Routes and Advancing Collaborative Development among Asian Cruise Cities



Multi-homeport routes

- Two or more homeports
- Fixed circular route operation
- **Multi-port** embarkation/disembarkation
- Bidirectional passenger sourcing



Coordinated port operations

Multi-port coordinated scheduling and resource sharing
Enhancing the overall competitiveness of the port

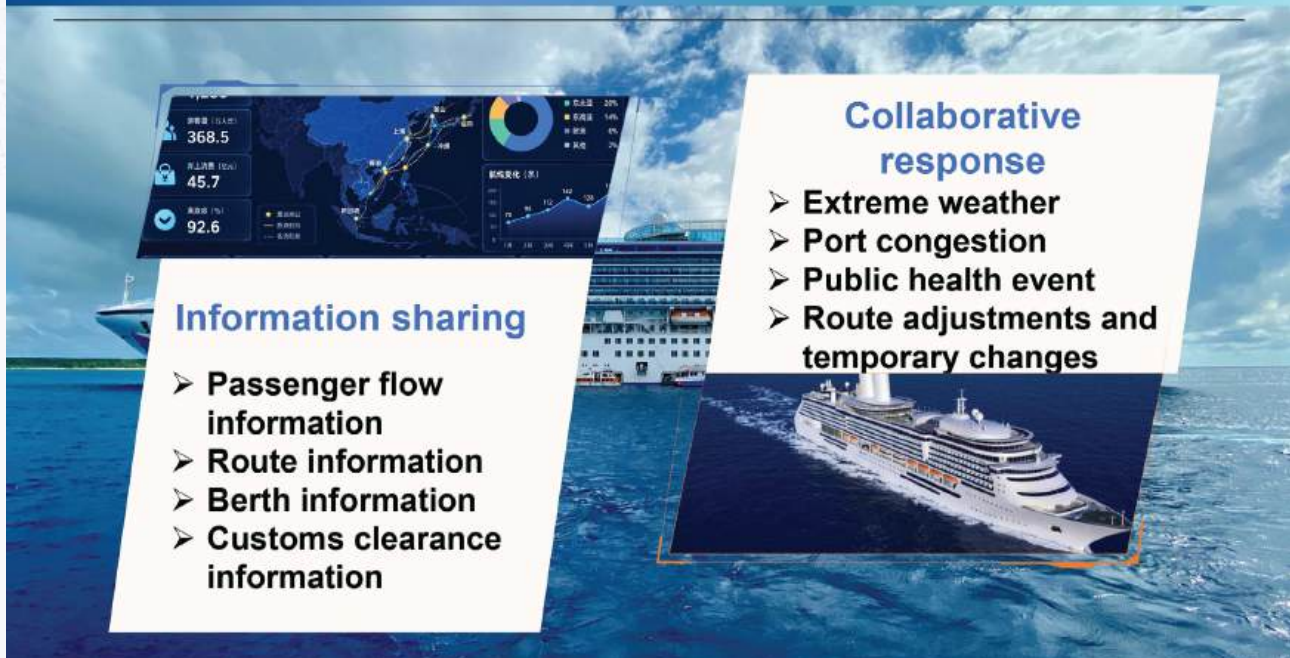
Flexible product sales

Enhancing product-mix flexibility to meet the travel needs of different customer segments

Significant scale effects

Networked route deployment to strengthen market coverage
Promoting passenger interchange and brand synergy

Shared Development, Shared Responsibility, and Interconnected Development

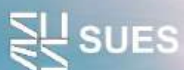


The future of Asian cruise development is not simply about "ships calling at more ports," but about creating true synergy among **ports, cities, routes, markets, and consumption**—jointly building an **Asian cruise destination network with genuine international appeal**. By staying true to our principles while embracing innovation, we move forward with steadiness and longtermism; by joining forces in mutual growth, we sail farther with enduring momentum.



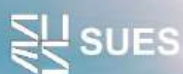


Welcome to follow SICBI's WeChat official account!



Thanks!





A Study on the Interconnected Development of Cruise Port Cities in Asia

Dr. Qiu Ling

Professor, School of Management Studies,
Shanghai University of Engineering Science (SUES)
President and Deputy Director of Shanghai
International Cruise Business Institute (SICBI)

Session 2 | 세션 2

Asia Cruise Destinations: Growth Strategies for Key Asian Destinations

아시아 크루즈 목적지: 아시아 주요 목적지의 성장 전략

Paulo Benito S. Tugbang

| 파울로 베니토 투그방

Director, Product and Market Development Office,
Department of Tourism, Philippines
필리핀 관광부 시장개발국장

BEYOND THE PORT CALL

Building the Philippine Destination Brand for Asian Cruise Tourism

Biography

Director of the Office of Product Development at the Philippine Department of Tourism, leading the development of tourism products and the country's national cruise tourism strategy. Since 2022, he has led the implementation of the updated National Cruise Tourism Strategy and the development of the country's expedition cruise model, contributing to the expansion of cruise destinations and strengthening the competitiveness of the Philippines as a regional cruise destination through close collaboration with government and industry stakeholders.

Key Career

Director, Office of Product Development, Philippine Department of Tourism
Project Lead, Philippine National Cruise Tourism Strategy
Developer, Philippine Expedition Cruise Model
Leader, Cruise Destination Development & Promotion

약력

필리핀 관광부 관광상품개발국(Office of Product Development)
국장으로 필리핀의 관광상품 개발과 국가 크루즈 관광전략을 총괄하고 있다.
2022년부터 국가 크루즈 관광전략 개편과 탐험 크루즈 모델 구축을
주도했으며, 기항지 확대와 정부·민간 협력을 통해 필리핀의 크루즈 관광
경쟁력 강화에 기여하고 있다.

주요 경력

현) 필리핀 관광부 관광상품개발국 국장
필리핀 국가 크루즈 관광전략 수립 총괄
탐험 크루즈(Expedition Cruise) 모델 구축
크루즈 관광 활성화 및 기항지 개발 추진





2026 ASIA CRUISE FORUM JEJU

BEYOND THE PORT CALL

Building the Philippine Destination Brand for Asian Cruise Tourism

Paulo Benito S. Tugbang, M.D.
Director, Office of Product Development
Philippine Department of Tourism



THE SHIFT WE'RE RESPONDING TO

EXPERIENCE OVER INFRASTRUCTURE

For decades, a destination's job was logistics: berths and terminals. Today, travelers are catching up to what independent travel already figured out.

"Guests aren't asking 'can we stop there,' but 'what will we actually experience?'"

CONTENT IS THE PRODUCT.

LOVE
THE PHILIPPINES



Morong Beach, Batanes

OUR PREMISE: A DESTINATION ISN'T A BRAND UNTIL IT IS STRUCTURED



ASSETS

The raw cultural capital:
heritage towns, reefs, and
traditions.



EXPERIENCES

Curating assets with
intention and a unique
narrative point of view.



PACKAGES

Sellable, booked products
with a price, duration, and
promise.

The real differentiation happens in the second layer: Turning assets into experiences.



THE FILIPINO BRAND OF WELLNESS



- ✓ **Silungan (Shelter):** Genuine reception; being welcomed rather than processed through a queue.
- ✓ **Danas (Experience):** A lived and felt experience, not just a checklist of sights to photograph.
- ✓ **Ginhawa (Ease):** A sense of well-being that is instantly recognizable once felt.



FIVE-SENSE FRAMEWORK

HAPLOS

Sense of Touch

TINGIN

Sense of Sight

HUNI

Sense of Sound

ALIMYON

Sense of Scent

TIKIM

Sense of Taste

ARUGA

Sense of Care

A concrete method for excursion partners to build coherent content.



BOHOL: SENSE BY SENSE

1

SIGHT

Chocolate Hills at golden hour light.

2

SOUND

River cruise with live Rondalla music.

3

TASTE

Boholano lunch explained dish by dish.

4

TOUCH

Weaving raw abaca fiber into cloth.

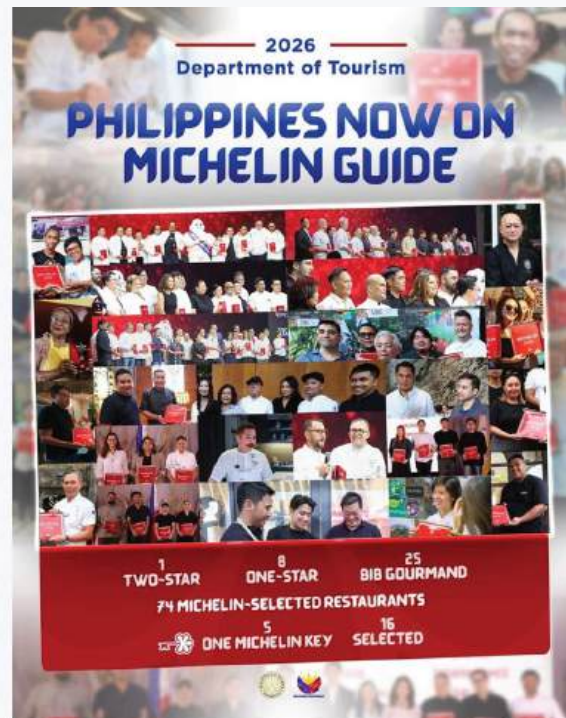


PROOF OF CONCEPT

MICHELIN RECOGNITION

Our curation model—curated by asset and tested by experience—is earning recognition from the Michelin Guide's "Roots and Refinement" Destination Masterclass.

A cruise line's culinary team notices when Michelin puts its name next to a destination's food story.



THE MODEL SCALES BEYOND WELLNESS

MULTI-PORT ITINERARY ADVANTAGE

Port A (Culture) → Port B (Gastronomy) → Port C (Marine Biodiversity).
One coherent national narrative across changing islands.

Dive and Marine Tourism

Shifting from basic reef boat tours to **Marine Sanctuary Recovery Stories**, featuring high-expertise local guide narratives.

Farm Tourism

Shifting from generic plantation visits to immersive **Soil-to-Table Journeys** tracking a single crop from harvest to culinary plating.



STRATEGY FOR LONGEVITY & ACCOUNTABILITY

Building for the Long Shelf Life: A Flagship Content Asset

- Nationally commissioned book on Filipino wellness culture, co-edited with a respected medical anthropologist.
- Structured around five senses arranged in a deliberate emotional order in the original language.
- Launching at ASEAN Tourism Forum in January 2027 as an exportable asset for press, cruise lines, and onboard partners.

Sustainability via Measurement

Pivoting from marketing rhetoric to empirical results through a rigorous Monitoring and Evaluation (M&E) Framework.

- **Triple Bottom Line:** Tracking economic, social, and environmental outcomes across 9 tourism product portfolios.
- **Strategic Alignment:** Integrated directly with the national tourism plan through 2028.
- **Data-Driven Proof:** Measuring actual visitor load against ecological carrying capacity and tracking local income retention



INSTITUTIONAL BACKBONE



12 UNITS

Convergence model connecting government and industry units into one pipeline.



STANDARDS

Quality certification checklists that ensure consistency across every province.



STRUCTURE

A methodology that survives personnel changes and stays durable over time.



WHAT THIS MEANS FOR CRUISE PARTNERS

PARTNER VALUE

- ✓ Low content-development risk
- ✓ Brand-coherent storytelling
- ✓ Pre-vetted sustainable excursions

REGIONAL INVITATION

We invite regional NTOs and cruise lines to cooperate on content, not just logistics. Shared thematic circuits—wellness or culinary—elevate the value of every port in Asia.



2026 ASIA CRUISE FORUM JEJU

MARAMING SALAMAT!

Beyond the Port Call:

Building the Philippine Destination Brand for Asian Cruise Tourism

Paulo Benito S. Tugbang, M.D.

Director, Office of Product Development

Philippine Department of Tourism

pstugbang@tourism.gov.ph; cruisephilippines@tourism.gov.ph



ACLN Session | 에이클린 세션

ACLN Special Day with Taiwan

ACLN 스페셜 데이 with 대만

(Joe) Yung Hui, Chou | 조우용혜

Chairman, Taiwan International Ports Corporation (TIPC)

대만국제항만공사(TIPC) 회장

Cruise Development in Taiwan's Ports

Biography

Chairman of Taiwan International Ports Corporation (TIPC), leading the development of Taiwan's port and cruise industries. Brings extensive experience in transportation, tourism, and public administration, having previously served as Director General of the Tourism Administration, Taiwan Railways Administration, and Railway Reconstruction Bureau under the Ministry of Transportation and Communications.

Key Career

Chairman, Taiwan International Ports Corporation (TIPC)

Director General, Tourism Administration, MOTC

Chairman, China Engineering Consultants, Inc.

Director General, Taiwan Railways Administration, MOTC

Director General, Railway Reconstruction Bureau, MOTC

약력

대만국제항만공사(TIPC) 회장으로 대만의 항만과 크루즈 산업 발전을 이끌고 있다. 교통·물류 및 관광 분야에서 풍부한 행정 경험을 바탕으로 대만 교통부 관광국장, 철도청장, 철도개선국장 등을 역임하며 국가 교통·관광 정책과 항만 인프라 발전에 기여했다.

주요 경력

현) 대만국제항만공사(TIPC) 회장

전) 대만 교통부 관광국장

전) China Engineering Consultants, Inc. 회장

전) 대만 교통부 철도청장

전) 대만 교통부 철도개선국장



ACLN Specially Day with Taiwan



Cruise Development in Taiwan's Ports

臺灣港群郵輪發展

Taiwan International Ports Corporation
Chairman Joe Y. Chou, Ph.D.

周永暉 博士

2026.July.24th



Presentation Outline

- 01 Taiwan's Cruise Market Review
- 02 Overview of Taiwan's Port
- 03 Development Strategies



01

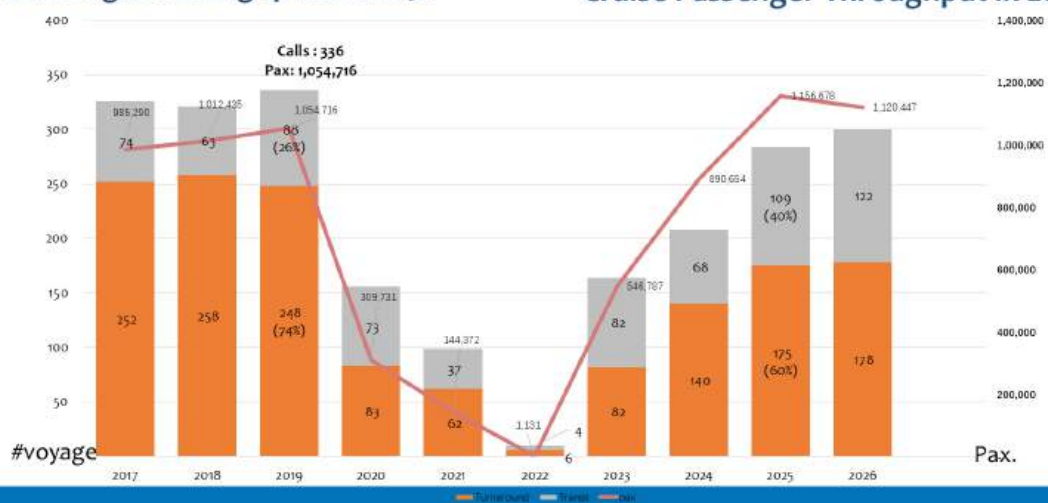
Taiwan's Cruise Market Review



Taiwan Linking Asia to the World

- Total **1.15M** Cruise Passenger Throughput in 2025.

- Total **1.13 M** estimated Cruise Passenger Throughput in 2026





Taiwan's Cruise Market Review

Beyond the Peak: Taiwan's Cruise Market Recovery and Evolution



Taiwan's Cruise Market
Reaches New Heights



Cruise Passengers in 2025

1.15 M Record High



Cruise calls in 2025

285 calls 37% Growth Compared with 2024



More Cruise Lines Calling at Taiwan

24- > 28- > **32** (2025)

An increase of 8 cruise lines since 2023



A More Global and Diversified
Cruise Market



Higher Share of
Luxury and
Expedition Cruises

- Growing demand for customized shore excursions
- Increased opportunities for premium destination experiences



Rapid Growth of
Large Cruise Ships

- Higher passenger volumes arriving simultaneously
- Greater need for terminal capacity, passenger flow management, and operational coordination

5



Taiwan's Cruise Market Review

Beyond the Peak: Taiwan's Cruise Market Recovery and Evolution



More Fly Cruise Travelers



The Evolution of Taiwan's
Cruise Travelers

<Average Age of Cruise Traveler >

46.5 Average Age of a Taiwanese
Cruise Traveler during 2024-2025

49.5 Asian Cruise Traveler's (2025)

<Average duration of a cruise from Taiwan>

3.36 Days 2023-2025

2.94 Days 2018-2019

6



Taiwan's Cruise Market Review

Comprehensive Upgrades for Cruise Terminal Facilities



Penghu International Cruise Terminal (No.1)
scheduled for completion by End of 2026



Kaohsiung Port Cruise Terminal (No.20)

- Pier Length: 726m
- Pier Depth: -10m
- Capacity: 250,000GRT



Kaohsiung Port Penglai Cruise Terminal (No. 9)
Grandly Launched in March 2026

7



02

Overview of Taiwan's Port



8



Overview of Taiwan's Port

Taiwan's Exceptional Cruise Port Network



5 Key Advantages of Taiwan's Ports

- ✓ Strategic Geographic Location
- ✓ Excellent Air and Rail Connectivity
- ✓ Diverse Tourism Attractions
- ✓ Warm Taiwanese Hospitality
- ✓ Modern Port Facilities and Services

Shore Power service in Port of Keelung & Port of Kaohsiung will be available in 2027

9



Overview of Taiwan's Port

Advancing Homeport Facilities and Services

Port of Kaohsiung: Dual Cruise Terminals

Asia's Vibrant Harbor City

● Kaohsiung Port Cruise Terminal

- ✓ One large and one small cruise ship.
- ✓ Two medium-sized cruise ships
- ✓ Shore Power Facilities
- Scheduled for completion in 2027

● Penglai Cruise Terminal

- ✓ Terminal renovation completed
- ✓ Installation of E gates*4



Kaohsiung

Keelung



Port of Keelung: Dual Cruise Terminals

Taiwan's International Gateway

● 2026

- ✓ Landscape enhancement project behind Warehouses W2 and W3
- ✓ Installation of E gates*4

● 2027

- ✓ Shore Power Facilities

● 2028

- ✓ New passenger boarding bridge

10



Overview of Taiwan's Port

Taiwan's Diverse Portfolio of Cruise Destinations

- ✓ Progressive upgrades to the Taichung Passenger Center
- ✓ Enhanced terminal facilities and immigration clearance processes



Island Paradise of the Taiwan Strait

- Extension of Berth No. 1 to accommodate cruise ships of up to 150,000 GT
- Penghu International Cruise Terminal (scheduled for completion by end-2026)

Culture, Creativity and Urban Charm

Gateway to Taiwan's Heritage

Welcoming luxury and expedition cruise ships



KEELUNG

SUAO

HUALIEN

Where Mountains Meet the Sea

- Completion of the Hualien Passenger Service Center Renovation (Pier 14)



Scenic Gateway to Taiwan's Northeast Coast

- Opening of Suao Cruise Terminal
- ✓ Attracting premium and luxury cruise vessels



Taiwan Cruise Port Development

The 2027-2031 Strategic Vision

Hardware & Green Transformation

US\$22.3M Keelung Pier E4&E5 Reconstruction

By modernizing 50-year-old piers to support advanced cruise berthing and commercial growth. (By 2027)

US\$48.2M Low-Carbon Shore Power Infrastructure

Investing to reduce vessel emissions, setting up hardware and shore power at Keelung and Kaohsiung cruise terminals.

Waterfront Commercial Growth

US\$781M Projected Private Investment

Developing Kaohsiung's "Asia New Bay Area" into a premier waterfront tourism and business corridor

Keelung "Golden Corridor" Planning

Converting Pier 4-7 into a startup and cruise recreation zone. (Through 2026)



03

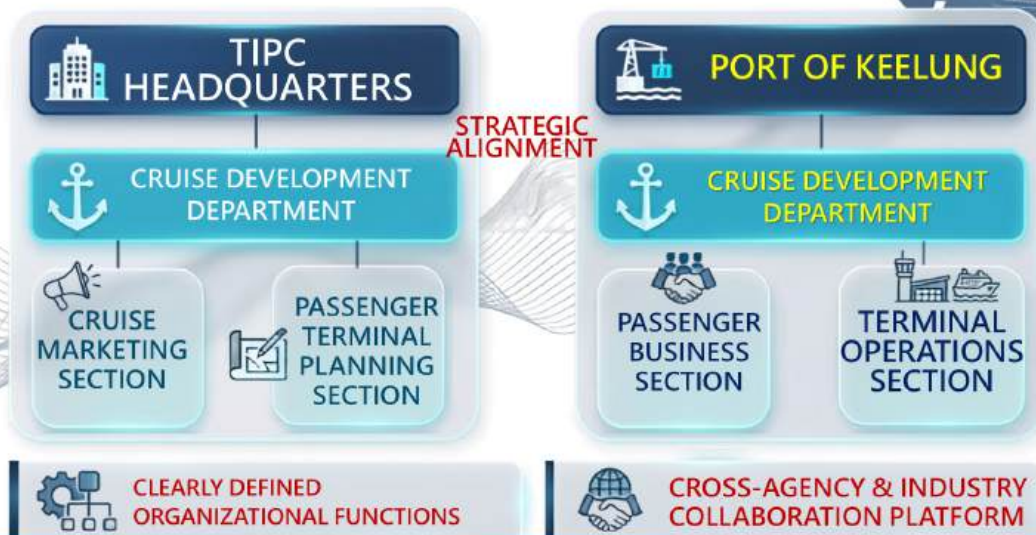
Development Strategies



13

Development Strategies

Establish a new Organization Network Department



14



Development Strategies

Cruise Friendly Environment



Optimize CIQS Process

40%

Less Waiting Time

Full e-Gate Access for Foreign Cruise Passengers



20%

Faster Processing

No fingerprint collection required for Manual Inspection

Exit Stamp-Free Clearance &
Stamp-Free on Passport Copies (enroute inspection)

Improved Passenger Convenience & Faster Passenger Flow



Upgrading Multilingual Wayfinding and Signage



Service environment available in
Chinese, English, Japanese and Korean



15



Promoting Taiwan

Through Port-City Collaboration

Cruise Tourism Benefits the Entire City

- » Driving tourism growth and visitor spending
- » Connecting and strengthening local industries
- » Enhancing the global profile of Taiwan's port cities

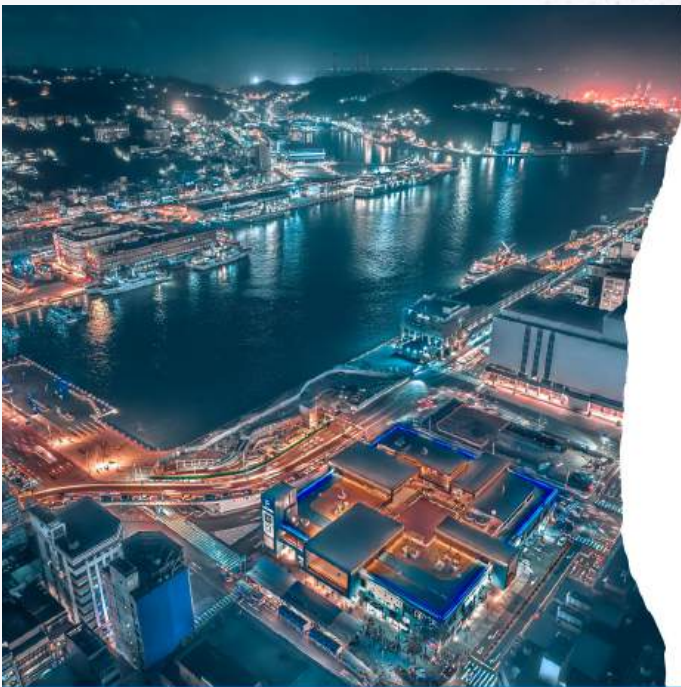


16



Strategic Waterfront Revitalization

Aligning with global benchmarks to catalyze growth



THANK YOU

Rooted in Taiwan,
Reaching Beyond,
Island Hopping,
Discovering More.

ACLN Session | 에이클린 세션

ACLN Special Day with Taiwan

ACLN 스페셜 데이 with 대만

Yang Sheng Ping | 양성평

The President, the Taiwan Tourism Institute

대만관광연구원 원장

WHY CALL IN TAIWAN?

Biography

President of the Taiwan Tourism Institute, leading tourism research, policy development, professional training, and international cooperation in Taiwan. An expert in tourism policy, destination management, and public administration, he has held senior leadership positions in both academia and government, contributing to the sustainable development and global competitiveness of Taiwan's tourism industry.

Key Career

President, Taiwan Tourism Institute

Member, Executive Yuan Tourism Industry Revitalization Advisory Committee

Former Director General, Department of Tourism, Taoyuan City Government

Former Chair & Assistant Professor, Department of Tourism and Hospitality, Kainan University

약력

대만관광연구원(Taiwan Tourism Institute) 원장으로 관광 연구와 정책 개발, 국제협력 등을 총괄하고 있다. 관광정책, 목적지 개발 및 관광행정 분야의 전문가로, 타오위안시 정부 관광국장을 비롯한 학계와 공공부문에서 다양한 리더십을 수행하며 대만 관광산업의 지속가능한 발전과 국제협력을 이끌고 있다.

주요 경력

현) 대만관광연구원 원장

현) 행정원 관광산업진흥 자문위원

전) 타오위안시 정부 관광국장

전) 카이난대학교 관광·호텔경영학과 교수 및 학과장





WHY CALL IN TAIWAN?

Taiwan Tourism Institute

Jeffrey S.P. Yang

2026 AISA CRUISE FORUM JEJU

TAIWAN'S LOGO + SLOGAN

TAIWAN
WAVES OF WONDER



TAIWAN PORTS



FLY-CRUIISING TO TAIWAN

- New York in ~17 hours
- DC in ~16 hours (Launching soon)
- Chicago/Toronto in ~16 hours
- Los Angeles/San Francisco in ~14 hours
- Seattle/Vancouver in ~13 hours
- Phoenix in ~15 hours



180+ Direct Flights to Taiwan from North America each week





Port of
Keelung

NORTHERN TAIWAN HIGHLIGHTS



Taipei 101



Yehliu Geopark



Pingxi



Jiufen



Port of
Anping

Port of
Kaohsiung

SOUTHERN TAIWAN HIGHLIGHTS



Alishan Forest



Dragon and Tiger Pagodas



Anping Old Fort



Kenting Baishawan Beach



CENTRAL TAIWAN HIGHLIGHTS



National Taichung Theater



Rainbow Village



Sun Moon Lake



Lukang



EASTERN TAIWAN HIGHLIGHTS



Qixingtang Beach



Lanyang Museum



Sanxiantai



Tropic of Cancer Marker

Port of Matsu

Port of Kinmen

Port of Penghu

OFFSHORE ISLAND HIGHLIGHTS

Columnar Basalt (Penghu)

Beihai Tunnel (Matsu)

Shanhou Folk Cultural Village (Kinmen)

Twin Hearts Stone Weir (Penghu)

GETTING ROUND TAIWAN



High Speed Rail



Rail Network



Metros (MRT)



Cycling



Buses & Coaches



Taxis & Uber



Domestic Flights



Ferries

FOOD CULTURE: FRESH, LOCAL DELICACIES, DAY OR NIGHT



*"Every single thing I had, and I had a lot, was absolutely delicious...
I need to come back to get everything."*

- Phil Rosenthal on

N SERIES
SOMEBODY
FEED PHIL

FOOD CULTURE: 400+ MICHELIN RECOMMENDED SPOTS



TEA CULTURE: THINGS TO DO



Drink all sorts of bubble tea



Join a tea picking workshop



Enjoy tea with a view



Have a tea ceremony



Enjoy tea with pineapple cakes



Grab a cold tea off-the-shelf

TEMPLE CULTURE: SO MANY UNIQUE TEMPLES TO EXPLORE



Dragon and Tiger Pagodas



Pa Cien Pagoda



Fo Guang Shan Buddha Museum



Longshan Temple



Sicao Dazhong Temple



Shitoushan Quanhua Temple

TEMPLE CULTURE: THINGS TO DO



Burn incense



Burn paper money & objects



Throw moon blocks



Draw lots



Watch a procession



Watch a puppet show

TRADITIONAL CULTURAL ACTIVITIES



Join a Hakka dyeing workshop



Release a sky lantern



Join amazing festivals



Enjoy oil paper umbrellas



Bombing of Master Han Dan



Burning of the Plague God Boat

INDIGENOUS CULTURE: 16 TRIBES TO EXPLORE



Rukai/Paiwan Tiayuma (swinging)



Tsou Mayasvi Ceremony



Bunun Ear-Shooting Festival



Yami (Tao) Flying Fish Festival



Amis Harvest Festival



Puyuma New Year Ritual

NIGHTLIFE



Night markets



Shopping Streets & Bookstores



Hot Springs



Karaoke (KTV)



Nightclubs



River Walks

Green & Sustainable Tourism



Yehliu Geopark



Gaomei Wetlands



Jing Zhai Jiao Tile Paved Salt Fields



Heping Island Geopark



Sun Moon Lake



Sicao Green Tunnel

Green & Sustainable Tourism



Great Harbor Bridge



Nasca Lines – Guardians of Stone Weirs



Qixintan



Kaohsiung Love River Bay



Daguoye Columnar Basalt



Liyu Lake

Incentives



For Overseas Cruise Ships:

Berthing ≤ 12 hours $\rightarrow$ US\$7,500 /ship

Berthing 12+ hours $\rightarrow$ US\$15,000 /ship



For Fly-Cruising:

Up to US\$10 per international passenger arriving in Taiwan as part of a fly-cruise program



TAIWAN

WAVES OF WONDER

eng.taiwan.net.tw



Taiwan Tourism Institute



ACLN Session | 에이클린 세션

ACLN Special Day with Taiwan

ACLN 스페셜 데이 with 대만

Hsu Mu-Jou | 쉬무로우

StarDream Cruises Vice President

스타드림크루즈 부총재

Creating the Next Wave of Cruising in Asia Beyond Growth. Toward Market Creation.

Biography

Vice President of StarDream Cruises, overseeing sales, market development, and trade partnerships in Taiwan. Leads cruise product development, homeport deployment strategies, and regional industry collaboration, while serving as Media & PR Convener of the Taiwan International Cruise Association.

Key Career

Vice President, StarDream Cruises
Media & PR Convener, Taiwan International Cruise Association
Head of Taiwan Sales & Market Development
Cruise Product & Homeport Strategy

약력

스타드림크루즈 부총재로 대만 시장의 영업과 파트너십, 시장 개발 전략을 총괄하고 있다.
크루즈 상품 개발과 모항 운영, 관광기관 및 항만과의 협력을 추진해 왔으며,
대만국제크루즈협회 미디어·홍보위원장으로 지역 크루즈 산업 협력 확대에도 참여하고 있다.

주요 경력

현) 스타드림크루즈 부총재
현) 대만국제크루즈협회 미디어·홍보위원장
대만 시장 영업 및 시장개발 총괄
크루즈 상품 및 모항 운영 전략 총괄



Creating

the Next Wave of Cruising in Asia

Beyond Growth. Toward Market Creation.

Victoria Hsu

Vice President, Sales
StarDream Cruises



Asia

One Region. Many Markets.

Asia is home to many successful cruise markets, each shaped by different travelers, partnerships and development paths.

There is no single model for market development.
That is why we learn from one another.

— That is why conversations
like **ACLN** matter.

*Different markets.
Different perspectives.
Shared learning.*



Taiwan

One Market. One Perspective.

Taiwan is not presented as a model to copy, but as a market shaped over time by people, partnership and long-term commitment.

Its experience contributes one perspective to Asia's shared conversation on market development.

Markets are ultimately built around people.



Foundations

What Builds a Market?

Every enduring cruise market rests on three foundations.

People

Partnership

Commitment

Sustainable markets **begin** with people,
grow through partnerships,
and **endure** through long-term commitment.

People

Markets begin with understanding people.

Cruise markets grow when products reflect the lives, aspirations and behaviors of local travelers.

People shape markets before products do.



Evidence

Different people create different demand.

Independent consumer research shows that **StarDream Cruises** attracts a younger and more balanced guest profile than the traditional cruise market.

StarDream Cruises Guests		
	Core Age Group	25–54
	Average Age	46
Younger and more balanced guest profile.		

Traditional Cruise Guests		
	Core Age Group	35–64
	Average Age	55
More concentrated in older age groups.		

The market shapes the product.

Experiences

People shape products.

Local experiences are not designed first. They emerge from understanding people.

Great products reflect local lives.



Taste

Taste is memory.



Culture

Culture creates belonging.

No Market Grows Alone.

Every successful cruise market is shaped by those who choose to build it together.



Government



Ports



Cruise Lines



Travel Trade



Tourism



Communities

Markets **grow** through shared commitment.

Partnership

Markets grow through collaboration.

Successful cruise markets depend on long-term collaboration across government, ports, tourism, distribution and industry partners.

Strong partnerships create enduring markets.



Commitment

Markets reward those who stay.

Long-term commitment creates continuity.

Continuity builds trust.

Trust makes meaningful localization possible.



1998
The Prelude



2014
Building the
Ecosystem



2023
A New Chapter



Today
Creating the Future

Time is the strongest form of commitment.

Impact

Commitment
creates
lasting value.

Cruising creates value
beyond tourism.

It strengthens local
economies, supply chains
and communities.



1.14M

Taiwan
Passenger Movements
(2025)

300,000+

StarDream
Guests from Taiwan
(2025)

NT\$170M+

Local Procurement
in Keelung
(2024, 3.5 Months)

NT\$1.7B

Estimated Economic Impact
in Kaohsiung
(2023 Homeport Season)

Market growth creates value far beyond tourism.

Future

Beyond Growth.
Toward Market Creation.

The future of cruising will not be defined by bigger ships.
It will be defined by a deeper understanding of people.

The next chapter of cruising
will not be written for Asia.
It will be written *from Asia.*



Session 4 | 세션 4

Asia Cruise Academic Part 1:

Coastal Cruise Activation and Multi-Homeport Hub Strategies

아시아 크루즈 아카데미 1부: 연안 크루즈 활성화와 다모항 거점 전략

KIM Jong-Nam | 김종남

Professor, Daekyung University / Chairman, Korea Cruise Forum
(사)한국크루즈포럼 운영위원장 / 대경대학교 교수

아시아 크루즈 시장 통합의 비전과 과제

파편화된 포트(Port)에서 단일 경제권(Economic Zone)으로

Biography

Professor of the Global Hotel Cruise Department and Director of the International Cruise Industry Research Institute at Daekyung University. Serves as Chairman of the Korea Cruise Forum and advisor to the Ministry of Oceans and Fisheries, supporting the development of Korea's cruise industry and maritime tourism policy.

Key Career

Professor, Global Hotel Cruise Department, Daekyung University
Director, International Cruise Industry Research Institute, Daekyung University
Chairman, Korea Cruise Forum
Policy Advisory Member, Ministry of Oceans and Fisheries
Chairman, Advisory Committee on the Promotion of Maritime Leisure Tourism,
Gyeongsangbuk-do

약력

대경대학교 글로벌호텔크루즈과 교수이자 국제크루즈산업연구소장으로 크루즈 산업 교육과 연구를 수행하고 있다. 한국크루즈포럼 운영위원장을 비롯해 해양수산부 정책자문과 해양관광 정책 수립에 참여하며 국내 크루즈 산업 발전을 지원하고 있다.

주요 경력

현) 대경대학교 글로벌호텔크루즈과 교수
현) 대경대학교 국제크루즈산업연구소장
현) 한국크루즈포럼 운영위원장
현) 해양수산부 정책자문위원 및 해양관광 SOC 자문위원
현) 경상북도 해양레저관광 육성자문위원회 위원장



Keynote · Asia Cruise Forum 2026

아시아 크루즈 시장 통합의 비전과 과제

파편화된 포트(Port)에서
단일 경제권(Economic Zone)으로

New Era of Asian Cruise — Vision and Challenges for Market Integration

Presenter

(사)한국해양관광학회 고문 · (사)한국크루즈포럼 운영위원장
김종남 교수

AI

MULTI-HOMEPORT

SMART PORT GOVERNANCE

Asia Cruise Forum 2026 · 02 / 27

AX TRENDS

Global Cruise Market 2026

글로벌 크루즈는 회복을 넘어,
AI 기반 고부가가치 산업으로 재편되고 있다

패러다임의 전환(paradigm shift)

Before · Hardware Era

배의 크기가 경쟁력이었다

Ship Size · 선박 크기

Passenger Capacity

Gross Tonnage

Itinerary Length



After · Software Era

데이터가 경쟁력이다

Data · 승객 · 운영 데이터

Personalization · 승객 경험의 개인화

Connectivity · IoT 웨어러블

Yield Management · 수익 최적화

AI Cruise Ecosystem

- 01 IoT 웨어러블 기반 승객 동선 관리
- 02 개인화 추천 엔진 기반
온보드 소비 확대
- 03 예측 가능한 정비 · 공급망 효율화
- 04 데이터 기반 수익관리 고도화

경쟁의 중심은 이제 Hardware에서 Software로 이동했다.

Region 1 — Hyper-Personalization · Birthplace of the Data Ecosystem

북미는 AI 웨어러블·생체인식으로
승객의 동선과 취향을 '지배'한다

Case 01 · Carnival Cruise Line
MedallionClass™
웨어러블 '오션 메달리온'
+ AI 연친 '지니(Johnny)'

Step 1 - Pre-Cruise
익스 수납·개봉

Step 2 - Onboard Ready
선상 자유유동

Use Case

- * 접근 인식·자동 도어록 — 메달리온이 객실 문 앞에 닿으면 AI가 인식해 자동 잠금 해제
- * 맞춤 캠페일 추천·배달 — 과거 주문 이력 + 선호도 분석으로 실시간 제안
- * 승객 동선 시각화 → 혼잡도 자동 제어 — 선내 빅데이터로 공급망 최적화

핵심 가치 — "승객 행동 데이터 → 매출·운영 의사결정"의 폐쇄 루프

Case 02 · Royal Caribbean Intl.
Smart Shaping™ & Bionic Bar
안면인식 출입국 + 선내 AI 에이전트

Use Case

- * 10분 스마트 보딩 — 모바일 앱 사진 등록 → 마이메이 터미널 안면인식 카메라가 자동 체크인
- * 바이오닉 바(Bionic Bar) — 로봇 바텐더가 앱 데이터와 연동해 취향 음료 제조

AI 에이전트 — 선내 모든 예약·문의를 단일 인터페이스로 처리
핵심 가치 — "승객 마찰(friction) 제로" 터미널-객실-선내 무경계 경험

북미는 웨어러블 IoT + 안면인식으로 'AX의 표준 모델'을 만들었다.

Region 2 — Green Operation × Local Connectivity

유럽은 환경 규제(EEXI/CII)를
'AI 운항 최적화'로 푼다

Case 03 · MSC Cruises
ZOE™ Voice AI & Eco-Routing
세계 최초 선실 전용 AI 음성 비서 + AI 항해 최적화

Use Case

- * 7개 국어 객실 음성 비서 — 바르셀로나·로마 등 기항지의 날씨·투어 예약을 말 한마디로 처리
- * AI 항해 최적화 — 연료 소모량·탄소 배출·기상 데이터 실시간 모니터링 → 지중해 최적 항로 자동 계산

규제 대응형 AX — EEXI/CII 등 강화되는 환경 규제를 데이터로 증폭
핵심 가치 — "승객 편의 + 환경 규제"를 한 알고리즘으로 동시 해결

Case 04 · Costa Cruises
Port Big Data Optimization
기항지 인프라 ↔ 선내 공급망 연결 데이터 플랫폼

Use Case

- * 기항지 혼잡도 AI 사전 예측 — 이탈리아·프랑스 소도시 부담을 데이터로 분산
- * 하선 시간·투어 버스 실시간 제어 — 시간대별 분산 배차로 피크 완화
- * 오버투어리즘 문제를 데이터로 해결 — 도시·항만·선사의 win-win 모델

핵심 가치 — "항만 도시와 공존"하는 데이터형 관광 모델

유럽은 규제와 로컬 분산을 AI로 푼다 — '운영형 AX'의 모범.

Region 3 — Smart Homeport · Digital Readiness Lab

아시아는 5G · 모바일 결제로 '모바일 통합형 AX'를 빠르게 추격한다



Case 05 · Royal Caribbean Asia
Smart Ship™ · Localized
 Spectrum of the Seas · 싱가포르 · 상하이 · 한국 기항

UNIFIED MOBILE

Use Case

- * 아시아 특화 결제 API 연동 — 위챗페이, 알리페이, 카카오페이, 네이버페이 통합
- * 선내 모든 결제·공연 예약·수속을 단일 모바일 플랫폼으로
- * 한·중·일 승객의 높은 모바일 의존도를 기회로 — 5G 인프라 강점 활용

핵심 가치 — "모바일 OS가 곧 크루즈 UX"의 아시아형 현지화

Case 06 · Resorts World Cruises
Multi-Homeport Provisioning AI
 켄팅 드림 — 싱가포르·대만·말레이시아 거점 연계

Use Case

- * 국적별 선호 식자재 · 소비 패턴을 AI로 예측
- * 싱가포르·대만 모항 수급 프로세스 자동화 — 다국적 승객 유입에 맞춘 동적 선용품 보급
- * 선내 폐기를 30%+ 감축 — ESG 성과로 직결

핵심 가치 — "다모항 = 데이터 다거점"의 아시아형 본보기

아시아는 모바일·결제 강점 위에서 '스마트 홈포트와 다모항 AI'를 검증 중이다.

Three Pathways · One Conclusion

세 권역 모두 'AI·데이터로 항만과 승객을 잇는다'

아시아만의 다음 질문 — 어떻게 '통합'할 것인가

Dimension	North America	Europe	Asia · The Next Move
AX Driver AX의 동인	하이퍼 개인화 · 매출 최적화	환경 규제(EEXI/CII) · 오버투어리즘	다모항 운영 · CIQ 마찰 해소
Signature Tech 대표 기술	IoT 웨어러블(메달리온) 안면인식 스마트 보딩	음성 비서(ZOE) AI 항로·연료 최적화	통합 모바일(위챗·카카오 등) 다모항 Provisioning AI
Lead Players 선도 선사	Carnival · Royal Caribbean	MSC · Costa	Royal Caribbean Asia · Resorts World (켄팅)
Strategic Lesson 전략적 시사점	승객 데이터의 '폐쇄 루프'가 매출을 만든다	AI는 규제와 지역사회를 관리하는 도구다	개별 선사 혁신을 넘어, 시장 차원의 데이터·제도 통합이 다음 단계

SO? 북미는 하드웨어 경쟁을 끝냈고, 유럽은 규제로 운영을 정렬했다 — 아시아는 '시장 자체'를 통합할 차례.

오늘의 논의 — AI · 빅데이터를 아시아 시장 통합의 인프라로 어떻게 작동시킬 것인가.

— Structural Bottlenecks in Asia

아시아 크루즈시장의 문제는 수요 부족이 아니라,
구조적 파편화(Fragmentation)다

01 파편화된 CIQ

한·중·일·대만 간 출입국 절차 비연동
→ 승객 경험과 운영 효율 동시 저하

02 단발성 포트 마케팅

지자체별 개별 유치 경쟁
→ 권역 전체의 네트워크 효과 부재

03 단일 노선 편중

중국발 대형선 중심 운항 구조
→ 다변화된 소비자 수요 대응 한계

Disconnected Ports — current state



아시아는 잠재력이 큰 시장이지만, 아직 '하나의 시장'으로 작동하지 못한다.

— The Case for Integration

시장 통합은 선택이 아니라,
리스크 분산과 성장 재설계를 위한 필수 전략이다D¹ Risk Diversification
리스크 분산

지정학적 리스크가 높아질수록 단일 국가·단일 출발지 의존 구조는 취약해진다

D² Demand Diversification
수요 다변화

아시아 내수 크루즈 수요를 연계해야 지속 가능한 성장이 가능하다

D³ Regional Economic
Integration

동북아 해양경제 통합

크루즈는 관광상품이 아니라, 동북아 해양 경제 협력 플랫폼이다

From — old model
외화 획득형 관광산업



To — integrated model
해양경제 네트워크 산업

크루즈 산업의 정의를 다시 쓸 시점이다. 관광 → 플랫폼.

Digital x Physical Nexus

아시아 크루즈의 미래는 데이터와 인프라가 결합된
Digital & Physical Nexus다

AI 기반 연결성 + 다모항 기반 물리 인프라 = 이중 통합(Dual Integration)

Vision 1 — AI Data Connectivity

실시간 데이터 셰어링이
아시아 크루즈를 예측 가능한 시장으로 바꾼다

감(感)이 아니라 데이터로. 정밀 운영 체계로 전환한다.

— Vision 2 — Northeast Asia Golden Circle

한국(부산·인천) · 상하이 · 도쿄/후쿠오카를 잇는
골든 서클(Golden Circle)이 동북아의 표준 노선이다



Four Keywords

KW 01

Multi-Homeport

복수의 모항 운용

KW 02

Multi-Boarding

여느 국가에서든 승하선

KW 03

Circular Route

왕복이 아닌 순환형 노선

KW 04

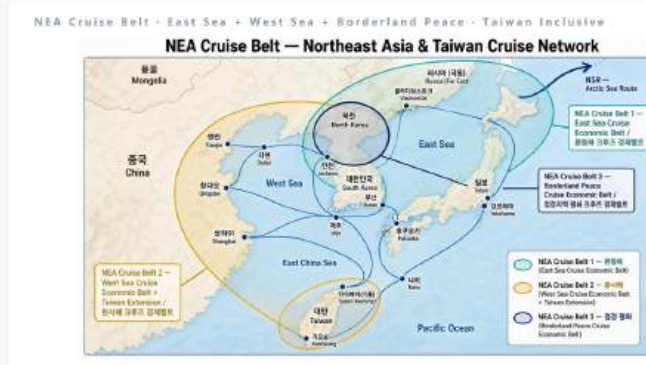
Flexible Embarkation

한 국가의 수요 둔화를 다른 국가 수요가 보완한다 — 시스템의 회복탄력성.

— From Route — Belts — Economic Community

동북아 크루즈벨트(NEA Cruise Belt)로
'크루즈 경제공동체'를 창설한다

Creating a Cruise Economic Community by the Northeast Asian Cruise Belt



Belt 1 - East Sea Cruise Economic Belt

환동해 크루즈 경제벨트

빈(남·북)·중·미 공동개발 · 신재생에너지 · 농수산업
 + 북극해 항로(HSR) 연계

KR DPRK CH RU NSR

Belt 2 - West Sea Cruise Belt - Taiwan

환서해 크루즈 경제벨트

경보(IT)기계 · 농수산업 · 글로벌 제조
 + 대만 경제 항로 확장

KR CH JP TW

Belt 3 - Borderland Peace Cruise Belt

접경지역 평화 크루즈 경제벨트

한반도 교육관광 · DMZ 평화 · 남북교류 · 청경 평화관광
 + 북극해 항로(HSR) 연계

KR DPRK FRAC NSR

점(항만) → 선(골든 서클) → 면(3대 벨트) · 경제공동체 — 크루즈가 동북아 경제 통합의 '동맥'이 된다.

— Vision 3 — Mega Port × Coastal Spokes

허브&스포크 모델과 다변화 전략 : 허브와 스포크가 결합하면
성장과 지역 분산을 동시에 달성한다



Korean Spoke Cases

남해안 벨트 연계

여수 · 동영 · 거제 등 다도해 자원과
허브 항만의 환승 연결

세만금 포트 관광·물류 연계

서해권 관광 거점화 + 복합 산업 연계 가능성

포항 영일만권 특화 기항지

동해권 거점 · 지역 특화 콘텐츠 결합 검토

Hub의 성장 없이 Spoke의 활성화는 어렵고, Spoke의 다양성 없이 Hub의 지속성도 약하다.

— Four Outcomes of Integration

선사 효율 · 지역 균형 · 내수 확대 ·
정책 협력이 동시에 움직인다

01 Fleet Efficiency
배선 효율 극대화

글로벌 선사의 아시아 상시 배치 유도
→ 시즌별 배선 공백 해소 · 운영 비용 절감

02 Regional Balance
기항지 편중 해소

거점 집중 구조 완화
→ 지역경제 파급 확대 · 균형 발전

03 Consumer Expansion
아시아 내수 시장 확대

중장기적으로 아시아 크루즈 인구 1,000만 명 시대 기반 조성

04 Policy Cooperation
정책 협력 플랫폼 형성

항만 · 관광 · 출입국 · 환경 정책 간
연계 강화 — 거버넌스 진화

항로를 늘리는 것이 아니라, 세 개의 축을 동시에 움직이는 전략이다.

Task 1 — CIQ Liberalization

다모항 체제의 출발점은
승객 이동의 마찰을 줄이는 스마트 CIQ다

Before · Current Process

5단계 — 평균 90분 이상



After · One-Pass

ASIA CRUISE ONE-PASS

3단계 — 평균 25분 내



Effect 01

승하선 대기시간 단축

평균 처리시간 70% 이상 감소 기대

Effect 02

환승형 노선 운영 가능

다국적 환승·연속 기항이 현실화

Effect 03

다국적 승객 편의 증대

국적 언어와 무관한 통등 경험 제공

출입국 절차가 항로의 속도를 따라가야 다모항이 작동한다.

Why the Schengen Sea Sails — and Ours Doesn't (Yet)

같은 모양의 바다, 다른 운명 —
CIQ가 다모항의 성패를 가른다

Case A · The Mediterranean — Success Model

유럽 지중해 — '생겐 海'

하나의 출입국 기준 위에서 27개국·수백 개 항만이 자유롭게 연결된다



SCHENGEN

최초 입국 1회 심사 — 바르셀로나에서 입국하면 로마·마르세유는 추가 대면 심사 없음

ONBOARD

선사 ↔ EU 이민국 시스템 연동 — 선박 카드웨어블로 국내선처럼 승하선

RESULT

기항지 CIQ 마찰 계수 ≈ 0 — 글로벌 1위 권역(연 3,200만 명+)

Case B · East Asian Mediterranean — Our Challenge

동북아 지중해 — '단절된 海'

같은 모양·같은 잠재력 — 그러나 4개국 CIQ가 매년 단절시킨다



RESET

매 항만마다 심사가 리셋 — 부산·상하이·후쿠오카 각각 별도 이민국 표준 적용

ISLAND

상하이 우송코우의 혁신도 자국 영토 한정 — 사전 전자심사·시 안면인식 우수, 그러나 권역 연동 X

RESULT

다모항 실현이 '제도'에 막힌다 — 잠재력 ≫ 실적

Takeaway

동북아 지중해를 '하나의 항해권'으로 만드는 출발점 — 스마트 CIQ가 인프라보다 먼저다.

Anatomy of Friction — A Real Itinerary

한 척의 배, 한 번의 항해 —
네 번의 다른 심사를 통과한다

Diagnosis

개별 항만이 못해서가 아니다 — 권역이 연동되지 않기 때문이다.
상하이의 혁신도, 부산의 표준도, '국경에서 매번 끝난다'.

4 × CIQ
Per One Round Trip

From Smart CIQ to One Pass Card — Region-wide Single Card

역내 크루즈 원패스 카드(One Pass Card) —
승객은 카드 한 장으로, 동북아를 자유롭게 항해한다

Introducing Cruise One Pass Card across the Northeast Asian Cruise Belt



스마트 CIQ가 '문을 여는' 인프라라면, 원패스 카드는 그 문을 통과한 승객이 '단일 경제권'에서 자유롭게 소비하는 화폐다.

Why Cabotage Reform Is So Hard

카보타지 해제 — 3대 난제가 가로막는다

왜 '철칙'을 풀기 어려운가

Context 카보타지(Cabotage)는 거의 모든 해양 국가가 영해 주권과 자국 해운 보호를 위해 헌정하는 철칙이다.



Barrier 01 · Sovereignty

안보·영해 주권

Geopolitical Risk

카보타지 해제 = 외국 국적선·외국인 승무원의 자국 연안 상시 운항 허용

☐ 한·중·일 간 미묘한 지정학적 긴장 → 군사·안보 당국의 행정적 진입장벽

"최전방 연안의 안보 민감성이 첫 번째 벽"



Barrier 02 · Labor

자국 해운·노동 보호

Domestic Industry Risk

저임 제3국 선원 + 편의치적선(FOC)의 국내 연안 수송 시장 잠식 우려

↓ 국내 선원 일자리 보호가 카보타지의 근본 목적 → 노조·업계 강력 반발

"내수 일자리 — 가장 정치적인 변수"



Barrier 03 · Trade

호혜주의의 불균형

Asymmetry Risk

상호 해제가 원칙이나 시장 규모 격차 (中 거대 vs 韓 협소)로 실익 계산 불균형

✚ 통상 협상 테이블에서 합의 도출 극도 난항 — 비대칭의 함정

"큰 시장과 작은 시장의 거래는 늘 비대칭"

그럼에도 풀어야 한다 — 그런데 '그냥 풀면' 또 다른 위험이 온다.

Next · The Double-edged Sword →

Risks of Opening Without a National Fleet

국적 크루즈선이 없는 채로 풀면, '안방'을 통째로 내어주는 꼴이 된다

The Concern "한국엔 국적 크루즈선이 사실상 전무하다 — 카보타지만 풀면 국내 연안 시장이 통째로 외국 선사에게 증속된다."

R¹

Risk 01 · Market Dependence

국내 시장의 해외 증속화

글로벌 메가 선사들이 부산-제주-여수-세만급 라인을 독점하면 —

- ✕ 노선 주도권 — 선사 손에
- ✕ 운임 결정권 — 선사 손에
- ✕ 공급량 통제권 — 선사 손에

"지자체는 인프라만 맡고 끌려다니는 구조"

R²

Risk 02 · Revenue Leak

경제적 낙수효과 유출



"재주는 곰이 낚고, 돈은 왕서방이 번다"

티켓 · 선내 소비 · 가이드 수익의 대부분 본사로 송금

R³

Risk 03 · Sprout Cut

국적선 육성 기회 영구 박탈



자국 연안 '테스트베드'에서 체력을 키울 기회 → 글로벌 선사 제급 경쟁에 시작 전 좌초

"싹을 자른 채로 시작하는 산업은 자라지 않는다"

카보타지 = 양날의 검. 그래서 '정교한 필터'가 필요하다.

Next · The Korean Filter →

— A Surgical Filter, Not a Blanket Reform

무조건적 해제가 아닌 —
'한국형 정교한 필터' 3대 대안으로 본다

A¹ Alternative 01 · Sandbox
크루즈 한정 규제 샌드박스
Cruise-Only · Time-Limited · Quota-Based

GENERAL FLEET
화물 · 일반 여객선
CARRIAGE LOCKED

VS

DESIGNATED CRUISE
지정 크루즈선만
OPEN · QUOTA

- 일반 화물·여객선은 철저히 카보타지 유지
- 국제 다모항 노선의 '지정 크루즈선'에 한해 한시 허용
- 한·중·일 공동 쿼터제로 실험 시작

안보·노동 영향 최소화한 첫 진입점

A² Alternative 02 · Local Content
로컬 콘텐츠 강제 쿼터제
Trade-Off · Open Access for Local Anchoring

Legal Conditions

30%+
선내 식자재
로컬 마켓 조달

100%
연안 가이드 · 기항지
원도모래이티 운영인력
국내고용

외국선 연안 운항 허용의 법적 장애 조건 —
영해를 내어주는 대가로 실질적 지역 경제 활성화 달보

납수료와 유출 방어의 핵심 기재

A³ Alternative 03 · Two-Track
트랙 육성 전략
Open the Door · Grow the Sprout

TRACK 1 · GLOBAL MEGA
다모항 터미널 개방 + 스마트 CIQ 유입

TRACK 2 · KOREAN STARTUP
5천~1만 톤급 소형 탐험 크루즈 + 금융·세제

- 개방: 외국 메가선 연 다모항 개방, 스마트 CIQ로 결속
- 육성: 국내 강소 선사 연 정책 금융·세제 혜택
- 병행: 글로벌 자본 활용 + 국적선 확충 보호

신성장 동력 — 종속 아닌 활용 전략

안방을 내어주는 게 아니다 — 글로벌 자본을 활용해 우리 연안 경제를 살리는 다모항의 전제 조건이다.

— Task 3 — Asia Cruise Data Hub

통합 시장의 기반은 항로가 아니라
표준화된 데이터다

Asia Cruise Data Hub — Structure

```

graph TD
    CL[CRUISE LINES  
선사] --- DH((DATA HUB  
Asia Cruise  
Big Data Center))
    PA[PORT AUTHORITIES  
항만공사] --- DH
    LG[LOCAL GOVERNMENTS  
지자체] --- DH
    TB[TOURISM BODIES  
관광기구] --- DH
    DH --- S[KPIs: STANDARDIZED KPI · SHARED METRICS · OPEN API]
          
```

Standardized KPIs
같은 기준으로 시장을 본다

- K1** 승객 수 (Passenger Count)
- K2** 체류 시간 (Length of Stay)
- K3** 승객 소비액 (Per-Capita Spend)
- K4** 재방문율 (Repeat Rate)
- K5** 계절별 수요 변동 (Seasonality)

노선 협의 이전에, 같은 기준으로 시장을 보는 일부터.

Task 4 — Green Port Co-Standard

지속 가능한 통합은 친환경 항만 공동 표준 위에서만 가능하다



AMP
육상전원공급 표준화

정박 중 엔진 가동 최소화
항만 대기질 개선의 핵심



Bunkering
LNG · 메탄올 병커링

탈탄소 연료 공급 네트워크 구축
아시아 권역 공동 인프라화



Certification
친환경 항만 인증

아시아 공통 인증 체계
국가 간 상호 인정 협력



ESG Metrics
ESG 기준 공유

선사 항만 선택 기준 변화
친환경 대응력이 입지를 결정

Key Message

환경 기준은 비용이 아니라, 미래 항로 입지의 조건이다.

선사가 어느 항만을 선택할지는 처리 능력이 아니라 **친환경 대응력**이 결정한다.

Task Synthesis Matrix

시급성 × 정책 난이도 — 단계화된 실행 매트릭스로 접근하라

↑ POLICY DIFFICULTY (HIGH)

LONG TERM 장기 과제 - C 카보다지 제도 개편 - D 친환경 인프라 공역 네트워크	MID TERM 중기 추진 - G 빅데이터 센터 설립 - H 허브-스포크 시험노선
MONITOR 관망 영역 — 장기 모니터링 대상 —	SHORT TERM - PRIORITY 단기 우선 - I CIQ 유연화 시범사업 - K 데이터 표준 KPI 정립 (KPI:역삼성과 지표)
↓ POLICY DIFFICULTY (LOW)	

← URGENCY (LOW) URGENCY (HIGH) →

Three Task Categories

Category 01
법제도 개선

CIQ · 카보다지 · 협정

Category 02
인프라 투자

스마트 터미널 · AMP · 병커링

Category 03
민관 협력

거버넌스 · 데이터 협력

한 번에 풀지 않는다. 시급성과 난이도에 따라 단계화한다.

NE Asia Cruise Council

통합은 선언이 아니라,
작동하는 거버넌스에서 시작된다



Practical Pilots

Pilot 01

남해안 벨트 ↔ 허브 포트 연계

광역 사범사업 우선 추진

Pilot 02

새만금 포트 — 관광 · 물류 복합

서해권 복합 연계 검토

Pilot 03

포항 영일만권 특화 크루즈

동해권 지역 특화 개발 검토

Legal Basis

크루즈산업육성법 등 관련 법제 연계

민간 · 정부 · 항만 · 지역이 따로 움직이면 안 된다. 공동의 운영 테이블이 필요하다.

파편화된 포트를 잇는 힘은, 결국 데이터와 정책의 연대다

Dimension 01

해양 연결성

동북아 항만 · 항로의
물리적 통합

Dimension 02

경제 협력

선사 · 항만 · 관광의
가치사슬 통합

Dimension 03

평화적 상호의존

동북아 신뢰 · 안전의
해양 인프라화

Closing Statement

“Port를 잇는 것은 항로가 아니라,
신뢰할 수 있는 데이터와 공동의 정책 의지다.”

Open the Floor

Q&A

경청해 주셔서 감사합니다

Thank You

Presenter

김종남 교수

(사)한국해양관광학회 고문 · (사)한국크루즈포럼 운영위원장
contact@asia-cruise-forum.org

Session 4 | 세션 4

Asia Cruise Academic Part 1:

Coastal Cruise Activation and Multi-Homeport Hub Strategies

아시아 크루즈 아카데미 1부: 연안 크루즈 활성화와 다모항 거점 전략

YOO Jae-Heung | 유재흥

Director, ASEA Institute of Lifelong Education

(재)아세아항공전문학교 평생교육원장

AI 기반 한중일 크루즈데이터 허브구축과 기항지 관광 최적화 전략 : IMO MSW 표준 프레임 워크 및 연합학습을 중심으로

Biography

Holds a Ph.D. in Tourism Management with extensive experience in cruise tourism education and workforce development. Currently serves as Director of the ASEA Institute of Lifelong Education and Director of the ASEA Cruise Training Center, contributing to Korea's cruise industry through education, research, and government-supported training programs.

Key Career

Director, ASEA Institute of Lifelong Education

Director, ASEA Cruise Training Center

Board Member, Korean Academic Society of Maritime Tourism

Principal Researcher, Cruise Professional Training Project, Ministry of Oceans and Fisheries (2015-2022)

Board Member, Gangwon Tourism Foundation (2020-2022)

약력

(재)아세아항공전문학교 평생교육원장과 아세아크루즈인재양성센터장을 맡고 있다. 관광학 박사로 해양수산부 크루즈 전문인력 양성사업 책임연구원 등을 역임하며 크루즈 관광 전문인력 양성과 교육 분야에서 활동해 왔다.

주요 경력

현) (재)아세아항공전문학교 평생교육원장

현) 아세아크루즈인재양성센터장

현) 한국해양관광학회 이사

전) 해양수산부 크루즈전문인력양성사업 책임연구원 (2015-2022)

전) 강원관광재단 이사 (2020-2022)



AI기반 한중일 크루즈데이터 허브구축과 기항지 관광 최적화 전략

: IMO MSW 표준 프레임 워크 및 연합학습을 중심으로



아세아항공직업전문학교

ASEA AVIATION OCCUPATIONAL TRAINING COLLEGE

유재홍

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☑ 아시아 주요 국가별 크루즈 소스마켓 현황

구분	여객수	점유율	평균 연령
중국 (Mainland China)	931,000명	36%	47세
싱가포르 (Singapore)	576,000명	22%	40대 초반
인도 (India)	308,000명	12%	40대 중반
일본 (Japan)	227,000명	9%	60세
대만 (Taiwan)	198,000명	8%	50대 초반
한국 (South Korea)	35,000명	1.3%	55세

☑ 아시아 크루즈 시장의 취약점



[높은 국적 의존도]

- 방한 중국인 비중 73% (2026년 1분기)
- 한중일의 소스마켓 격차



[낮은 충격 회복력]

- 외교갈등 시 방문객 급감 (77.6%)
- 코로나 등 다양한 대응전략 부재



[소비 다변화 실패]

- 방한 승객 지출 90% 이상(중국인 99%) 면세 쇼핑 편중
- 최근 3년 내 1인당 쇼핑액 반토막, 저가 패키지 수익 모델 한계 불착



[체류 만족도 저하]

- 평균 기항 체류 5~8시간의 초단기 통과형 일정
- 짧은 체류, 매력 없는 코스 불만 누적으로 기항지 브랜드 가치 하락

시장 진단 - 외형 회복세 이면의 구조적 위기 (팬데믹 회복 ≠ 산업 안정)

☑ 핵심 딜레마 : 데이터 고립과 정보제공의 한계

Needs (데이터 통합의 필요성)

- [현황] CIQ 관청, 항만공사, 선사, 여행사 등으로 원천 데이터 극도 파편화 (Data Silo)
- [한계] 입항 승객 연령, 성향 사전 파악 불가
→ 임기응변식 쇼핑 패키지 공급
- [목표] 출발-경유-도착 항만 간 데이터 연계를 통한 선제적 맞춤형 동선 매핑

VS

Blockers (통합 불가 장벽)

- [한국] 개인정보보호법 (PIPL)
- [중국] 데이터보안법(DSL) 및 개인정보보호법(PIPL)
- [일본] 개인정보보호법 (APPI)
- [결론] 외래 관광객 민감 정보의 '국외 무단 반출' 및 '중양집중식 저장' 원천 금지 (데이터 주권 마찰)

☑ AI를 기반으로 한 해결방안

합법적 데이터 원천 확보 IMO MSW (국제해사기구 해상단일창구)

2024년 1월 전면 의무화 규제
선박 입출항 행정 문서의 전 세계 표준화

개인정보 보존형 AI 연산 연합학습 (Federated Learning)

원본 데이터는 각국(로컬) 내 철저히 격리
학습된 AI 모델의 '가중치(Weights)'만 공유

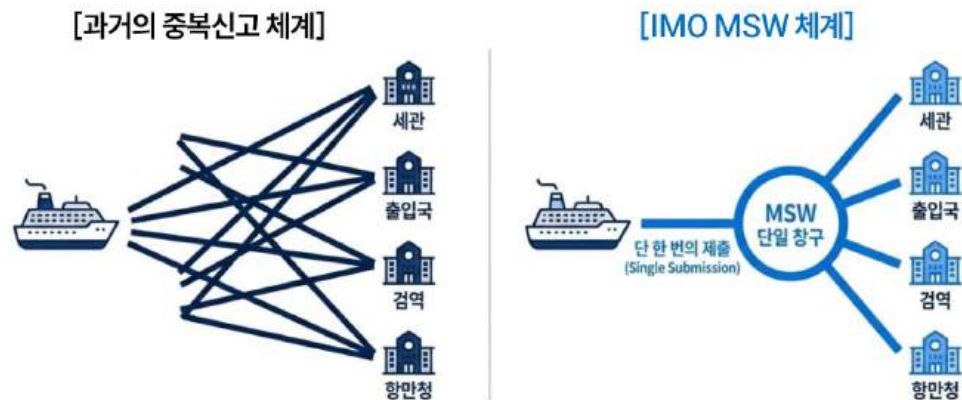


국제해사기구 기준과
3개국의 법규를 준수하는 방식의
AI 기반 관광예측 모델 공동 생산

IMO MSW 표준 프레임워크의 개념

I II III IV V VI

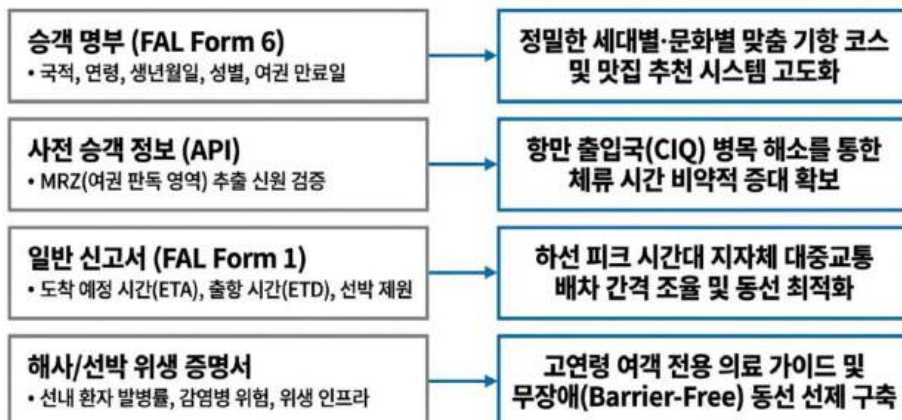
☑ IMO MSW(Maritime Single Window, 해상 싱글 윈도우)



IMO MSW 표준 프레임워크의 개념

I II III IV V VI

☑ IMO MSW 데이터의 활용범위

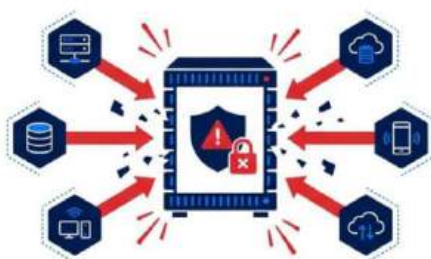


☑ IMO MSW의 국가별 적용 사례

유럽연합 (EMSWe)	싱가포르 (digitalPORT@SG)	호주 & 뉴질랜드
연계 대상: ETIAS, EES(행권 안전 관광망) 자동 정합 관광 혁신: - 승객 사전 스크리닝 및 국경 관리 통제 - 승무원 출국 직인 유효기간 최대 10일 확대 - 모바일 생체 인증(Mobile Biometrics) 도입	연계 대상: 창이공항 + 크루즈 터미널 결합 관광 혁신: - Fly & Cruise 여객 데이터 자동 수평 결합 - 크루즈 전용 e-manifest 일괄 심사 - SG-MDH 허브를 통한 공공-민간 API 협업	연계 대상: Trans-Tasman 크루즈 동맹 관광 혁신: - 출·입항 명세 대조를 통한 조건부 사전 승인(Provisional Clearance) - 바이오セキュリティ 및 감염병 역학 정보 융합 - 통관 지연 예방 및 위생 안전 관리

연합학습(Federated Learning)의 개념

☑ 중앙집중형 모델의 한계와 데이터 아일랜드 현상



- 원천 데이터 셋을 단일 서버 및 분산 GPU 클러스터로 집중시키는 기존 방식의 한계 도출
- 글로벌 개인정보 보장 규제(GDPR, CCPA, HIPAA 등) 강화로 인한 법적·재무적 리스크 증대



- 각 엔티티(기관/디바이스)에 데이터가 물리적으로 격리되는 현상 심화
- 데이터 파편화로 인해 개별 인공지능 모델의 일반화(Generalization) 성능 저해

연합학습(Federated Learning)의 개념

I II III IV V VI

☑ 현재 한중일 데이터 규제와 파편화 현상



연합학습(Federated Learning)의 개념

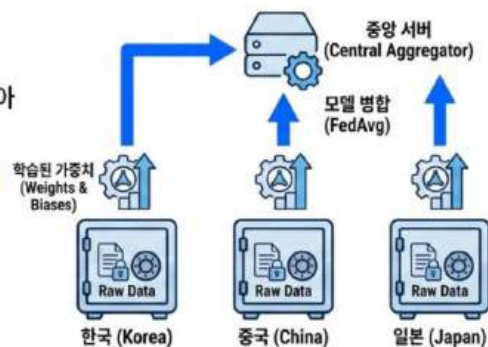
I II III IV V VI

☑ 연합학습의 체계

작동 메커니즘: 원본 데이터는 각국 서버(Silo)에 엄격히 보관하고, 학습된 가중치(Weights)와 편향(Biases)만 중앙 서버로 전송하여 병합(FedAvg)하는 최첨단 분산 AI 기술임

크루즈 산업 적용 시 3대 핵심 이점:

- 규제 우회 (Compliance): 데이터 주권을 훼손하지 않아 각국의 **데이터 프라이버시** 법망 완벽 준수함
- 보안 극대화 (Security): **동형암호** 및 **차분 프라이버시** 기술로 파라미터 역추적 원천 차단함
- 실시간 대응 (Real-time): 각 기관의 최신 로컬 데이터를 상시 학습하여 기민한 트렌드 대응 가능함



연합학습(Federated Learning)의 개념

I II III IV V VI

☑ 전통적 중앙집중형 AI & 지능형 연합학습의 비교

비교 지표	전통적 중앙집중형 AI	지능형 연합학습 (Federated Learning)
데이터 이동	해외 서버로 원본 데이터 직배송	디바이스 내 원본 보관, 가중치만 공유 (✓)
법적 컴플라이언스	PIPL, GDPR 등 위반 리스크 극상	4중 컴플라이언스 완벽 준수 (✓)
관광 추천 방식	범용적이고 일방적인 관광지 안내	시간/위치 인지형 초개인화 맞춤 추천 (✓)
인프라 비용	대규모 중앙 저장소 구축 비용 막대	엣지 디바이스 분산 연산으로 비용 절감 (✓)

*참조 : PIPL (중국 개인정보보호법) GDPR (EU 일반개인정보보호법)

연합학습(Federated Learning)의 개념

I II III IV V VI

☑ 데이터 성격에 따른 연합학습 매트릭스

수평적 연합학습 (Horizontal FL)	수직적 연합학습 (Vertical FL)
- 특징: 대상(유저)은 다르나 수집 데이터 항목이 동일함 - 적용 사례: 한국 승객 앱 로그 ↔ 중국 승객 앱 로그 병합 - 작동 기제: 중앙 배포 후 기기별 로컬 학습 및 가중치 평균(FedAvg) 도출	- 특징: 대상(유저)은 같으나 비즈니스 엔티티별 이종 데이터 항목 보유함 - 적용 사례: 중국 핀테크(결제) ↔ 한국 면세점(상품) 연계 - 작동 기제: 사설 집합 교집합/합집합 (PSI/PSU) 프로토콜로 고객 정보 노출 없이 앙상블 학습 견인

연합학습(Federated Learning)의 개념

I II III IV V VI

☑ 한중일 3국의 원천 데이터의 연합학습 표준 입력 데이터 전환

구분	보유기관	원천 데이터 항목	온톨로지 매핑
통신/인구통계	- 한국 : SKT / KT / LGU+ - 중국 : 차이나모바일 / 유니콤 - 일본 : NTT도모코 / KDDI	국적, 성별, 연령대, 시공간 GPS좌표, 입출항 일시, 기항지 총 체류시간 등	기지국 위치 포맷 공동 공간 인덱스로 통일
항만/선박운항	- 각국의 해양수산부처, 항만공사, 선사 - 항만공사 : 주요 크루즈 모항, 기항지 - 크루즈 선사 : 한중일 취항 크루즈	국제선박식별번호(IMO번호), 기항지, 크루즈 선명, 승객 명단 및 선원 명부, 접안부두 정보 등	입항 여객수 및 하선률
소비/여행산업	- 신용카드사 : BC, JCB, VISA 등 - 간편결제사 : 위챗, 알리페이, 카카오, 네이버페이, paypay 등 - 시내&항만 면세점, 쇼핑몰 - 국제여행사 & 민간여행사	가맹점 업종코드, 결제금액, 결제일시, 결제지역, 면세점 구매 품목 분류코드 등	쇼핑, 음식, 문화 등 표준서비스 카테고리 지정

연합학습(Federated Learning)의 개념

I II III IV V VI

☑ 연합학습의 상용화 성공 사례 : 타산업 분야

구분	연합학습 내용	성 과
의료/바이오	- 주제 : 코로나 19 환자의 산소 요구도 예측 모델 개발 - 수행 : 엔비디아(NVIDIA)는 전 세계 20개의 대형병원을 대상으로 환자의 의료데이터 반출없이 수행	각 병원이 자체 데이터 학습 후 예측했을 때보다 연합학습을 통한 글로벌 모델은 예측정확도가 평균 16% 향상 (Natruue Medicine 게재)
금융/보안	- 주제 : 미국의 가상자산 및 글로벌 은행 연합 핀테크 플랫폼 - 수행 : 경쟁관계의 글로벌 은행들이 고객의 자산/거래내역 공유없이 '이상금융거래 탐지 및 자금세탁방지' AI훈련 * 국내 카카오뱅크, 토스뱅크, 케이뱅크 보이스피싱 탐지모델 개발 및 도입(2026.6)	신종 금융사기 패턴을 실시간에 가깝게 공유/학습 하여 금융 사기 탐지율을 20%이상 높이고, 은행 간 기밀 유출 리스크 상쇄
소프트웨어	- 주제 : 구글의 Gboard 스마트폰 오타교정 시스템 - 수행 : 전 세계 스마트폰 사용자가 텍스트를 보낼 때 발생하는 오타 및 다음 단어예측을 구글 서버가 아닌 개별 폰에서 사용자의 사적 대화 내용을 보호하면서 수집 & 합성	키보드 오타 교정 정확도를 획기적으로 향상 *연합학습의 개념을 최초로 증명한 성공 사례

연합학습(Federated Learning)의 개념

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구분	연합학습 내용	성과
스마트 관광	- 주제 : 중국 하이난성 통합 관광객 처리량 플랫폼 운영 - 수행 : 면세점 그룹, 대형 리조트 벨리, 테마파크가 연합하여 각 기업의 영업비밀(매출액, 고객명부)을 공유하지 않고 동형암호 기반으로 면세특구인 하이난 관광객 소비트렌드 예측	시즌별 면세품 선제 재고 확보 및 리조트 프로모션 타이밍 최적화 등을 예측하여 참여기업의 평균매출 기존 대비 14.5% 증가시키는 효과
관광 교통	- 주제 : 스페인 바로셀로나 연합학습 기반 유동인구 제어 시스템 - 수행 : 바로셀로나 기지국이 협력하여 오버투어리즘 해결을 위해 각 지역의 기지국에서 관광객의 실시간 로밍위치 데이터 수집없이 유동인구 이동 패턴 로컬학습	관광객의 프라이버시 침해없이 대규모 크루즈 입항 시 특정 관광지의 인파 밀집도를 1~2시간 전에 90% 정확도로 예측하여 관광버스 동선 분산 및 안전 요원 배치에 성공
항공사 마케팅	- 주제 : STAR Alliance의 승객 수요 예측 시스템 - 수행 : 다른 국가의 독립 항공사들의 회원정보와 예약/발권정보 공유없이 노선별, 시즌별 가중치만 글로벌 항공 수요 예측 모델을 훈련	공동 운항(Code-Share) 노선의 탑승률 예측 오차를 12% 감소시키고, 이를 기반으로 연계된 관광상품 (항공 + 호텔)의 이용률 향상

기항지 관광 최적화 전략

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기항지 관광 최적화 전략

1. [행정] 출입국 병목 해소

: 스마트 CIQ 실행 및 원스톱 수속 서비스 제공

2. [경제] 로컬 상권 활성화

: 소비분산으로 기항지 로컬 상권 활성화

3. [교통] 실시간 동적 라우팅

: 차세대 크루즈 동적 아이티너리(Dynamic Itinerary) 전략

기항지 관광 최적화 전략

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☑ [행정] 출입국 병목 해소

기항지 관광 최적화 전략

1. 스마트 CIQ 및 원스톱 수속 서비스

| 크루즈 선 입항 최소 72시간 전에 AI가 해당 항차 승객들의 비자 형태, 연령대, 국가 이력 등 사전 승객 정보(API 데이터)를 기반으로 출입국심사 소요 시간(CIQ Lead Time)을 분석하여 심사지연 임계치 지수가 초과로 예측되면, 사전에 입항 당일 심사관 수 증원과 스마트 출입국 게이트의 프로토콜 조정을 통하여 기항지 관광 체류시간을 최대한 확보

ex) 국적별 비자 심사가 필요한 국적이 많을 수록 심사 시간 증가,
디지털세대(20~30대)와 60세 이상 실버 계층 비율에 따라 소요시간 차이,
단기체류 외국인의 자동 출입국 게이트 사용 확대 등

기항지 관광 최적화 전략

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☑ [경제] 로컬 상권 소비 분산 및 낙수효과 최적화

기항지관광 최적화 전략

2. 소비분산으로 기항지 로컬 상권 활성화 전략

| 3국의 신용결제 회사들의 국적/연령별 기항지의 소비(업종, 지역)선호도가중치로 연합학습의 허브로 도출하여 상권의 인프라를 매칭하고 승객별 로컬 상권 유도형 모바일 바우처를 푸시(발송)하여 소비 분산도 지수를 최적화

ex) 일본 / 중국 MZ세대 코호트 : K-뷰티, SNS기반, K-컬처 체험
중국 중장년세대 : 럭셔리리브랜드 선호, 면세점 쇼핑 선호, 메디컬 스파
중국 시니어 세대 : 단체관광 선호, 자연경관 추구, 음식관광 선호
일본 시니어 세대 : 가치 추구 미술관, 박물관 도슨트 투어, 웰니스 추구

☑ [교통] 실시간 동적 라우팅 적용

기항지 관광 최적화 전략

3. 크루즈 동적 아이티너리(Dynamic Itinerary) 전략

| 기상악화 및 항만 정체 유발 지수 발생 시 AI 동적 라우팅 알고리즘을 구동 하여
선박 및 환경 데이터(기상현황, 선박 위치, 침로, 연료소모율) + 항만 행정 데이터 +
관광수요 데이터(기항지 유동인구)를 근거로 연료소모 비용, 항만비용, 위약 손실
비용, 관광 편익가치(만족도, 소비) 등 우회 한계 비용과 대기 손실 비용의 편익을
연산하여 손실을 최소화 하고 새로운 경제적 가치 창출 방안

ex) 기존의 고정형 노선 (Fixed Itinerary)

: 부산 - 제주기항(태풍으로 입항 불가) - 일본 요코하마(해상 대기 및 보상금)

차세대 동적 아이티너리(Dynamic Itinerary)

: 부산 - 제주기항 x - 후쿠오카 or 인천 - 요코하마

☑ 한국-중국-일본 크루즈 데이터 공동체(TF) 설립 (G2B)

| 각국의 교통부처 및 항만청, 법무부(출입국), 기항도시, 통신사, 금융결제사 등의 연합체 구성

- '한·중·일 교통물류장관회의' : 매년 국제협력 강화 공동선언문 채택

- 민관학 중심의 아시아 크루즈 얼라이언스

: 아시아 크루즈 리더스 네트워크 (ACLN), 아시아크루즈터미널협회(ATCA) 등

| 국가별 참여 기관

- 대한민국 : 해양수산부, 법무부, 크루즈 기항도시, SK/KT/LG, 카드사(신한, 국민, 현대 등)

- 중국 : 교통운수부,公安부, 크루즈 모항(기항)도시, 통신사, Union Pay 등

- 일본 : 국토교통성, 출입국 재류관리청, 크루즈 기항도시, JCB카드사 등

AI기반 데이터 허브 구축을 위한 선결 과제

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☑ 한중일 크루즈관광 데이터 허브 프로토타입 실증 프로젝트

| IMS MSW 표준 데이터 피드 파이프라인 구축

: 3국 항만 MSW시스템에서 승객 예약 정보 사전 승객 정보 추출 표준화 작업

| 3국 민간 금융-물류 데이터 연합 학습 알고리즘 실증

: 데이터 이동없이 각국 서버 내에서 AI모델을 학습 시키고 가중치를 합성하는 방법론 검증

| 기항지 최적화 인터페이스 검증

: 합성된 AI 지능을 실제 기항지의 지상 인프라 및 관광 상품에 매칭하여 정량적 성과를

모의 테스트

AI기반 데이터 허브 구축을 위한 선결 과제

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☑ 디지털 동맹 민간 참여 유도를 위한 다자간 보상 매커니즘 기획

| 크루즈 선사 대상 인센티브 부여

: Just-In-Time 최우선 선석 배정권 부여, 항만세 차등 감면 적용, CIQ 고속 프리패스 지원

| 금융-카드사 대상 인센티브 부여

: 타겟형 위치기반 서비스(LBS) 마케팅 우선권 부여, TAX Refund 디지털 대행 우선권 부여

| IT 테크 기업 & 데이터 운영기업 대상 인센티브 부여

- 연합학습 모델 운영 간 발생하는 기술 결함, 오류에 대해 고의성의 없는 한 과징금, 법적 면책 지원

- 인프라 구축 매칭 펀드 지원

THE END

Thank you

Session 4 | 세션 4

Asia Cruise Academic Part 1:

Coastal Cruise Activation and Multi-Homeport Hub Strategies

아시아 크루즈 아카데미 1부: 연안 크루즈 활성화와 다모항 거점 전략

KIM Yong-Woon | 김용운

Deputy Director, Tourism Promotion Division,
Development Project Bureau, Saemangeum Development and
Investment Agency

새만금개발청 개발사업국 관광진흥과 사무관

아시아 크루즈 다모항제도를 위한 CIQ 및 카보타지(Cabotage) 개선 방안

Biography

Holds a Ph.D. in Tourism Management with extensive experience in tourism development and tourism policy. Currently serves as Deputy Director of the Tourism Promotion Division at the Saemangeum Development and Investment Agency and previously held key positions at Grand Korea Leisure and InterContinental Parnas under GS Group.

Key Career

Deputy Director, Tourism Promotion Division, Saemangeum Development and Investment Agency
Former General Manager, Innovation Management Division, Grand Korea Leisure (7Luck Casino)
Former Team Manager, Development Division, InterContinental Parnas, GS Group

약력

새만금개발청 관광진흥과 사무관으로 재직하고 있다. 관광학 박사로 그랜드코리아레저와 GS그룹 인터컨티넨탈 파르나스에서 관광·레저 및 개발사업 분야의 실무를 수행했다.

주요 경력

현) 새만금개발청 관광진흥과 사무관
전) 그랜드코리아레저(7Luck Casino) 혁신경영본부 부장
전) GS그룹 인터컨티넨탈 파르나스 개발사업본부 팀장



Brand New Cruise Destination

아시아 크루즈 다모항제도를 위한 CIQ 및 카보타지(Cabotage) 개선 방안

Updated 9 July 2026



Saemangeum Development and Investment Agency

김 용 윤 Ph.D



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04 카보타지(Cabotage) 개선

05 결론 및 정책 제언

1. 아시아 크루즈 시장의 현주소와 과제



01 아시아 크루즈 시장

ASIA CRUISE FORUM JEJU

1. 크루즈 산업 개념 및 현황

◆ 크루즈 산업 개념

- 크루즈 관광객들에게 숙박, 오락, 관광 등의 서비스를 제공하고, 이를 통해 수익을 창출하는 사업

◆ 크루즈 산업 특징

- 고부가가치 : 경제적 파급효과가 크며, 관련 산업(선박, 서비스, 관광컨텐츠 개발 등)의 성장을 견인
- 모항기항지 : 다국적 항구에 각 국가와 지역 문화, 역사, 자연 등을 다채로운 체험 기회 제공
- 기술혁신 : ESS 기술 등 친환경 기술 도입으로 차세대 크루즈 지속가능한 사업으로 발전

◆ 아시아 크루즈 시장 현황

- 2024년 아시아 크루즈 시장은 가파른 회복세를 기록하며 글로벌 산업의 핵심 성장 축으로 부상
- 동북아 중심의 수요 구조, 모항 유치 경쟁, 그리고 젊은 잠재 고객층의 부상이 특징

2. 다모항제도 법적·행정적 핵심 과제

CIQ(세관·출입국·검역) 절차 간소화

- 기항지는 수 시간 체류에 그치지만, 다모항 정착이 되면 승객들이 출항·입항 전후로 해당 도시의 호텔, 음식점, 전통시장 등을 지속적으로 이용하므로 지역 경제 파급효과가 2~3배 이상 증가

카보타지(Cabotage) 규제 완화

- 국내법(선박법 제6조)상 외국 국적 선박은 국내 항구와 항구 사이(예: 인천~부산)에서 영리 목적으로 여객을 수송할 수 없음. 다모항 활성화를 위해서는 외국 국적 크루즈선에 한해 연안 수송을 한시적으로 허용하는 '준모항' 지위 인정 등의 예외 조항이 필요

3. 다모항제도(Multi-homeport) 효과

◆ 기항지 체류 및 소비 급증

- 단순 기항은 수 시간 체류에 그치지만, 다모항 정착이 되면 승객들이 출항 전이나 입항 후에 해당 도시의 호텔, 음식점, 전통시장 등을 지속적으로 이용하므로 지역 경제 파급효과가 2~3배 이상 증가

◆ Fly&Cruise 상품 활성화

- 외국인 관광객이 비행기 타고 인천공항으로 입국해 서울을 여행한 뒤, 국내 기항지에서 크루즈를 타고 출발하는 융합형 고부가가치 관광 상품 개발이 가능

◆ 국내 크루즈 수요 창출

- 국내 승객들이 크루즈를 타기 위해 해외(싱가포르, 상하이 등)로 출국할 필요 없이, 국내 주요 항만에 서 바로 탑승할 수 있어 국내 크루즈 산업 저변 확대

3. CIQ(세관·출입국·검역) 개선



03 CIQ(세관·출입국·검역) 개선

ASIA CRUISE FORUM JEJU

1. CIQ 개선 필요성

◆ CIQ 개선 필요성

- CIQ 절차 개선 필요 수속이 지연되면 관광객의 체류 시간이 크게 줄어 경제적 효과가 감소
- 크루즈 산업 성장과 대형화된 크루즈 승객 증가로 기존의 수속 방식으로 감당하기 어려움
- 빠르고 효율적인 운영을 위해 CIQ(세관, 출입국, 검역) 수속 과정 개선이 필요

◆ 문제점(병목 구간)

- CIQ수속 지연의 관광객의 여행의 시작과 끝에서 겪는 불편 요인으로 여행의 만족도 하락
- 국가나 항구마다 CIQ수속 절차가 표준화되지 않아 처리 속도에 따른 불평과 불만
- 입출국 신고서나 문서 검사에 따른 직원 업무 부담 가중과 데이터 누락이나 오류의 위험이 높음

2. CIQ 개선 방안(스마트 수속)

◆ 스마트 시스템

- 생체 인식(안면 인식 등) 기술이 적용된 자동 게이트를 설치
- 신속하고 정확한 신원 확인으로 승객은 멈추지 않고 지나가는 것만으로 수속 완료

◆ 사전 신고(디지털, 모바일)

- 승객이 크루즈 탑승 전 앱이나 웹사이트를 통해 사전에 여권 정보 및 건강 상태를 제출
- 항구에서는 QR코드 스캔만으로 수속이 완료되어 현장 대기 시간이 획기적으로 줄어듦

◆ 통합 데이터 시스템

- 관계 기관(세관, 출입국, 검역)과 선사가 승객 정보를 실시간으로 공유하는 통합 플랫폼 구축
- 이를 통해 범죄자 등 위험 인물을 선제적으로 선별하고, 원활한 승객 흐름을 지원

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3. 해외 CIQ 특별구역 사례

국가	항만/터미널	주요 내용	내용 설명
싱가포르	마리나베이 크루즈센터	• FAST(Fast and Seamless Travel) 도입 • 사전승객정보시스템(APIS) 도입 및 운영 • SG Arrival Card(전자 입국신고서) 사전 신고 • 터미널 내 CIQ 전용 동선(Green Lane) 운영	• 싱가포르 마리나베이 크루즈센터(Marina Bay Cruise Centre, MBCCS)는 'FAST(Fast and Seamless Travel)'라 불리는 CIQ 신속 처리 운영 모델을 구축·운영 • 데이터를 기반으로 안면인식 및 홍채 인식 기술을 도입하여 크루즈 승객들은 별도의 입국 심사원 대면 없이 생체 인식만으로 신원확인 및 승하선 • 싱가포르의 전자 입국신고서인 'SG Arrival Card'를 통해 사전 제출된 데이터는 시스템에서 즉시 검증 • 입항 시 승객은 e-Gate(자동출입국심사대)와 연계된 전용 동선인 'CIQ Green Lane'을 통해 별도의 대면 심사 없이 신속하게 처리
일본	요코하마항 오산바시 크루즈터미널	• 사전승객정보시스템 도입 및 운영 • 웹(Visit Japan Web) 기반 사전 신고	• 일본은 2019년 전후로 요코하마(오산바시 크루즈터미널), 고베, 하카타 등 주요항만에서 크루즈 입국 절차 효율화를 위해 항만별 특례를 지정하는 방식으로 CIQ 간소화 조치를 시행한 사례가 있음 • 일본은 항공 중심의 사전승객정보시스템을 운영하면서 2022년부터 'Visit Japan Web' 기반 CIQ 사전 신고를 크루즈에도 적용하였음. 승객이 웹에 사전 등록하여 선내에서 QR 생성 후 하선하도록 하고 있음

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4. CIQ 개선 효과(기대 효과)

CIQ 개선은 승객, 선사, 항구 모두에게 긍정적인 영향

운영 효율화	보완 강화	승객 만족도 향상	항구 경쟁력 확보
• 빠르고 표준화된 프로세스로 항구 운영 예산 절감 • 자원을 효율적인 배치 가능	• 첨단 생체 인식 기술과 통합 데이터를 통해 더욱 정확한 신원 확인이 가능 • 보안 등급이 향상	• 빠른 수속으로 편리해짐에 따라 승객 만족도 향상 • 크루즈 재방문율을 높이는 핵심 요인	• 효율적인 시스템은 항구의 경쟁력 확보 • 경쟁력 확보 항구는 대형 크루즈 기항지 선정의 경쟁력 향상

4. 카보타지(Cabotage) 개선



1. 카보타지(Cabotage)

◆ 카보타지(Cabotage) 목적

- 카보타지(Cabotage laws)는 자국의 경제와 산업을 보호하고 강화하는 목적
- 특정 국가의 연안 및 국내 운송 시장을 외국 경쟁업체로부터 보호, 안정적 운영
- 카보타지는 고용 보호, 국가 안보, 산업 성장 측면으로 볼 수 있음

고용 보호	국가 안보	산업 성장
• 자국의 해운, 항공, 도로 운송산업을 보호하는 데 중요한 역할 • 미국(Jones Act)은 항구 간 화물 운송하는 선박을 미국 국적, 소유, 운영 선박으로 제한하여 선원 및 조선업 관련 일자리를 유지	• 군사적 갈등, 경제적 위기 상황에서 외국 운송업체에 의존하는 대신 자국의 운송 수단 활용 • 해운 및 항공 부문에서 자국 선박과 항공기의 운항을 통해 민간 및 군사 수요에 대응할 수 있는 준비 태세	• 외국 경쟁업체 참여 제한으로, 국내 운송업체들이 안정적인 시장을 기반으로 성장할 수 있는 환경 마련 • 선박 건조, 항공기 유지보수, 도로 인프라 등 관련 산업도 함께 성장

2. 카보타지(Cabotage) 과제와 논란

1. 비용증가와 경쟁 감소

- 높은 운송비용 : 운송업체 제한으로 운송 비용이 증가
- 지역 경제에 미치는 영향 : 하와이, 푸에르토리코, 알래스카와 같이 국내 운송에 의존하는 지역에서는 운송 비용이 상품 가격을 상승하여 서비스 접근 제한

2. 비효율적인 운영

- 유연성 제한 및 지연 : 운송 경로의 유연성을 줄이고 선박 가용성을 제한하여 운송 지연을 초래
- 노후화된 선박과 기술 제한 : 구형 선박에 의존하게 하는 결과를 초래(환경적 영향으로 비효율적 선박 유지)

3. 환경적 영향

- 탄소배출 및 연료비 상승 : 구형 선박을 사용하는 국내 운송업체의 연료 소비 증가로 탄소 배출량 증가
- 기술 접근제한 : 카보타지는 지속 가능한 최신 기술을 채택하는 데 장벽이 될 수 있음

4. 경제적 고려 사항

- 무역장벽과 시장고립 : 외국 운송업체 진입 제한으로 무역장벽 작용, 자유무역 원칙과 상충되는 보호 조치
- 물류기회의 제한 : 카보타지가 국가 간 물류 네트워크 통합을 제한한다고 주장

3. 카보타지(Cabotage) 변화 전망

규제 조정	패턴 변화	미래 전망
• (미국)존스 법에 따라 엄격한 카보타지 규정을 유지 • (브라질)카보타지 현대화를 목표로 BR do Mar법 통과, 특정 조건으로 외국 소유 선박이 연안무역에 참여할 수 있도록 허용 • (EU)유럽연합은 회원국 간의 통합 물류 네트워크 축진을 위해 점진적으로 카보타지 제한 완화 • (인도)특정 화물(예: 컨테이너)에 대해 외국 선박이 연안을 따라 운송할 수 있도록 카보타지 제한을 완화	• EU와 ASEAN과 같은 무역 동맹은 지역 통합을 지원하기 위해 보다 개방적인 카보타지 관행을 장려 • 또한, 전자상거래의 성장과 빠른 배송 수요 증가로 인해 카보타지 제한 완화를 통한 물류 장벽 축소 방안을 모색하는 움직임 • 일부 전문가들은 특수 선박이나 첨단 기술이 필요한 부문에서 카보타지가 더욱 유연해질 것으로 예상	• 최근 몇 년 동안 여러 국가들이 경제 변화, 산업 수요, 환경 문제에 대응하여 카보타지 규제를 조정 • 일부 정부는 비용 절감과 무역 효율성 증대를 위해 규제 완화하고, 특수 서비스에 대한 외국 운송업체의 접근을 허용하기 시작

4. 카보타지(Cabotage) 개선 및 기대효과

개선 사항
• 크루즈 예외 허용 : 한국 선박법 제6조와 같이 외국 국적선의 국내 항간 운송은 원칙적으로 금지되나, 크루즈선에 한해 국내 복수 항만 간 승·하선 권한을 개방 • 승·하선 다변화 : 기항지에서도 단순 경유지가 아닌, 일부 승객을 태우거나 내릴 수 있는 법적 마련 • 자유구역 협정 : 아세안권역 내에서 크루즈는 카보타지를 면제하는 다자간 협정 추진 필요
기대 효과
• 체류 시간 및 지역 소비 극대화 : 신속한 CIQ와 자유로운 승·하선으로 관광객의 실제 기항지 체류 시간이 크게 늘어나 서울, 부산, 제주 등 중심지뿐 아니라 주변 지방 기항지 경제까지 활성화 • Fly&Cruise 활성화 : 외국인 관광객이 비행기로 입국해 국내 항만에서 크루즈를 타고 주변국으로 출항하거나, 반대로 크루즈로 입국해 한국에 체류한 뒤 비행기로 귀국하는 융합 관광 상품이 활성화

5. 결론 및 정책 제언



크루즈 '다모항' 제도는 크루즈 운항 일정 중에 복수의 항만(제주-부산-여수 등)에서 승객 승·하선이 가능한 방식으로 제도적 성공을 위해서는 현재 CIQ(세관·출입국·검역) 절차를 완화하고 신속화하는 것이 핵심

1. 사전 검증 및 일괄 심사 제도 도입

- 해외 기항지 방식 도입: 승객이 매 항구마다 대면으로 출입국 심사를 받는 대신, 선박이 항구에 도착하기 전에 승객 명단과 관련 서류를 당국에 사전 제출하여 검증받는 방식
- 승·하선 병목 현상 해소: 출발국에서 심사를 마친 승객들이 기항지에 도착했을 때는 대면 심사 없이 바로 하선할 수 있도록 하여 통관 시간을 대폭 축소

2. 스마트 자동 출입국 심사대 확대

- 크루즈 기항지(부산항, 제주(강정)항 등)에 무인 자동 출입국 심사대가 구축·운영되고 있음. 이를 통해 수천 명에 달하는 승객이 짧은 시간에 심사를 마치고 국내 관광에 나설 수 있게 확대

3. 선상 심사 및 복수 기항지 간소화

- 국내 복수 기항(다모항) 시 두 번째 방문하는 항구부터는 출입국 절차를 간소화하거나 선상 심사를 확대 적용해 관광객의 체류 시간을 극대화 필요
- 질병관리청의 검역정보사전입력시스템(Q-CODE) 등과 연동하여 승선 전 검역을 빠르게 처리하여 검역 대기 시간 축소



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Thank you for listening! 😊



Session 5 | 세션 5

Asia Cruise Academic Part 2:

Development and Vision of Asian Cruise Island-Hopping Routes

아시아 크루즈 아카데미 2부: 아시아 섬 연계 크루즈 노선의 발전 방향과 비전

Yurie Saitoh | 사이토 유리에

Professor, Faculty of Economics, Chukyo University

주쿄대학교 경제학부 교수

Japan's Cruise Industry: Current State and Outlook

Business Opportunities in Island-Hopping Routes
and the Path to Sustainable Cruise Tourism

Biography

Professor at the Faculty of Economics, Chukyo University, specializing in public economics, public finance, and local government finance. Her research focuses on the economic impact of cruise ship calls and infrastructure development, while also contributing to cruise and transportation policy through advisory roles with the Japanese government and the Smart Cruise Academy (SCA).

Key Career

Professor, Faculty of Economics, Chukyo University

Staff Member, Smart Cruise Academy (SCA)

Expert Member, Ministry of Internal Affairs and Communications, Japan

Member, Council for Transport Policy, Ministry of Land, Infrastructure, Transport and Tourism

Director, Cruise & Ferry Society

약력

주쿄대학교 경제학부 교수로 공공경제학, 재정학 및 지방재정을 연구하고 있다. 크루즈 기항이 지역경제에 미치는 경제적 효과와 항만 인프라 개발을 주요 연구 분야로 삼고 있으며, 일본 정부의 크루즈 및 교통정책 자문과 스마트크루즈아카데미(SCA) 활동에 참여하고 있다.

주요 경력

현) 주쿄대학교 경제학부 교수

현) 스마트크루즈아카데미(SCA) 운영위원

현) 일본 총무성 전문위원

현) 일본 국토교통성 교통정책심의회 위원 및 방일 크루즈 관광객 수용 촉진사업 전문가위원

현) 크루즈&페리학회 이사



Japan's Cruise Industry: Current State and Outlook

— Business Opportunities in Island-Hopping Routes
and the Path to Sustainable Cruise Tourism —

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Session Objectives and the Role of This Presentation



Island-hopping route development

Explore future development opportunities for island-hopping cruise routes in Asia



Cooperation models

Identify potential cooperation models among ports and destinations in Northeast and Southeast Asia



Cross-border policy frameworks

Discuss policy frameworks that support the development of cross-border cruise tourism



Sustainability perspectives

Share academic, government, and industry perspectives on sustainable cruise tourism



Stakeholder collaboration

Foster collaboration among academia, government agencies, cruise destinations, and industry stakeholders



Japan's perspective

Japan offers one of the world's densest port networks (93 ports) and diverse island assets — the Seto Inland Sea, Okinawa, Amami, and the Goto Islands. This talk shares Japan's data and experience to help build an Asia-wide island-hopping cruise network.



Today's Agenda

1

Japan's cruise industry today

Latest data on port calls, destinations, operators, and cruise population

2

Cruise population by generation

Generational structure of the global, Asian, and Japanese markets

3

Island-hopping business opportunities

Expanding island calls and growth of luxury & expedition cruising

4

Destination cooperation experience

Domestic wide-area partnerships and international route cooperation

5

Policy initiatives & future strategy

The 1-million cruise population target for 2030 and support programs

Conclusion

Toward an Asian Island-Hopping Cruise Network

3

1



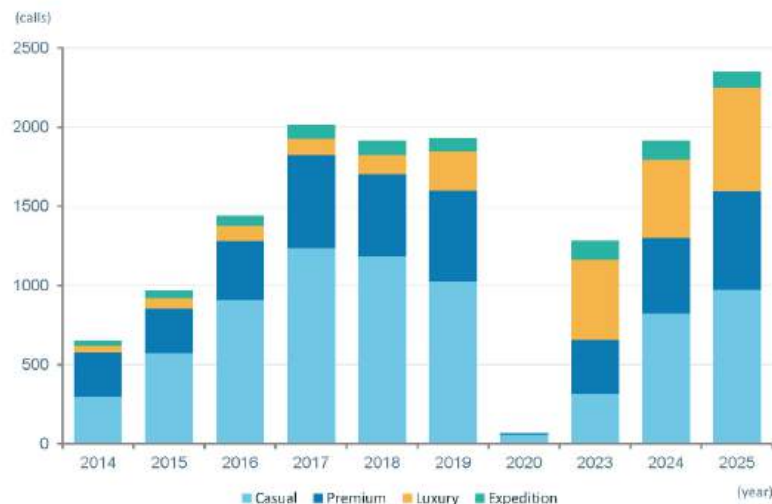
Japan's Cruise Industry: Current State & Trends

Port calls at a record high — from recovery to quality-driven growth

4



Foreign Cruise Ship Port Calls by Ship Class



2,352

Foreign port calls in 2025 (prelim.)

A record high, exceeding the 2017 peak of 2,013 calls

2.6×

Luxury-class calls vs. 2019

Up to 652 calls; expedition class also stays at a high level

+23%

Year-on-year growth in 2025

From 1,913 (2024) to 2,352 — from recovery to expansion

Source: MLIT Ports & Harbours Bureau, port call statistics (2025 figures are preliminary, based on port administrator surveys)

5



List of Ports and Other Facilities Visited by Foreign Cruise Ships

Legend: **red** = first-ever call in 2025 (9 ports) = island call

93 ports, 2,352 calls in total (2025 prelim.)

Rk	Port	Calls	Rk	Port	Calls	Rk	Port	Calls	Rk	Port	Calls
1	Nagasaki	194	25	Itsukushima	16	46	Nishinomote	6	72	Izu Oshima	1
2	Hakata	191		Niigata	16		Hagi	6		Iheya Is.	1
3	Naha	187	27	Kitakyushu	15		Fukue	6		Ujishima	1
4	Sasebo	122		Naze	15		Fukuyama	6		Yokosuka	1
	Kagoshima	122	29	Matsuyama	14	53	Sukumo Bay	5		Iwakuni	1
6	Ishigaki	121	30	Uno	13		Himeji	5		Miyazu	1
7	Yokohama	105		Uwajima	13	55	Ogi	4		Konryu	1
8	Hiroshima	100		Takamatsu	13		Karatsu	4		Omaezaki	1
9	Kobe	99	33	Miyako	12		Sato	4		Imabari	1
	Shimizu	99		Toba	12	58	Inobe	3		Mitajiri-Nakanoseki	1
11	Kochi	90	35	Tokushima-Komatsushima	10		Ushibuka	3		Onahama	1
12	Osaka	74		Aburatsubo	10		Izuhara	3		Aokata	1
	Tokyo	74	37	Kushiro	9		Shodoshima	3		Taketomi Is.	1
14	Hirara	72		Tsuruga	9	62	Urago	2		Nakakoshiki	1
15	Hakodate	62		Maizuru	9		Kamagari	2		Nakagusuku Bay	1
16	Kanazawa	44	40	Muroran	8		Kumejima	2		Tottori	1
17	Sakai	40	41	Ibaraki	7		Mitarai	2		Minamidaito Is.	1
18	Nagoya	37		Miyagaura	7		Zamami Is.	2		Futami (Chichijima)	1
19	Yatsushiro	36		Hososhima	7		Kamuiwaki	2		Hamajima	1
	Beppu	36		Sendai-Shiogama	7		Sezenoura	2		Motobu	1
21	Aomori	34		Fushiki-Toyama	7		Iriomote Is.	2		Yonaguni Is.	1
22	Akita	27	46	Shimonoseki	6		Hachinohe	2		Total	93 ports
23	Otaru	22		Sakata	6		Sakitsu	2			
24	Wakayama-Shimotsu	17		Shingu	6	72	Ine	1			

Source: MLIT Ports & Harbours Bureau, ports visited by foreign cruise ships (2025 preliminary, subject to revision). Island classification per the source

6



A Nationwide Port Network — 93 Ports, Reaching Remote Islands

Top 10 ports by foreign calls (2025)

Rank	Port	Calls
1	Nagasaki	194
2	Hakata	191
3	Naha	187
4	Sasebo	122
4	Kagoshima	122
6	Ishigaki	121
7	Yokohama	105
8	Hiroshima	100
9	Kobe	99
9	Shimizu	99

93 ports

Ports visited by foreign cruise ships (2025)

Calls are dispersed nationwide, from major cities to fishing ports

9 ports

First-ever cruise calls (2025)

New destinations emerge every year
(e.g., Ine, Yonaguni Island)

Islands

Expanding calls to Okinawa, Amami, Goto, Ogasawara

Naha 187, Ishigaki 121, Miyako (Hirara) 72, Naze 15 calls, etc. Kyushu/Okinawa ports dominate the top ranks, reflecting proximity to East Asian routes

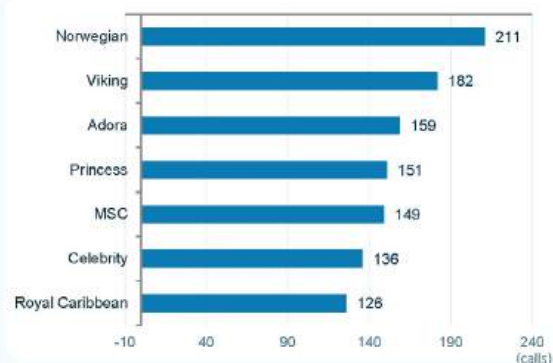
Source: MLIT Ports & Harbours Bureau, list of ports visited by foreign cruise ships (2025 preliminary).

7



Trends by Cruise Operator — Foreign and Japanese Lines (2025)

Foreign operators: 31 lines, 2,352 calls



Top lines span North American, European, and Chinese (Adora) brands, deploying Japan round-trip and coastal itineraries

Source: MLIT, 2025 port calls by cruise operator (preliminary)

Japanese operators: 765 calls (3 lines)

MOL Cruises 324 calls

Nippon Maru & MITSUI OCEAN FUJI; luxury fleet expanded in 2024

Setouchi Cruise(guntû) 238 calls

Small luxury ship guntû cruising the Seto Inland Sea archipelago

NYK Cruises 203 calls

Asuka II plus the new Asuka III, which entered service in 2025

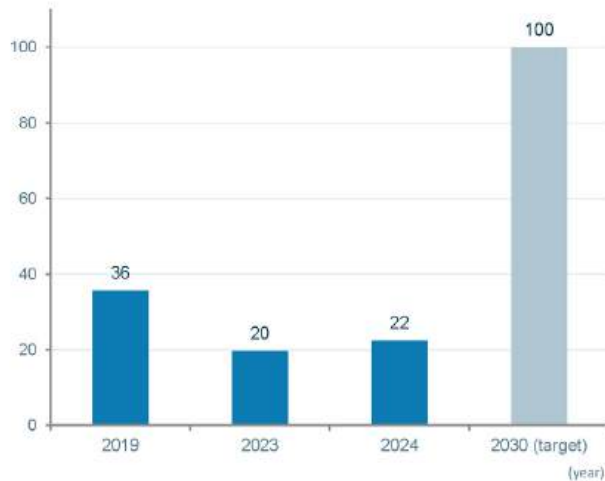
New ships are expanding the Japanese-flag market; a Disney Cruise Line ship under the Japanese flag is planned for 2028.

8



Japan's Cruise Population — Recovery and a New National Target

(10k passengers)



224,100

Japanese cruise passengers in 2024 (+14.2% YoY)
164k on international cruises + 61k on domestic cruises

1 million

New national target for 2030 (MLIT, July 2025)
~70% on Japanese ships, 30% on foreign ships; ≥10% foreign guests on Japan sailings

1.44 million

Inbound cruise visitors to Japan (2024)
Recovered to 57% of the 2017 peak — substantial headroom remains

Sources: MLIT Maritime Bureau, Japan cruise trends 2024; Expert Panel Report on Sustainable Development of Japan's Cruise Market (July 2025)

9

2



Cruise Population by Generation

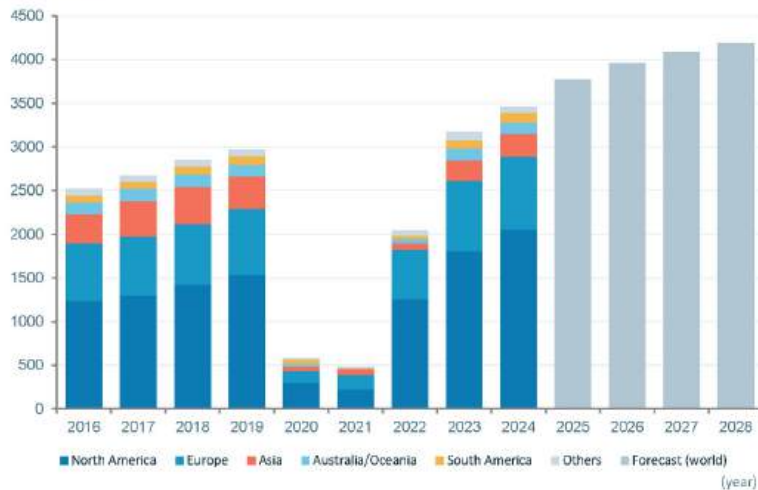
World, Asia, and Japan — opportunity lies in the gap between a rejuvenating world and senior-centered Japan

10



Global Cruise Population: Trend and Forecast

(10k passengers)



Sources: CLIA Global Market Reports (2019, 2022, 2024) and State of the Cruise Industry Report 2025

34.6 M

Global cruise passengers in 2024
+17% vs. pre-COVID 2019 (29.7 M) —
robust structural growth

59% / 24%

North America / Europe share (2024)
NA 20.5M and Europe 8.3M lead;
Asia at 2.6M (~8%) has ample headroom

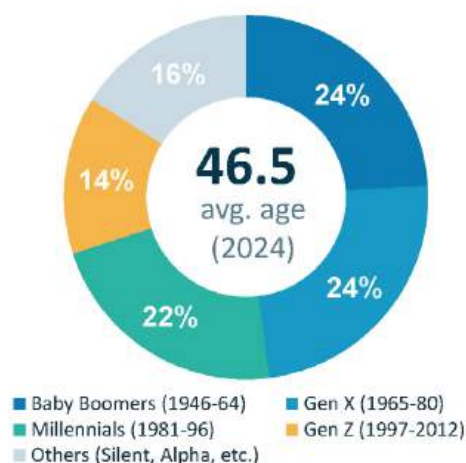
41.9 M

Forecast for 2028 (+21% vs. 2024)
Over 56 new ships in the coming
decade underpin growth

11



Global Cruise Population by Generation — A Rejuvenating Market



36%

Share of cruisers under age 40
Gen Z + Millennials alone account for 36%; average age is
trending down to 46.5

31%

First-time cruisers (past two years)
Up from 24% in 2019 — new-to-cruise acquisition is
accelerating worldwide

81-84%

Intent to cruise again (Millennials 81%, Gen X 84%)
Younger generations show the strongest satisfaction and
repeat intention

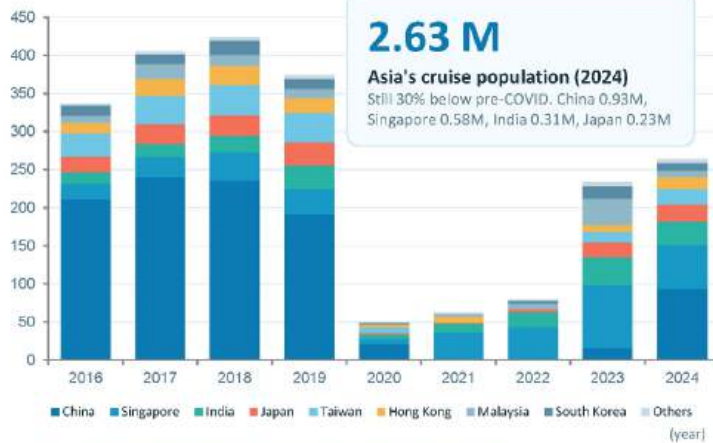
Source: CLIA State of the Cruise Industry Reports (2024, 2025). Generation definitions and shares per CLIA 2024 report

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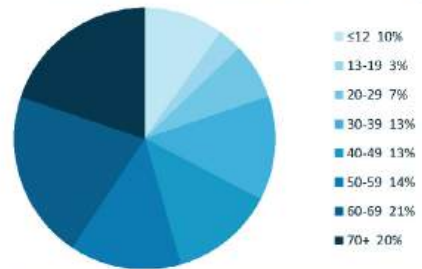


Asia's Cruise Population by Generation and Passenger Profile

(10k passengers)



Passenger age mix (2024, avg. 49.4)



41%

Share aged 60+ (average age 49.4)

More senior than the world (46.5), yet kids ≤12 are 10% — a multi-gen market

4.0 days

Average cruise length (2024)

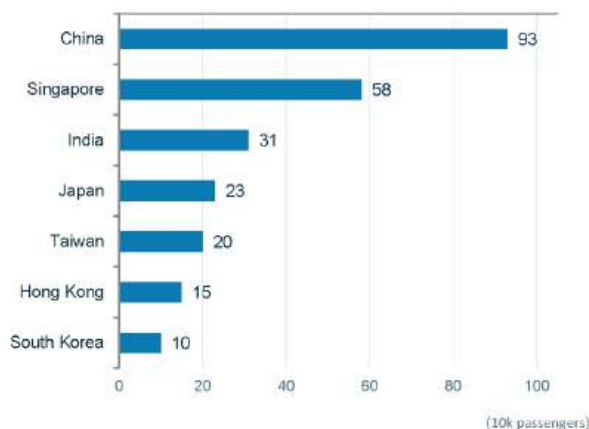
44% take ≤3 days and 46% take 4–6 days — short cruises fit island-hopping routes

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Japan's Generational Market — From Senior-Centered to a Broader Base

Asia's major source markets (2024)



Today: a senior-centered market

Japanese cruising — especially longer voyages on Japanese ships — is driven by guests in their 60s and over: loyal, but a narrow base



Opportunity: youth & families

Globally 36% of cruisers are under 40; in Japan, casual short cruises on foreign ships from Japanese ports are becoming the entry point for younger guests and families



Strategy: a generational portfolio

The 1-million target for 2030 rests on two engines: deepening the senior segment while winning younger and multi-generational travelers with tailored products, pricing, and promotion

Sources: CLIA 2024 Asia Market Report; MLIT Expert Panel Report (July 2025)

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3



Business Opportunities in Island-Hopping Cruise Routes

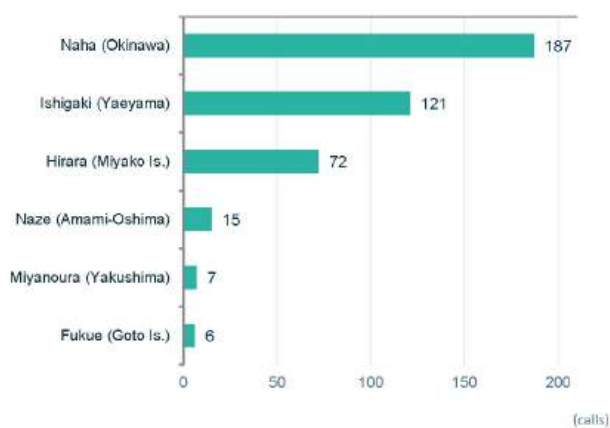
Small high-value ships × port network × short-cruise demand

15



The Island-Hopping Potential in the Data

Calls at major island ports (2025 prelim.)



Fleet shift favors islands

Luxury 652 calls (2.6× 2019) and expedition 102 calls: shallow drafts and tender operations reduce island-access constraints



First calls & small ports keep growing

Nine first-time ports in 2025 (e.g., Izu Oshima, Minamidaito, Ujishima). Calls now reach Kumejima, Zamami, Iriomote, Yonaguni, and Futami (Ogasawara)



A proven domestic model: Setouchi

guntō (Setouchi Cruise, 238 calls) pairs the Inland Sea archipelago with the luxury segment — proof that island-hopping commands premium prices

Source: MLIT preliminary 2025 data. Island-port classification follows MLIT's published list of island calls

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Reference: The Setouchi Model — DMO × Public–Private Fund

A scheme built by seven prefectures

Setouchi DMO

Setouchi Tourism Promotion Organization (JTA-registered wide-area DMO) + Setouchi Brand Corporation

Seven prefectures

Hyogo, Okayama, Hiroshima, Yamaguchi, Tokushima, Kagawa, Ehime — cross-border ports marketed as one region

Setouchi Tourism Revitalization Fund

Regional banks of all seven prefectures + DBJ supply equity-type capital — financed the construction of guntô

At its 10th anniversary, the seven governors are shaping the next five-year plan (funding & talent).



guntô — premium proof

19-suite “floating ryokan” based in Onomichi; anchors off islands on 1–3-night Inland Sea circuits, monetizing island-hopping at luxury prices



SEA SPICA — day cruising

High-speed sightseeing cruiser linking Hiroshima Port ↔ Onomichi — island scenery and interaction with local communities



From Individual Municipalities to Regional Management

With the goal of creating high-value-added tourist destinations, the organization manages the area by implementing integrated promotional campaigns tailored to specific target markets, such as Taiwan, China, Europe, and the United States.

Reference compiled from Setouchi DMO (Setouchi Tourism Promotion Organization / Setouchi Brand Corporation) and Japan Tourism Agency materials

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Three Concepts for Asian Island-Hopping Routes (Proposals)



East China Sea Island Corridor

Kyushu (Hakata, Nagasaki, Kagoshima) — Amami — Okinawa (Naha, Ishigaki, Miyako) — Taiwan (Keelung, Hualien)

4–7 days / casual to premium

Matches Asia's short-cruise demand (avg. 4.0 days). Links today's highest-frequency ports — the most feasible international island corridor



Seto Inland Sea Archipelago Route

Kobe, Hiroshima, Takamatsu, Uno, Itsukushima + inland-sea islands such as Shodoshima and Uwajima

3–5 days / small luxury ships

Internationalizes the premium model proven by guntô: art (Setouchi Triennale) × cuisine × seascapes for affluent Western and Asian travelers



Southern Link & Expedition Route

Okinawa/Yaeyama — Philippines — Borneo — Singapore, connecting to Southeast Asian archipelagos

**7–14 days /
expedition + fly & cruise**

A longer-term concept linking growing expedition demand and the Singapore market (Asia's No. 2, 0.58M) to Japan's islands

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4



Experience in Destination and Port Cooperation

No single port can build an itinerary
— from domestic partnerships to international cooperation

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Domestic Cooperation — Receiving Cruises as a Regional Network



National Cruise Promotion Conference

A nationwide public-private platform of port administrators and municipalities: sharing market intelligence, hosting business meetings with cruise lines, and spreading know-how — supporting attraction efforts no single port could mount alone



Wide-area itinerary partnerships

Multi-port regions such as Kyushu and the Seto Inland Sea jointly propose routes and develop shore excursions — evolving from 'one port, one attraction' to marketing whole areas as itineraries



Cruise Visitor Reception Program

A national subsidy (up to 1/2 of costs; ports, municipalities, and private firms eligible) covering reception facilities (CIQ space, waiting tents), secondary transport, shore-excursion development and sales channels, and resident-awareness activities — an integrated package

Sources: MLIT Ports & Harbours Bureau, Cruise Visitor Reception Program materials, and related documents

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International Cooperation

— Northeast Asian Routes Are Already Connected



A working Japan–Korea–Taiwan network

Kyushu/Okinawa itineraries routinely link with Busan, Jeju, Keelung, and Hualien — a de facto international island corridor is already operating; the dominance of Nagasaki, Hakata, and Naha reflects this proximity



Fly & cruise and 'one-touch' calls

Foreign ships' Japan coastal itineraries normally include one overseas port call; developing new models that combine air arrival, a short cruise, and onshore stays is supported by national programs



Dialogue channels with lines & markets

FAM tours for overseas travel agencies, joint booths at international cruise fairs, and joint port sales to cruise lines — destinations have accumulated real cross-border co-marketing practice



Next step: interoperable institutions

Smoother port-entry and CIQ procedures; standardized and shared port information, joint itinerary proposals, and alternate-port coordination in emergencies (typhoons) — the 'institutional infrastructure' for Asian port cooperation

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5



Policy Initiatives and Future Development Strategy

22



The Policy Framework — Four Pillars: Demand, Supply, Reception, Cooperation



Expand demand

One million Japanese cruise passengers by 2030 ($\approx 4.5\times$ the 2024 level), assuming $\sim 70\%$ on Japanese and 30% on foreign ships, while widening the base to younger, FIT, and multi-generational travelers



Strengthen supply

Building a fleet portfolio across price points and experiences. Create model tour itineraries for cruises around Asia and promote them to cruise lines and other relevant organizations. Expand source markets in the East Asian region.



Reception & Reducing environmental

CIQ, terminals, secondary transport, and tourism content. CLIA-member lines pursue net-zero by 2050 (alternative fuels, efficiency); ports must raise environmental performance, e.g., shore power. The shift to smaller ships is also environmentally friendlier



Cooperate & internationalize

Policy-making with academia and industry (expert panel), wide-area destination partnerships, and route/institutional cooperation with Asian nations — sustainable growth compatible with overtourism management

Sources: MLIT Expert Panel Report on Sustainable Development of Japan's Cruise Market (July 2025); reception program materials

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Conclusion — Toward an Asian Island-Hopping Cruise Network

- 1 Japan's port calls hit a record 2,352 across 93 ports in 2025, entering a quality-growth phase led by luxury and expedition ships
- 2 The world market is rejuvenating (36% under 40) while Asia favors short cruises (avg. 4.0 days) — island-hopping routes can serve both
- 3 Three route concepts — Kyushu–Okinawa–Taiwan, Setouchi, and the Southern Link — can be built on existing call volumes and cooperation experience
- 4 Cooperation, and sustainability — the platform for international collaboration is taking shape



Academia

Demand & carrying-capacity research, impact measurement, talent development



Government & ports

Intergovernmental Cooperation, Smoother CIQ, standardized information, joint promotion



Industry & lines

Joint itinerary development, destination products, sustainable operations

Let's extend the tri-sector collaboration platform across Asia's seas. Thank you.

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Session 5 | 세션 5

Asia Cruise Academic Part 2:

Development and Vision of Asian Cruise Island-Hopping Routes

아시아 크루즈 아카데미 2부: 아시아 섬 연계 크루즈 노선의 발전 방향과 비전

LEE Jung-Chul | 이정철

Professor, Namseoul University

남서울대학교 교수

The Charm of Korean Islands and Cruises

Biography

Professor at Namseoul University, specializing in maritime and fishing village tourism. Currently serves as Editor-in-Chief of the Korean Academic Society of Maritime Tourism and Auditor of the Korea Cruise Forum, while contributing to national policy and evaluation projects related to maritime tourism.

Key Career

Professor, Namseoul University

Editor-in-Chief, Korean Academic Society of Maritime Tourism

Auditor, Korea Cruise Forum

Former President, Korean Academic Society of Maritime Tourism (2020-2022)

Former Advisory Member, Ministry of Oceans and Fisheries

약력

남서울대학교 교수로 해양관광과 어촌관광 분야의 교육 및 연구를 수행하고 있다. 현재 한국해양관광학회 편집위원장과 한국크루즈포럼 감사를 맡고 있으며, 해양수산부 정책사업과 관광 평가·심사 분야에서 다양한 자문 및 심사 활동을 수행해 왔다.

주요 경력

현) 한국해양관광학회 편집위원장

현) 한국크루즈포럼 감사

전) 제9대 한국해양관광학회 회장 (2020-2022)

전) 국가중요어업유산 심사 및 자문위원(해양수산부)

전) 뉴딜300사업 심사 및 자문위원(해양수산부)



The Charm of Korean Islands and Cruises



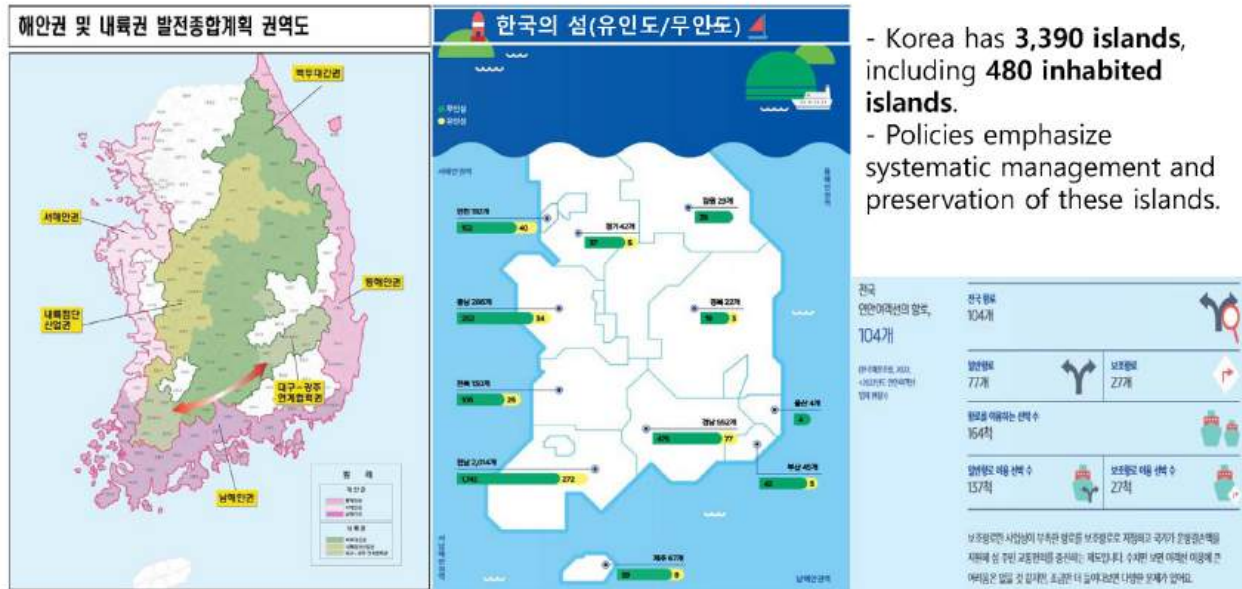
Jung Chul Lee Editor, Korean
Marine Tourism Society
Professor, Namseoul University



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1. Korea's Coastal Regions and Islands
2. Eco-Tourism in Korea
3. Cruise Port Infrastructure in Korea
4. Tourism and Cruise Policies
5. Tourism Trends in Korea
6. Cruise Potential in Korea
7. Korea's Cruise Readiness
8. Strategies for Island and Coastal Cruises

1. Korea's Coastal Regions and Islands



1. Korea's Coastal Regions and Islands

Beautiful Korean Islands



Mok Island, Ongjin County, Incheon (CNN selection)



Somaemuldo & Lighthouse Island, Tongyeong, Gyeongsangnam-do (Ministry of Oceans and Fisheries selection)



Ulleungdo and Dokdo

2. Eco-Tourism in Korea

5

1. Korea's Unique Ecological and Marine Environment

Ecology & Environment

Coastline Total 15,285 km

Islands (3390)
Inhabited 480
Uninhabited 2910

Coastal wetlands
(mudflats) 2,443 km²

Marine Protected Area
Marine Ecology / Marine
Life / Seascape / Coastal
Wetland Protection Area

Eco-Tourism



2. Eco-Tourism in Korea

6

2. Various Marine Tourism Resources in Korea 2

Marine Tourism Resources

Fishing Village Experience
and Leisure Village (119)

Beach (358)

National Important
Fisheries Heritage (16)

Islands Want to Visit (88)

2026 Yeosu World Islands
Expo

Marine Festival

Marine Tourism Platform



2. Eco-Tourism in Korea

7

2. Various Marine Tourism Resources in Korea 3



2. Eco-Tourism in Korea

8

3. Well-Prepared Marine Tourism Infrastructure

Marine Tourism Infrastructure

Cruise Port (9/14)
National Fishing Port(115)
Trade Port (31)
Local Fishing Port (289)
Fishing Village
Residential Port (627)
Small-scale
Fishing Port (1,255)
Marina Port (40)

Port-Centered Marine
Leisure Tourism



3. Cruise Port Infrastructure in Korea

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Area	Port	Category	Pier Extension (m)	Depth (m)	Maximum Docking Capability
Busan	Busan Port	Cruise-Only Pier	440(Yeongdo)	11.5	220,000GT
		Ferry, Cruise-Only Pier	2,040(Int' Passenger Terminal)	9-12	170,000GT
Incheon	Incheon Port	Ferry, Cruise-Only Pier	400(Int' Passenger Terminal)	12	150,000GT
		Cruise-Only Pier	430	12	225,000GT
Jeju	Jeju Port	Ferry, Cruise-Only Pier (International Passenger Terminal)	360 Outer Port (Pier 8)	12	140,000GT
			306(West breakwater)	11.5	85,000GT
		Cruise-Only Pier (Gangjeong Port)	420(West breakwater)	12-15	220,000GT
			690(South breakwater)	12-15	220,000GT
Jeonnam	Yeosu Port	Cruise-Only Pier	500(Yeosu Expo Pier)	11	170,000GT
Gangwon	Sokcho Port	Cruise-Only Pier	310	10	170,000GT
Gyeongbuk	Pohang Port	Ferry, Cruise-Only Pier	310(Int' Passenger Terminal)	11	110,000GT
Chungnam	Daesan Port	Ferry, Cruise-Only Pier	420(Int' Passenger Terminal)	12	130,000GT
Jeonbuk	Saemangeum Port	Ferry, Cruise-Only Pier	430(New Port)	14	220,000GT

3. Cruise Port Infrastructure in Korea

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The Goal of World Tourism

- Minimizing negative impacts and contributing to the socio-economy through sustainable tourism (UNWTO)
- Interest in and support for the value chain of the marine environment to sustain livelihoods in coastal areas (UNFAO)

Recent Marine Tourism Activities

- Leisure and tourism activities focused on preserving marine resources and enhancing understanding of the natural, cultural, and industrial value of the ocean.
- Providing environmental interpretation and education, increasing interest in marine ecotourism activities.
- Participation of local residents as key players in marine management and positive cultural exchange with tourists.

Policies of Global Cruise Lines and Ports

- Climate action and circular economy, health and well-being, sustainable tourism, biodiversity and conservation, diversity, equity, and inclusion (Royal Caribbean)
- Building continuous partnerships between relevant companies, cruise tourists, and local communities (Barcelona, Spain)
- Efforts to provide cruise tourists with ample onshore experiences through the appointment of onshore tourism experts within the organization (Oceania Cruises)

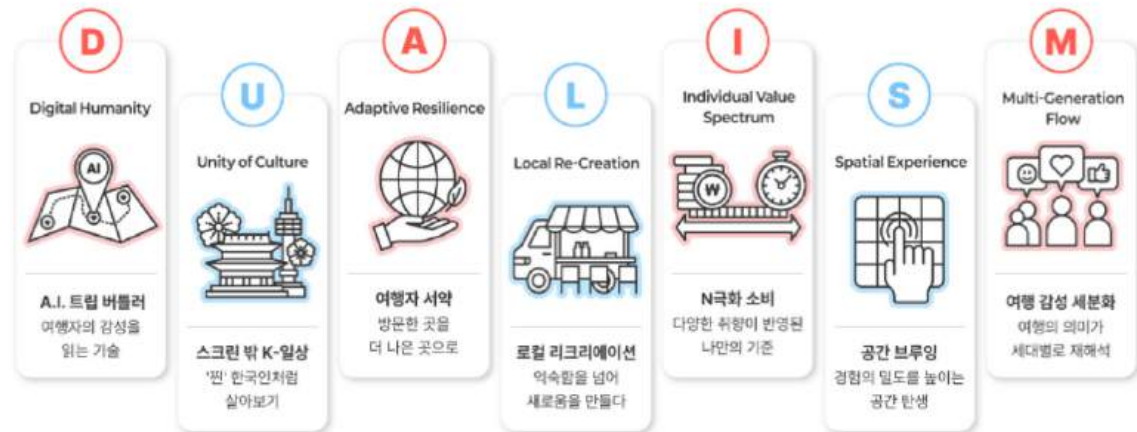
Examples of Global Marine Tourism Policies

- Future ports will create lasting value for local communities and promote sustainable growth (aligning government and local policies)
 - Consistent political support
 - Continuity of leadership (ongoing leadership of port authorities)
 - Strong collaboration across industries (cooperation among shipping companies, ports, CIQ, land-based tourism organizations, and other related institutions)
- Pursuing changes in port facilities
 - Fuel support facilities for eco-friendly new ships (electricity, LNG, ethanol, etc.)
 - Food waste management (dehydrators, dryers, biodigesters, etc.), ship provisions, meal donations (food culture exchange)
- The concept of marine tourism is changing
 - It's not about where to go, but how you participate that matters
 - Tourism can be about hands-on experiences and explorations at sea, or relaxing on a cruise ship with fancy food, spas, and other comforts
 - The authenticity and indulgent(?) relaxation on a cruise ship, where there's space, freedom, and warmth, enhance the cruise experience
 - Eco-tourism + local culture + understanding the local people (well-structured experiences like cooking with residents at festivals)
- Need to rethink how marine tourism resources are distributed
- Efforts are needed for local residents to participate in and understand marine tourism

5. Tourism Trends in Korea

2026 Korean Tourism Trends

2026 관광트렌드 'DUALISM'



5. Tourism Trends in Korea



Tourism Trends and Cruise Tourism

- The era of smart travel with AI, smart port operations- K-Contents and Theme Cruises- Experiencing destinations (local platforms) and luxurious cruise relaxation
- Cruise tourism and communication with local residents



The Potential of Cruises in Korea

- Cruises in the East Sea and Yellow Sea regions (unique cruise products)
- Theme Cruises (focused on K-Contents)- Demo Port cruise products (Northeast Asia Cruise Hub)
- The charm of Korean Islands (eco and culture-focused island and coastal cruises)

The East Sea Region

- Attractive as a departure point for Arctic cruises
- Currently running cruise packages in the Triangle (Korea, Japan, Russia)
- Developing Fly & Cruise packages by focusing on island sightseeing coastal cruises
- Potential to develop long journey cruise packages including Taiwan and China

The West Sea Region

- Developing cruise products with Korea, China, Japan, and Taiwan ports
- Developing Fly & Cruise products focusing on island tourism coastal cruises
- Developing long-journey cruise products including Taiwan and China

Rethinking Marine Tourism Products

- Awareness of various marine tourism products (World Heritage sites, marine ecology, islands, nationally important fishing heritage, fishing village experiences, K-Contents festivals, etc.)
- Awareness of piers accessible by tender boats
- Awareness of developing cruise products that allow people to experience Korean life
- Awareness of the importance of communication between cruise lines, ports, and local residents
- Awareness of the need to develop cruise products that combine cruises with marine leisure and hands-on experiences

1. Preparing for the Advancement of Cruise Tourism

- Port preparation in line with Ocean Digital/Carbon Neutral major transformation
- Upgrading berthing facilities, passenger facilities, etc. (customer baggage handling, CIQ operation systems, smart port facilities, ship supplies industry, etc.)
- Enhancing cruise ship repair and service capabilities with Korea's advanced shipbuilding technology Cruise ports as a Northeast Asia HUB & SPOKE
- Developing cruise products for Korean islands and coasts using AI (with AI experts and maritime leisure tourism specialists involved)
- Creating onboard programs suited for coastal cruises Exploring ways for cruise lines to operate berths at each port
- Local community participation: cultural exchange with cruise lines / cruise passengers experiencing local culture
- Reorganizing tourist products to match cruise passenger characteristics: port passengers (FIT & GROUP) / homeport passengers / 1-night passengers tailored experiences
- Preparing cruise incentives: for cruise lines / travel agencies
- Developing Korea-style themed cruise products centered on K-Contents
- Gaining trust through operations by cruise specialist groups in neighboring countries

2. A New Cruise Paradigm 1

Cruise Tourism in Korea

- Cruise Tourist → Coastal Scenery + Island Tour + Interaction and Experience
- Local Resident → Visitor Interaction + Local Development



2. A New Cruise Paradigm 2



8. Strategies for Island and Coastal Cruises

1. Developing Products that Match the Desires of Cruise Tourists

○ Marine Leisure Tourism using Various Types of Ships



Developing customized products for cruise tourists

Ex) Ecological tours on yachts, fishing village experiences, island tours, marine events

Develop cruise tourism products that can connect ports.

Ex) Port-centered product development:

Marine scenery/island tours + visits to famous tourist spots around docking ports

Differentiated entertainment planning(Special Event for Cruise Tourists)

Ex) Entertainment planning that can organize both land events and sea events



8. Strategies for Island and Coastal Cruises

2. Developing Hands-On Programs with Local Residents

○ Developing Experience Programs Suitable for Cruise Tourists



Ecotourism: Using Boats Suitable for Marine Tourism Resources

Ex) Ecotourism = Visiting beautiful islands using water leisure equipment like yachts

Development of hands-on programs

Ex) Developing participatory experience programs and purchasing local specialties linked with port town festivals, etc.

Development of onboard programs for coastal cruises

Ex) Developing event programs suitable for cruise passengers



3. Preparation Strategies for Developing Cruise Products

Step-by-Step Business Execution Strategy (example)

Category		Step 1(Pilot Project/Short-term Plan)	Step 2(Mid- to long-term plan)
		It's important to come up with success cases for each ship, each port, and each town.	
Port	Route	Selection of operation course	Developing various ship navigation routes
	Pier	Using the existing pier and docking area	Expanding to various docks like the ecological park and the fishing village pier
	Can be introduced	Focused on nature and ecology	Introducing a theme
	Business approach	After investing in public sector finance projects, either entrust management or go public	After investing in public sector financial projects, entrust management or open competition
Marine Leisure	Marina	Using the existing mooring area	New construction tailored to the local characteristics
	Introduction function	Non-powered water sports	Introducing eco-friendly facilities and equipment suited to the local area
	How to carry out the business	Consignment management by public offering	Attracting private investment or tender-based outsourced management

4. Dock and Marina Development Strategy 1

Category	Evaluation Factors	Evaluation Items	Detailed Evaluation Items
Water area Conditions	Front water area Usability	Water area size	- The current size of the water area and whether there's potential for future expansion, etc.
		Mudflat	- Current tidal flat status and future changes in tidal flats
		Existing facilities	- Whether there are existing mooring and pier facilities and future plans / Whether there are existing water area facilities and their scale - The size and level of existing piers and mooring facilities, and the possibility of future construction or plans / Whether support facilities and user convenience facilities are available, etc.
		Water depth and wave speed	- The depth structure and seabed conditions of the front area of the fishing grounds / The current conditions in the area related to marine leisure activities and ship navigation
		Docking and undocking	- Ease of docking and undocking ships in the water area
		Route	- Degree of waterway width secured for smooth passage of vessels within the water area and presence or absence of fishing rights / congestion of the entire water area / weather characteristics such as the prevailing wind direction along the navigation route - Presence or absence of scenic elements along the navigation route, quality of scenic elements and continuity of the scenery, and presence or absence of key viewpoints.

8. Strategies for Island and Coastal Cruises

4. Dock and Marina Development Strategy 2

Category	Evaluation Factors	Evaluation Items	Detailed Evaluation Items
Inland area Conditions	Local benefits and ease of development	Ripple effect	- Possibility of attracting public and private capital - Overall impact on the economy and local community, such as promoting regional development and boosting local tourism
		Land use	- The landscape level of the coastal terrain and how easy it is to arrange facilities (elevation, slope, etc.) / Current land use of the site and surrounding areas - Whether there are any higher-level plans or marine leisure tourism-related plans for the area and the possibility of planning them
		Land Use Plans and Regulations Constraints	- Whether there are obstacles or inconveniences for residents during natural disasters and how easy it is to secure the site - Whether it conflicts with various related laws and the level of land use regulations
	Traffic	Transportation facilities	- Level of securing transportation facilities (tour bus and car parking lots), etc.
		Accessibility and Transportation System	- Current level and future plan for accessibility to the city center / connection with fishing ports (public transport, connectivity with transport networks, and convenience)
	Back connection Tourism attraction	Tourism resources and tourism support functions	- The basic appeal level of tourism resources in the hinterland, like how well-known the tourist spots are and the sightseeing, food, shopping, and learning experiences available. - The potential for using unexploited tourism resources / the conditions and level of leisure facilities behind the pier, etc.

Session 5 | 세션 5

Asia Cruise Academic Part 2:

Development and Vision of Asian Cruise Island-Hopping Routes

아시아 크루즈 아카데미 2부: 아시아 섬 연계 크루즈 노선의 발전 방향과 비전

Paulo Benito S. Tugbang

| 파올로 베니토 투그방

Director, Product and Market Development Office,

Department of Tourism, Philippines

필리핀 관광부 시장개발국장

THE PHILIPPINES

CRUISE TOURISM AS A NATIONAL STRATEGIC AGENDA

Biography

Director of the Office of Product Development at the Philippine Department of Tourism, leading the development of tourism products and the country's national cruise tourism strategy. Since 2022, he has led the implementation of the updated National Cruise Tourism Strategy and the development of the country's expedition cruise model, contributing to the expansion of cruise destinations and strengthening the competitiveness of the Philippines as a regional cruise destination through close collaboration with government and industry stakeholders.

Key Career

Director, Office of Product Development, Philippine Department of Tourism

Project Lead, Philippine National Cruise Tourism Strategy

Developer, Philippine Expedition Cruise Model

Leader, Cruise Destination Development & Promotion

약력

필리핀 관광부 관광상품개발국(Office of Product Development)
국장으로 필리핀의 관광상품 개발과 국가 크루즈 관광전략을 총괄하고 있다.
2022년부터 국가 크루즈 관광전략 개편과 탐험 크루즈 모델 구축을
주도했으며, 기항지 확대와 정부·민간 협력을 통해 필리핀의 크루즈 관광
경쟁력 강화에 기여하고 있다.

주요 경력

현) 필리핀 관광부 관광상품개발국 국장
필리핀 국가 크루즈 관광전략 수립 총괄
탐험 크루즈(Expedition Cruise) 모델 구축
크루즈 관광 활성화 및 기항지 개발 추진





2026 ASIA CRUISE FORUM JEJU

THE PHILIPPINES

CRUISE TOURISM AS A NATIONAL STRATEGIC AGENDA

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THE PHILIPPINE PROPOSITION

Archipelagic Wealth & Ecosystems

- One of the world's largest archipelagic nations containing more than 7,000 pristine tropical islands
- Recognized globally as the "Center of the center" of marine biodiversity
- Serves as a massive cultural cradle of endemic flora and fauna with unmatched natural attractions

Global Workforce & Unique Appeal

- The leading source of global maritime manpower, giving the country a natural advantage in cruise hospitality
- Richly textured living cultures and welcoming traditions across several island groups
- Uniquely positioned to become a top-of-mind, diverse expedition and cruise destination



Living cultures and traditions



"Center of the center"
of marine biodiversity



Cultural cradle of endemic
flora and fauna



CRUISE TOURISM AS A STRATEGIC GROWTH AREA

The National Tourism Development Plan (NTDP) 2023 - 2028 identifies Cruise Tourism as a high-value sector intricately linked to adjacent products



Core Cruise Focus

Establishing the strategic infrastructure required to become a regional pivot point for international vessels.



Product Synergy

Connecting Nature, Dive, Food, Wellness, Culture, and classic Sun & Beach experiences to expand guest spend.



Strategic Niches

Nurturing specialized markets such as ESL, M.I.C.E., and bespoke expedition operations across the islands.

PORTS AND DESTINATION, BY THE NUMBERS

Expanding Network & Dynamic Access

- Twelve (12) Active Ports: Fully participating in cruise tourism, including strategically placed gateways like Manila, Subic, Coron, Puerto Princesa, and Salomague
- Destination Breadth: Eighty (80) cruise-ready destinations offering a rich variety of shore excursion activities.



MULTI-PORT ADVANTAGE: THREE EXPERIENCE PILLARS IN ONE NETWORK



CULTURE



NATURE



ISLANDS

THE UNIQUE SELLING PROPOSITION FOR ITINERARY PLANNERS



Global Familiarity & Ease

A familiar Filipino maritime workforce creates a warm, trusted connection between guests, crew, and destination even before arrival.



Seamless Accessibility

The Cruise Visa Waiver Program reduces entry friction across multiple Philippine ports—not only the first stop.



Expedition Focus

A differentiated expedition-cruise opportunity allows access to remote islands and lesser-known destinations beyond the reach of larger vessels.

GROWTH TRAJECTORY: CRUISE ARRIVALS 2023-2028

Number of Calls	Top Destinations	Growth Rate by Calls	Sea Arrivals
2023: 125 calls	1st - Manila 2nd - Puerto Princesa 3rd - Subic	22.55% Compared to 2019	25,067
2024: 108 calls	1st - Manila 2nd - Puerto Princesa 3rd - Coron	-13.60%	24,283
2025: 136 calls	1st - Manila 2nd - Puerto Princesa 3rd - Boracay	25.93%	24,855
2026: 130 scheduled calls as of June 29, 2026	1st - Puerto Princesa 2nd - Coron & Manila 3rd - Boracay	-4.41% projected	58,939 projected
2027: 132 scheduled calls as of June 29, 2026	1st - Puerto Princesa 2nd - Manila 3rd - Coron		
2028: 26 projected calls as of June 29, 2026	1st - Manila 2nd - Coron 3rd - Puerto Princesa		

Source of Data of Number of Calls: list of Cruise Calls submitted by shore excursion handlers/port agents, based on maximum capacity of cruise vessel
Source of Data of 2023-2025 Sea Arrivals: DOT Statistics, Economic Analysis and Information Management Division
Source of Data of projected 2026 Sea Arrivals: list of Cruise Calls submitted by shore excursion handlers/port agents, based on maximum capacity of cruise vessel times 78% - estimated percentage of passengers that disembark for shore excursions



EXPANDING THE MAP

2025

Launched 10 new destinations: Divilacan Bay; Polilio Island; Jomalig Island; Busuanga; San Vicente, Palawan; the Underground Caverns of Palawan; Caramoan National Park; Higatangan Island; Malapascua Island; and Tapuitan

2027

Expanding to Basco, Batan Islands, and Cogayancillo

2026

Opening Corregidor Island and the pristine Flower Island.

2028

Activating Malcapuya Island and Mantigue Island for premium routes

WHERE WE'RE FOCUSING: THE TURQUOISE TRIANGLE

Concentrating high-density cruise traffic around the nation's primary travel anchors

Northern Board:

Salomague, Currimao, Aparri, Batanes, Subic which is Ideal for lines originating from Northeast Asia.

Western Board:

Manila, Puerto Princesa, Coron, El Nido, Puerto Galera which is the core natural ecosystems and heritage.

Central Board:

Boracay, Iloilo, Dumaguete, Bohol, Kalanggaman, Camiguin, Siargao which is the classical tropical islands.



POLICY INFRASTRUCTURE THAT MAKES IT REAL

Frictionless Access

We introduced the **Cruise Visa Waiver Program** to simplify multi-port entries. As of June 2026, over 16,563 digital waivers have been successfully issued at Subic and Manila



Coordinated Governance

The **Cruise Tourism Development Committee** is reconstituted via JMC to integrate immigration, customs, port operations, and local governments.



GLOBAL AND REGIONAL ENGAGEMENT

Seatrade Cruise Global

The Philippines' participation in Seatrade Cruise Global in Miami Beach, Florida strengthened its position as a competitive cruise destination through strategic meetings with international cruise executives, tourism stakeholders, and potential partners. The 2026 participation generated ₱4.56 billion in sales leads, ₱146.99 million in publicity value, and a 42,128.32% ROI, while the 2025 event introduced new cruise destinations, advanced regional partnerships, and produced ₱57.37 million in sales leads, ₱58.83 million in publicity value, and a 1,015.17% ROI, reinforcing the country's visibility and growth opportunities in the global cruise tourism market.



GLOBAL AND REGIONAL ENGAGEMENT

Asia Cruise Leaders Network

The Philippine Department of Tourism (PDOT) was officially inducted as the third national tourism organization to join the Asia Cruise Leaders Network (ACLN), alongside founding member Subic Bay Metropolitan Authority. As part of the 85-member network of tourism organizations, port authorities, and international cruise lines, the PDOT gains enhanced global visibility, stronger access to key cruise industry stakeholders, and greater opportunities to promote Philippine ports as part of multi-country cruise itineraries.



GLOBAL AND REGIONAL ENGAGEMENT

Asia Cruise Forum Jeju

The Department of Tourism (DOT) and the Jeju Tourism Organization (JTO) explored a proposed Memorandum of Understanding (MoU) to strengthen tourism cooperation, including cruise connectivity and related tourism products. As of September 18, 2025, the draft agreement was under Department of Foreign Affairs (DFA) review, timed loosely to a possible future direct flight between Jeju and Bohol.



LOOKING FORWARD

The luxury cruise landscape is expanding rapidly. We are officially welcoming premier vessels from Swan Hellenic, the Ritz-Carlton Yacht Collection, and Compagnie du Ponant.

Our long-term future focus prioritizes small-ship expedition cruising: leveraging the high biodiversity and remote islands that large vessels physically cannot reach.





2026 ASIA CRUISE FORUM JEJU

THE PHILIPPINES

CRUISE TOURISM AS A NATIONAL STRATEGIC AGENDA

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MARAMING SALAMAT!



Session 5 | 세션 5

Asia Cruise Academic Part 2:

Development and Vision of Asian Cruise Island-Hopping Routes

아시아 크루즈 아카데미 2부: 아시아 섬 연계 크루즈 노선의 발전 방향과 비전

Hsu Chihsin | 쉬즈 신

Director, Tourism Bureau, Kinmen County Government

금문현 정부 관광처장

Beyond Frontiers, Anchoring Peace:

Kinmen's Strategic Coordinates

and Sustainable Blueprint in the Asia Cruise 4.0 Era

Biography

Director of the Tourism Bureau, Kinmen County Government, overseeing tourism and transportation policy for Kinmen. Leads initiatives to strengthen cross-strait tourism and maritime connectivity between Kinmen and Xiamen while promoting regional tourism development.

Key Career

Director, Tourism Bureau, Kinmen County Government
Oversees Tourism and Transportation Policy, Kinmen County
Promotes Cross-Strait Tourism and Maritime Cooperation

약력

금문현 정부 관광처장으로 금문현의 관광 및 교통 정책을 총괄하고 있다. 대만과 샤먼을 연결하는 해상교통과 관광 교류 활성화를 추진하며, 양안 관광 협력과 지역 관광 발전을 위한 정책을 이끌고 있다.

주요 경력

현) 금문현 정부 관광처장
현) 금문현 관광 및 교통 정책 총괄
현) 대만-샤먼 해상관광 및 항로 협력 추진



跨越邊界・和平啟航

金門在東亞郵輪跳島時代的戰略藍圖

Beyond Frontiers, Anchoring Peace: Kinmen's Strategic Coordinates and Sustainable Blueprint in the Asia Cruise 4.0 Era

主講人：金門縣觀光處 處長 許績鑫

Speaker: Hsu Chi-Hsin, Director,
Tourism Department, Kinmen County Government

前言與核心發展理念

**Introduction &
Core Development Principles**

國際郵輪市場趨勢與計畫緣起

Global Cruise Market Trends & Project Background



後疫情時代，全球郵輪市場快速復甦

Rapid Recovery of the Global Cruise Market
國際旅客需求回升，市場規模持續擴大，競爭進入新階段。



旅客需求轉變，追求文化深度與永續體驗

In-Depth Cultural, Historical, and Sustainable Eco-Tourism
從大型娛樂型郵輪轉向深度文化、歷史特色與永續生態旅遊。



東亞各國積極發展「跳島郵輪」新航線

New Island-Hopping Routes and Port Cooperation
Island-Hopping Cruise 成為區域觀光新趨勢，帶動港口合作與航線整合。



金門具備獨特優勢，迎來戰略轉型契機

Kinmen's Unique Advantages
戰地文化、地緣位置與閩南文化資源，成就金門的關鍵戰略地位。

金門作為東亞郵輪跳島樞紐之整體發展藍圖與推動策略。

Overall Development Blueprint and Implementation Strategy for
Positioning Kinmen as an East Asian Island-Hopping Cruise Hub



亞洲郵輪 4.0 之核心發展理念

Core Development Concepts of Asia Cruise 4.0

「亞洲郵輪 4.0」為區域合作架構，從港口競爭走向海洋共榮，打造東亞跳島郵輪新典範。



區位與連結 Connectivity

以金門為核心十字節點 | Kinmen as a Central Strategic Crossroads | 向上串聯東北亞日韓高價值市場、向下輻射東南亞新興市場，橫向深化兩岸與離島間的跨海網絡，建構具備高韌性的跳島航線生態系統。



合作與開創 Collaboration

建立跨國界、跨區域的官方與民間高層常設對接機制，共同開發多點停靠的新型態跳島航線 | Joint Development of New Multi-Port Island-Hopping Cruise Routes | 將地緣競爭壓力實質轉化為推動東亞郵輪產業升級的新動能。

共同打造東亞郵輪觀光共同未來

Shaping a Shared Future for East Asian Cruise Tourism

01 Kinmen's Location Advantage and East Asia Strategy

金門的地理區位優勢 與東亞戰略布局

東亞航線樞紐之空間地理分析

金門群島位居台灣海峽西側要衝，扼守閩江口與廈門灣交界，在現代航海地理中，它是東亞海上交通航道的黃金十字路口 | Kinmen as a Golden Crossroads of East Asian Maritime Routes | 周邊海域水體條件良好且氣候宜人，為郵輪安全停靠與旅客岸上活動提供理想環境。其優越的地理位置與航線連結能力，使金門具備發展為區域郵輪樞紐的巨大潛力，進而成為串聯東亞與東南亞跳島航線的重要節點。



台灣西側要衝 Strategic Gateway on Taiwan's Western Front

金門是台灣向西延伸、面向大腹地市場的核心前哨港口，具備優異的避風條件與穩定航道。



東北亞通道捷徑 Shortcut Corridor to Northeast Asia

由金門出發向北延伸，可在極短航程內串聯澎湖、馬祖，並直通韓國濟州島、日本沖繩群島，是建構東北亞黃金跳島航線的最近軸心捷徑。



東南亞起點門戶 Gateway Starting Point to Southeast Asia

向南則可順向接入南海航道，成為前往香港、菲律賓及越南等東南亞新興郵輪市場的跳島起點。



和平交流節點 Hub for Peaceful Exchange

金門已由昔日的軍事前線，逐步轉型為兩岸交流、文化互動及區域合作的重要門戶，具備串聯跨境旅遊與國際郵輪航線的獨特戰略價值 | From Military Frontline to Gateway for Exchange and Regional Cooperation |



金門的地理區位與周邊交通優勢

串聯兩岸與台灣本島，建構高效率的區域交通網絡。

Kinmen's Location as a Link between Cross-Strait Routes and Taiwan's Main Island



02 Turning Kinmen's Battlefield Heritage into Universal Values

金門的戰地文化特質 與普世價值轉化

獨特冷戰歷史資產的國際化包裝

International Presentation of
Unique Cold War Heritage

金門最核心且無法被全球其他任何旅遊目的地複製的絕對競爭力，在於其保存極其完整的冷戰時期戰地遺跡。這段歷史不僅屬於地方，更是整場東亞冷戰史的縮影 | Kinmen's Cold War military sites reflect the history of the Cold War in East Asia |

我們致力於將這些「戰爭記憶」提煉為普世認同的「和平精神與反思教育」 | Transforming War Memories into Universal Values of Peace, Reflection, and Education | 使其成為面向全球郵輪旅客的頂級知性旅遊資源，讓東亞與全球遊客深刻認識金門的戰爭記憶與和平意義。



獨一無二的戰地遺跡
Military Heritage Sites
保存完整的冷戰歷史資產



和平精神的價值轉化
Value Transformation
從戰爭記憶走向和平反思



歷史反思與教育意義
Reflection and Education
深度歷史教育與文化啟發



面向國際的知性旅遊資源
Educational Cultural Tourism
東亞冷戰史縮影，走向國際舞台

戰地遺跡的創新轉譯與深度體驗升級

Transforming and Refining Kinmen's Battlefield Heritage

為迎合國際郵輪旅客對高規格、具啟發性與故事張力行程的需求，金門的戰地文化資產正進行全面的轉化與精緻化升級。



地下防禦體系的動態美學體驗
Dynamic Aesthetic Experiences in
Underground Defense Systems

翟山坑道、九宮坑道等地下花崗岩軍事坑道，阻絕了昔日炮火。世界級坑道音樂會 | World-Class Tunnel Music Festival | 與低礫光影藝術，讓國際遊客在歷史實景中體驗鬼斧神工的軍事工程與和平音符的強烈對比。



戰地窖藏文化的沉浸式品鑑
Former Military Shelters Transformed
into Kaoliang Liquor Cellars

昔日軍事掩體（如經武坑道）轉化為高粱酒窖，孕育世界級金門高粱。結合五感體驗，旅客於恆溫恆濕的花崗岩坑道中品鑑佳釀，感受高粱從「戰備物資」昇華為「和平佳釀」的歷史轉變，展現戰地微醺美學。



海岸防線的和平演繹
Anti-Landing Barriers Reimagined
as Environmental Art Installations

將昔日反登陸的「軌條砦」、防線、防空碉堡群與軍事標語牆，轉化為全台最美黃昏海岸步道與環境藝術裝置，讓遊客在歷史實景中思索戰爭的代價與和平的珍貴。



戰術防禦地景的當代重構
Artillery Drill Demonstrations at
Shishan Howitzer Front

將冷戰防線提升至地緣政治遺產高度。如「獅山砲陣地」的砲操動態演練，轉譯為止戰思辨的儀式；「小艇坑道」則由地下煙補線，昇華為見證生存韌性的史詩空間，為國際旅客帶來深具普世價值的沉浸式知性洗禮。



03 Upgrading Port Facilities and Integrating Smart Services

金門港埠設施提升 與智慧服務整合

港埠設施旗艦升級

水頭商港旅客服務中心全新啟用

Port Upgrade : Kinmen Port Passenger Terminal

硬體建設的重大突破，是支撐金門進軍國際大型郵輪市場的最強基石。
金門港埠設施已全面邁入國際一流水準。



水頭商港旅客服務中心之戰略啟用

Strategic Opening of the Kinmen Port Passenger Terminal

2026.02.03 一水頭商港旅客服務中心正式啟用，現代化建築與動線規劃，提供頂級旅運服務。



營運亮眼實績與成長預估

Expected to exceed 2 million passengers by the end of 2026
隨航線復甦與新大樓啟用，預估至 115 年底突破 200 萬人次，展現強勁成長與港口營運活力。



巨量服務量能與市場效益

Annual service capacity of up to 3.5 million passengers

寬敞出入境大廳、高效行李托運區與免稅購物街，設計年服務量能高達約 350 萬人次。



分級靠泊與外海接駁因應機制

Cruise ships under 10,000 tons can berth directly, while larger vessels use offshore anchoring and shuttle transfers.
萬噸以下郵輪可直接靠泊；萬噸以上郵輪採外海錨泊，透過高效接駁艇安全快速接送旅客登岸。

完備且高效的國際 CIQS 通關體系

A well-established CIQS inspection system

成熟的 CIQS 聯檢機制，可快速完成大型郵輪旅客通關，提供高效率、安全且順暢的國際出入境服務。

數位智慧化 與無縫接駁服務

Smart Digital Services and Seamless Transfers

智慧科技 × 在地整合 — 打造國際郵輪旅客最便利的旅遊體驗。



「金門行動旅服」PWA 智慧地接系統

首創 PWA 技術，免下載即可秒速載入，整合食、宿、遊、購、行資訊，提供即時交通動態、低碳公車、租車及共享運具查詢，並搭配語音導覽，打造國際自由行旅客的數位智慧友善環境 | A Smart Digital Environment for International Independent Travelers



e-Gate 智慧通關系統全面覆蓋

水頭商港旅客服務中心內建新一代 e-Gate 智慧通關系統 | e-Gate Smart Immigration Clearance System | 結合生物辨識與 AI 查驗技術，提供高效率且安全的通關服務，大幅降低跨國遊客排隊等待時間。



陸運接駁智慧無縫銜接

建置智慧接駁調度中心，即時調配新能源巴士、觀光公車及導覽車隊，確保旅客「零等待」接駁 | Smart and Seamless Land Transfer Services | 安全快捷前往全島各大景點。

04 Regional Cooperation and Future Collaboration

區域合作經驗分享 與前瞻協同分析



扎實歷史基礎 × 成熟跨境經驗

14

Solid Historical Foundations × Mature Cross-Border Experience

從歷史實績到多元交通網絡，奠定金門郵輪觀光的发展優勢。

2013 | 麗星郵輪首航金門 Star Cruises

國際郵輪首次成功靠泊金門，驗證港區航行與靠泊條件可行性，建立中央、地方與郵輪業者合作經驗。

● 驗證成果：建立國際郵輪靠泊基礎。



2018 | 卡莉多麗號靠泊 Caledonian Sky

4,200 噸高端探險郵輪順利靠泊，展現金門接待中小型精品郵輪與探險郵輪的能力。

● 驗證成果：具備精品郵輪接待量能。



2021 | 探索夢號跳島航線 Explorer Dream

75,338 噸大型郵輪採外海靠泊與接駁模式，運用小三通交通船完成高效率旅客接駁。

● 驗證成果：完成大型郵輪營運驗證。



區域合作案例與小三通互補模式

15

Regional Cooperation and the Complementary Role of the Mini Three Links

善用二十年跨境經驗，串聯郵輪、航空與小三通，打造東亞跨境旅遊新模式。

01



二十年跨境網絡奠基 Two Decades of Cross-Border Network Building

Fly-Cruise 多元商業模式
Diversified Fly-Cruise Business Model

- 二十年以上小三通營運經驗
- Fly-Cruise (飛機+郵輪)
Fly-Cruise: Air Travel and Cruise
- 小三通+郵輪整合行程
Integrated Mini Three Links and Cruise Itineraries



02



建構黃金中轉樞紐 Building a Golden Transit Hub

一程多站旅遊模式

- 串聯金門、廈門、泉州
Connecting Kinmen, Xiamen, and Quanzhou
- 對接 240 小時過境免簽政策
Linking with China's 240-Hour Visa-Free Transit Policy
- 擴大跨境旅遊腹地
Expanding the Cross-Border Tourism Market



03



雙軌互補客源模式 Dual-Source Complementary Visitor Model

區域協同新格局

- 郵輪 × 小三通
- 國際旅客 × 百萬客流
- 降低通關成本，提高吸引力
Creating a New Model for Cross-Border Cruise Cooperation in East Asia

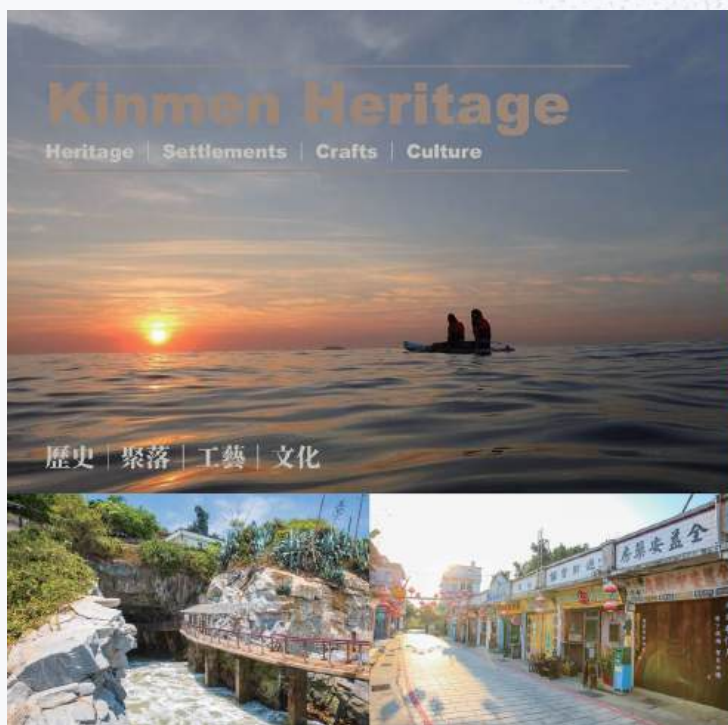


東亞主要郵輪目的地的 互補性矩陣分析

Complementarity Matrix

以差異化定位串聯區域合作，打造東亞跳島郵輪共榮網絡。

合作港口	核心特色	合作策略
濟州 (Jeju) 	 火山地景  自然景觀  潮流購物	 結合金門戰地文化與閩南人文，形成「自然 × 歷史」雙主題航線，豐富北向跳島旅遊體驗。 Dual-Theme Routes: Nature × History
沖繩 (Okinawa) 	 陽光沙灘  海島度假  美式琉球文化	 沖繩提供休閒度假，金門提供歷史文化與和平教育，共同滿足不同客群需求。 History, Culture, and Peace Education
高雄 (Kaohsiung) 	 國際母港  現代港埠  完善補給	 高雄提供大型郵輪母港功能，金門提供深度岸上遊程，形成「規模 × 體驗」互補模式。 Kaohsiung as a Major Cruise Homeport : Scale × Experience



05 Opportunities, Challenges, and Target Markets

金門跳島航線的機會、挑戰 與客群精準定位

四大核心航線規劃藍圖

Planning Blueprint for Four Core Cruise Routes

為將金門推向東亞十字樞紐，規劃三條具備高商業價值的黃金航線

● 北向黃金航線（日韓高端市場）

金門 → 台灣 → 沖繩 → 日本 → 濟州 → 韓國

8-10 天中長程航程

深度文化 × 戰地歷史 × 免稅購物

● 東向精品航線（國旅與區域市場）

金門 → 台灣—高雄／臺中 → 返回母港

3-5 天中短程航程

國旅市場 × 跳島旅遊 × 城市觀光

● 南向探索航線（國際深度市場）

金門 → 香港 → 菲律賓 → 東南亞

10-14 天長程航程

東南亞新興市場 × 深度旅遊 × 國際郵輪

● 西向跨境航線（兩岸跨境走廊）

金門 → 廈門 → 泉州 → 福州

5-7 天中長程航程

兩岸跨境 × 深度文化 × 一程多站



四大潛在客群精準定位

Four Key Target Groups and Precise Positioning

以多元旅遊需求為核心，精準鎖定高價值客群，推動金門郵輪觀光市場拓展。



歷史文化愛好者

History and Culture Enthusiasts

對閩南紅磚聚落、僑鄉洋樓文化、宗族非物質文化遺產有濃厚興趣的高知識分子與銀髮族。



生態與永續旅遊者

Eco and Sustainable Travelers

青睞綠色低碳交通、喜愛野鳥生態（如金門夏日精靈栗喉蜂虎、冬候鳥鸛鷀）與友善社區旅遊的國際環保客群。



和平精神推廣者

Peace Advocates

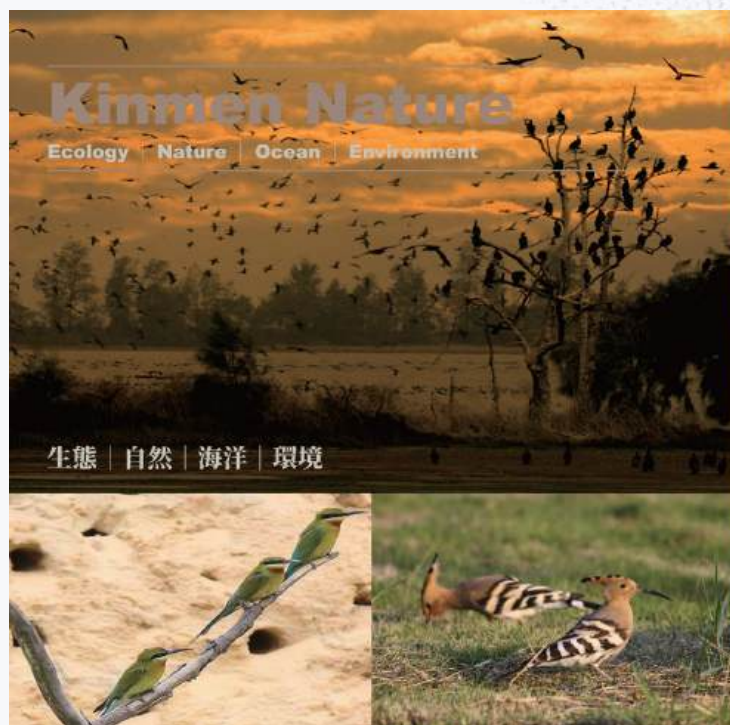
重視地緣政治歷史、渴望親身體驗冷戰遺跡，並期盼將歷史傷痛轉化為推動全球和平正能量的國際旅客與組織成員。



家庭與跨世代教育旅遊團

Family and Intergenerational Educational Tour Groups

看中金門安全治安與豐富寓教於樂資源，適合學校戶外教學、畢業旅行及親子共學的跨世代族群。



06 Cooperation Proposals and Conclusion

區域合作機制提案與結語

跨區域合作機制之四大利器提案

23

Cross-Regional Cooperation Mechanism

為將「亞洲郵輪 4.0」從理念轉化為實際行動，提出以下四大區域合作機制，誠邀東亞各港口共築生態系統

「超越界限，連結成一體」

建立更緊密連結、合作且永續的亞洲郵輪生態系統

Building a more connected, collaborative, and sustainable Asian cruise ecosystem



跳島航線 聯合開發機制

Joint Development Mechanism
for Island-Hopping Routes

推動與周邊港口（如高雄、澎湖、廈門、漳州、沖繩）協調泊位時程，統一東亞跳島旅遊品質認證體系，建立聯合在線行銷與銷售平台。



人才與知識 共享計畫

Talent and Knowledge Sharing
Program

邀請各港口間港務管理人員、跨境遊覽專家及高階雙語導遊人員的互訪交流與共同培訓，分享綠色港口建設的最佳實踐案例。



市場推廣 與聯合品牌建設

Market Promotion and Joint
Brand Building

打造統一的「東亞郵輪號島 (Mystic East Asia Cruise)」國際品牌形象，聯手參加全球大型郵輪展進行聯合招商與媒體宣傳。



綠色港口獎勵機制 與港埠優惠措施

Green Port Incentive Mechanism

建立綠色港口獎勵制度，提供首航郵輪、環保認證郵輪及深度在地導覽航次優惠，並依船舶環保績效及營運模式給予碼頭費、泊位費減免，提升國際郵輪靠泊誘因。

合作勝於競爭，金門蓄勢待發

金門已做好迎向東亞郵輪新時代的準備。

從 2013 年麗星郵輪成功靠泊的實證經驗，到水頭商港旅客服務中心正式啟用，

金門已具備接軌國際郵輪市場的基礎條件與接待量能。

未來，金門期待攜手東亞各港口，

以跳島航線、智慧服務、文化交流與永續治理為共同目標，

共同打造兼具和平價值與區域共榮的亞洲郵輪新藍圖。

誠摯邀請各位親臨金門，感受島嶼魅力，共創東亞郵輪合作的新未來。

We warmly invite you to Kinmen to experience its island charm and join us in shaping a new future for East Asian cruise cooperation.

跨越邊界・和平啟航

Building an East Asia Cruise Network

through Collaboration, Peace and Sustainability

合作，讓航線沒有邊界；和平，讓海洋連結世界。



樂遊金門 Youtube
QR Code

Session 5 | 세션 5

Asia Cruise Academic Part 2:

Development and Vision of Asian Cruise Island-Hopping Routes

아시아 크루즈 아카데미 2부: 아시아 섬 연계 크루즈 노선의 발전 방향과 비전

Yan Guodong | 연귀동

Director, Department of Tourism & Marketing,
Shanghai University of Engineering Science
상하이공정기술대학교 관광·마케팅학과 학과장

New Trends in China's Cruise Route Development

Biography

Director of the Department of Tourism & Marketing and Professor at Shanghai University of Engineering Science. Also serves as a researcher at the Shanghai International Cruise Business Institute, focusing on tourism management, cruise economy, and industry-related research projects.

Key Career

Director, Department of Tourism & Marketing, Shanghai University of Engineering Science
Professor and Master's Supervisor, Shanghai University of Engineering Science
Researcher, Shanghai International Cruise Business Institute
Member, Cruise Professional Committee, Shanghai Tourism Standardization Technical Committee

약력

상하이공정기술대학교 관광·마케팅학과 학과장이자 교수로 관광경영과 크루즈 경제를 연구하고 있다. 상하이국제크루즈비즈니스연구원 연구원으로 활동하며 관광 및 크루즈 산업 관련 국가·지방 연구과제를 수행하고, 관광산업 발전을 위한 연구와 교육을 이어가고 있다.

주요 경력

현) 상하이공정기술대학교 관광·마케팅학과 학과장
현) 상하이공정기술대학교 교수 및 석사과정 지도교수
현) 상하이국제크루즈비즈니스연구원 연구원
현) 상하이 관광표준화기술위원회 크루즈전문위원회 위원



New Trends in China's Cruise Route Development

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Shanghai University of Engineering Science

Shanghai International Cruise Business Institute

July 24 2026

Professor

researcher



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- ① Background
- ② Typical Case
- ③ current development
- ④ bottleneck
- ⑤ Suggestions



New Trends in China's
Cruise Route Development

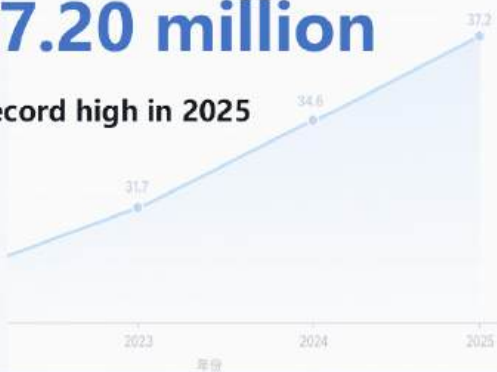
Background

01

Global Cruise Market: Steady Growth

37.20 million

Record high in 2025



29.70
million
2019

34.60
million
2024

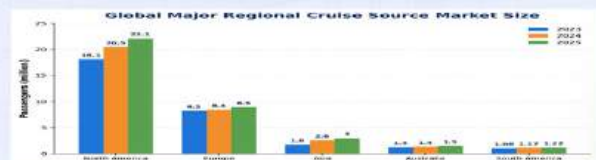
37.20
million
2025

North America Leads
Europe Stable,
Asia Rising

59.4%
North America's share of the
global source market in 2025

15.0%
Year-on-year growth in Asia

3720 million
Total global passengers



International Cruise Routes

251 ships → **310** ships

2018-2025: the global ocean cruise fleet grew by about **23.5%**

Route Distribution

- Over **70%** of global cruise routes are concentrated in North America and Europe;
- the Mediterranean, Hawaii, and the Caribbean are popular;
- Alaska is a summer-only destination, attracting **4.5%** of passengers.

Itinerary Trends

- 4-7-day short and medium itineraries dominate the market;
- itineraries over 14 days remain generally stable;
- shorter itineraries are becoming more prominent.

Regional Differences

- Routes adjust with seasonal changes
- Diversification reduces climate risks



New Trends in China's Cruise Route Development

Typical Case 02

Multi-Port Hinterland Routes in the Mediterranean



On its 2026 Western Mediterranean itineraries, MSC World Europa sells 7-night round-trip products from multiple ports, including Marseille, Genoa, Naples, Barcelona, Messina, and Valletta.

Western Mediterranean Multi-Homeport Route

Costa Toscana

Costa Toscana organizes around 7-night Western Mediterranean products around **Genoa**, **Marseille**, **Barcelona**, **Civitavecchia/Rome**, **Palermo**, and **Savona**.



Core Experience

Route organization: "fixed loop + periodic operation".
7 nights or 8 days is the basic cycle, with stable operation.

Port functions: "tiered collaboration" with clear primary and secondary roles to avoid operational disorder

Source-market organization: one fixed loop becomes multiple market gateways, reducing tourists' transport costs and expanding market reach

Caribbean Multi-Homeport Route Case

MSC

MSC World Europa will operate 7-night and 14-night French Antilles and Southern Caribbean itineraries in the 2026/2027 winter season

MSC Opera will use La Romana as a new regular homeport from November 2026, offering 7-night or 14-night "butterfly" Southern Caribbean itineraries.



Core Experience

Winter-focused season:

serves European and North American demand for warm-weather vacations

Embarkation port location:

concentrated in areas closer to Southern Caribbean and French Antilles destination clusters

Fly-cruise integration:

relies on coordination among aviation, hotels, and transfers

Flexible product mix:

7-night, 14-night, or 21-night combinations balance short breaks and in-depth travel

Disney Cruise No-Destination Sea Cruise Case

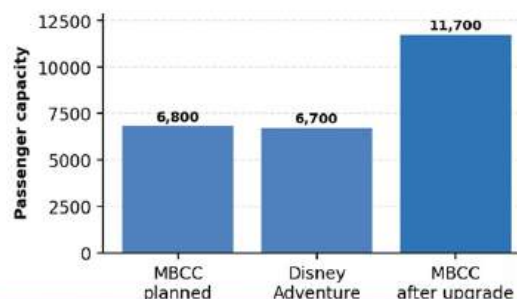
Disney Adventure will depart from Singapore on 3- or 4-night itineraries, emphasizing that "the ship itself is the destination".

Disney offsets the potential monotony of no-destination cruises with "IP content + service processes".

No-destination products place higher requirements on port efficiency

Homeport capacity determines turnover limits.

Singapore's Marina Bay Cruise Centre has been upgraded with added capacity for waiting areas, seating, check-in, and dual-ship berthing.



Carnival Cruise deploys Australian No-Destination route

Carnival's three ships in the Australian market have established clear short round-trip vacation products.

Most itineraries last 2 to 4 days, with 3-day/2-night sailings being most common. The products are compact and have a low travel threshold.



Carnival Splendor:

classic short no-destination sea cruises centered on Sydney homeport.

Carnival Adventure:

family and young-traveler products under a multi-homeport layout, highlighting city short breaks + onboard entertainment.

Carnival Encounter:

standardized sea-vacation products based at Brisbane homeport, all 3-day itineraries under regular operation.

Star Voyager No-Destination Cruise

The Star Voyager "Keelung-Sea Cruise-Keelung" route is a short-cycle high-seas cruise product operated by Star Cruises.

In 2025, it operated **13** different routes, including 3-day, 4-day, and 6-day products, with 3-day sailings accounting for the largest number.



New Trends in China's
Cruise Route Development

current development 03



Current situation of China's cruise industry



543ships

Total national cruise
ships in 2025

276ships

Total annual cruise ships at
Shanghai Port in 2025

185.2million

Inbound and outbound
passengers at Shanghai Port

Over 60% share



Current situation of China's cruise industry



Shipbuilding: key breakthroughs in domestic construction and operation

China's second domestically built large cruise ship, *Adora Flora City*, is scheduled for delivery on November 6, 2026 and to operate from Guangzhou Nansha



Operations: international and domestic brands grow together

Domestic brands such as Adora and international brands such as Royal Caribbean and MSC are developing in mutual reinforcement



Products: cruise routes become increasingly diversified

Cruise products are extending from single Japan-Korea short routes to multi-homeport and themed routes



Policy: greater convenience for inbound tourism by foreign visitors

In 2024, China implemented a 15-day visa-free policy for foreign tourist groups entering by cruise, covering 13 cruise port cities. Multiple departments also issued regulations on port calls and supplies.



The current situation of Chinese cruise routes

China's cruise routes are divided into **three** main categories and ten subcategories





Features of China's Cruise Routes



Hong Kong-Guangzhou Nansha Dual Homeport

Dream Cruises' *World Dream* sailed to Vietnam, the Philippines, and other destinations



Shanghai-Busan Dual Homeport

MSC *Bellissima* completed its first trial operation in January 2026, marking the normalization of China's first China-South Korea cross-border dual-homeport route



Shanghai-Fukuoka-Jeju Multi-Port Route

Costa Serena launched multi-point embarkation and disembarkation in 2025, enabling "one ticket, multiple ports; embark and disembark at will"



Shanghai-Hong Kong Dual Homeport

Royal Caribbean's *Spectrum of the Seas* will operate 56 itineraries in the 2027-2028 season from the dual homeports of Shanghai and Hong Kong.



Tianjin-Japan/Korea Two-Way Route

In July 2025, *Oriental Cruise's Dream* completed the first cross-border dual-homeport voyage at Tianjin Port, with nearly 20 passengers embarking in Jeju, South Korea and entering Tianjin



Features of China's Cruise Routes



Viking Yi Dun Multi-Homeport Route -- Launch date: June 2026

China's first cruise tailored for Chinese guests departed from Shanghai, crossing three continents over 60 days and taking more than 700 passengers to 27 destinations in 16 countries.
The crew-to-passenger ratio reaches 1:2.



Oriental Dream South Seas Mystery Route -- Launch date: September 2026

6 to 12 days, three ways to explore the South Seas:
First Encounter - Vietnam's "Authentic Beauty" (6 days/5 nights), Cruise - Sabah + Brunei + Nha Trang (10 days/9 nights), and Grand Journey - Sabah + Brunei + Singapore + Phu My (12 days/11 nights)

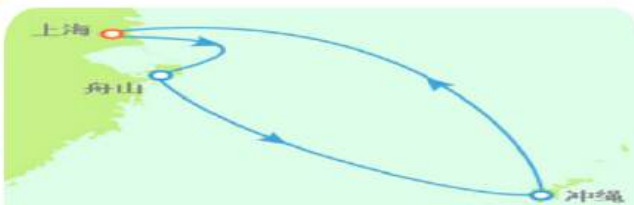


Features of China's Cruise Routes



Adora Magic City Dual-Homeport Route Launch date: May 2025

The "Shanghai-Jeju" dual-homeport route marks Shanghai's upgrade from a "single homeport" to international "multi-port collaboration", injecting new momentum from the "China hub" into the global cruise network.



Blue Dream Melody 33-Night Pan-Asia Voyage Launch date: November 2024

First to create "one route with four homeports" visiting 15 ports in 10 countries, linking intangible cultural heritage, and suited to travelers exploring South Seas culture.

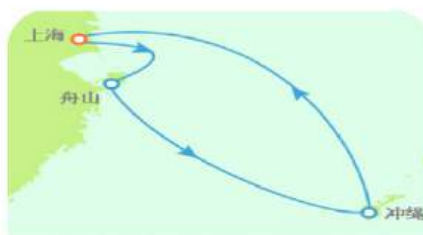


Features of China's Cruise Routes



Viking Yi Dun 15-Day Long-Haul Route Launch date: March 2024

Covering multiple destinations, suitable for high-end travelers seeking in-depth travel. In October 2022, it operated the "Shenzhen-Xiamen-Wenzhou-Zhoushan-Shanghai" Southeast Coastal Cultural Tourism Route, selected as the Ministry of Transport's first pilot premium cruise route.



Gulangyu Multi-Call Route Launch date: January 2020

Shanghai-Zhoushan
Domestic
Multi-Call Route



Features of China's Cruise Routes



SuperStar Virgo Fixed Multi-Homeport Route Launch date: May 2017

It launched the first 8-day/7-night fixed multi-homeport route in China's cruise industry, linking Shanghai, Osaka, and Tokyo, with passengers able to embark and disembark at each port.



Costa Atlantica 86-Day World Cruise Launch date: March 2015

Departing from Shanghai, the 86-day voyage crossed 3 oceans, 5 continents, 18 countries and regions, and visited 28 destinations.



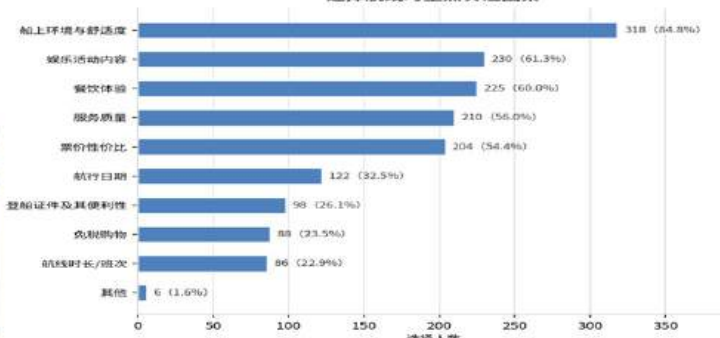
Features of China's Cruise Routes



Adora Magic City's First No-Destination Sea Cruise Route Launch date: June 2026

China's first "No-Destination Sea Cruise" exit-entry travel permit was issued. Tourists can enjoy a visa-free, no-leave-needed, 3-day/2-night weekend cruise.

选择航线时重点关注因素



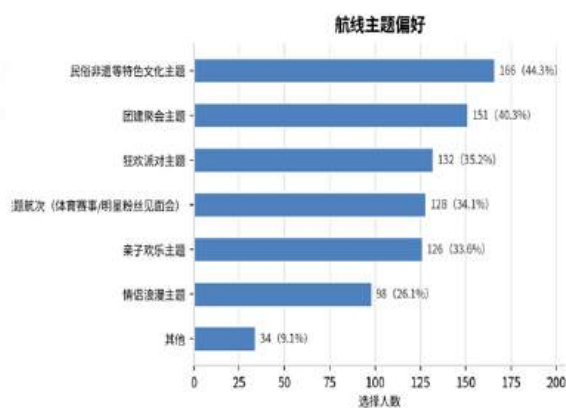
First-Voyage Passenger Profile:

Mainly from East China, with an average age of 47, lower than the 55-year average on regular routes

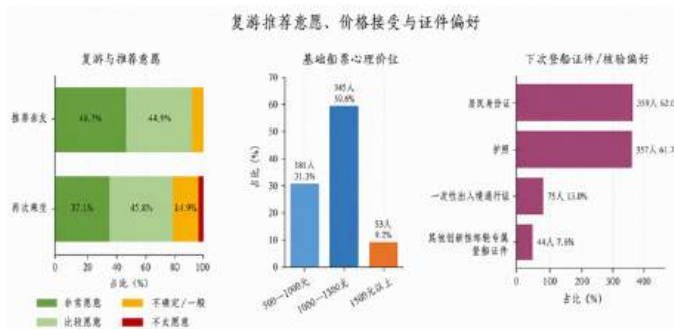
Key factors in route selection: onboard environment and comfort, entertainment activities, dining experience, etc.



Features of China's Cruise Routes



Route theme preferences:
Cultural themes featuring folk customs、 intangible heritage had the highest selection rate.



Revisit and recommendation intention:
82.9% of tourists said they would take the cruise again;
93.6% said they would recommend it to relatives and friends.

There is strong expectation for simplified identity-card, passport, and other document verification.



New Trends in China's Cruise Route Development

Bottleneck challenges

04



Bottlenecks in China's Cruise Route Development

Geopolitical factors
affect route stability

Tourist behavior favors
short-term routes

routes have been frequently adjusted due to geopolitical events affecting consumers' safety concerns, cultural identification, and itinerary reliability

Stability

Demand
Preferences

Japan-Korea routes find it difficult to meet tourists' demand for diverse destinations, weakening revisit appeal and constraining long-term market development.

Geographical location limits
route diversification

Due to location and cost constraints, it is difficult to develop long-haul routes, resulting in product homogeneity and low-price competition.

Diversifi-
cation

Policy
Impleme-
ntation

Insufficient policy implementation and limited innovation

a normalized operating model for no-destination cruises and multi-call routes has not yet been established.



Challenges facing China's cruise routes

01

Port Clearance Coordination
Efficiency
Needs Improvement

- Information sharing and mutual recognition covering overseas partner ports have not yet been established
- Differences in customs-clearance regulations and cross-border data management rules

02

Adaptability of Port
Facilities and Services
Needs Strengthening

- Port passenger-flow zoning, baggage sorting, and transport dispersal need optimization
- Supporting services such as foreign visitor payments and multilingual consultation need strengthening
- Port shore-power parameters, supply procedures, and cold-chain support standards are not unified

03

Cross-Regional Port
Coordination
Needs Improvement

- cross-port dispatch coordination system is still absent
- Passenger service standards vary across ports, and long-term coordination is lacking



Recommendations for Optimizing China's Cruise Routes

1. Diversified design to stabilize the core base of short and medium cruise products



Spatial layout: strengthen regional linkage and cross-border dual circulation

Theme scenarios: launch themed routes for families, white-collar workers, and silver-age groups to improve services precisely.

Supporting services: enhance the appeal of urban culture and services, and promote normalized joint inspection and convenient transport connections.

Stable route operation: fix loop schedules, cabin allocation, and port berthing to make embarkation and disembarkation predictable



2. Differentiated innovation to expand long-haul products across multiple regions

Breaking bottlenecks: expand differentiated long-haul products

Regional extension: enrich Northeast Asian routes, extend long-haul routes to Southeast Asia, and create Silk Road themed products.



Recommendations for Optimizing China's Cruise Routes



3. Regional interaction to expand multi-homeport and mutual-homeport routes

Operating model: adopt model to realize one-trip multi-port travel and regional linkage.

Normalized operation: expand the normalized operation of mutual-homeport routes. Strengthen international linkage and domestic regional coordination.



4. Pilot breakthroughs to normalize premium no-destination cruise routes

Responding to challenges: develop 1-to-3-day no-destination cruise products and operate them regularly to fill market gaps.

Promotion: strengthen cultivate consumer awareness. visibility through quality services, IP partnerships



Recommendations for Optimizing China's Cruise Routes



5. Facilitate approval and expand multi-call routes from departure ports

Policy optimization: simplify approval for multi-call routes.

Increase flexibility for foreign cruise ships: refine embarkation and disembarkation policies and increase operational flexibility.

Data sharing: share border-inspection data along route ports, and improve operational efficiency.



6. Enhance attractiveness and expand shore routes for ports of call

Shore excursion planning: deepen cultural and linked products. Expand space for organizing inbound source markets.

International promotion: strengthen promotion through international events and special exhibitions.

Market review: comprehensively optimize product design.

"Harmony & Shared Future" Initiative

和合共进

One Family Asia-Pacific Cruise
Community with a Shared Future

Shape a foundation for
harmonious and
symbiotic development

绘就和谐共生
的发展底色



Build ecological wisdom of
harmony between
humanity and nature

构建天人合一
的生态智慧

Build a mutually
beneficial and win-win
industrial system

构筑互利共赢
的产业体系

Stimulate the
enterprising talent
efficiency

激发锐意进取
的人才效能

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ENGINEERING SCIENCE

上海国际邮轮经济研究中心
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New Trends in China's Cruise Route Development

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