2022 Asia Market Report

The resilience of cruise was at the forefront in 2022, as the industry continued to rebound from the voluntary pause in operations that occurred in March 2020, followed by the responsible resumption of operations over the past two years. By the end of 2022, 100% of CLIA cruise line members' ocean-going vessels were back in the water, and more than 20 million passengers enjoyed a cruise holiday with family and friends, while enjoying the best vacation there is.

Throughout the year, intent to cruise continued to rise – surpassing 2019 levels – and cruise ships were once again bringing full ships to ports around the world and positively contributing to their local economies.

Despite the challenges of the past few years, our cruise line members continued to drive an ambitious environmental agenda, and with each year, the CLIA-member cruise line fleet becomes more efficient and sustainable. CLIA cruise lines are committed to sailing toward a better future, and as part of that effort are pursuing the goal of net zero carbon cruising by 2050, supporting the long-term sustainability of the industry and creating positive travel experiences that inspire lifelong cruise travelers and generations of new-to-cruise travelers to sail responsibly.

However, as this report will show, Asia, and especially East Asia, has been slower to recover than the other major cruising regions of the world mainly due to deployment/capacity and its effect on local source markets.

Regional Overview: **Asia**

Passenger Volume (K)

2019	2020	2021	2022
3,738	497 (-86.7% ▼)	626 (26.0% ▲)	791 (26.3% ▲)

Average Duration, in Days

2019	2020	2021	2022
4.2	3.9	3.0	3.8

Average Age

2019	2020	2021	2022
46.2	46.3	35.4	39.2

Passenger Volume (K) from Top Source Markets (Ranked by 2022)

	2019	2020	2021	2022
Singapore	325	72 (-78.0% ▼)	360 (403.1% ▲)	425 (17.8% ▲)
India	313	46 (-85.4% ▼)	123 (168.0% ▲)	201 (63.8% ▲)
Malaysia	121	13 (-88.9% ▼)	25 (83.1% ▲)	74 (202.5% ▲)
Japan	296	19 (-93.7% ▼)	12 (-37.8% ▼)	42 (263.7% ▲)
Indonesia	62	9 (-85.2% ▼)	0 (-98.8% ▼)	16 (14596.3% ▲)
Philippines	29	2 (-92.4% ▼)	0 (-82.9% ▼)	7 (1803.9% ▲)
Thailand	20	2 (-90.7% ▼)	0 (-94.5% ▼)	6 (5666.3% ▲)
South Korea	49	6 (-86.7% ▼)	0 (-98.0% ▼)	6 (4459.8% ▲)
Hong Kong SAR	191	36 (-81.2% ▼)	77 (113.2% ▲)	4 (-94.3% ▼)
Vietnam	7	1 (-82.6% ▼)	0 (-96.3% ▼)	3 (6956.8% ▲)
Mainland China	1,919	205 (-89.3% ▼)	6 (-97.1% ▼)	2 (-72.4% ▼)
Taiwan Region	389	83 (-78.8% ▼)	23 (-71.9% ▼)	1 (-94.8% ▼)

Passenger Share from Top Asian Source Markets

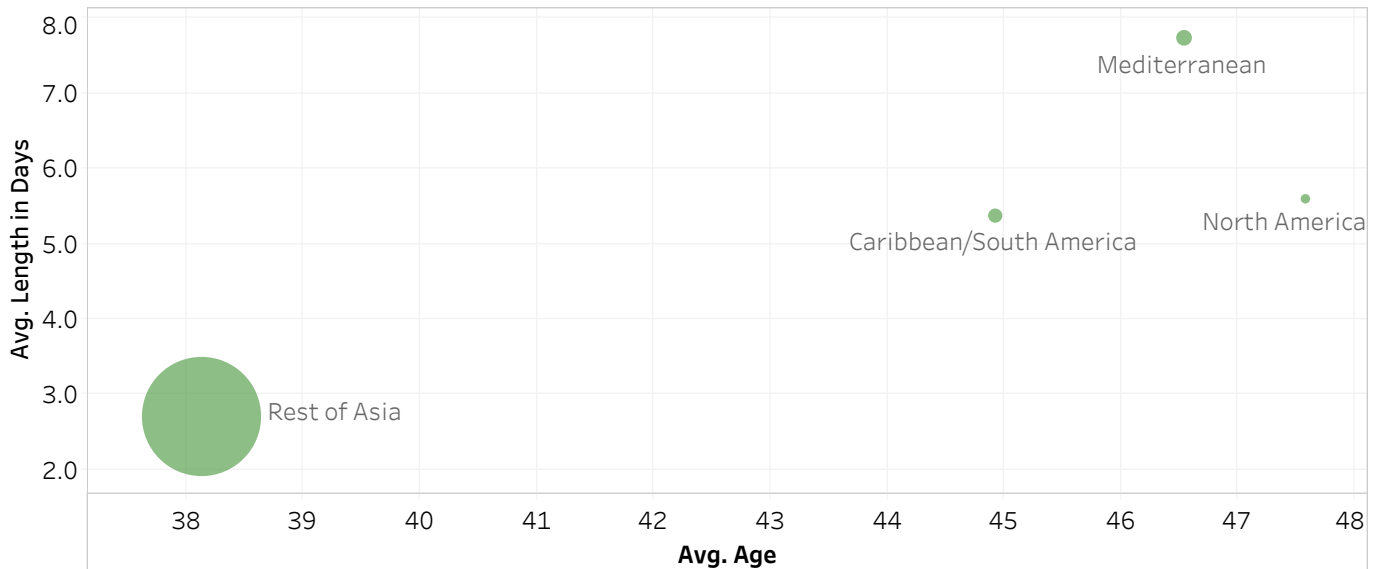|	2019	2020	2021	2022
Singapore	8.7%	14.5%	57.6%	53.9%
India	8.4%	9.3%	19.6%	25.5%
Malaysia	3.2%	2.7%	3.9%	9.5%
Japan	8.0%	3.8%	1.9%	5.4%
Indonesia	1.7%	1.9%	0.0%	2.0%
Philippines	0.8%	0.5%	0.1%	0.9%
Thailand	0.5%	0.4%	0.0%	0.7%
South Korea	1.3%	1.3%	0.0%	0.7%
Hong Kong SAR	5.1%	7.3%	12.2%	0.5%
Vietnam	0.2%	0.2%	0.0%	0.4%
Mainland China	51.6%	41.5%	1.0%	0.2%
Taiwan Region	10.5%	16.7%	3.7%	0.2%

Average Age and Cruise Length from Top Source Markets, 2022
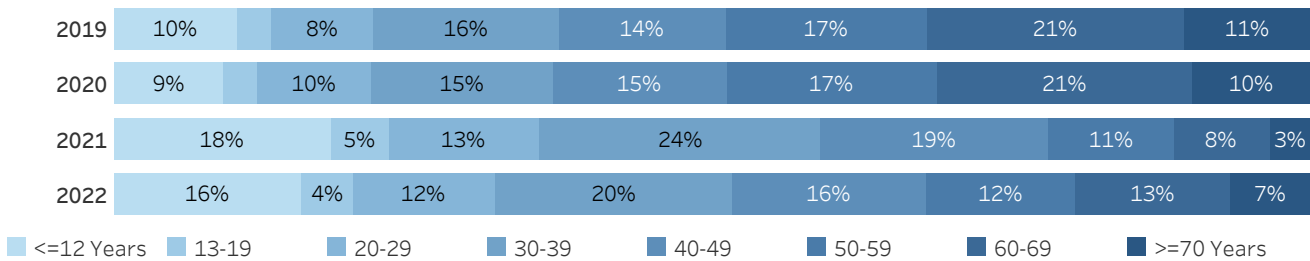Bubble size indicates relative passenger volume
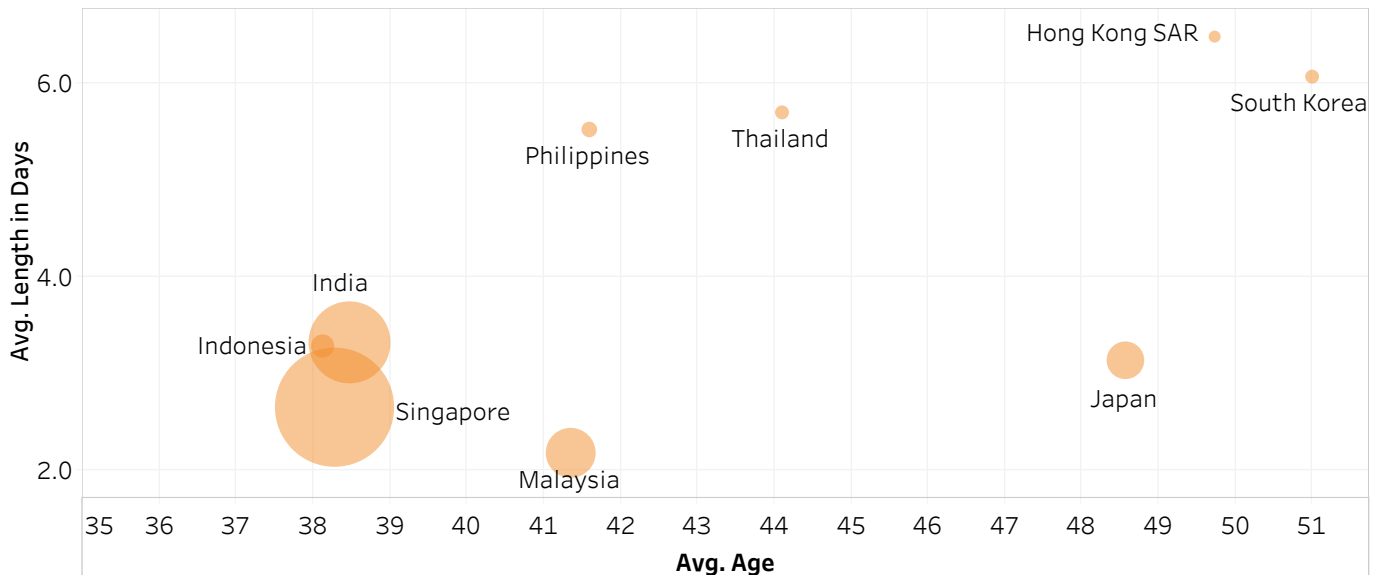
Regional Overview: **Asia** (Continued)

Average Age and Cruise Length by Destination / Trade Route, 2022

Average Passenger Age Groups

2019	10%	8%	16%	14%	17%	21%	11%	
2020	9%	10%	15%	15%	17%	21%	10%	
2021	18%	5%	13%	24%	19%	11%	8%	3%
2022	16%	4%	12%	20%	16%	12%	13%	7%

■ <=12 Years ■ 13-19 ■ 20-29 ■ 30-39 ■ 40-49 ■ 50-59 ■ 60-69 ■ >=70 Years

Average Cruise Duration

2019	34%	55%	6%	4%
2020	44%	46%	7%	
2021	78%	21%		
2022	63%	33%		

■ Up to 3 Days ■ 4-6 Days ■ 7 Days ■ 8-13 Days ■ 14 Days ■ 15-20 Days ■ 21 Days Plus
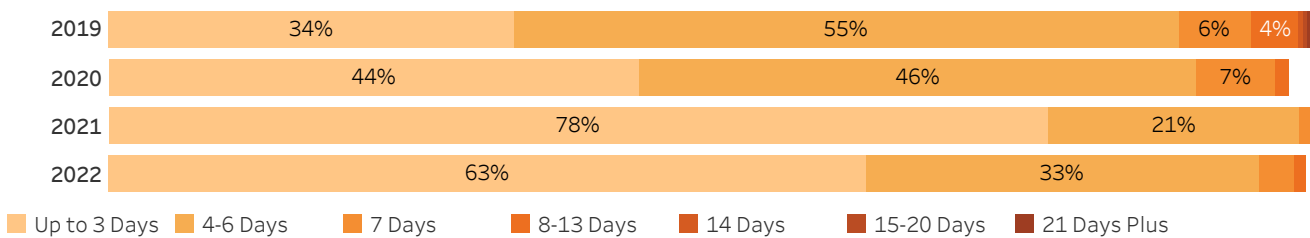
Volume of Passengers (K) by Destination/ Trade Route, 2022
At least 4K Passengers per Destination

Regional Overview: **Asia** (Continued)

Passenger Volume (K) by Destination/Trade Route

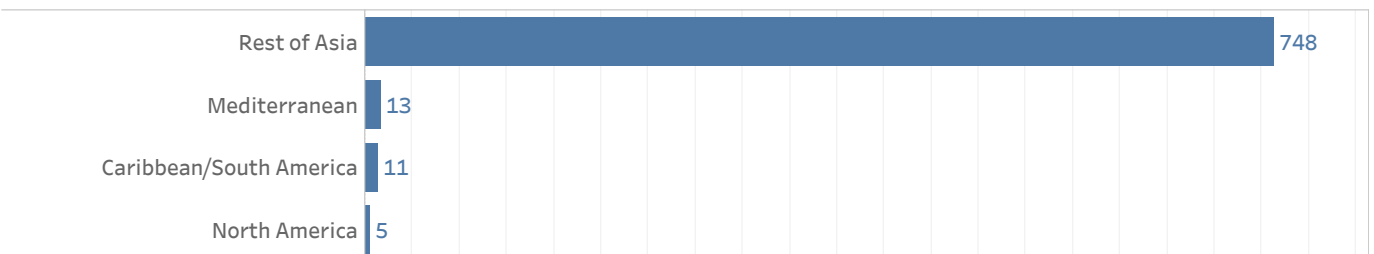|	2019	2020	2021	2022
Rest of Asia	1,571	194 (-88% ▼)	519 (167% ▲)	748 (44% ▲)
Mediterranean	89	6 (-93% ▼)	(-100% ▼)	13
Caribbean/South America	48	8 (-84% ▼)	(-100% ▼)	11
North America	10	(-100% ▼)		5
Other	18	9 (-48% ▼)	(-100% ▼)	
Mainland China, Hong Kong, Taiwan	1,904	269 (-86% ▼)	106 (-61% ▼)	(-100% ▼)
Expedition Destinations	11	(-100% ▼)		
Baltics/Northern Europe	22	(-100% ▼)		
Australia/NZ/Pacific	14	6 (-60% ▼)	(-100% ▼)	
Alaska	25	(-100% ▼)		
Africa/Mid-East/World Cruise/Transatlantic	21	(-100% ▼)		

Passenger Volume (K) by Destination/Trade Route with Source Market Share

Each row represents the volume to the listed destination; color represents source market
(Not showing data points for source markets below 2K)

Rest of Asia	421 K; 56% 187 K; 25% 73 K; 10%
Caribbean/South ..	4 K; 41%

Legend:
- Singapore
- India
- Japan
- Malaysia
- Indonesia
- Philippines
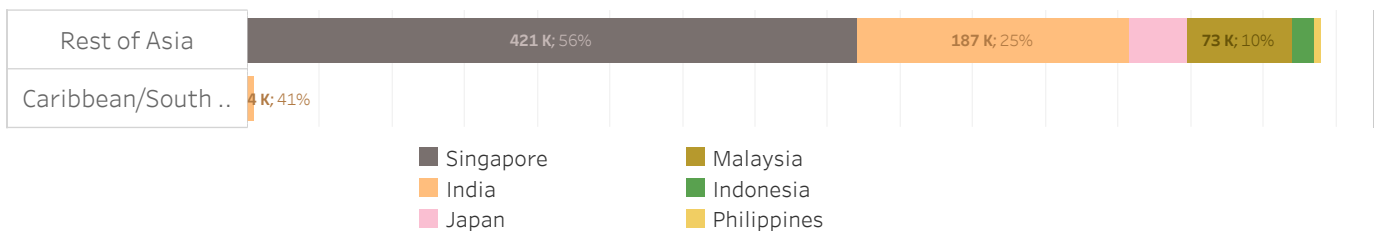
Passenger Volume (K) by Quarter with Source Market Share

Each row represents the volume by quarter; color represents source market
(Not showing data points for source markets below 2K)

Q1	44 K; 92%
Q2	63 K; 79% 12 K; 15%
Q3	56 K; 60% 15 K; 16% 13 K; 14%
Q4	76 K; 64% 12 K; 10% 9 K; 8% 12 K; 10%
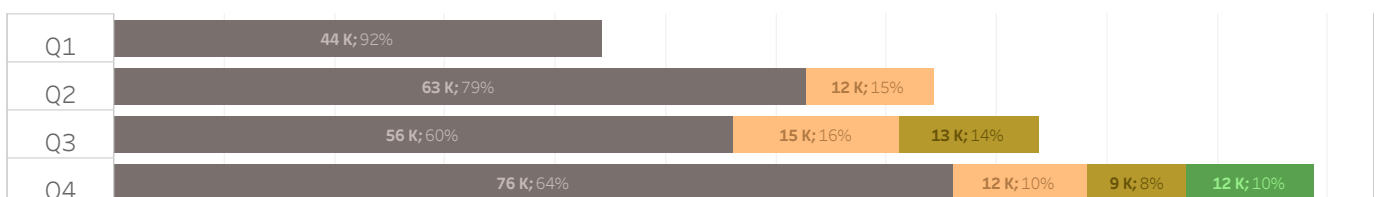
Source Market: **Singapore**

Passenger Volume (K)

2019	2020	2021	2022
325.4	71.7 (-78.0% ▼)	360.5 (403.1% ▲)	424.7 (17.8% ▲)

Average Duration, in Days

2019	2020	2021	2022
2.7	2.6	2.1	2.7

Average Age

2019	2020	2021	2022
48.9	45.7	34.1	38.3

% by Age Range

Year								
2019	10%	4%	7%	11%	12%	18%	24%	15%
2020	10%	5%	9%	13%	15%	17%	20%	11%
2021	19%	5%	13%	25%	19%	9%	7%	3%
2022	18%	4%	11%	20%	16%	11%	12%	7%

Legend: <=12 Years | 13-19 | 20-29 | 30-39 | 40-49 | 50-59 | 60-69 | >=70 Years

% by Duration

Year			
2019	73%	23%	
2020	73%	23%	4%
2021	82%	18%	
2022	68%	31%	

Legend: Up to 3 Days | 4-6 Days | 7 Days | 8-13 days | 14 Days | 15-20 days | 21+ Days
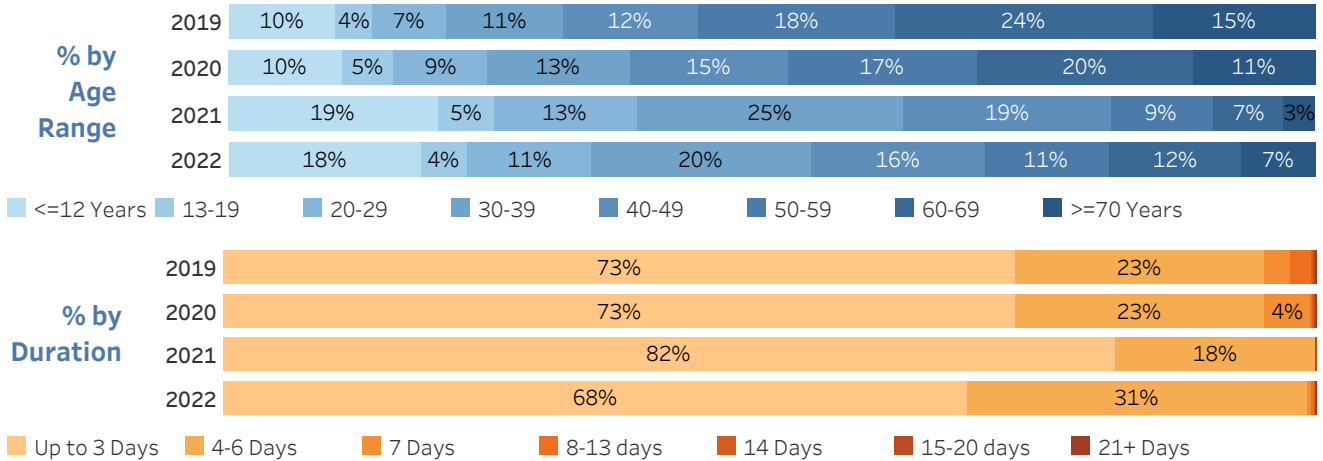
Passenger Percentages by Destination/Trade Route

	2019	2020	2021	2022
Rest of Asia	96.2%	98.5%	100.0%	99.2%
Mediterranean	0.7%			0.3%
Alaska	0.8%			0.2%
Caribbean/South America	0.3%			0.1%
Australia/NZ/Pacific	0.2%	0.8%		0.1%
Baltics/Northern Europe	0.3%			0.1%
North America	0.1%			
Exploration Destinations	0.3%			
Mainland China, Hong Kong, Taiwan	0.8%			
Other	0.1%			
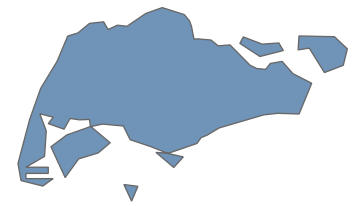
Passenger Volume & YOY Change by Age Group

	Passenger in K				Variance			
	2019	2020	2021	2022	2019	2020	2021	2022
<=12 Years	32	7	28	42		-76%	277%	50%
13-19	11	3	8	10		-71%	127%	37%
20-29	22	6	19	27		-71%	203%	43%
30-39	35	9	36	48		-73%	282%	35%
40-49	40	10	28	38		-74%	168%	37%
50-59	58	12	13	27		-79%	9%	101%
60-69	76	14	10	29		-81%	-33%	205%
>=70 Years	48	8	4	16		-83%	-47%	284%

Passenger Volume & YOY Change by Duration

	Passenger in K				Variance			
	2019	2020	2021	2022	2019	2020	2021	2022
Up to 3 Days	236	52	294	290		-78%	466%	-2%
4-6 Days	74	16	66	132		-78%	303%	100%
7 Days	8	3		2		-61%		6032%
8-13 Days	6			1				7050%
14 Days	1							
15-20 Days	0			0				6500%

Singapore, Average Age and Cruise Length by Destination/ Trade Route, 2022
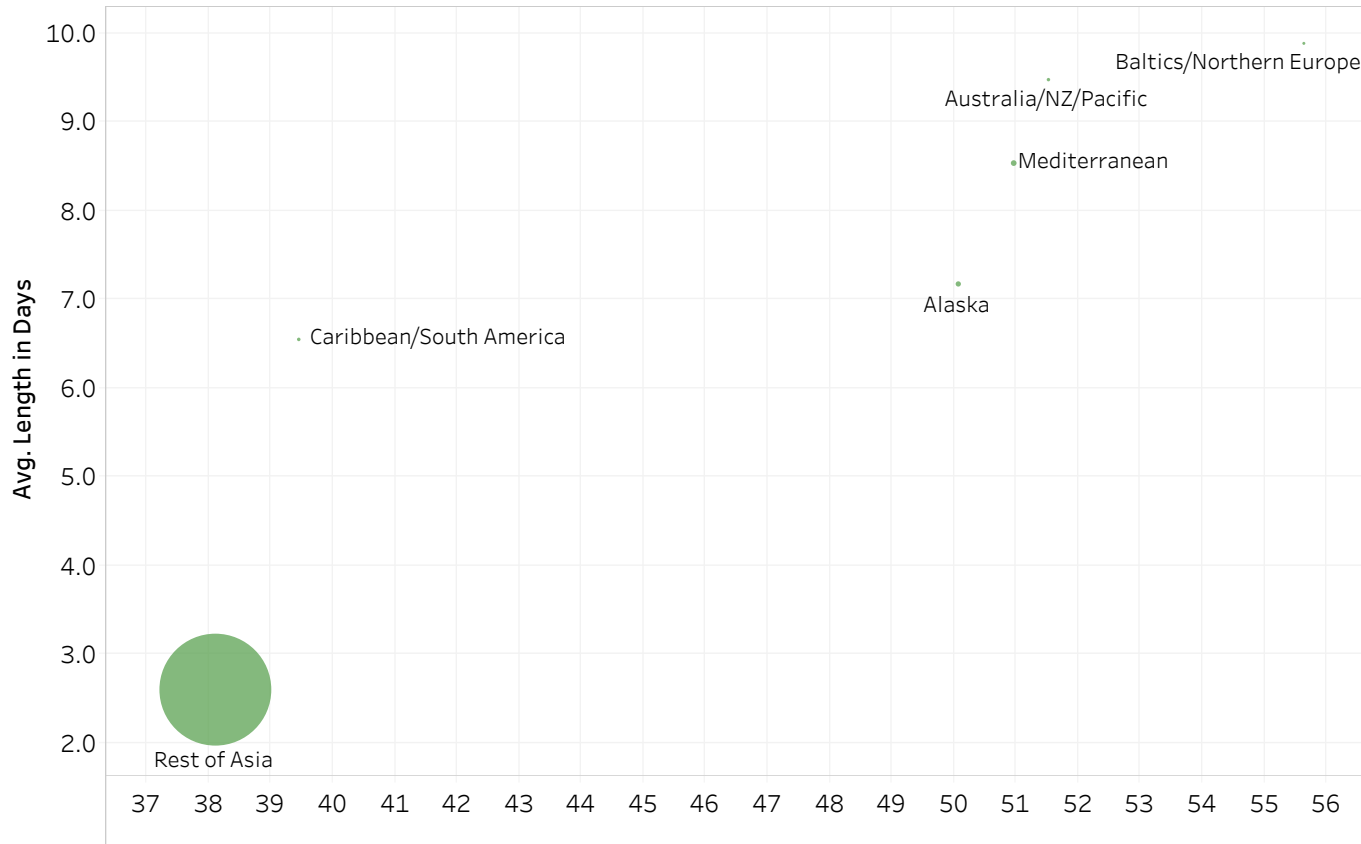
Data Points with Values Below 2,000 Passengers are not Displayed in the above Visuals and Tables.
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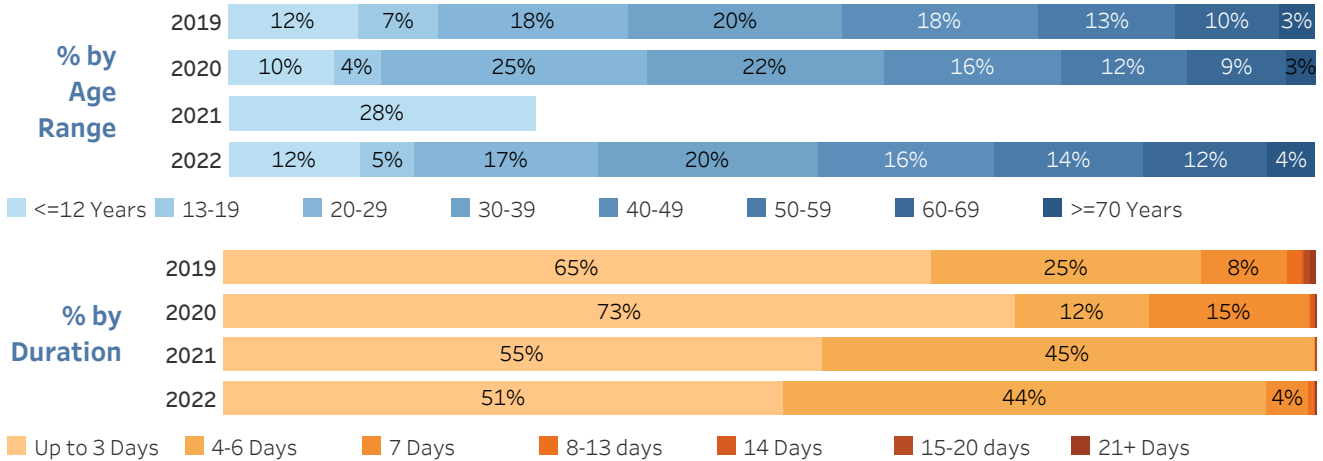
Source Market: **India**

Passenger Volume (K)

2019	2020	2021	2022
312.6	45.7 (-85.4% ▼)	122.6 (168.0% ▲)	200.8 (63.8% ▲)

Average Duration, in Days

2019	2020	2021	2022
3.2	2.8	3.1	3.3

Average Age

2019	2020	2021	2022
37.0	36.7	30.8	38.5

% by Age Range

Year								
2019	12%	7%	18%	20%	18%	13%	10%	3%
2020	10%	4%	25%	22%	16%	12%	9%	3%
2021	28%							
2022	12%	5%	17%	20%	16%	14%	12%	4%

Legend: ■ <=12 Years ■ 13-19 ■ 20-29 ■ 30-39 ■ 40-49 ■ 50-59 ■ 60-69 ■ >=70 Years

% by Duration

Year			
2019	65%	25%	8%
2020	73%	12%	15%
2021	55%	45%	
2022	51%	44%	4%

Legend: ■ Up to 3 Days ■ 4-6 Days ■ 7 Days ■ 8-13 days ■ 14 Days ■ 15-20 days ■ 21+ Days

Passenger Percentages by Destination/Trade Route

	2019	2020	2021	2022
Rest of Asia	80.1%	86.4%	99.7%	93.3%
North America	0.5%			0.3%
Mediterranean	3.0%			1.8%
Baltics/Northern Europe	1.6%			0.2%
Caribbean/South America	3.6%	1.5%		2.2%
Alaska	1.6%			0.4%
Australia/NZ/Pacific	0.1%			
Africa/Mid-East/World Cruise/Transatla..	5.2%			1.4%
Exploration Destinations	0.1%			0.2%
Mainland China, Hong Kong, Taiwan	2.1%			
Other	2.0%	10.1%		

© Mapbox © OSM

Passenger Volume & YOY Change by Age Group

	Passenger in K				Variance			
	2019	2020	2021	2022	2019	2020	2021	2022
<=12 Years	24	2	0	5		-91%	-88%	1654%
13-19	15	1		2		-93%		3867%
20-29	36	6		7		-84%		7303%
30-39	40	5		8		-87%		3091%
40-49	37	4		6		-90%		4366%
50-59	26	3		5		-90%		6676%
60-69	20	2		4		-89%		8712%
>=70 Years	7	1		2		-91%		6244%

Passenger Volume & YOY Change by Duration

	Passenger in K				Variance			
	2019	2020	2021	2022	2019	2020	2021	2022
Up to 3 Days	202	33	67	103		-84%	103%	53%
4-6 Days	77	6	55	89		-93%	892%	61%
7 Days	25	7		8		-73%		7406%
8-13 Days	4			1				6450%
14 days	1							
15-20 Days	1							
21+ Days	2							

India, Average Age and Cruise Length by Destination/ Trade Route, 2022

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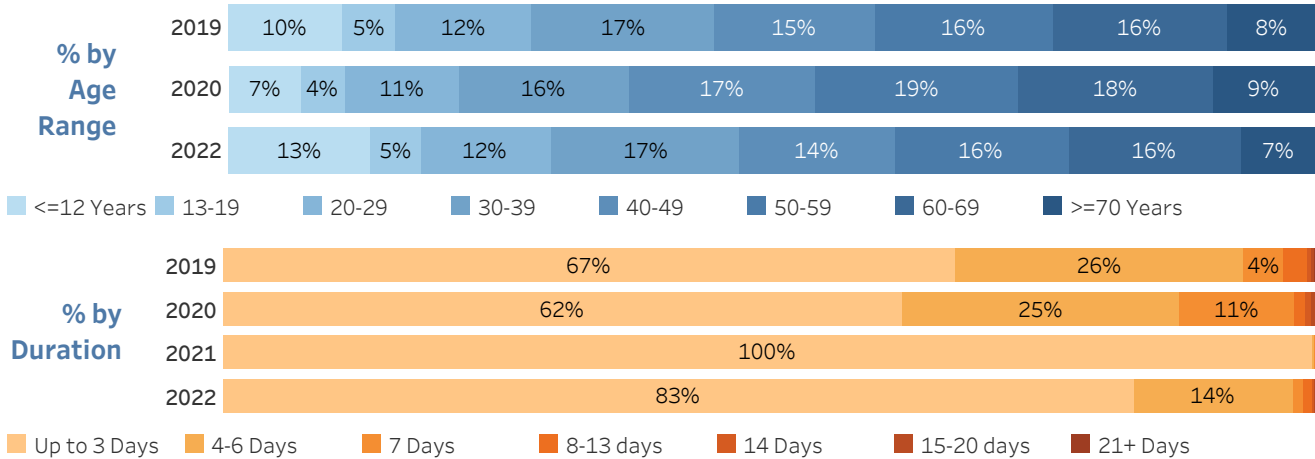
Source Market: **Malaysia**

Passenger Volume (K)

2019	2020	2021	2022
120.7	13.4 (-88.9% ▼)	24.6 (83.1% ▲)	74.5 (202.5% ▲)

Average Duration, in Days

2019	2020	2021	2022
2.9	3.2	1.5	2.2

Average Age

2019	2020	2021	2022
42.7	45.9	37.1	41.3

% by Age Range

Year	<=12 Years	13-19	20-29	30-39	40-49	50-59	60-69	>=70 Years
2019	10%	5%	12%	17%	15%	16%	16%	8%
2020	7%	4%	11%	16%	17%	19%	18%	9%
2022	13%	5%	12%	17%	14%	16%	16%	7%

% by Duration

Year	Up to 3 Days	4-6 Days	7 Days	8-13 days	14 Days	15-20 days	21+ Days
2019	67%	26%	4%				
2020	62%	25%	11%				
2021	100%						
2022	83%	14%					

Passenger Percentages by Destination/Trade Route

	2019	2020	2021	2022
Rest of Asia	91.7%	93.6%	99.8%	97.7%
Mediterranean	2.1%			1.3%
Caribbean/South America	0.5%			
Africa/Mid-East/World Cruise/Transatla..	0.2%			
Australia/NZ/Pacific	0.3%	3.3%		
Mainland China, Hong Kong, Taiwan	2.9%			
North America	0.3%			
Alaska	0.6%			
Baltics/Northern Europe	0.8%			
Exploration Destinations	0.3%			

Passenger Volume & YOY Change by Age Group

	Passenger in K			Variance		
	2019	2020	2022	2019	2020	2022
<=12 Years	12	1	3		-93%	41643%
13-19	6	1	1		-91%	
20-29	15	1	3		-91%	5991%
30-39	20	2	4		-90%	6629%
40-49	18	2	3		-87%	14550%
50-59	20	3	4		-87%	35540%
60-69	19	2	4		-88%	59250%
>=70 Years	10	1	2		-87%	17189%

Passenger Volume & YOY Change by Duration

	Passenger in K				Variance			
	2019	2020	2021	2022	2019	2020	2021	2022
Up to 3 Days	81	8	25	62		-90%	194%	153%
4-6 Days	32	3		11		-89%		22344%
7 Days	4	1		1		-68%		6782%
8-13 Days	3			1				8714%
14 Days	0							
15-20 Days	0							

Malaysia, Average Age and Cruise Length by Destination/ Trade Route, 2022

Avg. Length in Days

Mediterranean

Rest of Asia

40 41 42 43 44 45 46 47

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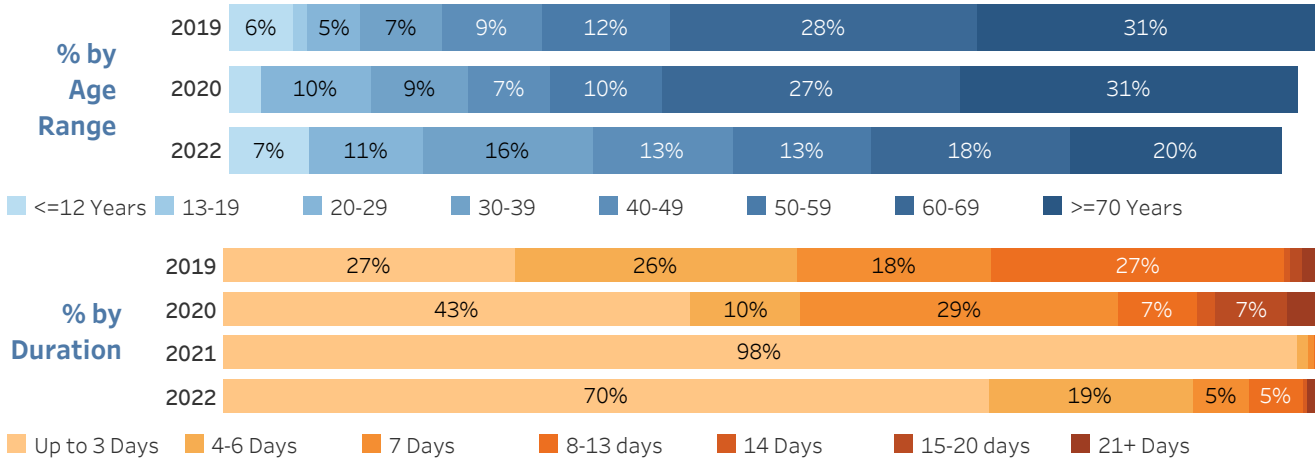# Source Market: **Japan**

Passenger Volume (K)

2019	2020	2021	2022
296.5	18.7 (-93.7% ▼)	11.6 (-37.8% ▼)	42.3 (263.7% ▲)

Average Duration, in Days

2019	2020	2021	2022
6.4	6.1	1.6	3.1

Average Age

2019	2020	2021	2022
57.1	56.6	42.5	48.6

% by Age Range

Year							
2019	6%	5%	7%	9%	12%	28%	31%
2020		10%	9%	7%	10%	27%	31%
2022	7%	11%	16%	13%	13%	18%	20%

Legend: <=12 Years | 13-19 | 20-29 | 30-39 | 40-49 | 50-59 | 60-69 | >=70 Years

% by Duration

Year					
2019	27%	26%	18%	27%	
2020	43%	10%	29%	7%	7%
2021	98%				
2022	70%	19%	5%	5%	

Legend: Up to 3 Days | 4-6 Days | 7 Days | 8-13 days | 14 Days | 15-20 days | 21+ Days

Passenger Percentages by Destination/Trade Route

	2019	2020	2021	2022
Rest of Asia	79.1%	56.0%	99.1%	92.4%
Mediterranean	9.9%	16.4%		2.6%
Caribbean/South America	3.5%	12.8%		2.2%
Africa/Mid-East/World Cruise/Transatla..	0.5%	2.9%		0.7%
Australia/NZ/Pacific	1.2%	4.5%		
Mainland China, Hong Kong, Taiwan	1.9%	3.3%		
Hawaii	0.6%	1.7%		
North America	0.6%	1.6%		
Alaska	0.8%			
Baltics/Northern Europe	0.9%			
Exploration Destinations	0.6%			
Other	0.6%			

Passenger Volume & YOY Change by Age Group

	Passenger in K			Variance		
	2019	2020	2022	2019	2020	2022
<=12 Years	11	0	0		-97%	3514%
13-19	2					
20-29	9	1	0		-88%	2723%
30-39	13	1	1		-93%	1814%
40-49	16	1	0		-95%	1758%
50-59	21	1	0		-95%	1596%
60-69	50	3	1		-94%	8914%
>=70 Years	56	3	1		-94%	9529%

Passenger Volume & YOY Change by Duration

	Passenger in K				Variance			
	2019	2020	2021	2022	2019	2020	2021	2022
Up to 3 Days	79	8	11	30		-90%	43%	159%
4-6 Days	76	2		8		-97%		5623%
7 Days	53	5		2		-90%		4085%
8-13 days	80	1		2		-98%		19264%
14 days	2	0				-81%		
15-20 Days	3	1				-59%		
21+ Days	4	0		0		-88%		

Japan, Average Age and Cruise Length by Destination/ Trade Route, 2022

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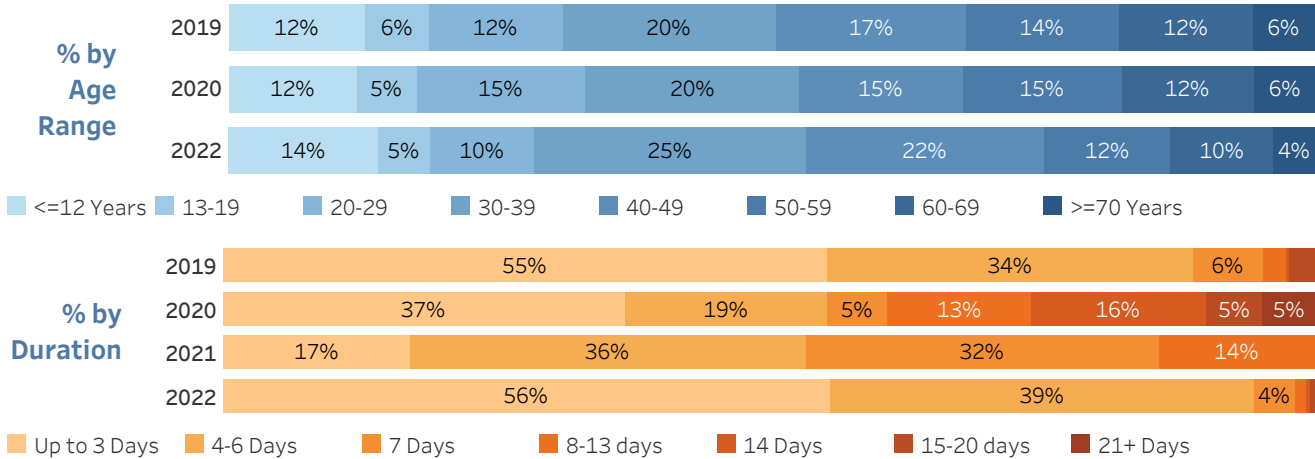# Source Market: **Indonesia**

Passenger Volume (K)

2019	2020	2022
62.1	9.2 (-85.2% ▼)	16.0 (74.6% ▲)

Average Duration, in Days

2019	2020	2021	2022
3.6	7.9	5.8	3.3

Average Age

2019	2020	2021	2022
39.6	39.4	41.5	38.1

% by Age Range

Year	<=12 Years	13-19	20-29	30-39	40-49	50-59	60-69	>=70 Years
2019	12%	6%	12%	20%	17%	14%	12%	6%
2020	12%	5%	15%	20%	15%	15%	12%	6%
2022	14%	5%	10%	25%	22%	12%	10%	4%

% by Duration

Year	Up to 3 Days	4-6 Days	7 Days	8-13 days	14 Days	15-20 days	21+ Days
2019	55%	34%	6%				
2020	37%	19%	5%	13%	16%	5%	5%
2021	17%	36%	32%	14%			
2022	56%	39%	4%				

Passenger Percentages by Destination/Trade Route

	2019	2020	2022
Rest of Asia	86.7%	57.4%	93.0%
Caribbean/South America	1.2%		2.1%
Mediterranean	2.5%		1.9%
Alaska	2.6%		
Australia/NZ/Pacific	2.8%		
Baltics/Northern Europe	0.6%		
North America	0.5%		
Mainland China, Hong Kong, Taiwan	2.7%		
Other		37.9%	

Passenger Volume & YOY Change by Age Group

	Passenger in K					Variance
	2019	2020	2022	2019	2020	2022
<=12 Years	8	1	2		-91%	27038%
13-19	4	0	1		-91%	12600%
20-29	8	1	2		-88%	7853%
30-39	12	1	4		-90%	24681%
40-49	11	1	3		-92%	18216%
50-59	9	1	2		-90%	7852%
60-69	7	1	2		-91%	9947%
>=70 Years	4	0	1		-91%	20567%

Passenger Volume & YOY Change by Duration

	Passenger in K					Variance
	2019	2020	2022	2019	2020	2022
Up to 3 Days	34	3	9		-90%	49317%
4-6 Days	21	2	6		-92%	16274%
7 Days	4	0	1		-88%	1676%
8-13 Days	1	1			-4%	
14 Days		1			681%	
15-20 Days	1	0			-68%	
21+ Days		0			1054%	

Indonesia, Average Age and Cruise Length by Destination/ Trade Route, 2022
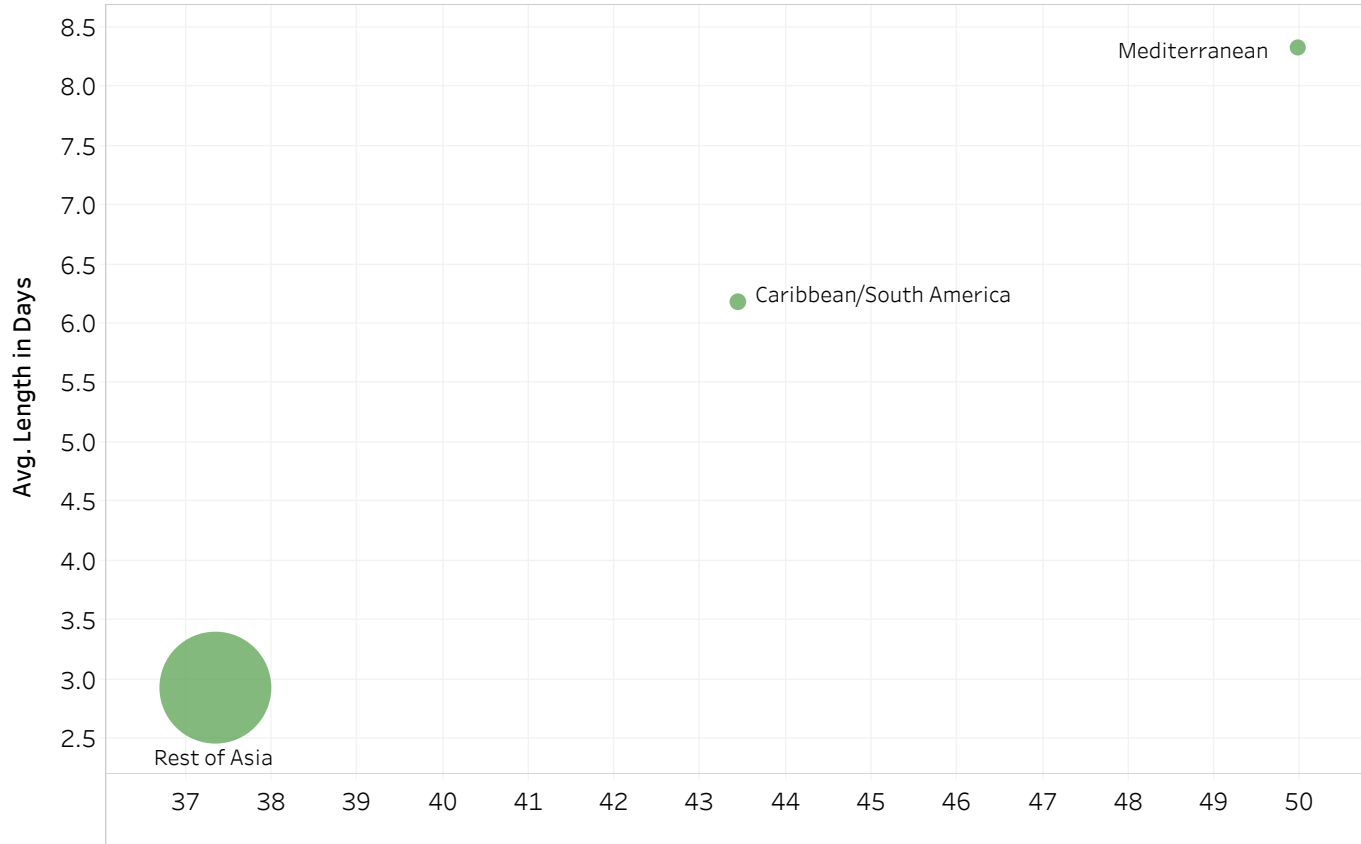
Passenger Volume (K) for Other Source Markets

	2019	2020	2021	2022
Thailand	20	2 (-90.7% ▼)	(-100.0% ▼)	6
South Korea	49	6 (-86.7% ▼)	(-100.0% ▼)	6
Hong Kong SAR	191	36 (-81.2% ▼)	77 (113.2% ▲)	4 (-94.3% ▼)
Vietnam	7	1 (-82.6% ▼)	(-100.0% ▼)	3
Mainland China	1,919	205 (-89.3% ▼)	6 (-97.1% ▼)	2 (-72.4% ▼)
Taiwan Region	389	83 (-78.8% ▼)	23 (-71.9% ▼)	1 (-94.8% ▼)
Pakistan	2	(-100.0% ▼)		1
Kazakhstan	2	1 (-70.9% ▼)	(-100.0% ▼)	1
Sri Lanka	2	(-100.0% ▼)		
Nepal	1	(-100.0% ▼)		
Myanmar	2	(-100.0% ▼)		
Macau Region	2	(-100.0% ▼)		
Cambodia	1	(-100.0% ▼)		
Bangladesh	1	(-100.0% ▼)		
Afghanistan	1	(-100.0% ▼)		

Explanatory Note

Though the analyses include both CLIA and non-CLIA lines some figures will be slightly understated as no data was available for two brands that were known to draw on Asian source markets in 2022.

This especially applies to mainland China, where one cruise brand was active during occasional periods of 2022.

Figures are, however, complete for all Japan and India based brands in addition to nearly all international lines.

GLOSSARY

This report is based on 2022 calendar year passenger statistics provided by the ocean-going cruise line members of the Cruise Lines International Association (CLIA), who represent nearly 95% of global cruise industry capacity (significantly less in Asia), plus additional data collected by CHART Management Consultants from non-CLIA cruise lines (whose share of Asia capacity is high). The research is based on a methodology that is used in similar studies around the world. This consistent approach facilitates comparisons with other major cruise markets. Data points below 2,000 passengers (for source markets) and 4,000 (for destinations) are not displayed.

All analyses and information exclude one-night cruises, consistent with past CLIA Asia source market reports. Destinations and trade routes are determined by the area where the ship is predominantly sailing, with the exception of the following:

- "Mainland China, Hong Kong, and Taiwan" represents sailings that embark from these markets and sail within Asia.

- "Rest of Asia" excludes sailings that embark from Mainland China, Hong Kong, and Taiwan.

- References to "Other" in the destinations/trade routes consist of transatlantic, world cruise, Africa/Middle East, Australasia/Pacific, Panama Canal/South America, Canada/New England, exploration, no trade route identified, and others.

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