



# 2020 Asia Cruise Deployment & Capacity Report

## **BACKGROUND TO 2020**

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

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

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

## **THE 2020 REPORT**

This report on cruise activity across the whole of Asia in 2020 naturally reflects the limited cruise activity versus prior years.

As before, it provides a comprehensive and accurate analysis of deployment, capacity and destination volumes for the calendar year for every ship that operated in or passed through Asia (whether or not such ships belonged to a CLIA member line). Trends over the past three years are also reported.

The vast expanse of the world for which cruise operations are analysed extend from India in the west to Japan and the Philippines in the east, from Russia in the north to Indonesia in the south, a total of 20 nations. (A map is presented in the Appendix).

**Report and analyses Commissioned from:  
CHART Management Consultants**



**CHART MANAGEMENT CONSULTANTS PTY LTD**  
CRUISE SHIPPING AND TOURISM STRATEGY & EXECUTION

## 2020 CAPACITY

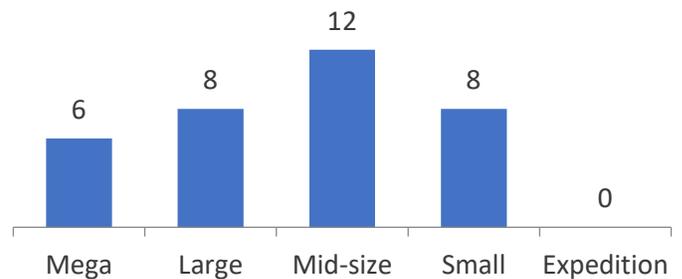
**Ships:** In 2020, 34 ships were active in Asian waters with a variety of product offerings. Mid-sized ships accounted for almost one third of the fleet with 12, while Large and Small each had 8 ships. There were no expedition ships operating in Asia in 2020.

**Segments:** Cruise lines catered mainly to the premium and contemporary segments with 12 such lines operating 18 ships in Asia. Another 7 upscale cruise lines operated 10 ships. There were four luxury lines (6 ships) and no expedition lines or vessels.

**Sailings:** Within the Asian regions, 279 Asia-to-Asia itineraries took place and a smaller volume of voyages (22) that called at Asian ports at some point in the itinerary. In total, 301 sailings occurred in 2020.

**Cruise Duration:** Short cruises still dominate the itineraries in Asia. Cruises of 2-3 nights accounted for the highest share of all cruises, 53 percent, followed by 4-6 nights representing 27 percent of all cruises.

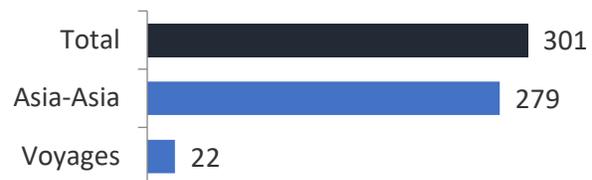
**Ships in Asia by Size, 2020**



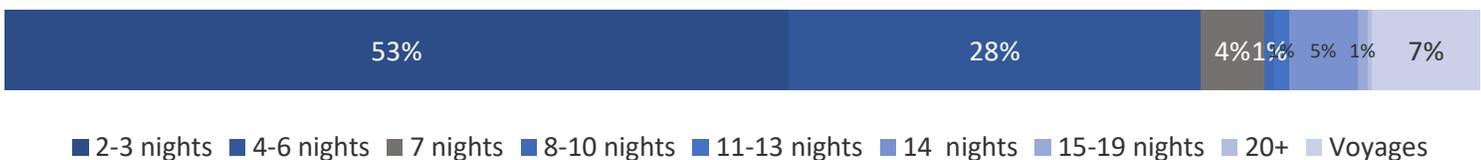
**Cruise Ship Segments, 2020**

Cruise Ship Segment	# Lines
Premium & Contemporary	12
Upscale	7
Luxury	4
Expedition	0

**Cruises Offered by Type, 2020**



**Length of Cruises & Voyages Offered, 2020**



The allocation of ships and cruise itineraries resulted in 1,273 operating days in Asia for 2020 providing a total capacity for 655K passengers.

**Capacity Summary, 2018-2020**

	2020	2019	2018
Ships	34	79	78
Sailings	301	1,917	2,041
Operating Days	1,273	10,245	10,467
Passenger Capacity (Millions)	0.66	4.02	4.26

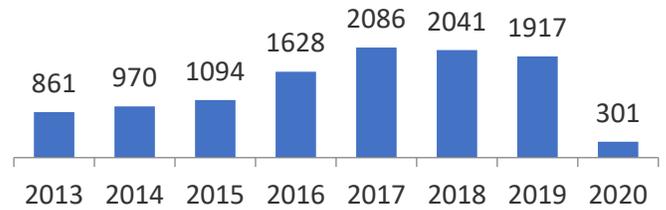
## Capacity: Trends

The effects of the pause due to the global pandemic are clearly visible in the stark drop-off in number of sailings in 2020: from 1,917 in 2019 down to only 301 in 2020.

As cruising resumed in later parts of 2020, shorter itineraries dominated the volume with 57% of cruises having a duration of 2-3 nights. Cruises of 4-6 nights represent about 27% of the volume in Asia shrinking from 38% in 2019.

93% of cruises in Asia were 7 nights or less in 2020.

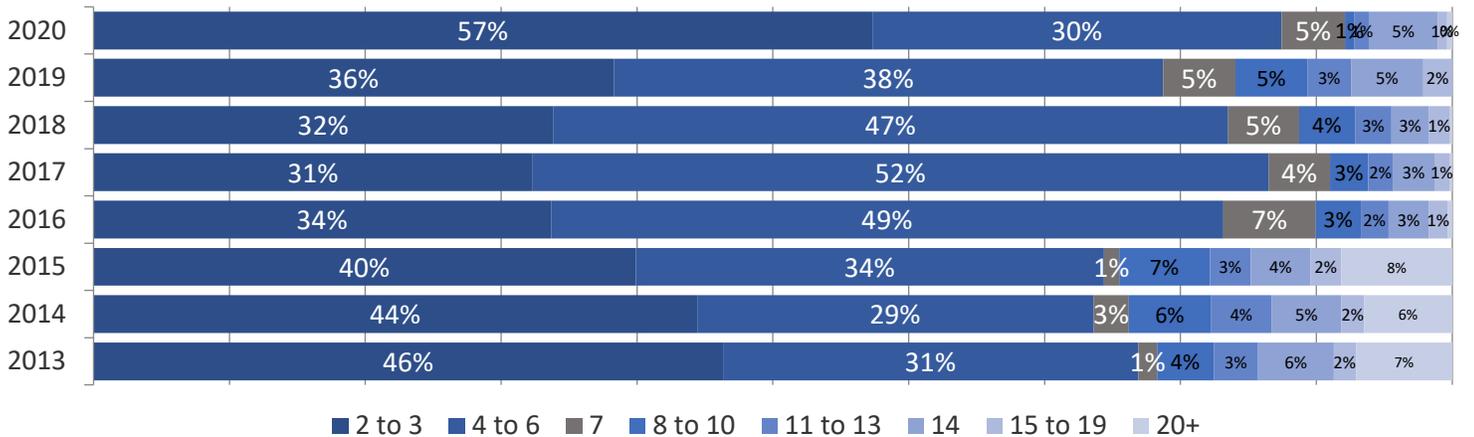
### Activity in Asia, Total Cruises & Voyages



### Cruise Ships Deployed by Type, Asian Region

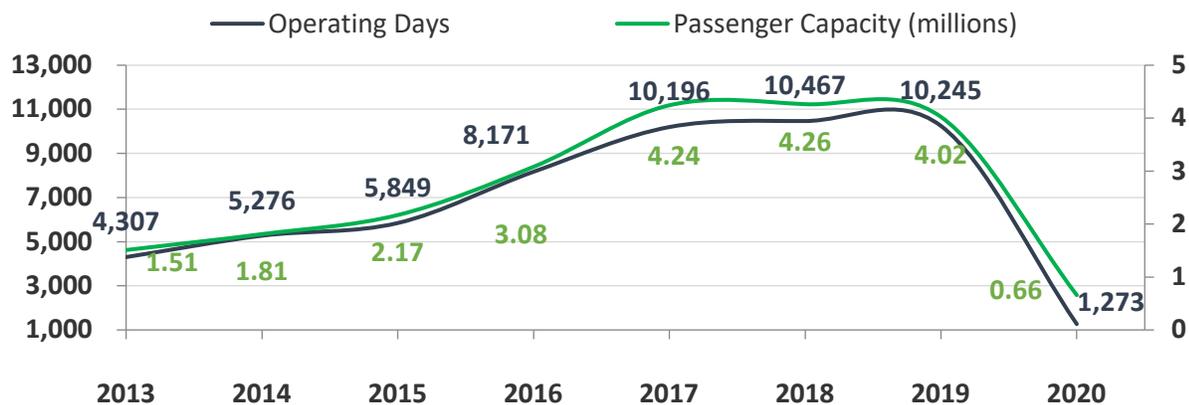
	Expedition	Small	Midsize	Large	Mega	Total
2013	2	14	19	8	0	43
2014	5	15	21	9	0	50
2015	4	14	22	11	1	52
2016	6	17	21	15	2	61
2017	5	17	26	13	5	66
2018	5	21	27	19	6	78
2019	6	22	26	18	7	79
2020	0	8	12	8	6	34

### Duration of Asia-Asia Cruises (nights)



For 2020, there were 1,273 operating days. Overall passenger capacity for ships in the region in 2020 was 157,134

### Capacity Growth 2013-2020



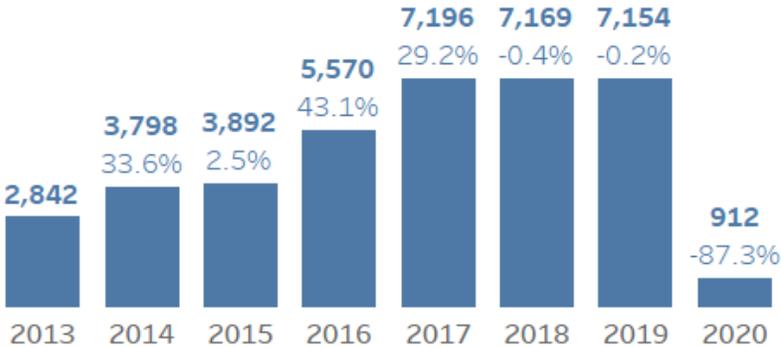
# **CRUISE DESTINATIONS: Port Calls and Passenger Destination Days**

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# Destination: All Asia

## Port Calls by Year

With YOY Variances, 2013-2020



## Port Calls by Region

With YOY Variances, 2018-2020

Region	Year	Port Calls	YOY Variance
East Asia	2018	4,363	-
	2019	4,252	-2.5%
	2020	388	-90.9%
Southeast Asia	2018	2,560	-
	2019	2,462	-3.8%
	2020	445	-81.9%
South Asia	2018	246	-
	2019	440	78.9%
	2020	79	-82.0%

## Top Ports by Calls

With YOY Variances, 2018-2020

Port	Year	Port Calls	YOY Variance
Singapore, Singapore	2018	374	-
	2019	400	7.0%
	2020	102	-74.5%
China, Baoshan / Shanghai	2018	416	-
	2019	276	-33.7%
	2020	27	-90.2%
Taiwan, Keelung / Taipei	2018	322	-
	2019	284	-11.8%
	2020	74	-73.9%
Hong Kong, Hong Kong	2018	249	-
	2019	255	2.4%
	2020	26	-89.8%
Japan, Fukuoka / Hakata	2018	245	-
	2019	245	0.0%
	2020	13	-94.7%
Japan, Naha / Okinawa	2018	231	-
	2019	243	5.2%
	2020	26	-89.3%
Thailand, Patong Bay / Phuket	2018	219	-
	2019	188	-14.2%
	2020	29	-84.6%
Japan, Nagasaki	2018	214	-
	2019	198	-7.5%
	2020	13	-93.4%
Malaysia, Georgetown / Penang	2018	139	-
	2019	158	13.7%
	2020	23	-85.4%
South Korea, Jeju Isl	2018	22	-
	2019	29	31.8%
	2020	0	-100.0%

## Top Destinations by Number of Calls

With YOY Variances, 2018-2020

Destination	Year	Port Calls	YOY Variance
Japan	2018	2,601	-
	2019	2,681	3.1%
	2020	125	-95.3%
Mainland China	2018	1,012	-
	2019	809	-20.1%
	2020	64	-92.1%
Thailand	2018	581	-
	2019	550	-5.3%
	2020	142	-74.2%
Malaysia	2018	458	-
	2019	561	22.5%
	2020	74	-86.8%
Vietnam	2018	493	-
	2019	368	-25.4%
	2020	86	-76.6%
Singapore	2018	374	-
	2019	400	7.0%
	2020	102	-74.5%
Taiwan Region	2018	346	-
	2019	304	-12.1%
	2020	172	-43.4%
Indonesia	2018	354	-
	2019	387	9.3%
	2020	19	-95.1%
Hong Kong	2018	249	-
	2019	255	2.4%
	2020	26	-89.8%
South Korea	2018	134	-
	2019	172	28.4%
	2020	1	-99.4%

## Destination: All Asia (Continued)

### Passenger Destination Days (PDDs) by Region In Thousands (K) w/ YOY Variances, 2018-2020

East Asia	2018	8,732	
	2019	8,242	-5.6%
	2020	694	-91.6%
Southeast Asia	2018	3,911	
	2019	4,249	8.6%
	2020	834	-80.4%
South Asia	2018	262	
	2019	541	106.7%
	2020	97	-82.1%

### Top Ports by PDDs

#### In Thousands (K), w/ YOY Variances, 2018-2020

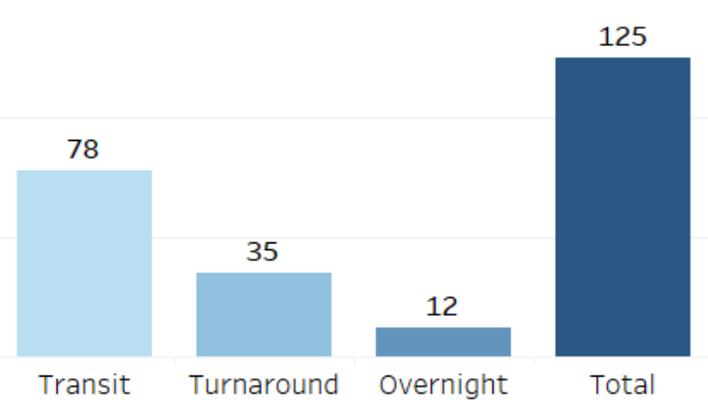
Singapore, Singapore	2018	900	
	2019	991	10.1%
	2020	298	-69.9%
China, Baoshan / Shanghai	2018	1,246	
	2019	854	-31.5%
	2020	68	-92.1%
Japan, Fukuoka / Hakata	2018	676	
	2019	668	-1.1%
	2020	37	-94.5%
Hong Kong, Hong Kong	2018	604	
	2019	606	0.2%
	2020	64	-89.4%
Taiwan, Keelung / Taipei	2018	598	
	2019	527	-11.8%
	2020	132	-75.0%
Japan, Nagasaki	2018	601	
	2019	531	-11.6%
	2020	36	-93.2%
Japan, Naha / Okinawa	2018	445	
	2019	529	18.8%
	2020	44	-91.7%
Thailand, Patong Bay / Phuket	2018	459	
	2019	370	-19.4%
	2020	57	-84.7%
China, Guangzhou / Nansha	2018	349	
	2019	328	-5.8%
	2020	17	-94.9%
South Korea, Jeju Isl	2018	32	
	2019	44	38.1%
	2020	0	-100.0%

### Top Destinations by PDDs

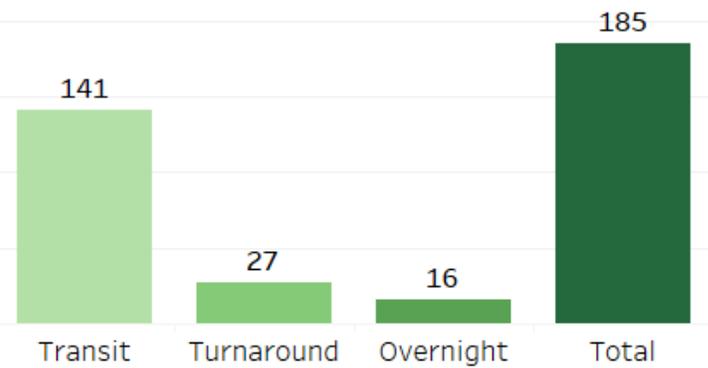
#### In Thousands (K), w/ YOY Variances, 2018-2020

Japan	2018	4,854	
	2019	4,726	-2.6%
	2020	185	-96.1%
China	2018	2,397	
	2019	2,015	-15.9%
	2020	128	-93.6%
Malaysia	2018	825	
	2019	1,157	40.2%
	2020	178	-84.6%
Singapore	2018	900	
	2019	991	10.1%
	2020	298	-69.9%
South Korea	2018	224	
	2019	290	29.7%
	2020	3	-99.0%
Thailand	2018	861	
	2019	788	-8.5%
	2020	164	-79.2%
Vietnam	2018	645	
	2019	617	-4.4%
	2020	129	-79.0%
Hong Kong	2018	604	
	2019	606	0.2%
	2020	64	-89.4%
Taiwan	2018	628	
	2019	553	-12.0%
	2020	314	-43.2%
Indonesia	2018	271	
	2019	395	46.0%
	2020	28	-92.9%

## Port Calls in 2020



## Passenger Destination Days in 2020 (K)

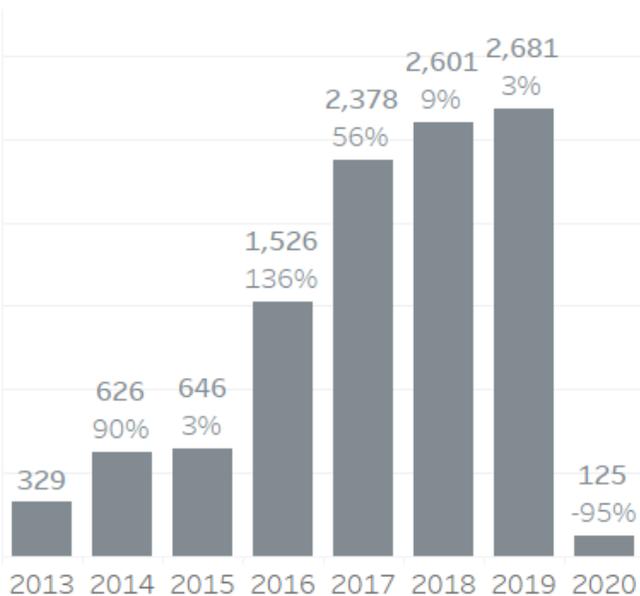


## Japan: Top Ports 2020

Port	Transit	Turnaround	Overnight	Total
Yokohama	0	26	2	28
Naha / Okinawa	18	0	8	26
Fukuoka / Hakata	13	0	0	13
Nagasaki	11	0	2	13
Miyakojima / Hirara	2	0	0	2
Sakaide	1	0	0	1
Tokyo	0	1	0	1

## Port Calls by Year

### With YOY Variances, 2013-2020

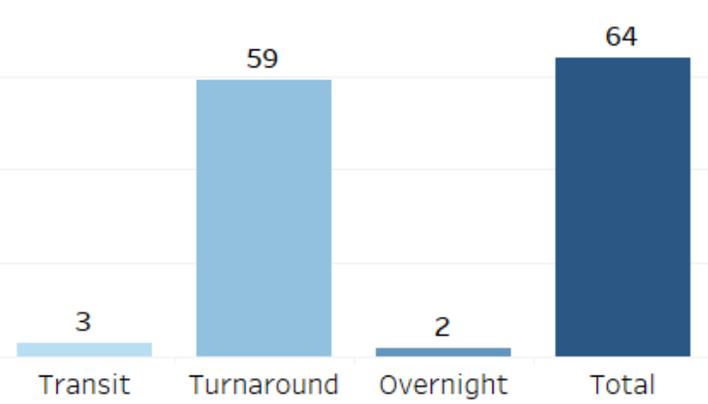


**Note:** Port calls for Japan prior to 2016 do not include the three local cruise lines and are therefore under-stated.

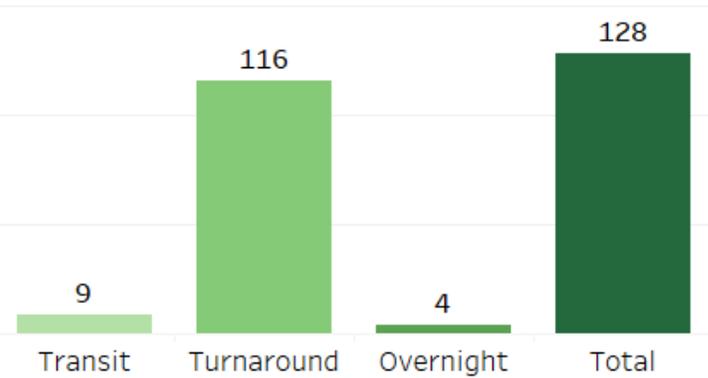
## CAGR Charts

Due to the significant decrease in volume in 2020 as a result of the global pandemic, compound annual growth figures are not meaningful and so are omitted from this year's report.

## Port Calls in 2020



## Passenger Destination Days in 2020 (K)

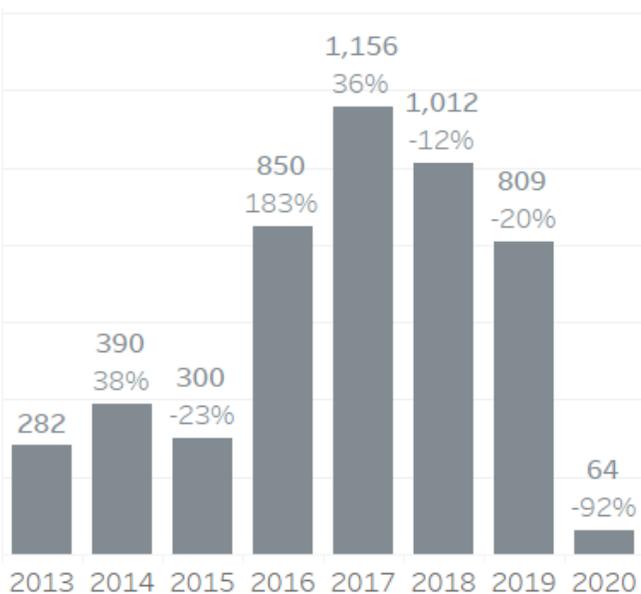


## Mainland China: Top Ports 2020

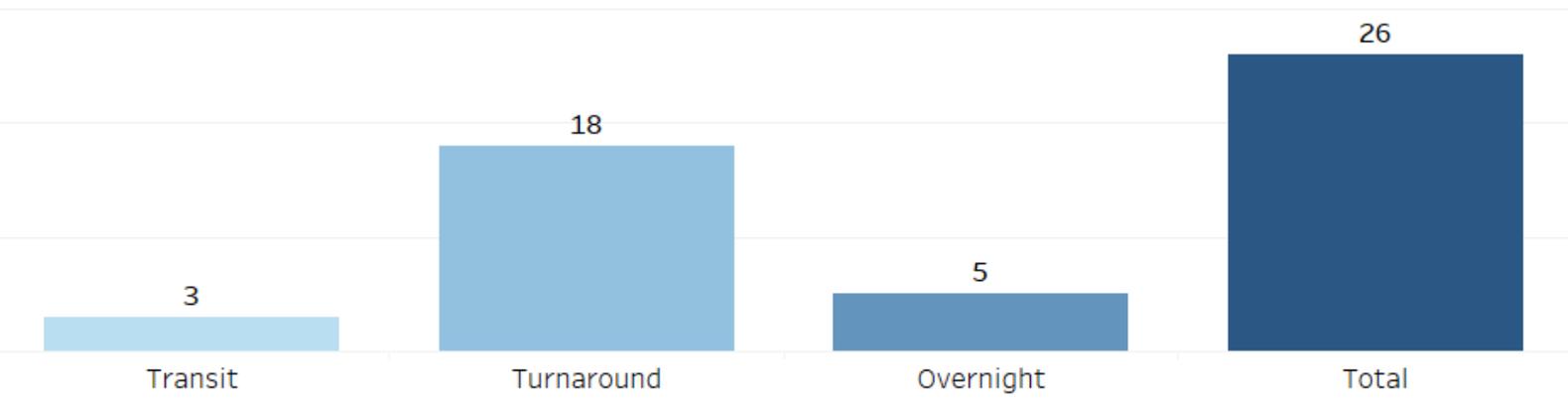
Port	Transit	Turnaround	Overnight	Total
Baoshan/ Shanghai	0	26	1	27
Shenzhen/ Shekou	0	15	0	15
Guangzhou/ Nansha	2	3	0	5
Tianjin/ Xingang/ Beijing	0	5	0	5
Xiamen	0	3	0	3

## Port Calls by Year

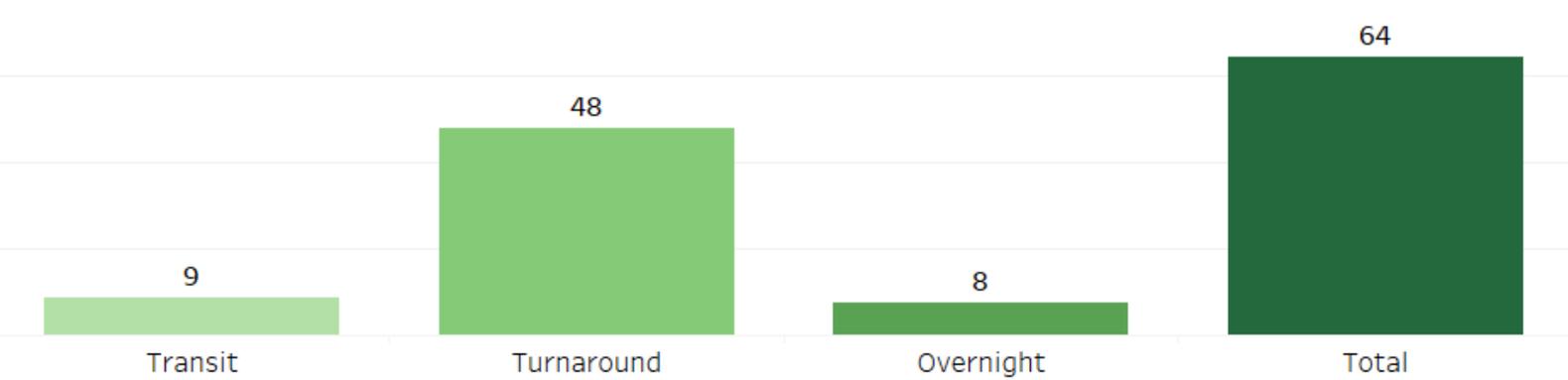
With YOY Variances, 2013-2020



## Port Calls in 2020

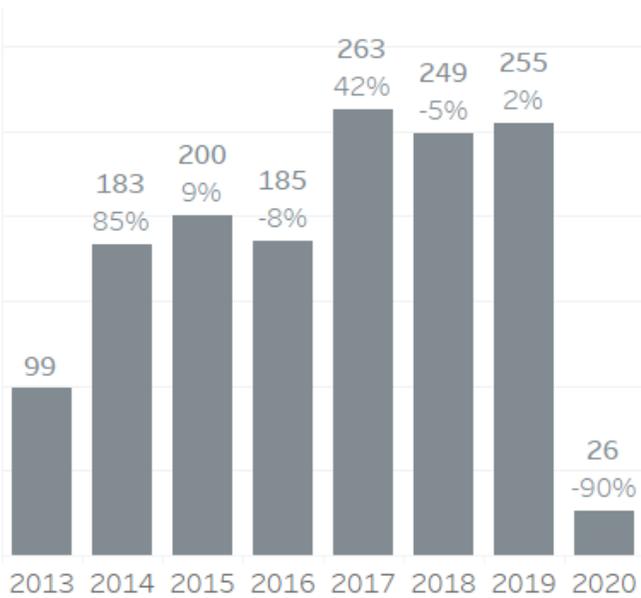


## Passenger Destination Days in 2020 (K)

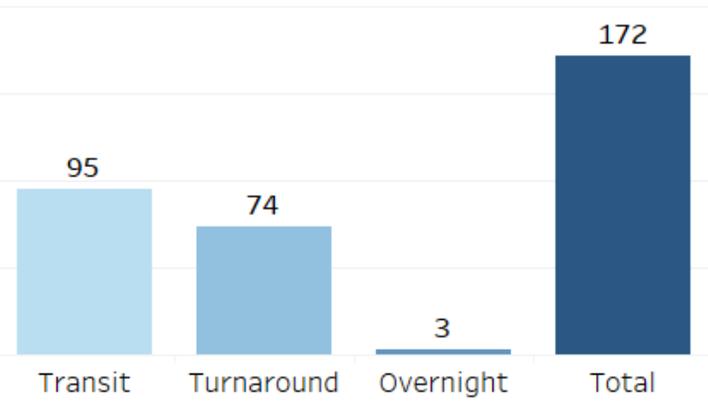


## Port Calls by Year

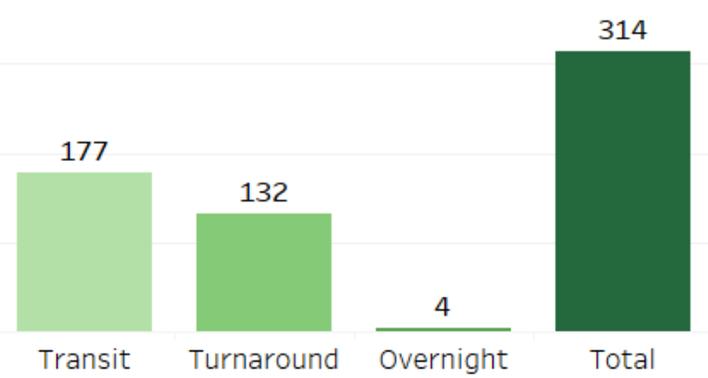
With YOY Variances, 2013-2020



## Port Calls in 2020



## Passenger Destination Days in 2020 (K)

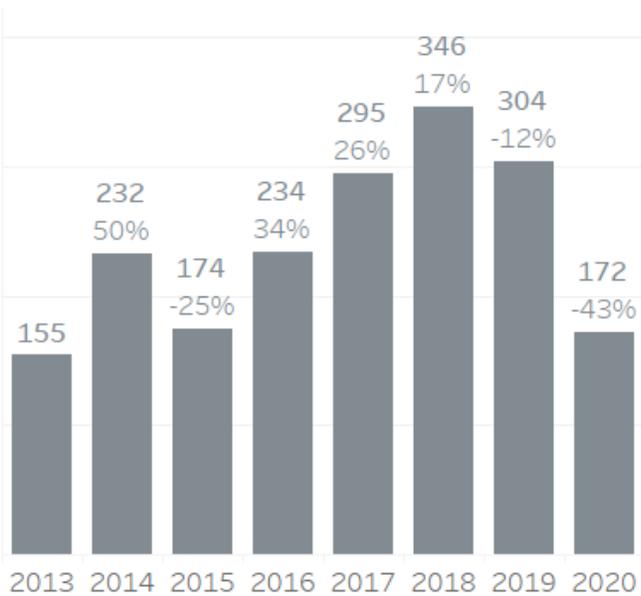


## Taiwan Region: Top Ports 2020

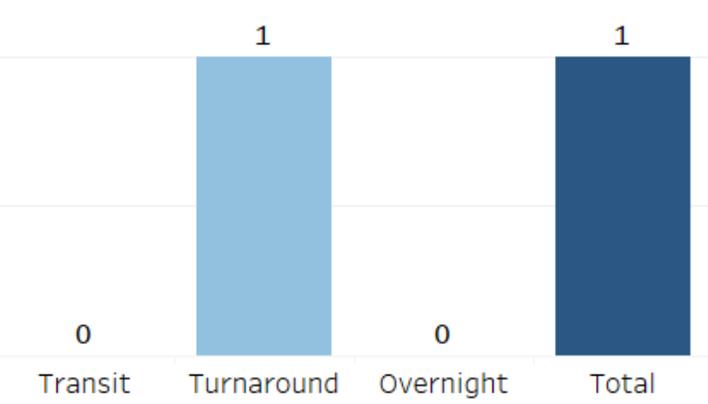
Port	Transit	Turnaround	Overnight	Total
Keelung/ Taipei	3	70	1	<b>74</b>
Hualien	34	0	0	<b>34</b>
Kaoshung	16	4	2	<b>22</b>
Matsu	11	0	0	<b>11</b>
Kinman Isls	9	0	0	<b>9</b>
Other Taiwan	6	0	0	<b>6</b>

## Port Calls by Year

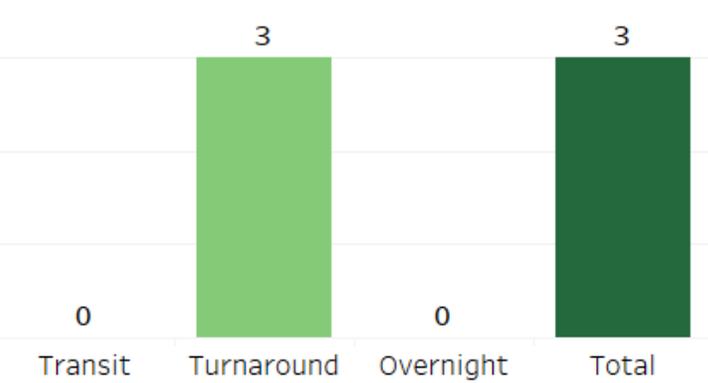
With YOY Variances, 2013-2020



## Port Calls in 2020



## Passenger Destination Days in 2020 (K)



## South Korea: Top Ports 2020

Port	Transit	Turnaround	Overnight	Total
Pusan/ Busan	0	1	0	1
	0	0	0	0
	0	0	0	0
	0	0	0	0
Incheon/ Seoul	0	0	0	0
	0	0	0	0
	0	0	0	0
	0	0	0	0
Jeju Isl	0	0	0	0
	0	0	0	0
	0	0	0	0
	0	0	0	0
Ulsan	0	0	0	0
	0	0	0	0
	0	0	0	0
	0	0	0	0
Yeosu	0	0	0	0
	0	0	0	0
	0	0	0	0
	0	0	0	0

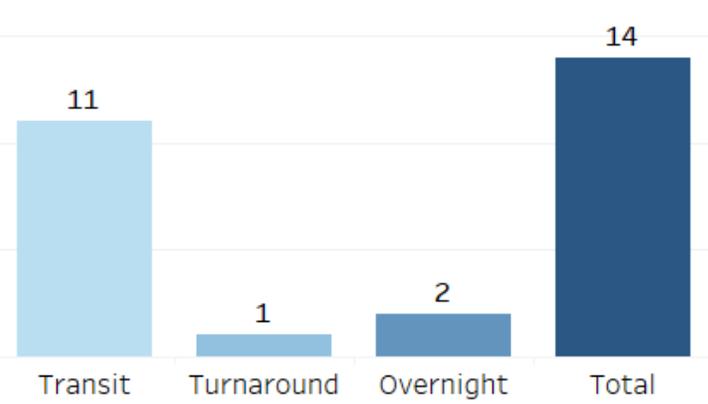
## Port Calls by Year

With YOY Variances, 2013-2020

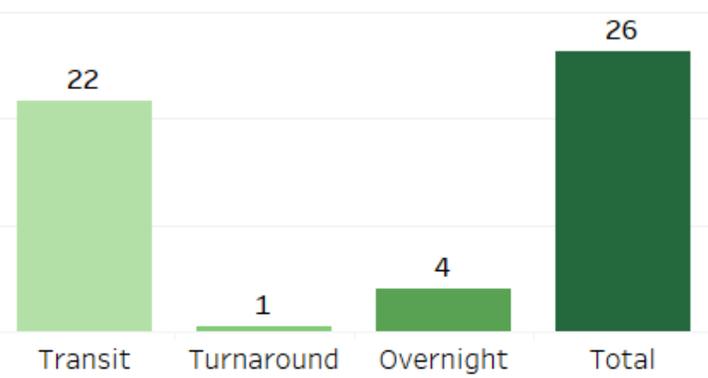


**Note:** The majority of calls scheduled to ROK after March 2017 did not take place due to the restrictions thereafter on visits by ships based in Mainland China.

## Port Calls in 2020



## Passenger Destination Days in 2020 (K)

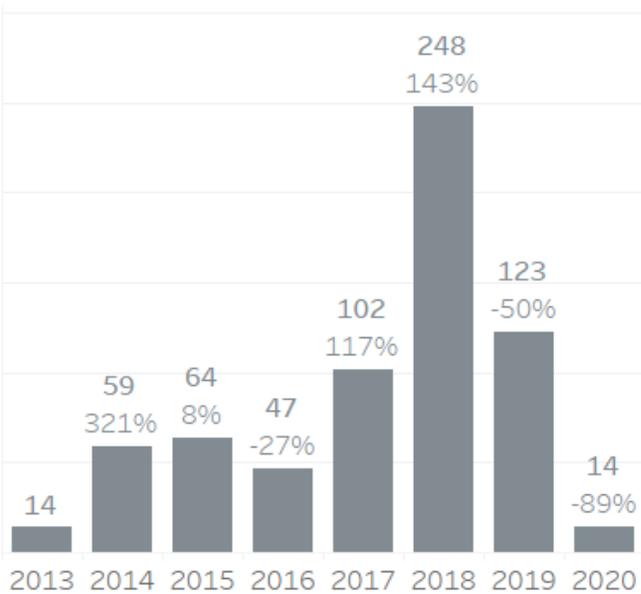


## Philippines: Top Ports 2020

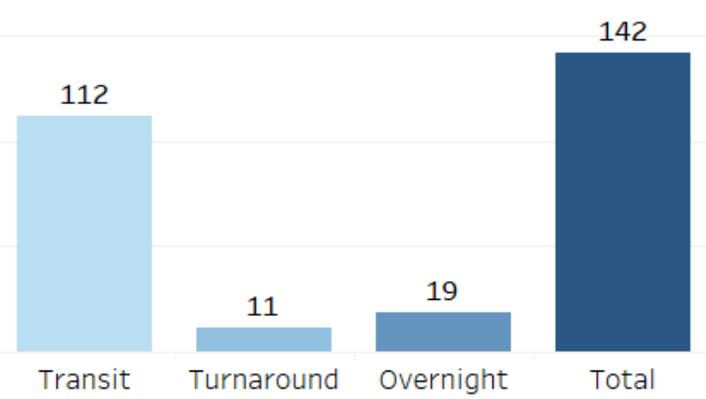
Port	Category	Count
Manila	Transit	6
	Turnaround	1
	Overnight	2
	<b>Total</b>	<b>9</b>
Subic Bay	Transit	2
	Turnaround	0
	Overnight	0
	<b>Total</b>	<b>2</b>
Boracay	Transit	1
	Turnaround	0
	Overnight	0
	<b>Total</b>	<b>1</b>
Coron	Transit	1
	Turnaround	0
	Overnight	0
	<b>Total</b>	<b>1</b>
Puerto Princesa	Transit	0
	Turnaround	0
	Overnight	0
	<b>Total</b>	<b>0</b>

## Port Calls by Year

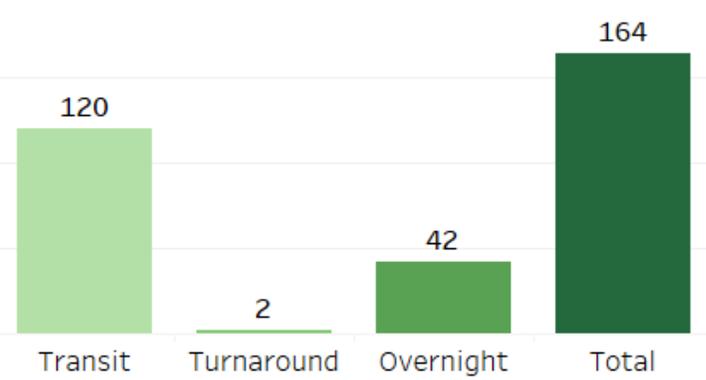
With YOY Variances, 2013-2020



## Port Calls in 2020



## Passenger Destination Days in 2020 (K)

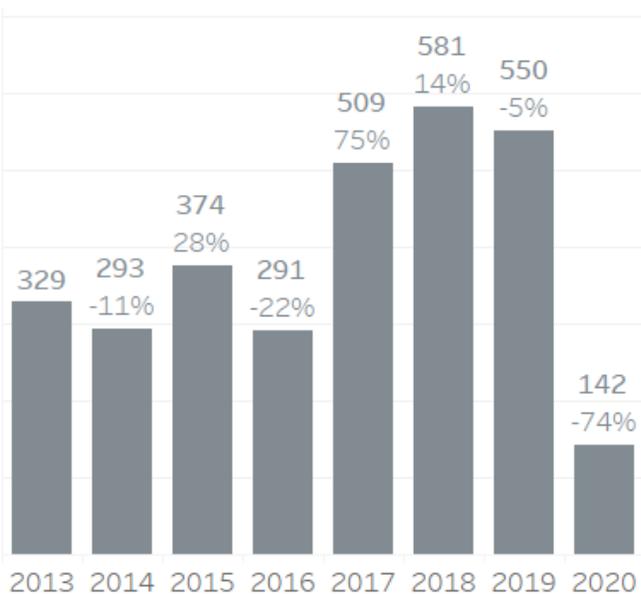


## Thailand: Top Ports 2020

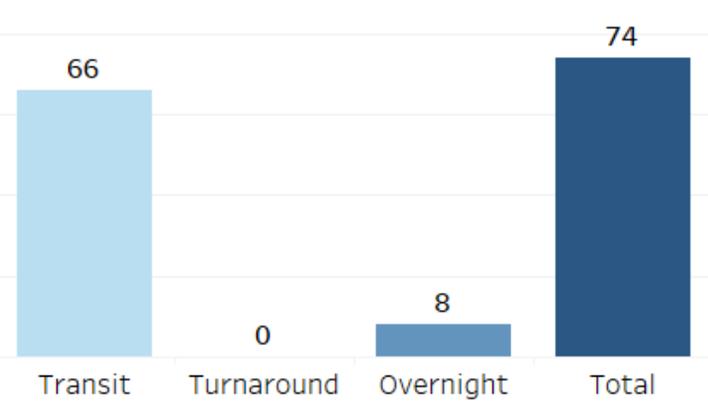
Port	Transit	Turnaround	Overnight	Total
Bangkok (Laem Chabang & Klong Toey)	21	1	15	37
Patong Bay / Phuket	15	10	4	29
Koh Samui	12	0	0	12
Ko Hong	10	0	0	10
Phang Nga Bay	10	0	0	10

## Port Calls by Year

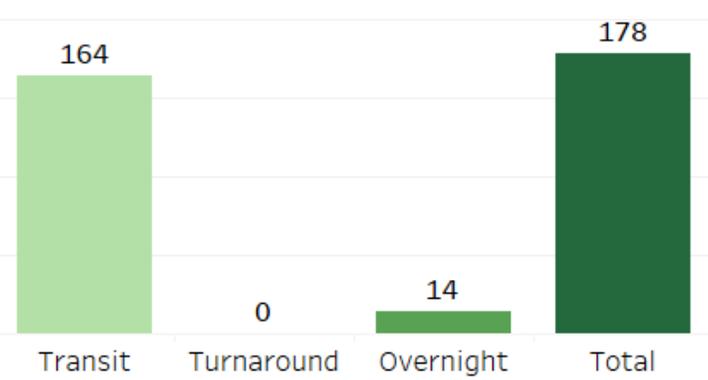
With YOY Variances, 2013-2020



## Port Calls in 2020



## Passenger Destination Days in 2020 (K)

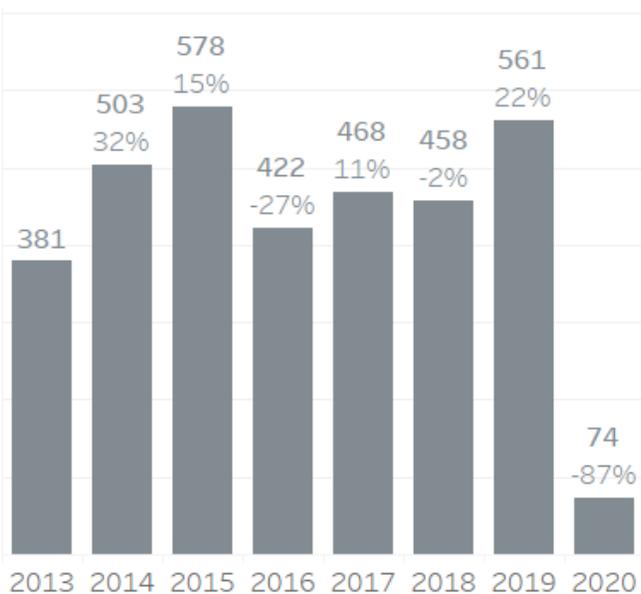


## Malaysia: Top Ports 2020

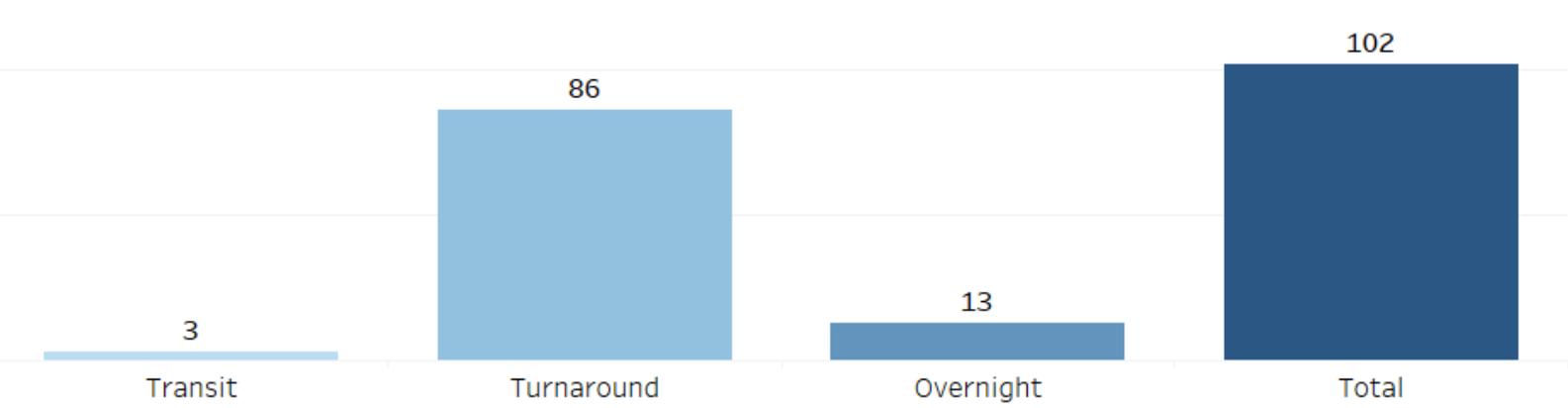
Port	Transit	Turnaround	Overnight	Total
Port Klang/ Kuala Lumpur	21	0	8	29
Georgetown / Penang	23	0	0	23
Langkawi	14	0	0	14
Malacca	7	0	0	7
Kota Kinabalu	1	0	0	1

## Port Calls by Year

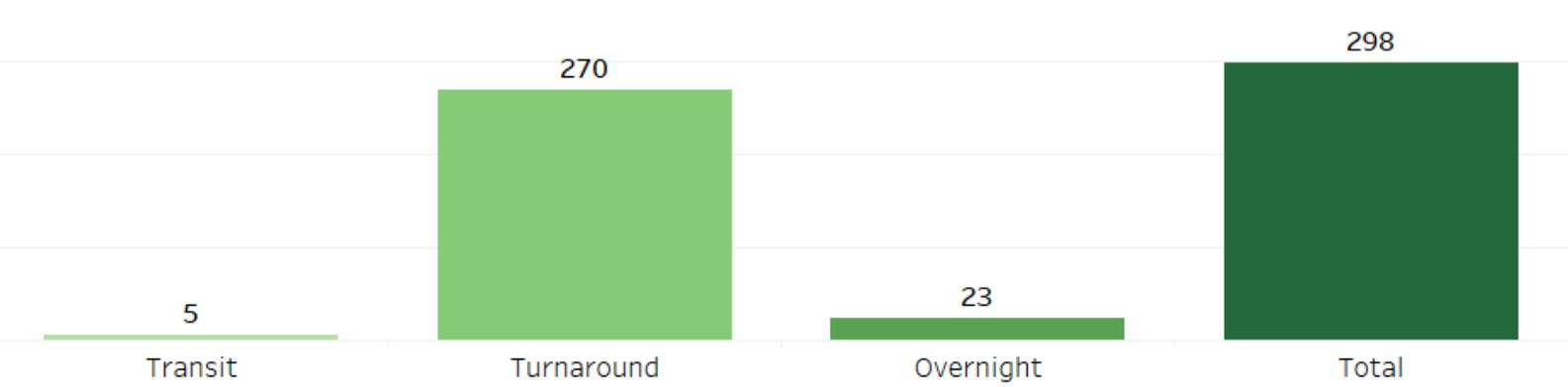
### With YOY Variances, 2013-2020



## Port Calls in 2020

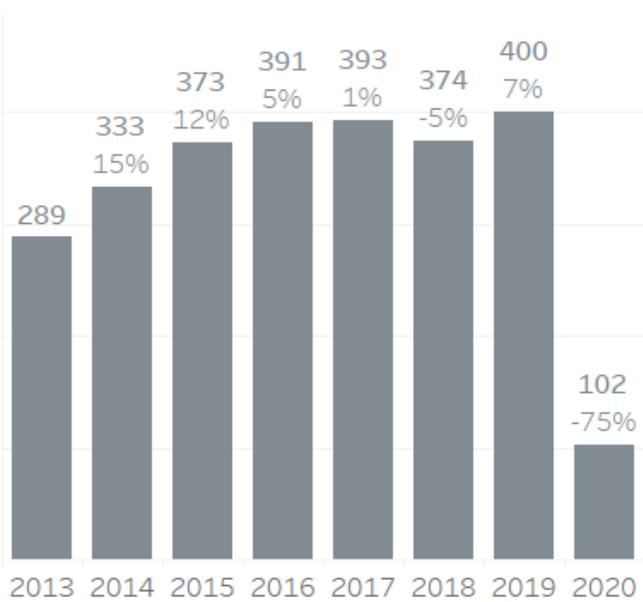


## Passenger Destination Days in 2020 (K)

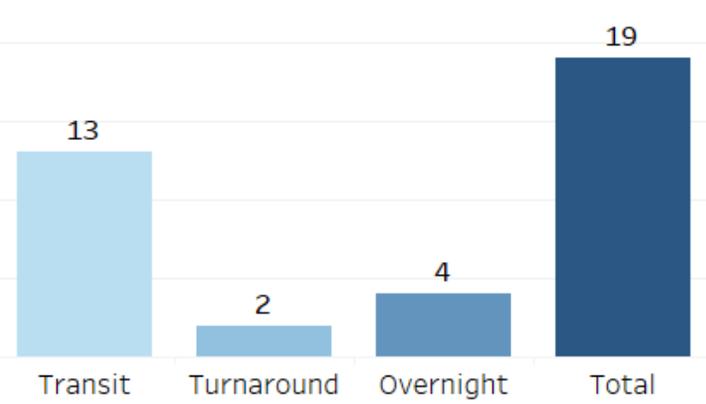


## Port Calls by Year

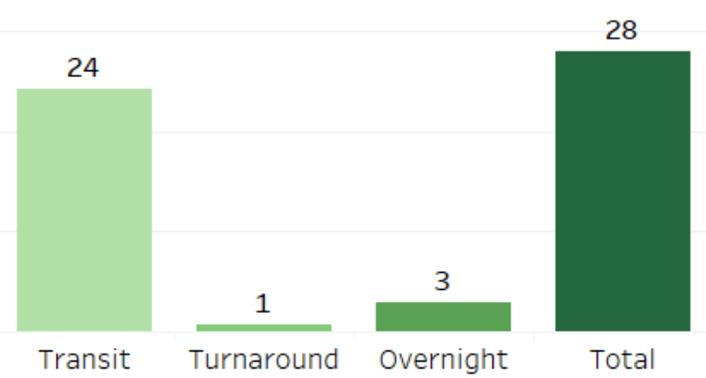
With YOY Variances, 2013-2020



## Port Calls in 2020



## Passenger Destination Days in 2020 (K)



## Indonesia: Top Ports 2020

Port	Transit	Turnaround	Overnight	Total
Benoa/ Bali	3	2	4	9
Bintan	4	0	0	4
Komodo / Slawi Bay	3	0	0	3
Lembar / Lombok	1	0	0	1
Semarang / Borobudur	1	0	0	1
Ende	0	0	0	0
Kalabahi	0	0	0	0

## Port Calls by Year

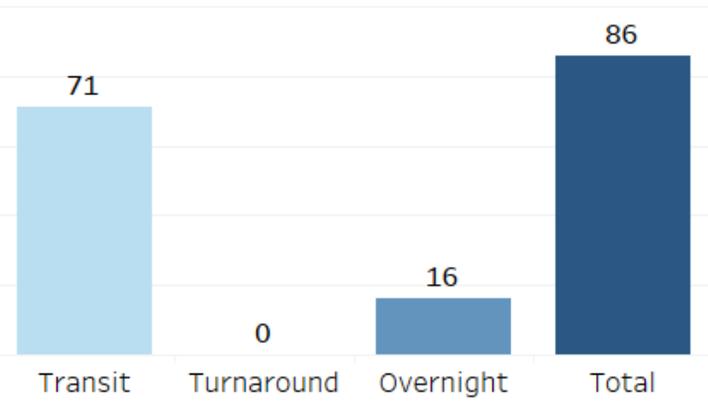
With YOY Variances, 2013-2020



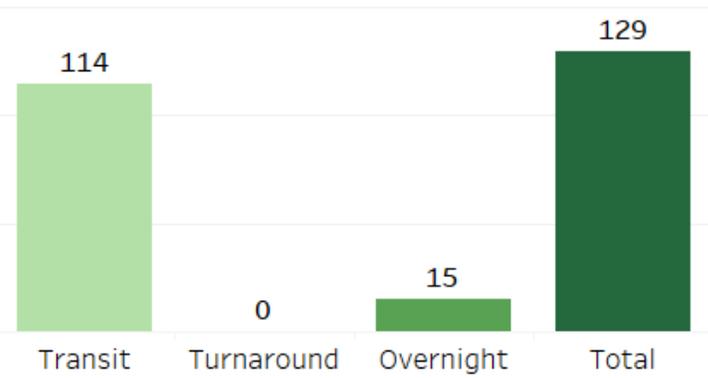
# Destination: Vietnam

# Southeast Asia

## Port Calls in 2020



## Passenger Destination Days in 2020 (K)

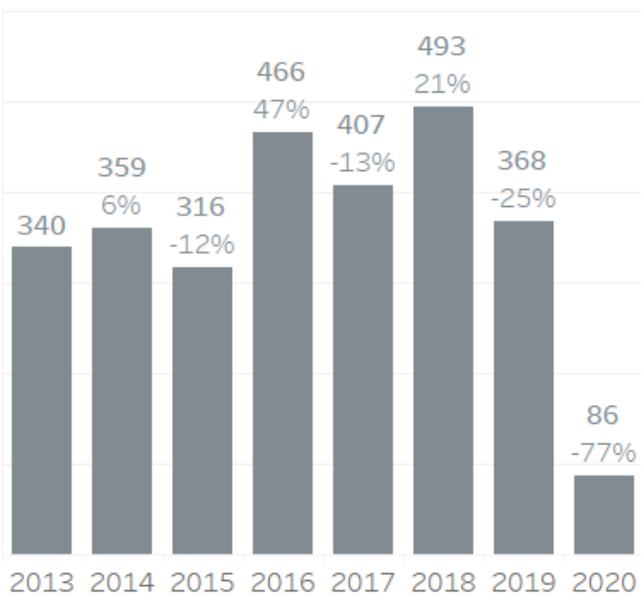


## Vietnam: Top Ports 2020

Port	Transit	Turnaround	Overnight	Total
Da Nang / Hue / Chan May	31	0	4	35
Ho Chi Minh City / Phu My	19	0	10	29
Halong Bay / Hanoi	8	0	2	10
Nha Trang	8	0	0	8

## Port Calls by Year

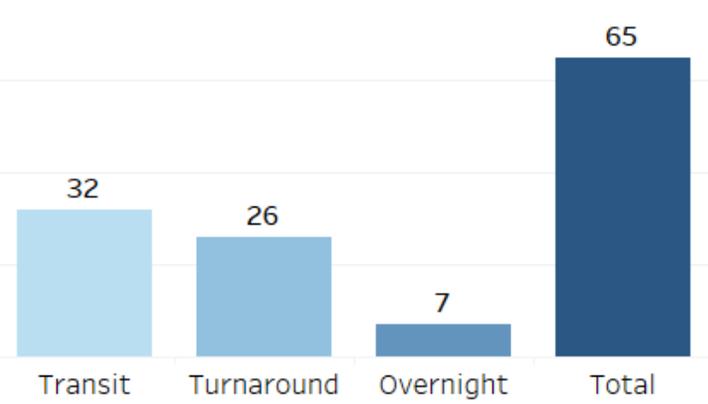
### With YOY Variances, 2013-2020



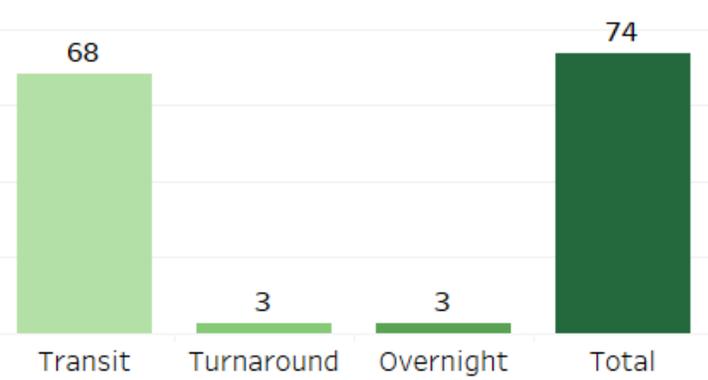
# Destination: India

# South Asia

## Port Calls in 2020



## Passenger Destination Days in 2020 (K)

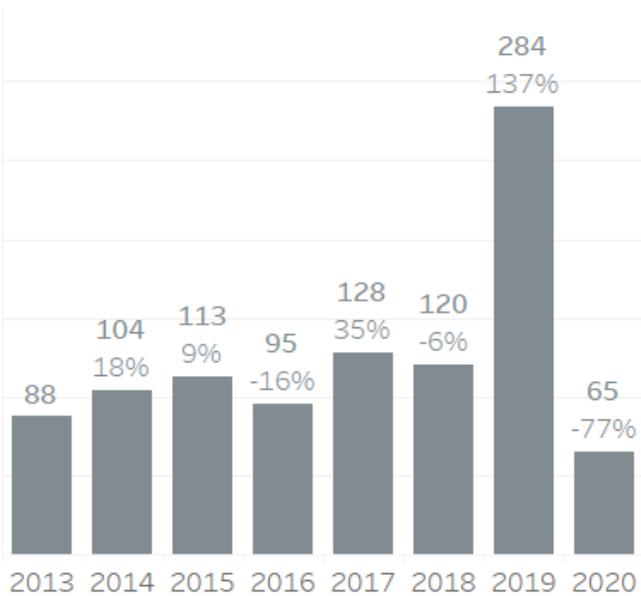


## India: Top Ports 2020

Port	Transit	Turnaround	Overnight	Total
Mumbai	5	26	5	36
Mormugao / Goa	14	0	1	15
Cochin	5	0	1	6
Diu	5	0	0	5
Angre	2	0	0	2
Mangalore	0	0	0	0
Port Blair / Andaman Is	0	0	0	0
Trincomalee	0	0	0	0

## Port Calls by Year

With YOY Variances, 2013-2020



**Destination:**  
**Less Visited Destinations 2020**  
**Port Calls**

Destination	Transit	Turnarou..	Overnight	Total
Sri Lanka	8	1	3	12
Cambodia	7	0	0	7
Myanmar	1	0	1	2
Timor	1	0	0	1
Bangladesh	0	0	0	0
Brunei	0	0	0	0
Macau Region	0	0	0	0
Maldives	0	0	0	0
Russia	0	0	0	0

**Destination:**  
**Less Visited Destinations 2020**  
**Passenger Destination Days (K)**

Destination	Transit	Turnarou..	Overnight	Total
Sri Lanka	19.2	0.5	2.2	21.8
Cambodia	9.4	0.0	0.0	9.4
Myanmar	0.9	0.0	0.9	1.8
Timor	1.3	0.0	0.0	1.3
Bangladesh	0.0	0.0	0.0	0.0
Brunei	0.0	0.0	0.0	0.0
Macau Region	0.0	0.0	0.0	0.0
Maldives	0.0	0.0	0.0	0.0
Russia	0.0	0.0	0.0	0.0

# APPENDIX

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- The forgoing report outlines capacity and destination trends between 2014 and 2020, 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 23 international and regional brands cruising in Asia in 2020.
- 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.
- Contrary to previous Asia reports (that analysed planned itineraries), all data represented is based on itineraries actually operated with passengers on board through the year 2020.

Appendix - Port Calls by Port, 2020  
 Top 45 Ports Ranked by Total Calls

Rank	Destination	Port	Transit	Turnaround	Overnight	Total
1	Singapore	Singapore	3	86	13	102
2	Taiwan	Keelung / Taipei	3	70	1	74
3	Thailand	Bangkok (Laem Chabang & Klong Toey)	21	1	15	37
4	India	Mumbai	5	26	5	36
5	Vietnam	Da Nang / Hue / Chan May	31	0	4	35
6	Taiwan	Hualien	34	0	0	34
7	Malaysia	Port Klang/ Kuala Lumpur	21	0	8	29
8	Thailand	Patong Bay / Phuket	15	10	4	29
9	Vietnam	Ho Chi Minh City / Phu My	19	0	10	29
10	Japan	Yokohama	0	26	2	28
11	China	Baoshan / Shanghai	0	26	1	27
12	Hong Kong	Hong Kong	3	18	5	26
13	Japan	Naha / Okinawa	18	0	8	26
14	Malaysia	Georgetown/ Penang	23	0	0	23
15	Taiwan	Kaoshung	16	4	2	22
16	Taiwan	Penghu	16	0	0	16
17	China	Shenzhen / Shekou	0	15	0	15
18	India	Mormugao / Goa	14	0	1	15
19	Malaysia	Langkawi	14	0	0	14
20	Japan	Nagasaki	11	0	2	13
21	Japan	Fukuoka /Hakata	13	0	0	13
22	Sri Lanka	Colombo	8	1	3	12
23	Thailand	Koh Samui	12	0	0	12
24	Taiwan	Matsu	11	0	0	11
25	Thailand	Ko Hong	10	0	0	10
26	Thailand	Phang Nga Bay	10	0	0	10
27	Vietnam	Halong Bay / Hanoi	8	0	2	10
28	Indonesia	Benoa/ Bali	3	2	4	9
29	Japan	Kobe	3	6	0	9
30	Japan	Ishigaki	9	0	0	9
31	Philippines	Manila	6	1	2	9
32	Taiwan	Kinman Isls	9	0	0	9
33	Thailand	Similian Is	9	0	0	9
34	Thailand	Ko Rok Nok	9	0	0	9
35	China	Hainan / Sanya	0	7	1	8
36	Vietnam	Nha Trang	8	0	0	8
37	Cambodia	Sihanoukville	7	0	0	7
38	Malaysia	Malacca	7	0	0	7
39	India	Cochin	5	0	1	6
40	Taiwan	Other Taiwan	6	0	0	6
41	Thailand	Ko Adang	6	0	0	6
42	China	Guangzhou / Nansha	2	3	0	5
43	China	Tianjin / Xingang / Beijing	0	5	0	5
44	India	Diu	5	0	0	5
45	Thailand	Ko Butang	5	0	0	5

**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. (*See Map, Page 25*)

**Ocean cruise:** A cruise itinerary that sails to destinations via the ocean; itineraries last 2 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 operated in 2018 resulted 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 3 ports on one cruise, it generates 3,000 PDD].

**Port Calls:** Until this year (2020) *Asia Cruise Trends* studies consistently reported 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 make adjustments to their itineraries as the year progresses. In such cases their actual calls 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). For this year, all the analyses are based on ACTUAL itineraries operated in Asia with passengers on board (again as advised confidentially to CHART Management Consultants by every cruise line).

### 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. (See Map, Page 25)

**Southeast Asia**: Geography that includes Singapore, Malaysia, Indonesia, Brunei, Philippines, Thailand, Cambodia, Vietnam, and Timor-Leste. (See Map, Page 25)

**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.

# Map East Asia, South Asia, & Southeast Asia

## Cruise Destination Countries & SARs by Region

(Following geography)

### SOUTH ASIA

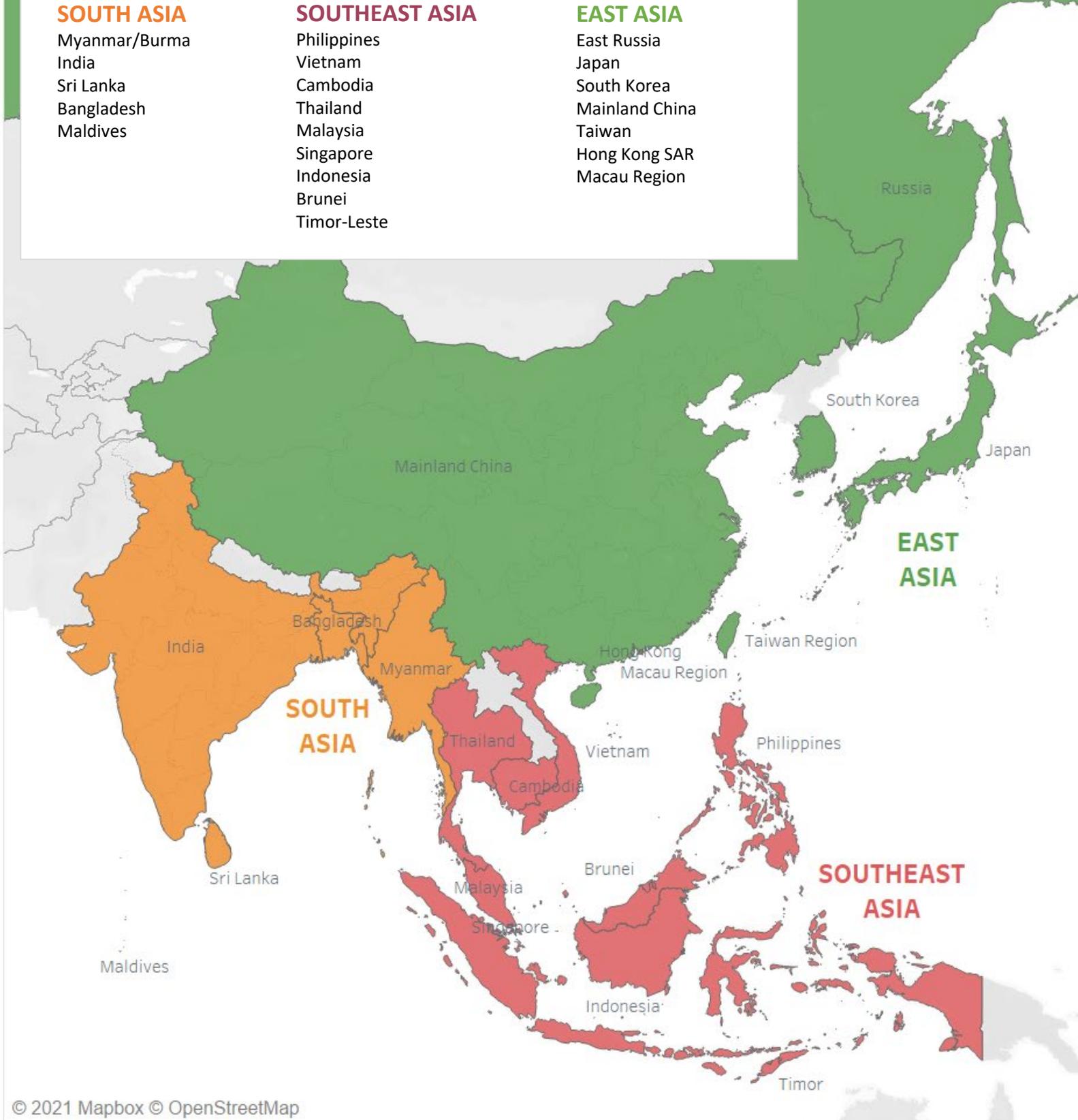
- Myanmar/Burma
- India
- Sri Lanka
- Bangladesh
- Maldives

### SOUTHEAST ASIA

- Philippines
- Vietnam
- Cambodia
- Thailand
- Malaysia
- Singapore
- Indonesia
- Brunei
- Timor-Leste

### EAST ASIA

- East Russia
- Japan
- South Korea
- Mainland China
- Taiwan
- Hong Kong SAR
- Macau Region



**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](http://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; operational and market assessment for a new cruise port development in Vietnam; investment in the Asian river cruise industry. The firm designed and delivered the 2013 Asia Cruise Association White Paper as well as all Asia Cruise Trends reports and the subsequent Asia Cruise Deployment & Capacity Reports published by CLIA.

For more information: [www.CHARTmgmtconsultants.com](http://www.CHARTmgmtconsultants.com)

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1201 F STREET NW, SUITE 250  
WASHINGTON, DC 20004  
+1.202.759.9370