



2019 Asia Cruise Deployment & Capacity Report

INTRODUCTION

With the dynamic nature of the cruise industry in Asia, government authorities, cruise lines, destinations and industry stakeholders need to closely monitor trends to understand the potential for cruise tourism growth, to prepare for the associated infrastructure needs and to cater for the increasingly aware and responsive guest source markets.

To achieve these goals, Cruise Lines International Association (CLIA) commissioned CHART Management Consultants to deliver deployment research and analysis to complement its recently released 2018 Asia Cruise Industry Ocean Source Market Report.

This newly titled 2019 Asia Cruise Deployment and Capacity Report covers the planned cruise activity throughout Asia in 2019.

With the collaboration of international and regional cruise brands and the analysis of published data, this project set out to update and extend the 2014, 2016, 2017 and 2018 studies of Asia's ocean cruise segment (2+ nights) and accomplish three key objectives:

1. Provide industry stakeholders with actionable, meaningful information, particularly on trends in the key drivers of cruise activity: capacity, deployment, and destinations.
2. Provide a tool to work with governments and the private sector to structure long-term benefits for local economies and specifically to
 - Assist authorities in forming cruise industry-specific policies and regulations;
 - Provide analysis to inform investment and infrastructure decisions.
3. Generate detailed destination volume data to underpin economic impact assessments.

SUMMARY: ASIA CRUISE DEPLOYMENT 2019

Note: This report is based on *planned* itineraries.

CRUISE CAPACITY IN ASIA

In 2019, 39 cruise brands are active in Asian waters, deploying a total of 79 ships. This year will see similar numbers of vessels in Asian waters to 2018 with only small changes in numbers by ship size category.

Despite having a similar number of ships in Asia, the total passenger capacity deployed in Asia was expected to fall this year, after several years of rapid growth. The drop of 5.7% is driven by a decrease in the number of operating days (down 2%) and sailings offered (down 6%), mainly due to the reduction in short cruise itinerary options ex-mainland China.

The planned itineraries of 1,917 sailings will generate capacity for 4.02 million passengers to cruise in Asia in 2019.

PORT CALLS IN ASIAN DESTINATIONS

The number of port calls to Asian destinations is expected to fall marginally in 2019. A total of 7,154 port calls will be made throughout Asia, 15 fewer than last year.

In Mainland China, port calls will decrease by 21% while the passenger destination days will decrease by 17%.

However, not all destinations will experience a decline in port calls. Many will see growth: India (+137%), Malaysia (+22.5%), Indonesia (+9.3%), Singapore (+7.0%), Japan (+3.1%) and Hong Kong (+2.4%) will see gains in port calls, while South Korea (+28.4%) will bounce back following an 82% dip in 2018.

The five-year compound annual growth rate (CAGR) of Asia's port calls is 14%, and the five-year growth from 2014-2019 is 88%, continuing an upward growth trajectory. Destinations such as Japan, Mainland China, the Philippines, Indonesia and India will show a stronger five-year CAGR and five-year growth than Asia's average.

PASSENGER DESTINATION DAYS IN ASIA

Contrary to the decline in port calls, Asia will see a rise in Passenger Destination Days (PDD). In 2019, there will be 13.03 million PDD, which is an increase from the 12.96 million PDD expected in 2018. A higher PDD translates to more potential visits from cruise passengers to destinations across the region, creating a stronger tourism impact.

CAPACITY:

Cruise ships, sailings and passenger capacity

NUMBER OF SHIPS

In 2019, 39 cruise brands are active in Asian waters, deploying a total of 79 ships. The number of ships deployed in Asia grew 58% since 2014.

Of the 79 ships in 2019, 13 operate year-round while another 22 operate for five or more months. Seven of the 79 are mega ships (over 3,500 passenger capacity or over 150,000 gross register tonnage) while 18 are large (2,000 to 3,500 passengers and over 75,000 GRT). In 2014 there were as few as 50 ships cruising in Asia.

NUMBER OF SAILINGS

These ships are providing 1,786 cruises and a further 131 voyages in 2019. The total of 1,917 sailings is 6% fewer than in 2018.

The operators fall into four distinct tiers:

1. Five cruise lines each operate over 100 sailings, 61% of the industry total sailings in 2019
2. Eleven lines offer 25 to 100 sailings, 29% of the 2019 total
3. Eleven lines offer between 10 and 24 sailings (8%)
4. The remaining 12 lines offer nine sailings or less (2%).

PASSENGER CAPACITY

The industry is generating capacity for 4.02 million passengers to cruise in Asia in 2019, 3.8 million on Asia cruises and 175,000 on voyages passing through Asia.

The 4.02 million passenger capacity on Asian cruises is 5.7% less than in 2018, while the five-year CAGR in passenger capacity in Asia from 2014 is 122%.

2019 CAPACITY

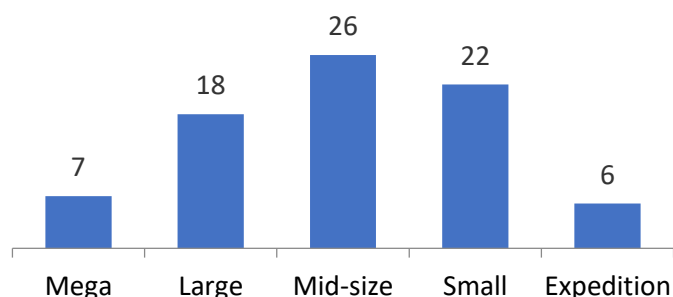
Ships: In 2019, 79 ships are scheduled to sail in Asian waters with a variety of product offerings. Mid-sized ships will account for most of the fleet (26 ships) followed by 22 small ships and 18 large ships.

Segments: Cruise lines will cater mainly to the premium and contemporary segments with 19 such lines operating 44 ships in Asia. Another 11 upscale cruise lines will operate 17 ships. There will be five luxury lines (12 ships) and four expedition lines (six ships).

Sailings: Within the Asian regions, 1,786 Asia-to-Asia itineraries are scheduled and a smaller volume of voyages (131) that call at Asian ports at some point in the itinerary. In total, 1,917 sailings are scheduled in 2019.

Cruise Durations: Short cruises still dominate the itineraries in Asia. Cruises of 4-6 nights will account for the highest share of all cruises, 38%, followed by 2-3 night offerings representing 36% of all cruises.

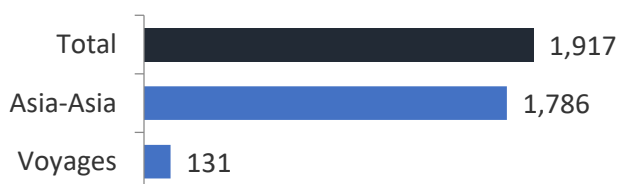
Ships in Asia by Size, 2019



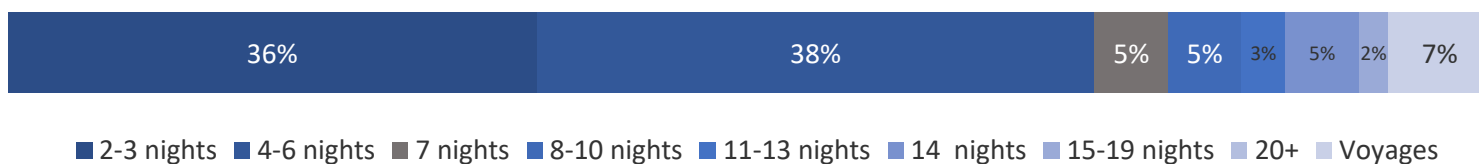
Cruise Ship Segments, 2019

Cruise Ship Segment	# Lines
Premium & Contemporary	19
Upscale	11
Luxury	5
Expedition	4

Cruises Offered by Type, 2019



Length of Cruises & Voyages Offered, 2019



The allocation of ships and cruise itineraries will result in 10,245 operating days in Asia during 2019, providing a total capacity for 4.02 million passengers.

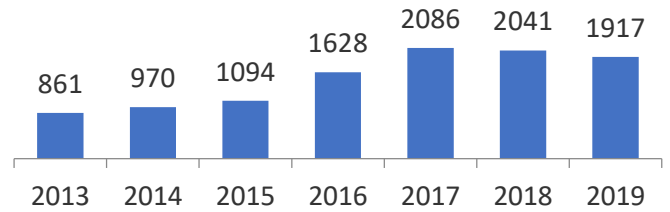
Capacity Summary, 2018-2019	2019	2018
Ships	79	78
Sailings	1,917	2,041
Operating Days	10,245	10,467
Passenger Capacity (millions)	4.02	4.26

Capacity: Trends

Sailings in and through Asia from 2013 through 2017 had strong and consistent growth, increasing 122% from 861 cruises and voyages in 2013 to 2,086 in 2017. However, after seeing consistent growth for four consecutive years, 2018 and 2019 each saw very slight declines in the number of sailings, falling 2.2% from 2017 to 2018, and decreasing another 6.0% from 2018 to 2019.

Cruises of 4-6 nights represent about 41% of the volume in Asia shrinking from 47% of the total sailings in 2018. Cruises of 2-3 nights increased from 32% to 38% of total Asia-Asia sailings in 2019. The general trend in the region continues to be shorter cruises, with 79% of cruises being six nights or less.

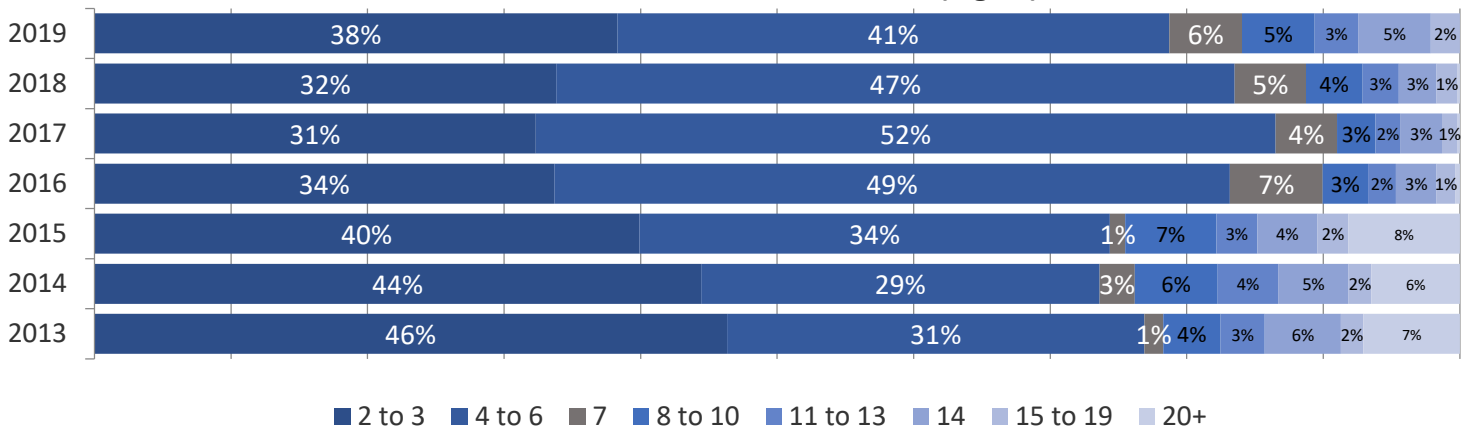
Activity in Asia, Total Cruises & Voyages



Cruise Ships Deployed by Type, Asian Region

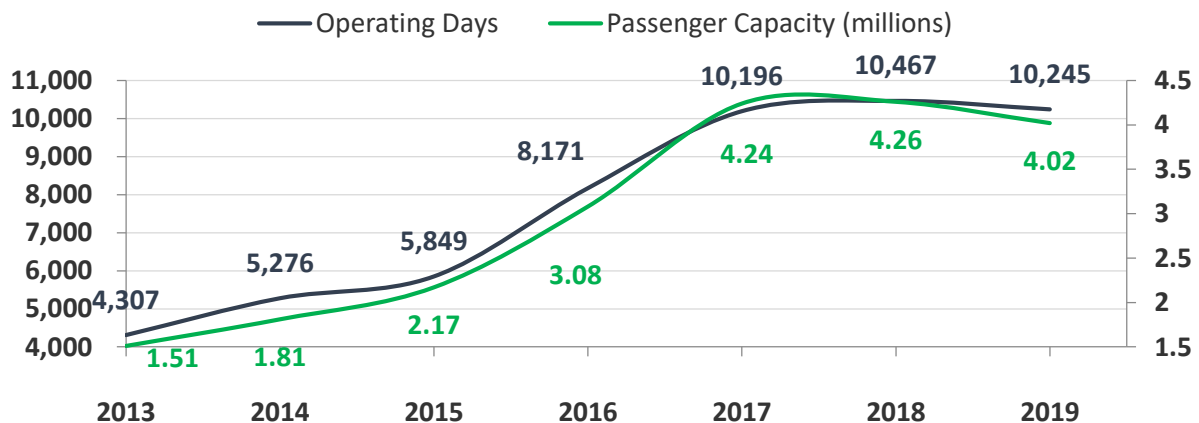
	Expedition	Small	Midsize	Large	Mega	Total
2013	2	14	19	8	0	43
2014	5	15	21	9	0	50
2015	4	14	22	11	1	52
2016	6	17	21	15	2	61
2017	5	17	26	13	5	66
2018	5	21	27	19	6	78
2019	6	22	26	18	7	79

Duration of Asia-Asia Cruises (nights)



For 2019, there will be 10,245 operating days, a 2% decrease from 10,467 in 2018. Overall passenger capacity will decline about 5.7% from 4.26 million in 2018 to 4.02 million in 2019.

Capacity Growth 2013-2019



CRUISE DESTINATIONS: Port Calls and Passenger Destination Days

PORT CALLS

In 2019, 7,154 port calls are being made throughout Asia, 15 fewer than last year.

A total of 306 different destinations in Asia will receive cruise ships in 2019, an increase from the 288 different destinations in 2018. Ships in Asia increasingly call at more places, increasing the range of choice for passengers.

Destinations seeing the most planned calls are Japan (2,681), Mainland China (809), Malaysia (561) and Thailand (550). Top individual ports in the region are Singapore (400), Taipei (284), and Shanghai (276). Twenty-three Asian ports will host 99 or more calls each.

The key turnarounds in Asia are from ports in Mainland China, Taiwan region and Singapore.

Japan is by far the most popular destination in Asia and will see the most calls with 2,681. Of these port calls, 83% are transit calls.

Mainland China hosts the most turnarounds at its several homeports with 687, or 85% of the total 809 port calls.

PASSENGER DESTINATION DAYS (PDD)

PDD is a measure of potential visits from cruise passengers when a ship calls at a destination, and an increase translates to more tourism impact for the destination.

Contrary to the decline in port calls, Asia will see an increase in PDD. In 2019, there will be 13.03 million PDD, which is a 1% increase from the 12.9 million PDD expected in 2018. The increase will come from regions of Southeast Asia (+8.6%) and South Asia (+106.8%). South Asia's growth will be fueled by India's expected 137% year-on-year growth in port calls.

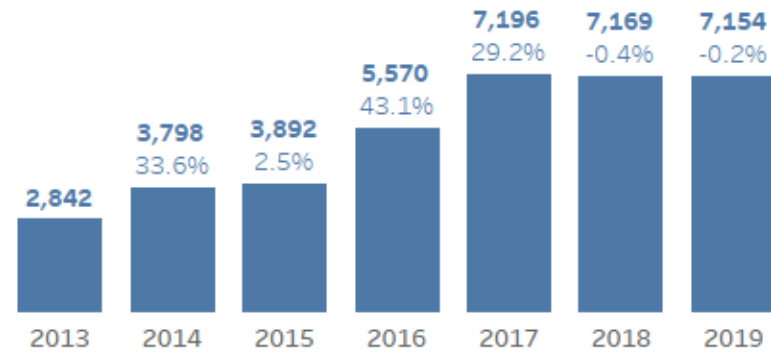
Singapore moved up to be the top port hosting 991,000 PDD. Despite a short dip, Japan remains the top destination, hosting 4,726,000 PDD.

India (+150%), Indonesia (+46%), Malaysia (+40.2%) and Singapore (+10.1%) saw double-digit growth in PDD. South Korea also bounced back with a 29.7% growth in 2019.

Destination: All Asia

Port Calls by Year

With YOY Variances, 2013-2019



Port Calls by Region

With YOY Variances, 2017-2019

Region	Year	Port Calls	YOY Variance
East Asia	2017	4,875	-
	2018	4,342	-10.93%
	2019	4,221	-2.79%
Southeast Asia	2017	2,093	-
	2018	2,560	22.31%
	2019	2,462	-3.83%
South Asia	2017	274	-
	2018	267	-2.55%
	2019	471	76.40%

Top Ports by Calls

With YOY Variances, 2017-2019

Port	Year	Port Calls	YOY Variance
Singapore, SINGAPORE	2017	393	-
	2018	374	-4.8%
	2019	400	7.0%
Taiwan, Keelung / Taipei	2017	237	-
	2018	322	35.9%
	2019	284	-11.8%
China, Baoshan / Shanghai	2017	581	-
	2018	416	-28.4%
	2019	276	-33.7%
Hong Kong, Hong Kong	2017	263	-
	2018	249	-19.4%
	2019	255	2.4%
Japan, Fukuoka / Hakata	2017	341	-
	2018	245	-28.2%
	2019	245	0.0%
Japan, Naha / Okinawa	2017	213	-
	2018	231	8.5%
	2019	243	5.2%
Japan, Nagasaki	2017	247	-
	2018	214	-13.4%
	2019	198	-7.5%
Thailand, Patong Bay / Phuket	2017	150	-
	2018	219	46.0%
	2019	188	-14.2%
Malaysia, Georgetown / Penang	2017	207	-
	2018	139	-32.9%
	2019	158	13.7%
South Korea, Jeju Isl	2017	477	-
	2018	22	-95.4%
	2019	29	31.8%

Top Destinations by Number of Calls

With YOY Variances, 2017-2019

Destination	Year	Port Calls	YOY Variance
Japan	2017	2,378	-
	2018	2,601	9.4%
	2019	2,681	3.1%
Mainland China	2017	1,156	-
	2018	1,012	-12.5%
	2019	809	-20.1%
Malaysia	2017	468	-
	2018	458	-2.1%
	2019	561	22.5%
Thailand	2017	509	-
	2018	581	14.1%
	2019	550	-5.3%
Singapore	2017	393	-
	2018	374	-4.8%
	2019	400	7.0%
Indonesia	2017	187	-
	2018	354	89.3%
	2019	387	9.3%
Vietnam	2017	407	-
	2018	493	21.1%
	2019	368	-25.4%
Taiwan	2017	295	-
	2018	346	17.3%
	2019	304	-12.1%
Hong Kong	2017	309	-
	2018	249	-19.4%
	2019	255	2.4%
South Korea	2017	737	-
	2018	134	-81.8%
	2019	172	28.4%

Destination: All Asia (Continued)

Passenger Destination Days (PDDs) by Region In Thousands (K) w/ YOY Variances, 2017-2019

East Asia	2017	9,957
	2018	8,707 -12.6%
	2019	8,190 -5.9%
Southeast Asia	2017	3,230
	2018	3,911 21.1%
	2019	4,249 8.6%
South Asia	2017	291
	2018	287 -1.3%
	2019	594 106.8%

Top Ports by PDDs

In Thousands (K), w/ YOY Variances, 2017-2019

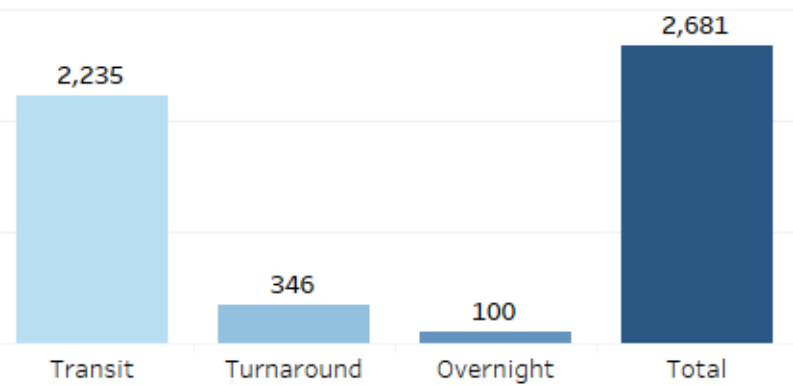
Singapore, SINGAPORE	2017	748
	2018	900 20.4%
	2019	991 10.1%
China, Baoshan / Shanghai	2017	1,538
	2018	1,246 -19.0%
	2019	854 -31.5%
Japan, Fukuoka / Hakata	2017	826
	2018	676 -18.2%
	2019	668 -1.1%
Hong Kong, Hong Kong	2017	633
	2018	604 -4.5%
	2019	606 0.2%
Japan, Nagasaki	2017	667
	2018	601 -9.9%
	2019	531 -11.6%
Japan, Naha / Okinawa	2017	429
	2018	445 3.8%
	2019	529 18.8%
Taiwan, Keelung / Taipei	2017	423
	2018	598 41.5%
	2019	527 -11.8%
Thailand, Patong Bay / Phuket	2017	260
	2018	459 77.0%
	2019	370 -19.4%
China, Guangzhou / Nansha	2017	457
	2018	349 -23.7%
	2019	328 -5.8%
South Korea, Jeju Isl	2017	1,257
	2018	32 -97.5%
	2019	44 38.1%

Top Destinations by PDDs

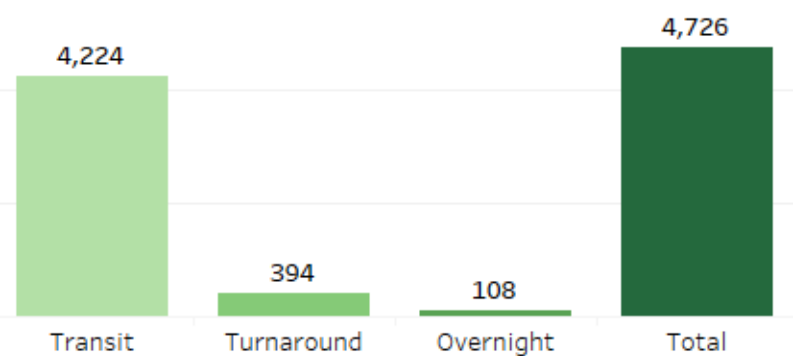
In Thousands (K), w/ YOY Variances, 2017-2019

Japan	2017	4,340
	2018	4,854 11.9%
	2019	4,726 -2.6%
China	2017	2,615
	2018	2,397 -8.3%
	2019	2,015 -15.9%
Malaysia	2017	816
	2018	825 1.1%
	2019	1,157 40.2%
Singapore	2017	748
	2018	900 20.4%
	2019	991 10.1%
Thailand	2017	624
	2018	861 38.0%
	2019	788 -8.5%
Vietnam	2017	753
	2018	645 -14.3%
	2019	617 -4.4%
Hong Kong	2017	633
	2018	604 -4.5%
	2019	606 0.2%
Taiwan	2017	522
	2018	628 20.2%
	2019	553 -12.0%
Indonesia	2017	133
	2018	271 104.3%
	2019	395 46.0%
South Korea	2017	1,848
	2018	224 -87.9%
	2019	290 29.7%

Port Calls in 2019



Passenger Destination Days in 2019 (K)

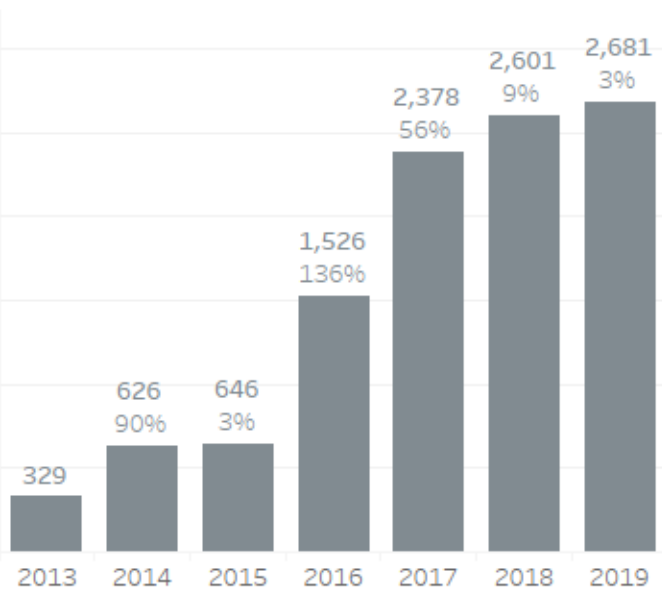


Japan: Top Ports 2019

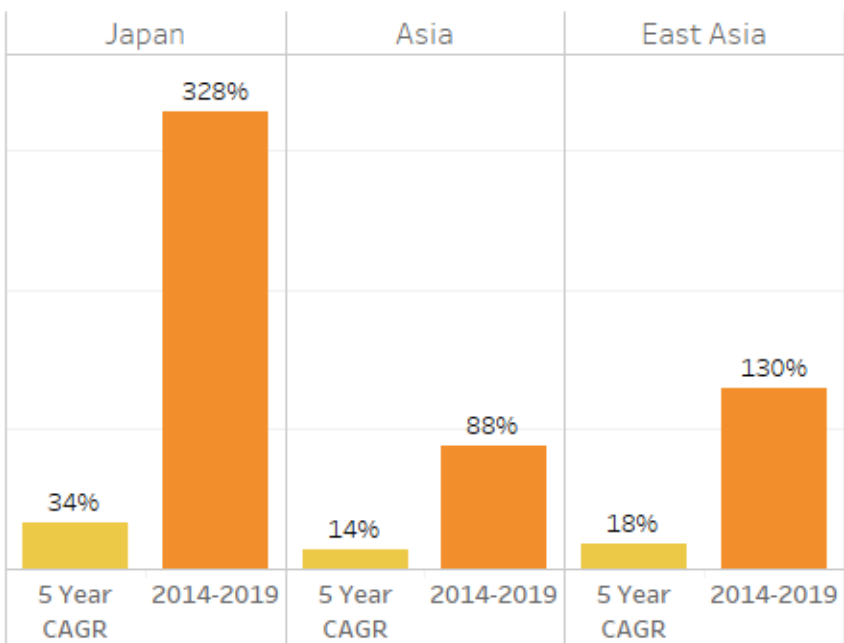
Port	Transit	Turnaround	Overnight	Total
Fukuoka / Hakata	217	24	4	245
Naha / Okinawa	234	5	4	243
Yokohama / Tokyo	14	166	22	202
Nagasaki	195	2	1	198
Miyakojima / Hirara	166	0	0	166

Port Calls by Year

With YOY Variances, 2013-2019

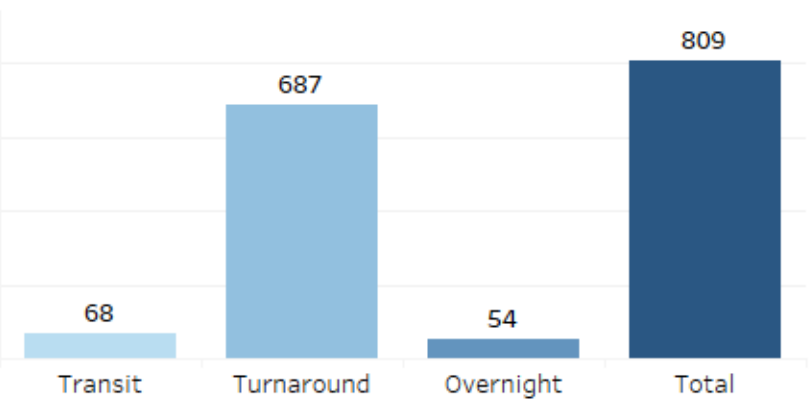


2014 vs. 2019: 5 Year CAGR & Total Growth



Note: Port calls for Japan prior to 2016 do not include the three local cruise lines and are therefore under-stated.

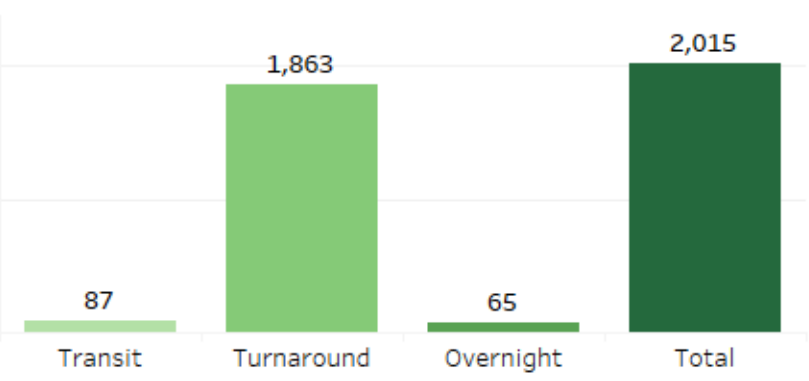
Port Calls in 2019



Mainland China: Top Ports 2019

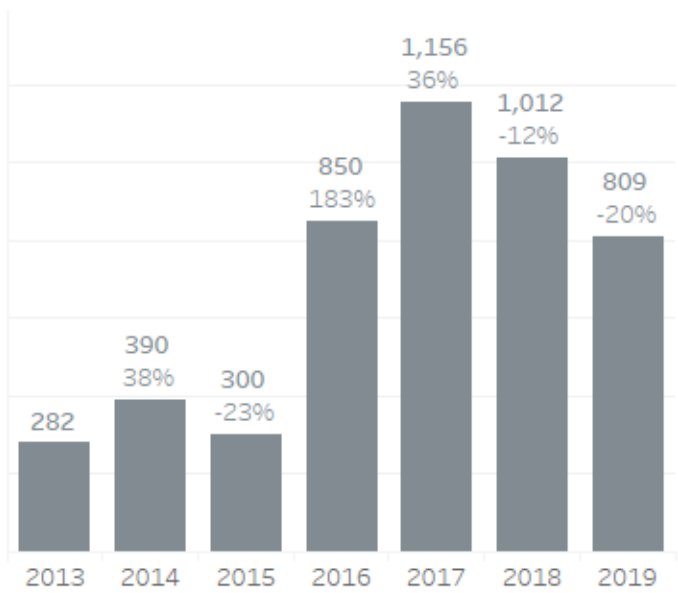
Port	Transit	Turnaround	Overnight	Total
Baoshan / Shanghai	22	221	33	276
Tianjin / Xingang / Beijing	15	129	17	161
Xiamen	6	119	4	129
Guangzhou / Nansha	0	98	0	98
Shenzhen / Shekou	1	63	0	64

Passenger Destination Days in 2019 (K)

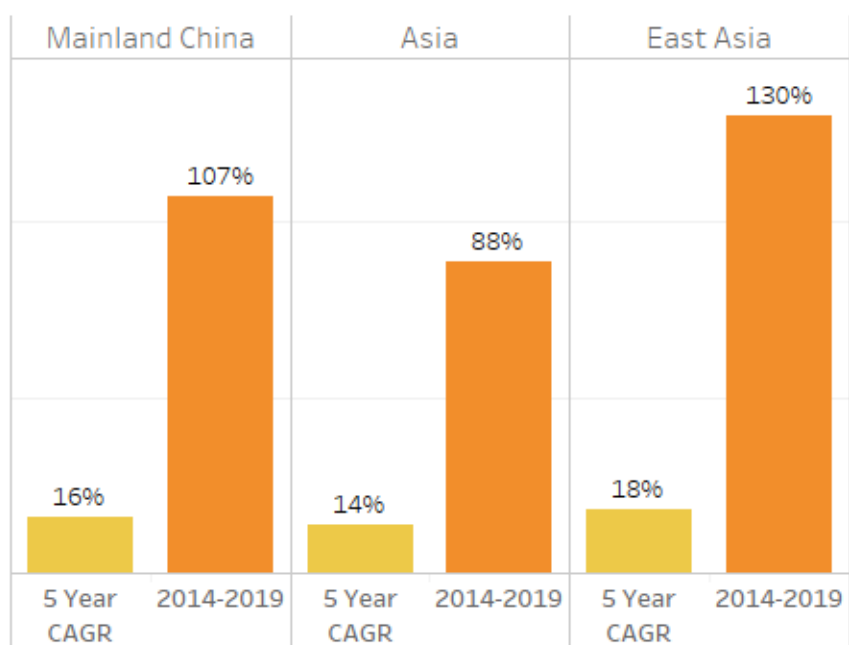


Port Calls by Year

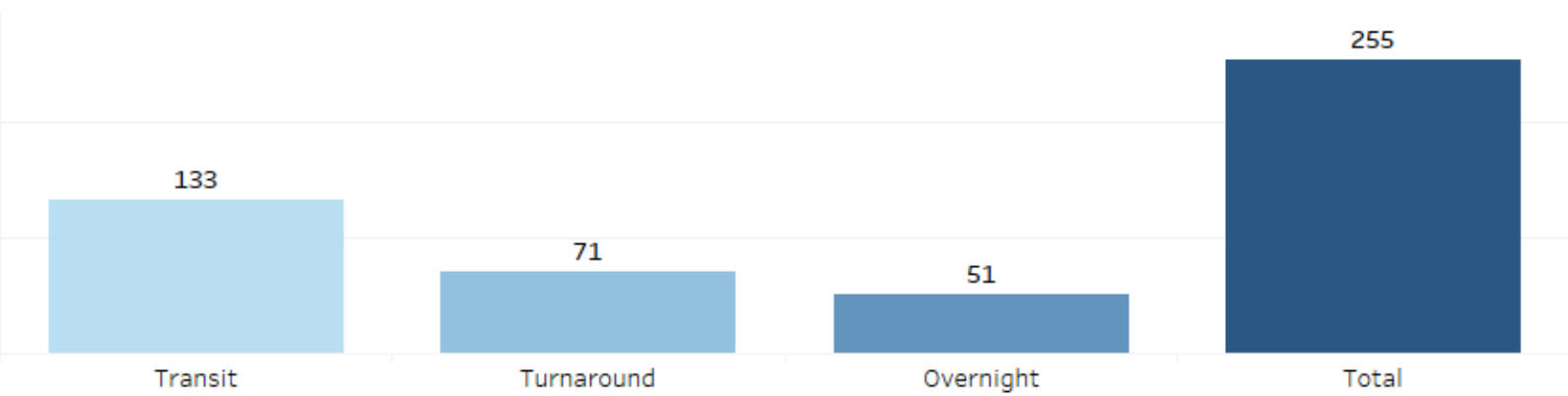
With YOY Variances, 2013-2019



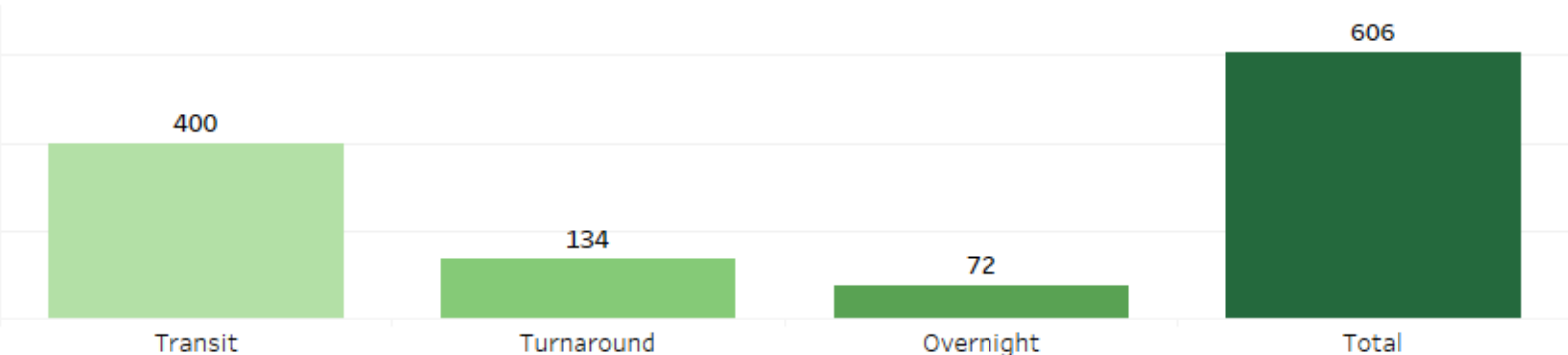
2014 vs. 2019: 5 Year CAGR & Total Growth



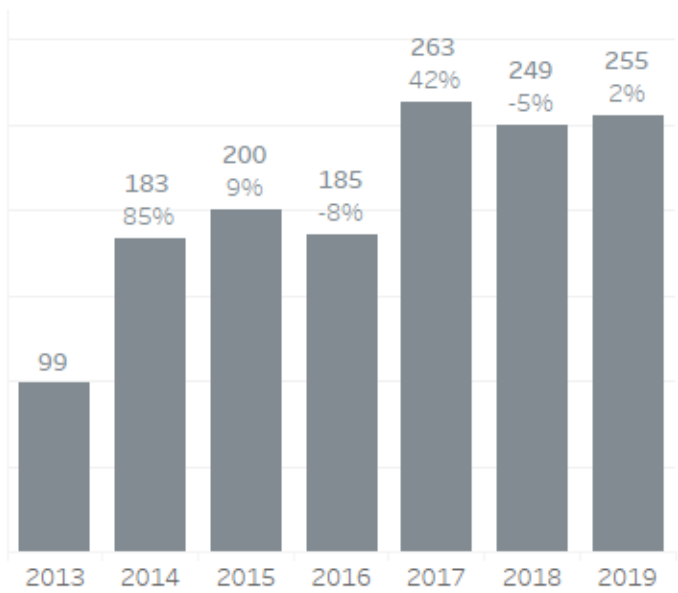
Port Calls in 2019



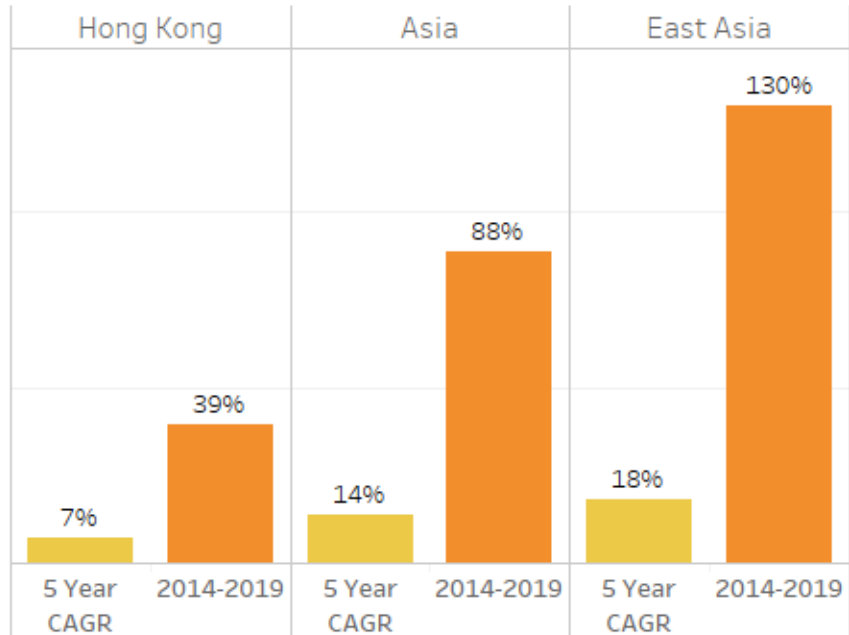
Passenger Destination Days in 2019 (K)



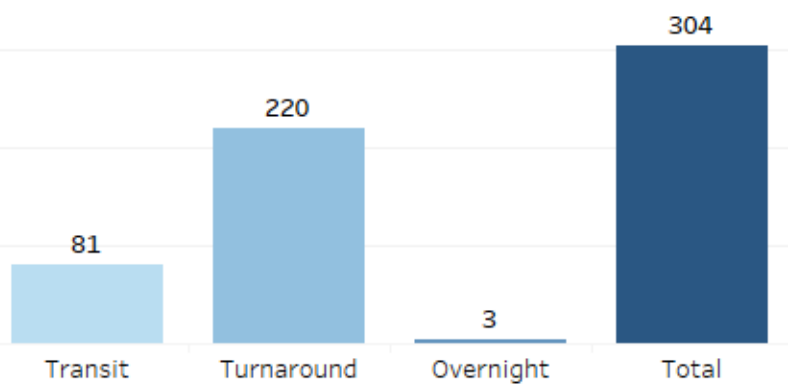
Port Calls by Year
With YOY Variances, 2013-2019



2014 vs. 2019: 5 Year CAGR & Total Growth



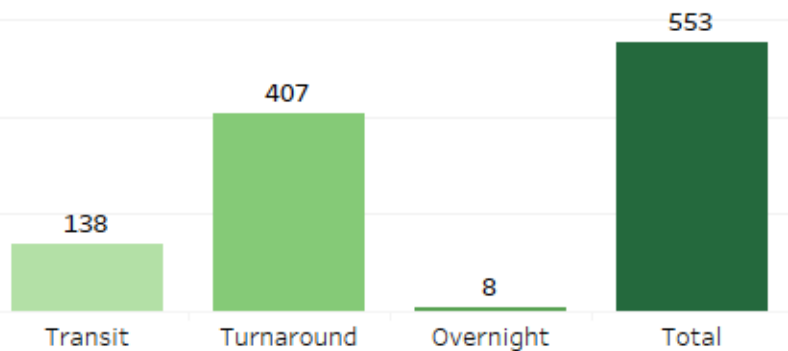
Port Calls in 2019



Taiwan Region: Top Ports 2019

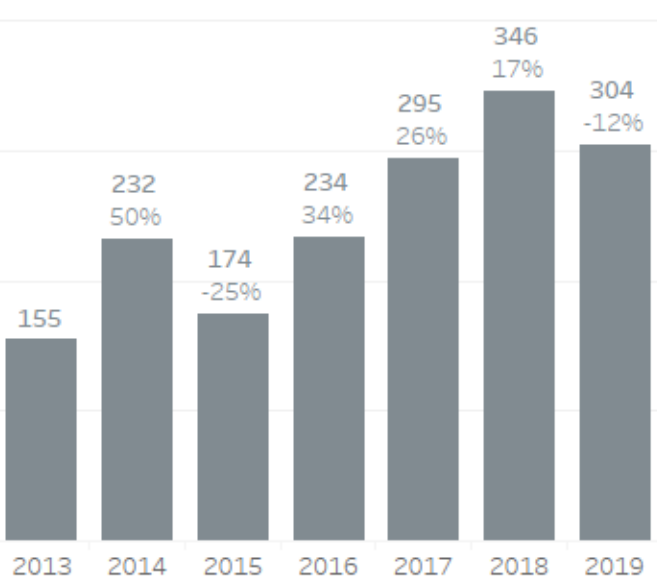
Port	Category	Value
Keelung / Taipei	Transit	61
	Turnaround	220
	Overnight	3
	Total	284
Kaoshiung	Transit	14
	Turnaround	0
	Overnight	0
	Total	14
Hualien	Transit	5
	Turnaround	0
	Overnight	0
	Total	5

Passenger Destination Days in 2019 (K)



Port Calls by Year

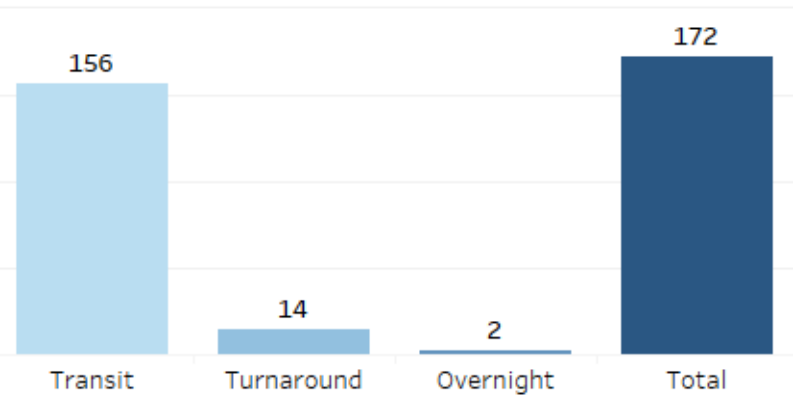
With YOY Variances, 2013-2019



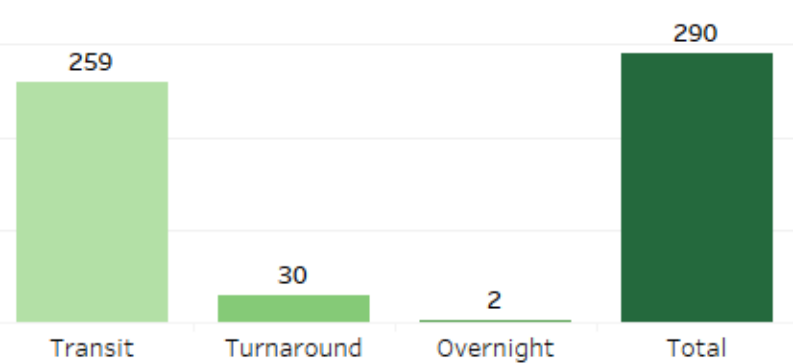
2014 vs. 2019: 5 Year CAGR & Total Growth

Region	5 Year CAGR	2014-2019 Total Growth
Taiwan	6%	31%
Asia	14%	88%
East Asia	18%	130%

Port Calls in 2019



Passenger Destination Days in 2019 (K)

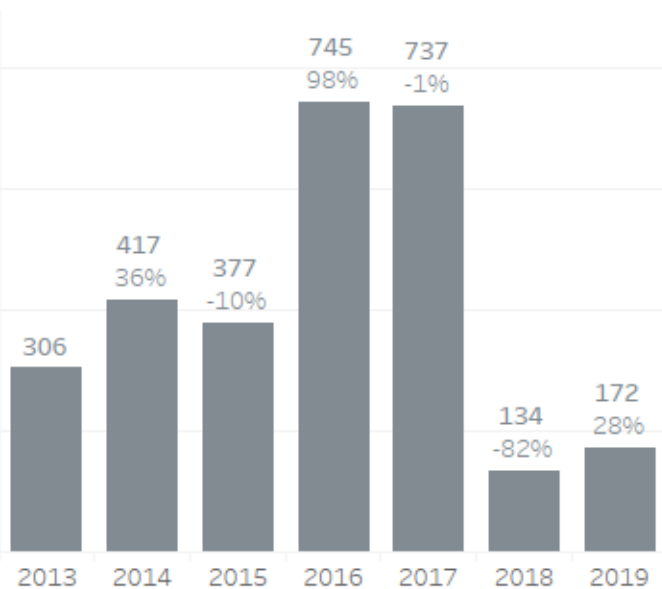


South Korea: Top Ports 2019

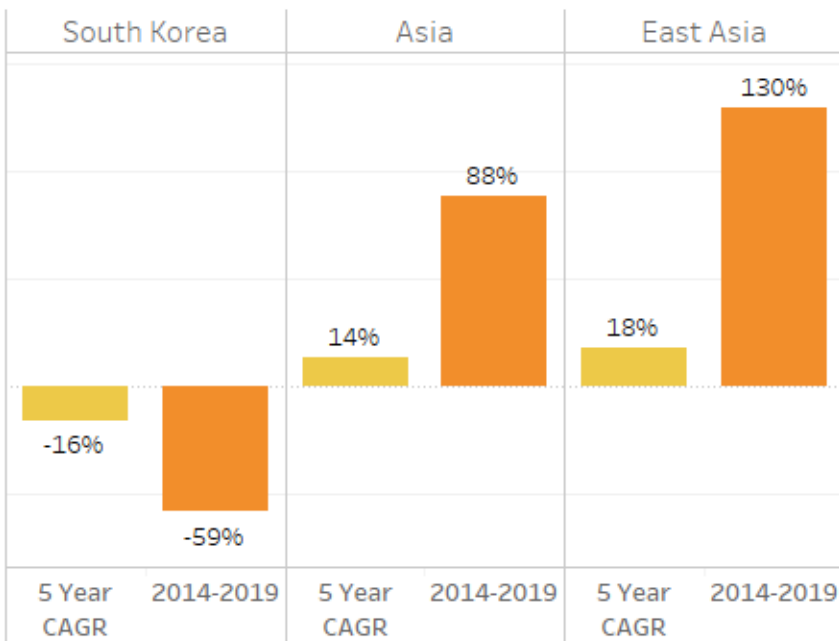
Port	Transit	Turnaround	Overnight	Total
Pusan/ Busan	101	8	1	110
Jeju Isl	28	0	1	29
Incheon/ Seoul	7	2	0	9
Ulsan	6	0	0	6
Yeosu	6	0	0	6

Port Calls by Year

With YOY Variances, 2013-2019

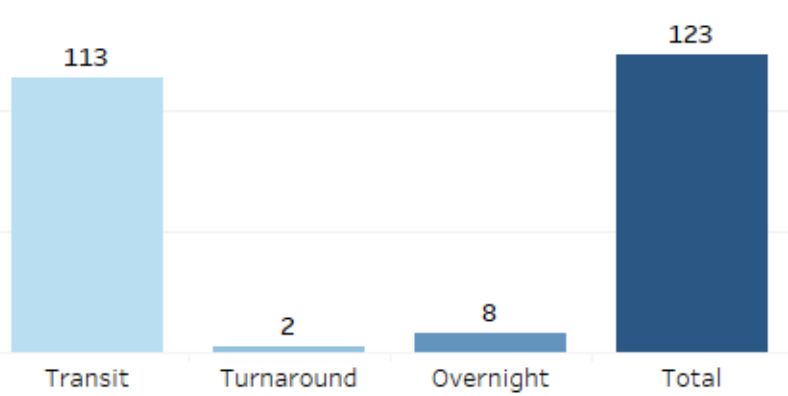


2014 vs. 2019: 5 Year CAGR & Total Growth



Note: The majority of calls scheduled to ROK after March 2017 did not take place due to the restrictions thereafter on visits by ships based in Mainland China.

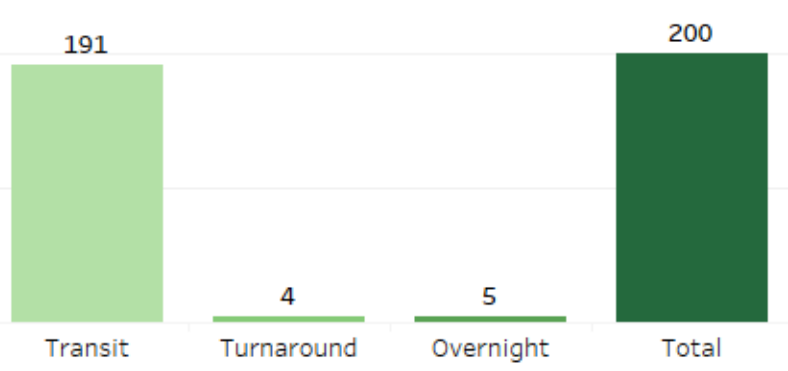
Port Calls in 2019



Philippines: Top Ports 2019

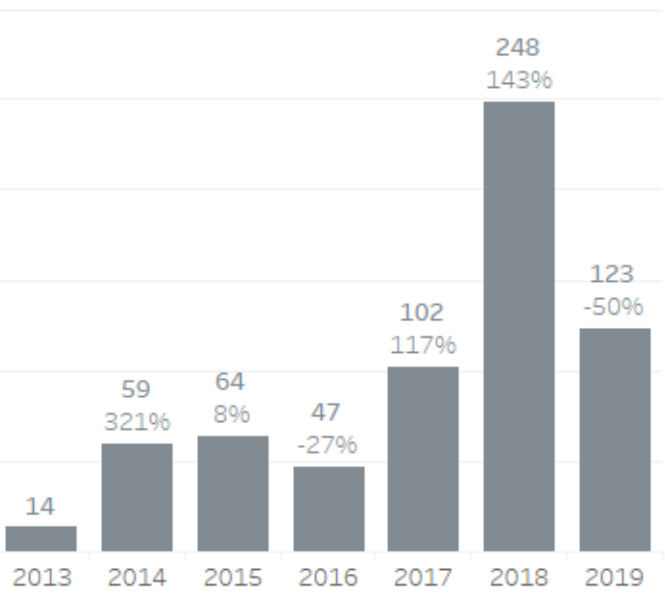
Port	Transit	Turnaround	Overnight	Total
Manila	41	2	6	49
Subic Bay	21	0	1	22
Puerto Princesa	13	0	1	14
Boracay	12	0	0	12
Coron	10	0	0	10

Passenger Destination Days in 2019 (K)

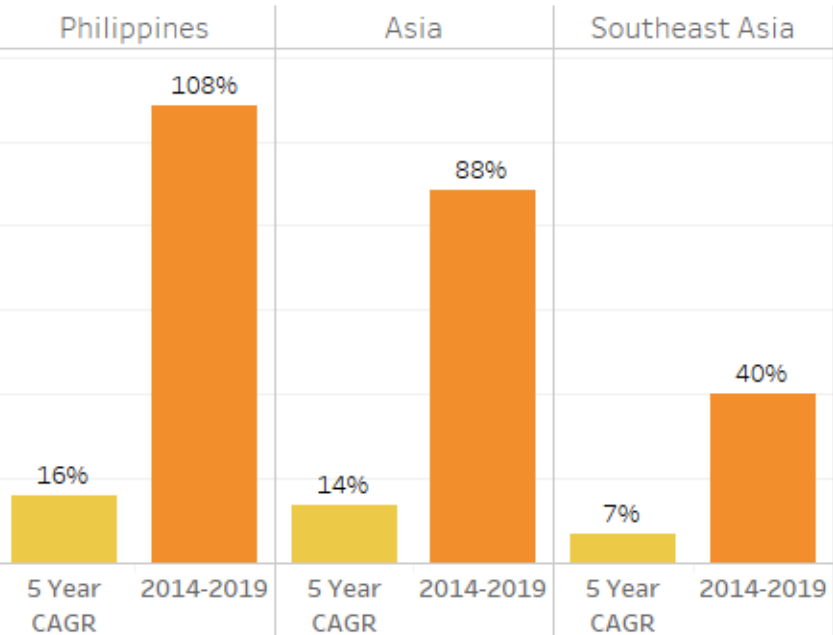


Port Calls by Year

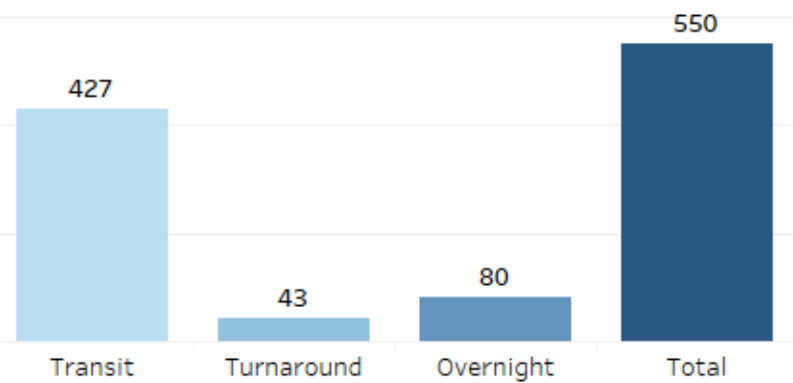
With YOY Variances, 2013-2019



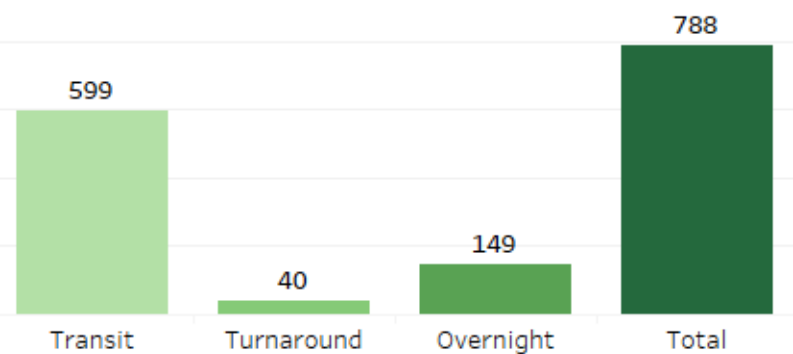
2014 vs. 2019: 5 Year CAGR & Total Growth



Port Calls in 2019



Passenger Destination Days in 2019 (K)

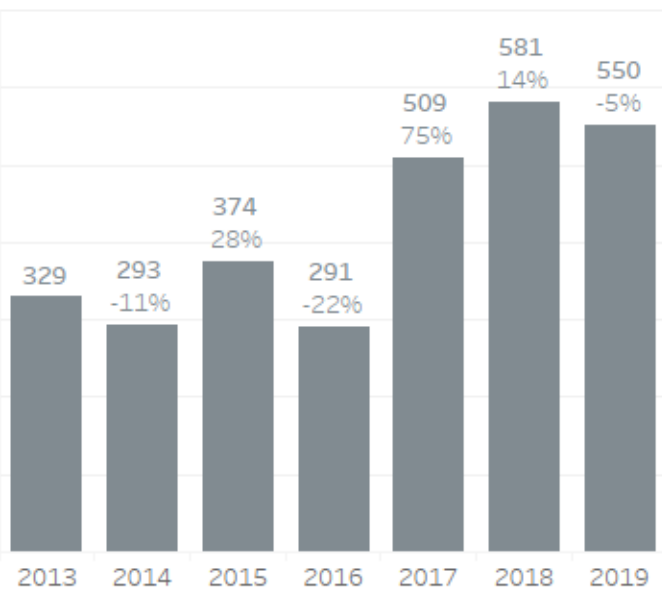


Thailand: Top Ports 2019

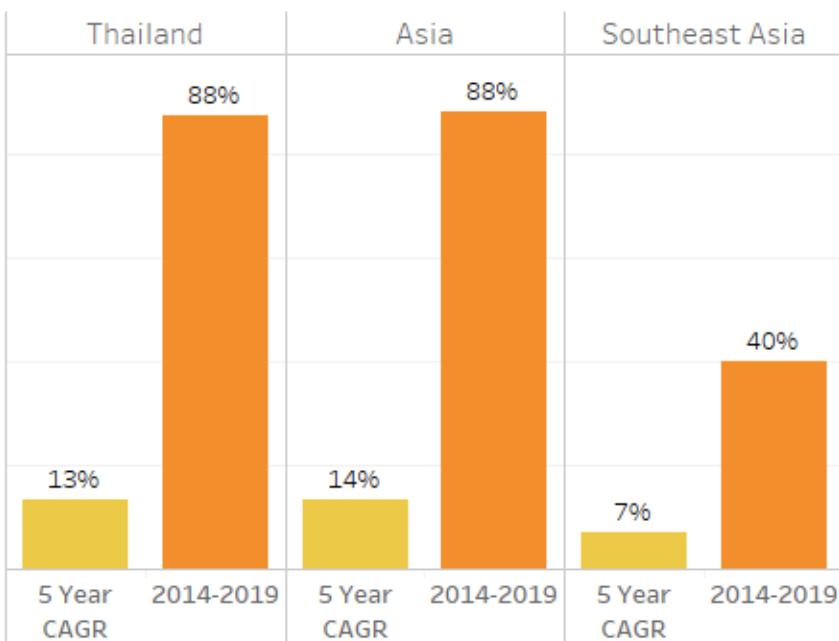
Port	Transit	Turnaround	Overnight	Total
Patong Bay / Phuket	151	22	15	188
Bangkok (Laem Chabang & Klong Toey)	61	21	65	147
Koh Samui	59	0	0	59
Phang Nga Bay	29	0	0	29
Ko Hong	28	0	0	28

Port Calls by Year

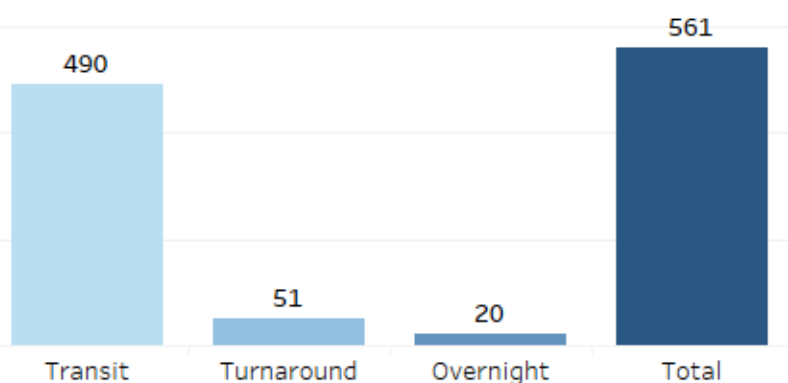
With YOY Variances, 2013-2019



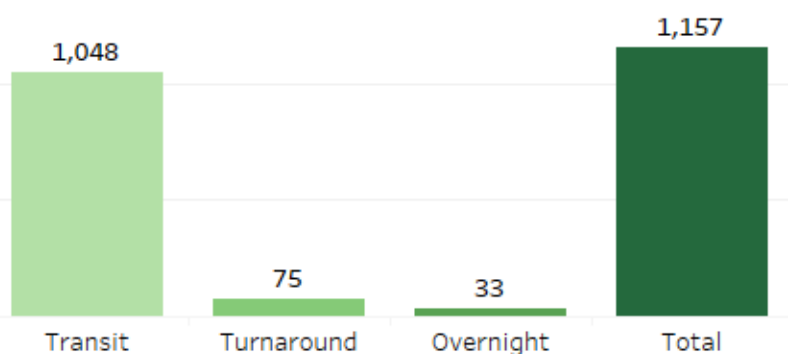
2014 vs. 2019: 5 Year CAGR & Total Growth



Port Calls in 2019



Passenger Destination Days in 2019 (K)

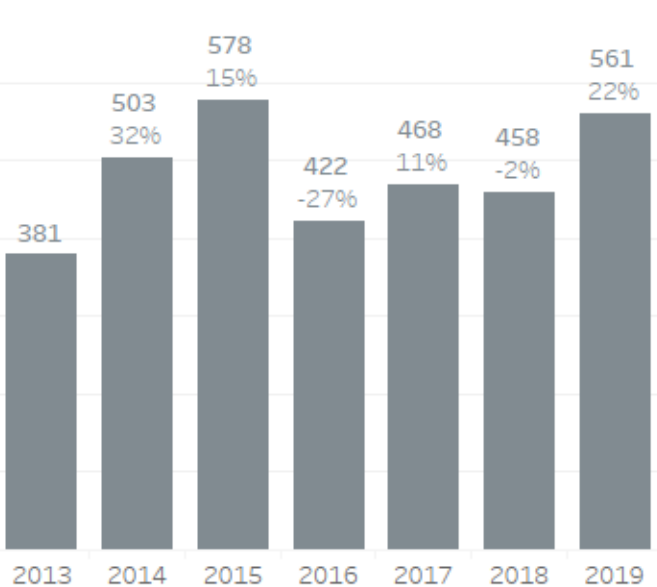


Malaysia: Top Ports 2019

Port	Transit	Turnaround	Overnight	Total
Port Klang/ Kuala Lumpur	126	43	7	176
Georgetown/ Penang	152	6	0	158
Langkawi	95	0	8	103
Malacca	62	0	0	62
Kota Kinabalu	19	2	1	22

Port Calls by Year

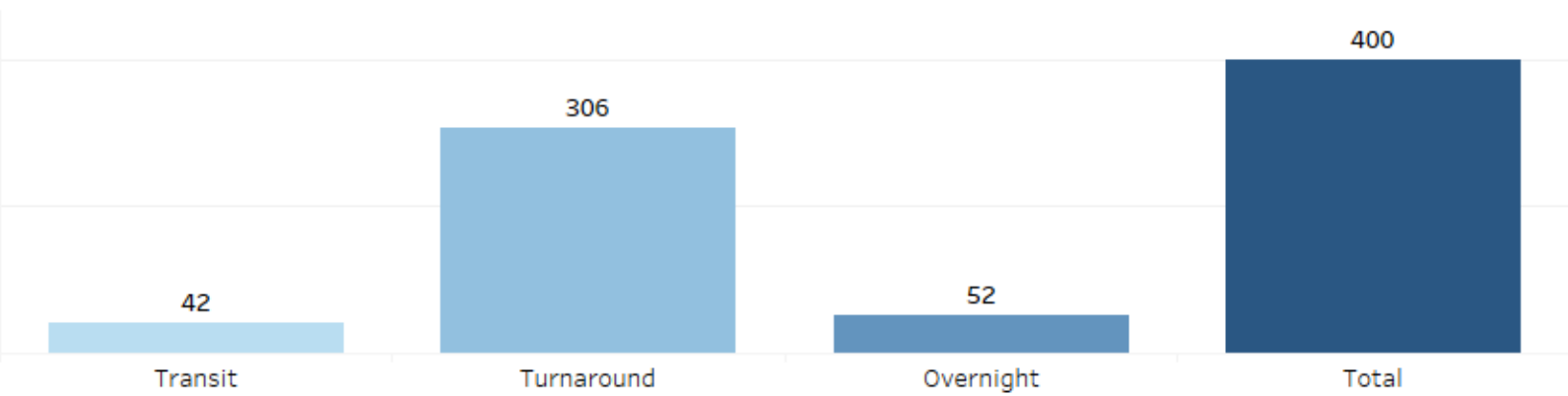
With YOY Variances, 2013-2019



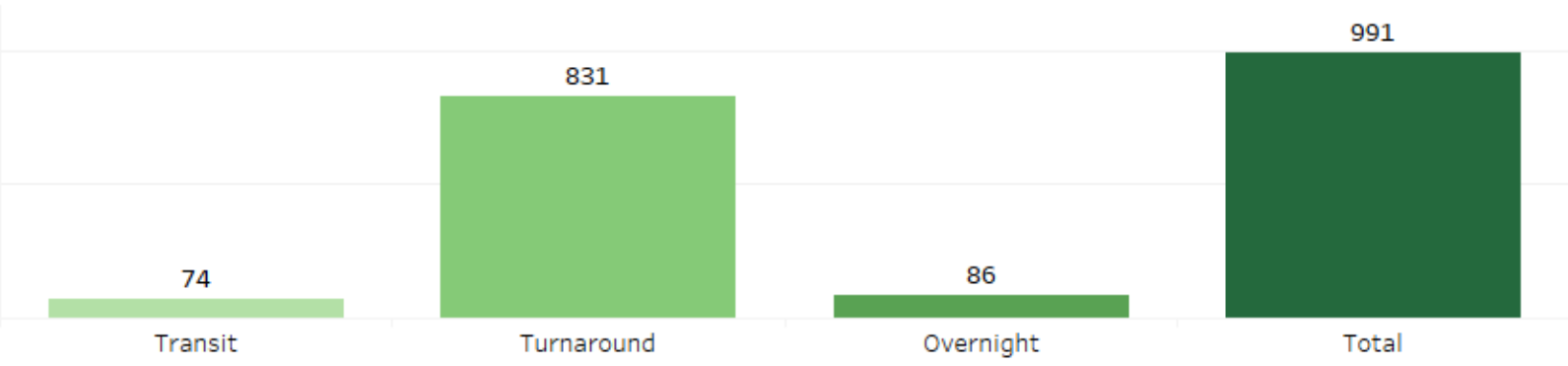
2014 vs. 2019: 5 Year CAGR & Total Growth

Region	5 Year CAGR	2014-2019 Total Growth
Malaysia	2%	12%
Asia	14%	88%
Southeast Asia	7%	40%

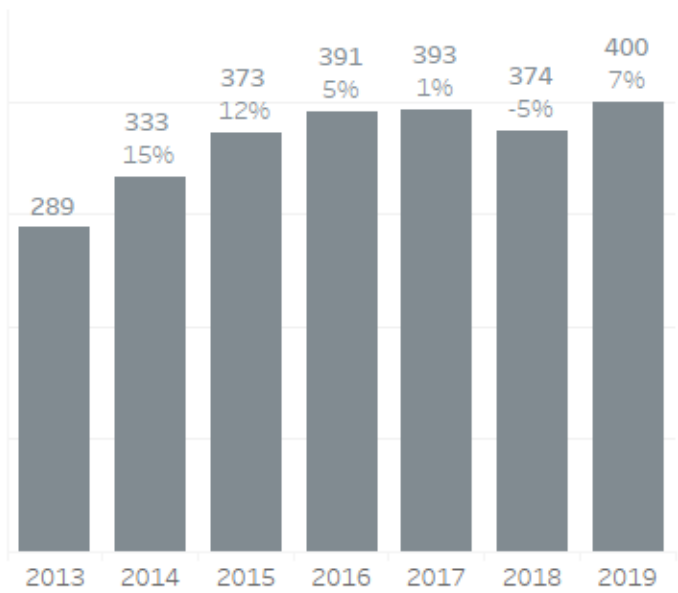
Port Calls in 2019



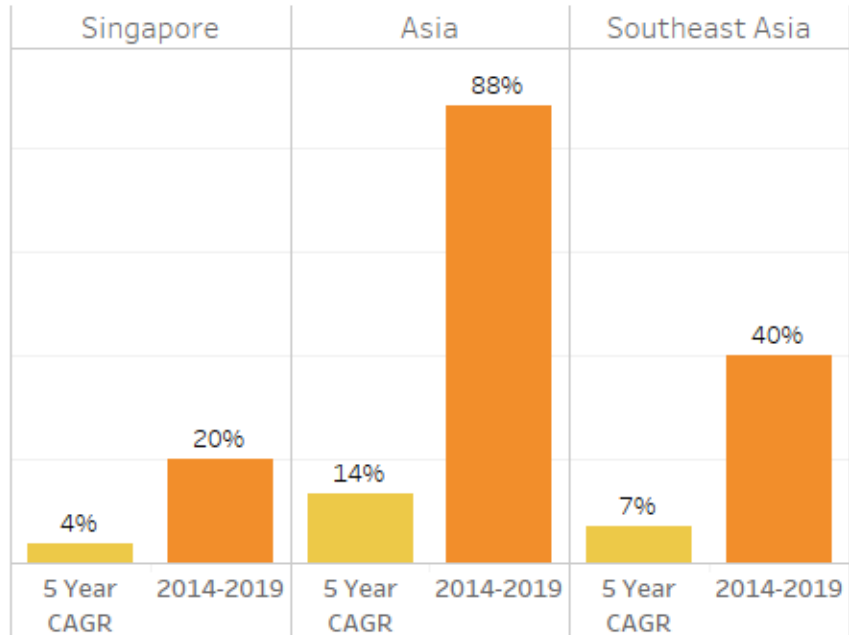
Passenger Destination Days in 2019 (K)



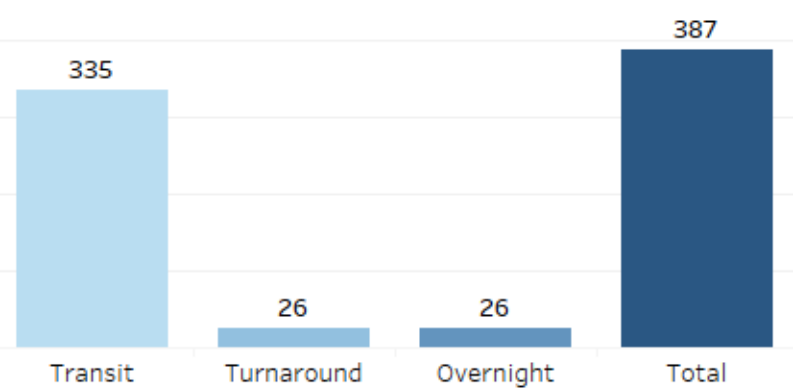
Port Calls by Year
With YOY Variances, 2013-2019



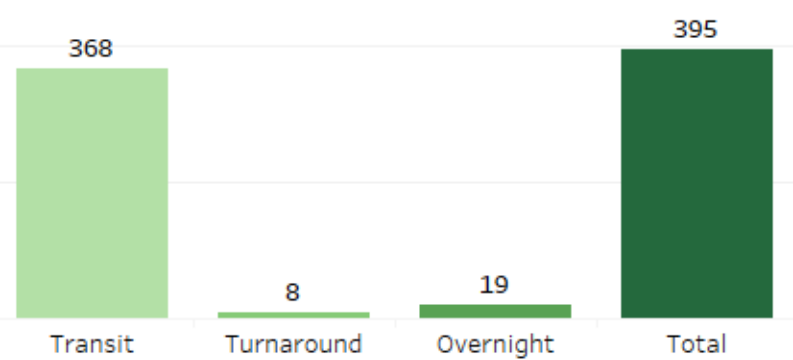
2014 vs. 2019: 5 Year CAGR & Total Growth



Port Calls in 2019



Passenger Destination Days in 2019 (K)

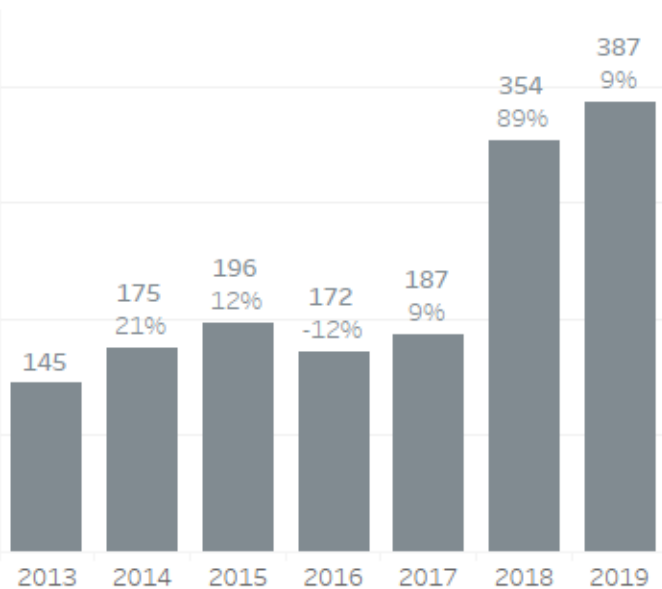


Indonesia: Top Ports 2019

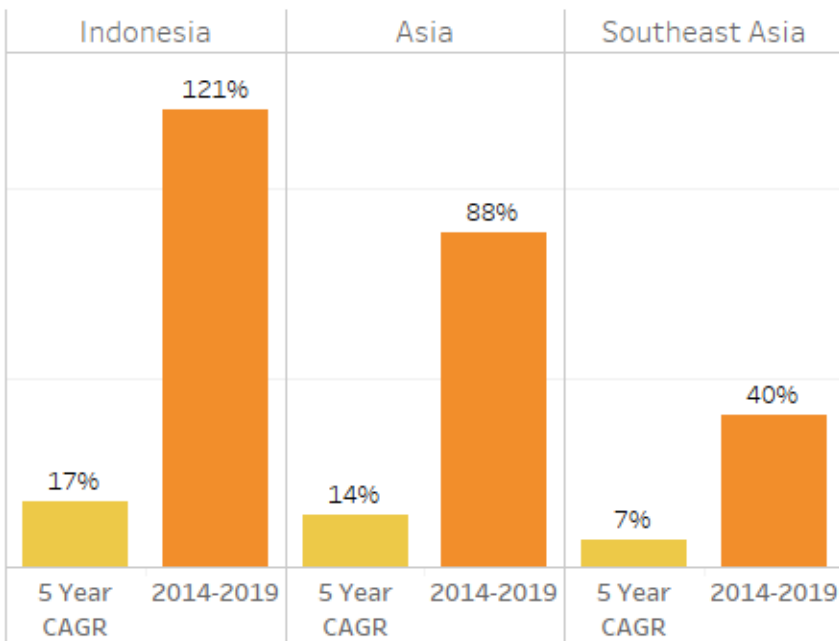
Port	Transit	Turnaround	Overnight	Total
Benoa/ Bali	28	26	16	70
Bintan	51	0	0	51
Komodo/ Slawi Bay	40	0	4	44
Lembar/ Lombok	44	0	0	44
Semerang/ Borobudur	23	0	0	23

Port Calls by Year

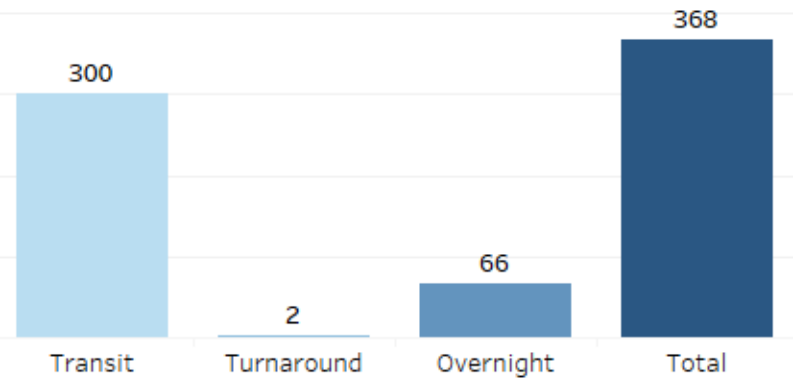
With YOY Variances, 2013-2019



2014 vs. 2019: 5 Year CAGR & Total Growth



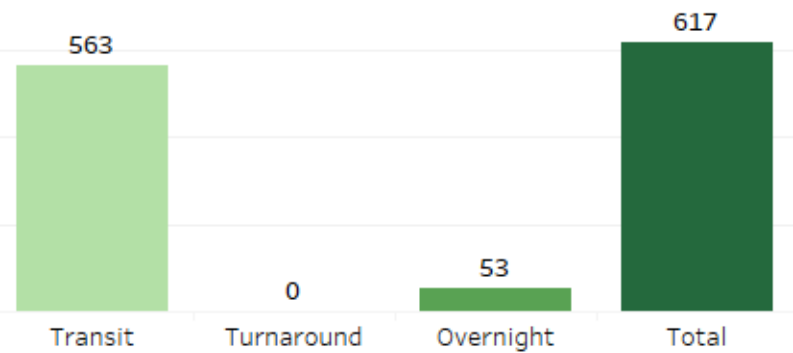
Port Calls in 2019



Vietnam: Top Ports 2019

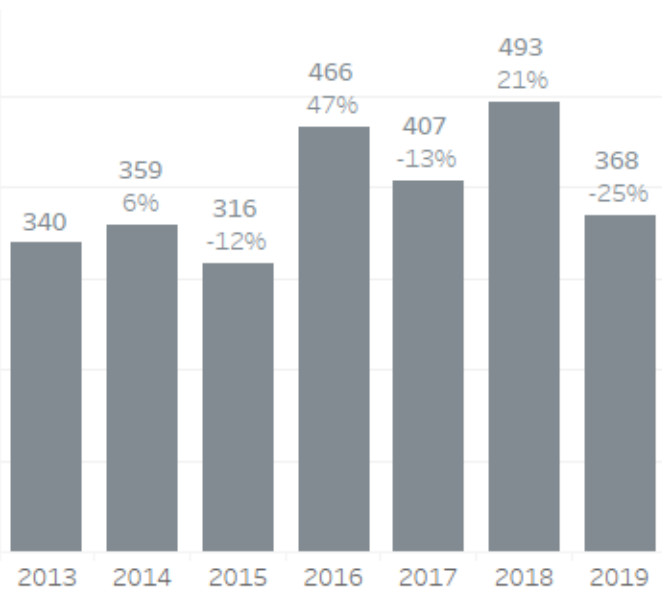
Port	Transit	Turnaround	Overnight	Total
Ho Chi Minh City/ Phu My	100	1	43	144
Da Nang/ Hue/ Chan May	106	0	10	116
Halong Bay/ Hanoi	50	0	13	63
Nha Trang	40	0	0	40

Passenger Destination Days in 2019 (K)

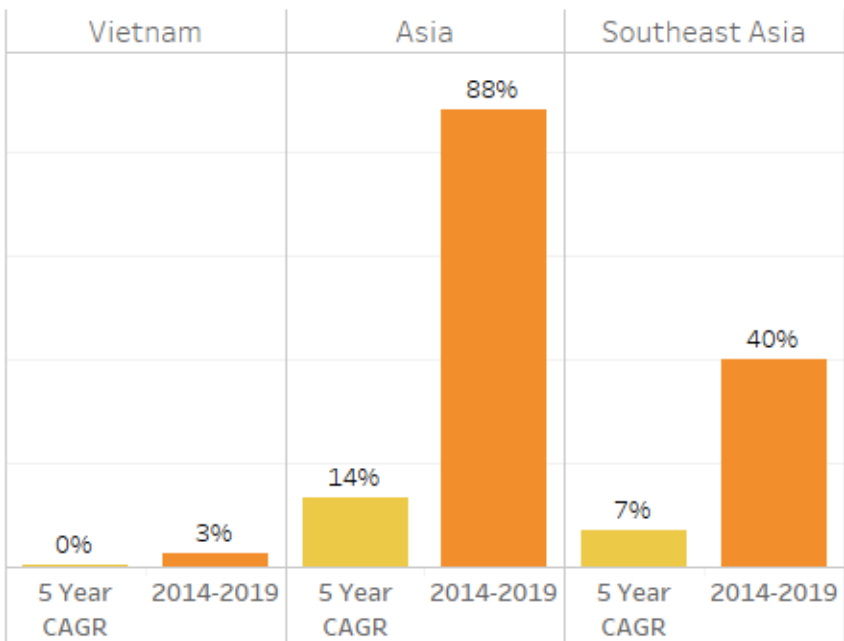


Port Calls by Year

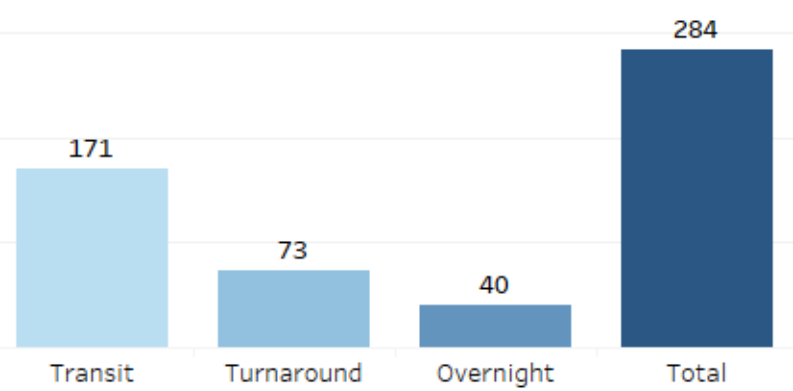
With YOY Variances, 2013-2019



2014 vs. 2019: 5 Year CAGR & Total Growth



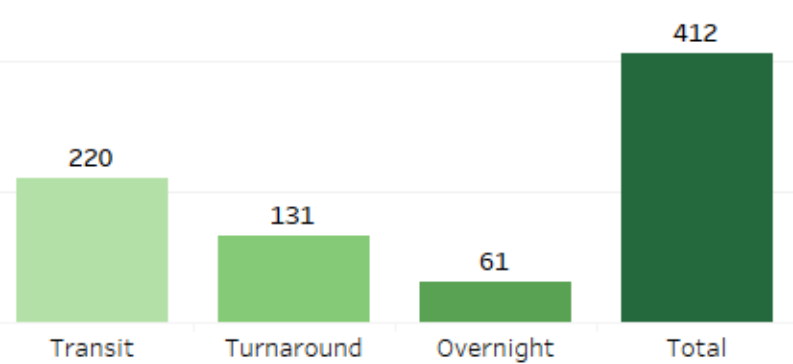
Port Calls in 2019



India: Top Ports 2019

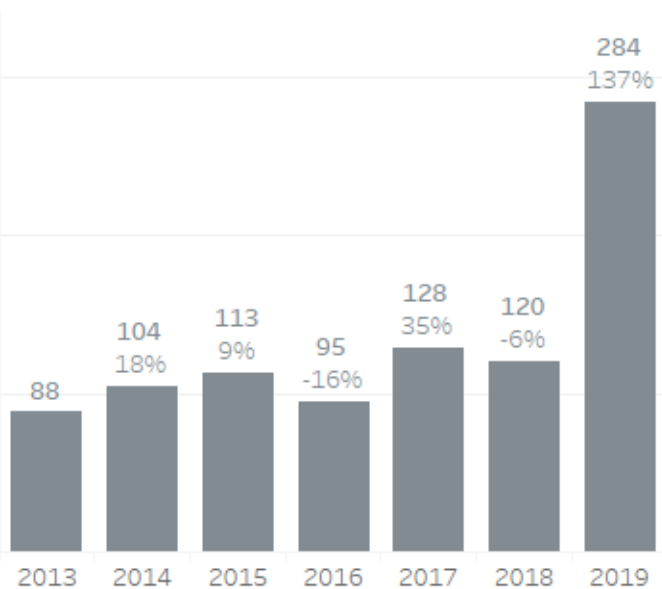
Port	Transit	Turnaround	Overnight	Total
Mormugao / Goa	66	61	19	146
Cochin	35	2	10	47
Mumbai	22	8	10	40
Mangalore	24	0	0	24
Port Blair / Andaman Is	7	0	1	8

Passenger Destination Days in 2019 (K)

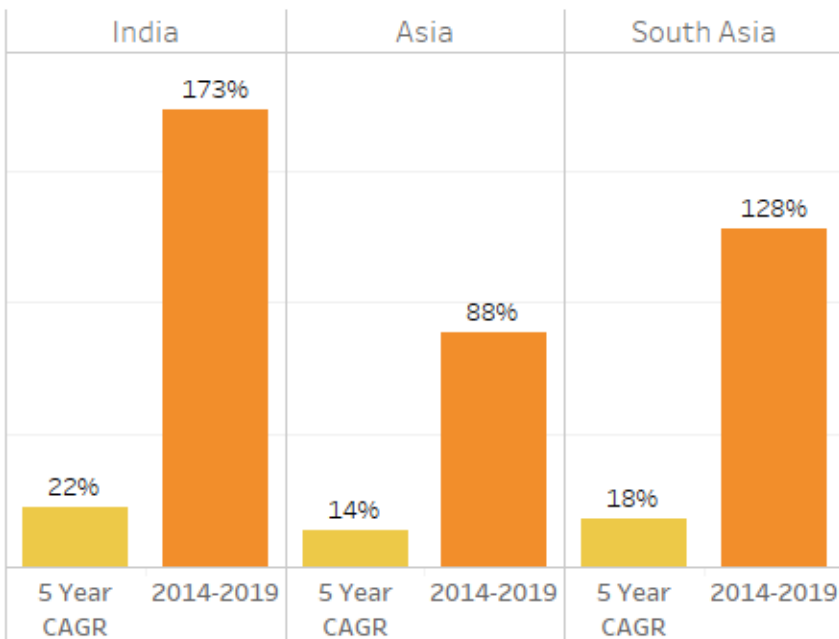


Port Calls by Year

With YOY Variances, 2013-2019



2014 vs. 2019: 5 Year CAGR & Total Growth



Destination:**Less Visited Destinations****Port Calls**

Destination	Transit	Turnarou..	Overnight	Total
Sri Lanka	146	10	19	175
Myanmar	60	3	66	129
Cambodia	105	0	7	112
Maldives	44	7	31	82
Russia	71	2	3	76
Brunei	33	0	0	33
Bangladesh	14	0	4	18
Timor	7	0	0	7
Macau Region	0	0	0	0

Destination:**Less Visited Destinations****Passenger Destination Days (K)**

Destination	Transit	Turnarou..	Overnight	Total
Cambodia	81.7	0.0	4.0	85.7
Sri Lanka	66.6	3.7	3.4	73.7
Russia	51.3	0.9	0.0	52.1
Maldives	18.6	6.4	5.1	30.1
Myanmar	10.3	0.2	13.5	24.1
Brunei	11.4	0.0	0.0	11.4
Timor	5.1	0.0	0.0	5.1
Bangladesh	1.1	0.0	0.5	1.6
Macau Region	0.0	0.0	0.0	0.0

APPENDIX

APPENDIX: METHODOLOGY

- The following report outlines capacity and destination trends between 2014 and 2019, based on CHART Management Consultant's analysis of detailed itinerary information obtained from the cruise lines that are operating in Asia. Key capacity metrics, like ship counts, cruises, operating days and passenger capacity, aggregated and analyzed. Additional destination metrics such as port calls and passenger destination days describe the deployment trends.
- The study entails a comprehensive and detailed analysis of trends in ocean cruise capacity and destinations visited among international and regional brands cruising in Asia in 2019. The cruise lines included in the study represent over 98 per cent of the capacity identified in Asia.
- Consistent with past Asia reports, all analyses and information exclude one-night cruises, river cruises, ferry or ocean cruise operators with ships under 100 passenger capacity.

Why the Asia Cruise Trends reports may differ to the figures reported by some markets/ports:

- CLIA/CHART's data is based on planned cruise itineraries for the year ahead and so presents scheduled calls by destination. Port authorities/local governments, on the other hand, report after the year has ended on actual calls. Most years the differences are minor with only a few ships making changes to deployment as the year progresses. However, for 2017, there were major differences in East Asia, principally due to Mainland China's ban after March on calls to South Korea, significantly reducing calls there and boosting calls to some other destinations, mostly in Japan. Some redeployments from East Asia also led to more calls in Southeast Asia as did the new ship launched that November.

Appendix - Port Calls by Port, 2019

Scheduled Port Calls by Port, 2019 (40 or more calls)

Rank	Destination	Port	Transit	Turnaround	Overnight	Total
1	Singapore	Singapore	42	306	52	400
2	Taiwan	Keelung / Taipei	61	220	3	284
3	China	Baoshan/ Shanghai	22	221	33	276
4	Hong Kong	Hong Kong	133	71	51	255
5	Japan	Fukuoka /Hakata	217	24	4	245
6	Japan	Naha / Okinawa	234	5	4	243
7	Japan	Yokohama / Tokyo	14	166	22	202
8	Japan	Nagasaki	195	2	1	198
9	Thailand	Patong Bay / Phuket	151	22	15	188
10	Malaysia	Port Klang/ Kuala Lumpur	126	43	7	176
11	Japan	Miyakojima / Hirara	166	0	0	166
12	China	Tianjin / Xingang / Beijing	15	129	17	161
13	Malaysia	Georgetown/ Penang	152	6	0	158
14	Japan	Ishigaki	155	0	1	156
15	Thailand	Bangkok (Laem Chabang & Klong Toey)	61	21	65	147
16	India	Mormugao / Goa	66	61	19	146
17	Vietnam	Ho Chi Minh City / Phu My	100	1	43	144
18	China	Xiamen	6	119	4	129
19	Japan	Kobe	52	50	19	121
20	Vietnam	Da Nang / Hue / Chan May	106	0	10	116
21	Japan	Kagoshima	107	2	1	110
22	South Korea	Pusan/ Busan	101	8	1	110
23	Malaysia	Langkawi	95	0	8	103
24	China	Guangzhou / Nansha	0	98	0	98
25	Japan	Sasebo	86	1	1	88
26	Japan	Osaka / Sakai	64	5	11	80
27	Indonesia	Benoa/ Bali	28	26	16	70
28	Japan	Hiroshima	56	5	8	69
29	China	Shenzhen / Shekou	1	63	0	64
30	Vietnam	Halong Bay / Hanoi	50	0	13	63
31	Malaysia	Malacca	62	0	0	62
32	Thailand	Koh Samui	59	0	0	59
33	Japan	Hakodate	48	7	1	56
34	Japan	Yonaguni	55	0	0	55
35	Cambodia	Sihanoukville	48	0	4	52
36	Japan	Kanazawa	45	4	2	51
37	Indonesia	Bintan	51	0	0	51
38	Japan	Shimizu	41	3	6	50
39	Japan	Sakaiminato	47	1	1	49
40	Philippines	Manila	41	2	6	49
41	Sri Lanka	Colombo	38	4	7	49
42	India	Cochin	35	2	10	47
43	Japan	Nakagusuku / Okinawa	46	0	0	46
44	Indonesia	Komodo / Slawi Bay	40	0	4	44
45	Indonesia	Lembar / Lombok	44	0	0	44
46	Vietnam	Nha Trang	40	0	0	40
47	India	Mumbai	22	8	10	40
48	Myanmar	Yangon (Rangoon)	11	2	27	40

Cruises: Encompass deployment within Asia only. Our definition of a Cruise is a one that both begins and ends in an Asian port and includes only Asian ports in its itinerary. A Round-trip cruise returns to its port of embarkation while an Open-jaw cruise (fly-cruise) begins in one Asian port and finishes in another.

East Asia: Geography that includes Mainland China, Hong Kong, Taiwan, South Korea, Japan and East Russia.

Ocean cruise: A cruise itinerary that sails to destinations via the ocean; itineraries last two or more nights.

Operating Days: Days spent cruising (on both voyages and cruises) in Asian waters.

Overnight Port Call: An *overnight* call occurs when the vessel departs at least one day after arriving in port. Overnight calls may be added to a transit call or added to a turnaround call. For example, a vessel arriving in Bangkok on 21 May and departing on 23 May is counted as making one transit call (21/5) and two overnight calls (21 and 22/5). A vessel arriving in Hong Kong on 21 May and departing with a different cruise number on 22 May is considered to have had one turnaround and one overnight call. Note that, in our treatment, an overnight does not exist independently of one or the other calls.

Passenger Capacity: The number of lower berths multiplied by the number of cruises for each vessel. [Example: Voyager of the Seas' 3,114 lower berths on the 62 cruises it operates in 2018 results in passenger capacity of 193,068]

Passenger Destination Days (PDD): A measure of potential visits from cruise passengers when a ship calls at a destination. It assumes 100% lower berth occupancy and that all passengers have the opportunity to go ashore. [Example: A ship of 1,000 capacity calling at a destination for one day creates a potential of 1,000 PDD. So, if that ship visits three ports on one cruise, it generates 3,000 PDD].

Port Calls: Asia Cruise Trends studies consistently report on PLANNED deployment at the beginning of each year, the source being the detailed day-by-day itineraries prepared by all cruise operators for each of their cruise ships in Asia. Occasionally operators will make adjustments to their itineraries as the year progresses. In such cases their actual calls will differ from planned call volumes in certain destinations. The difference in industry-wide figures is usually small. But in 2017 the restriction on cruises from Mainland China to Korea after March required many changes in East Asia (dramatically reducing port calls to Korea and boosting those to Japan).

Product Segments:

Contemporary & Premium : Mostly large ships that offer predominantly short – 3,4,5-night – cruises as well as some 7-night and longer

Upscale: Distinguished by more spacious, refined on-board accommodation, superior dining, a more discrete service and higher prices.

Luxury: The Luxury lines are another step above the Upscale in on-board comforts, product inclusions and price-point. Their ships typically carry few passengers and have very high staff-to-guest ratios. They also typically operate longer cruises – such as 12 nights.

Expedition: Very small ships (100 to 300 passengers) offering immersion in remote destinations, usually with a high standard of service and accommodation.

Ship size categories:

Since the 2013 Asia Cruise White Paper, CHART has been defining ships by size as follows:

Mega Ships: Lower berth capacity of 3,500 or more - OR GRT over 150,000

Large Ships: Lower berth capacity of 2,000 to 3,500 - AND GRT over 75,000

Midsized Ships: Lower berth capacity of 750 to 2,000 passengers

Small Ships: Lower berth capacity under 750 passengers

Expedition Ships: Lower berth capacity typically 100 to 300 passengers

South Asia: Geography that includes India, Myanmar/Burma, Bangladesh, Sri Lanka and the Maldives

Southeast Asia: Geography that includes Singapore, Malaysia, Indonesia, Brunei, Philippines, Thailand, Cambodia, Vietnam, and Timor-Leste.

Transit Port Call: A *transit* call applies to all ships that have the arrival and departure scheduled on the same day. The same passenger load arrives and departs on a transit call.

Turnaround Port Call: A *turnaround* call occurs when the vessel arrives under one cruise number and departs with a different cruise number. This would generally involve all passengers on board disembarking and a new passenger load embarking. Turnarounds mark the end of one cruise and the start of the next. Passengers typically do not have the opportunity to sight-see or shop, take shore excursions or tour on a turnaround unless they opt to arrive in the port city early or stay over for an additional night or nights. The ship usually takes on fuel, fresh water, provisions, etc.

Passengers and their baggage have to be disembarked and go through customs and immigration procedures, take transfers to the airport (or hotels). The new passenger complement has to be embarked.

[Note that in Asia some ships are taking passengers on board in consecutive ports on the one cruise – e.g. Shenzhen and Hong Kong. In this case the first port is counted as turnaround, the second as transit].

Voyages: Itineraries that include ports of call outside the regions of Asia. Voyages are typically longer than cruises. Voyages often involve the seasonal positioning of a vessel from Europe, America or Australia to an Asian port from where it will offer a series of cruises (or from Asia back to one of those cruising areas). Other voyages include vessels on round world or other long trips, calling at Asian ports as part of the journey.

Commissioned by: CLIA

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

For more information about CLIA and the Cruise Industry, visit www.cliaasia.org

Research and Analysis by: CHART Management Consultants

CHART assists senior management to understand complex issues, to develop strategic solutions to problems and to devise innovative approaches to capitalizing on the growth of the cruise industry. The firm brings unique experience, analytical rigor, strong communication and implementation skills and exceptional client service to every project. In recent years the firm's focus is mostly to Asia and the Pacific. The firm created the highly successful strategy for Papua New Guinea, the National Cruise Tourism Strategy for the Philippines, the Pacific Cruise Market Research and Intelligence project and a Development Strategy for SPTO. CHART's recent analyses and strategic advice for cruise projects in Asia include: a new port development in China; financing newbuilds for Asia; private investment in a new Asian cruise operation. The firm designed and delivered the 2013 Asia Cruise Association White Paper as well as all Asia Cruise Trends reports and this 2019 Asia Cruise Capacity Report.

For more information: www.CHARTmgmtconsultants.com

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