



**U.S. Department of Transportation  
Maritime Administration**



# **North American Cruise Statistical Snapshot, 2010**



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# North American Cruise Statistical Snapshot, 2010

Office of  
Policy and Plans

Maritime Administration

U.S. Department of  
Transportation



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## Preface

This report contains cruise statistics for the major cruise lines that offer North American cruises with a U.S. port of call. The statistics include passengers booked and capacities offered by the cruise lines. Capacities are based on two passengers per stateroom. The statistics are presented in terms of passengers and passenger nights.



## Notes and Sources

### **Destinations:**

Alaska  
Bahamas  
Bermuda  
Canada (CA)/New England  
Eastern Caribbean  
Hawaii  
Mexico  
Nowhere  
Pacific Coast  
South America  
South Pacific/Far East  
Southern Caribbean  
Trans-Panama Canal  
Transatlantic  
Western Caribbean

### **Cruise Lines:**

Azamara  
Carnival  
Celebrity  
Costa  
Crystal  
Cunard  
Disney  
Fred Olsen  
Holland America  
MSC  
Norwegian (NCL)  
Oceania  
Princess  
Regent  
Royal Caribbean  
Seabourn  
Seadream  
Silversea  
Windstar

### **Destination Notes:**

Eastern Caribbean - Southeast of Bahamas to St. Martin, and west of St. Martin to Haiti.

Southern Caribbean - South of St. Martin to northern coast of South America as far as Aruba.

Western Caribbean - West of Haiti, includes ports in Mexico, Central America and Columbia.

Nowhere - Begins and ends at the same port with no intervening calls.

### **Sources:**

Cruises, cruise passengers and departure ports are derived from the U.S. Customs and Border Patrol Vessel Entrance and Clearance documents. Destinations are derived from the Official Steamship Guide International and cruise line brochures.



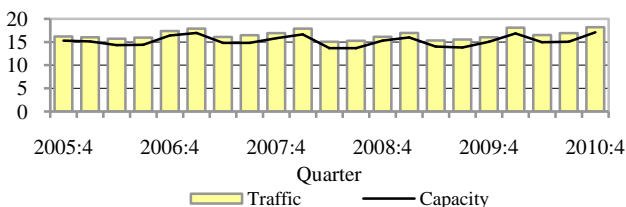
# North American Cruise Statistics

## Highlights

During the fourth quarter of 2010, a record 18.2 million passenger nights were booked on North American cruises, up 13.5 percent from a year earlier (Figure 1 and Table 1). About 2.7 million passengers were carried on 1,083 cruises.

For the year, 69.7 million passenger nights were booked, up 9.4 percent from the year before.

Figure 1. North American Cruises,  
Traffic and Capacity  
(Million Passenger Nights)



Source: Maritime Administration.

Passenger nights are a measure of supply/demand for cruises while passengers (embarked) are a measure of supply/demand for U.S. port services. An increase in supply/demand for cruises does not necessarily mean an increase in supply/demand for port services, and vice versa. For example, passenger nights (and cruise lengths) increased from the 3<sup>rd</sup> to 4<sup>th</sup> quarter of 2009 while passengers fell over the same period (Table 1).

The North America cruise market has been capacity driven; that is, cruise lines set fares to fill ships.<sup>1</sup> Capacity is based on two passengers per stateroom. A stateroom with two passengers is considered 100 percent occupied. Since many double staterooms can accommodate three or four people, occupancy rates are generally above 100 percent.

<sup>1</sup> For the period 2005:1 to 2010:4, the correlation coefficient for passenger nights offered and passenger nights booked was 0.97.

# North American Cruise Statistics

Table 1. North American Cruises, Key Statistics  
(Capacity and Traffic in Millions)

Year/Qtr.	Vessels		Capacity <sup>^</sup>			Traffic		Occupancy %	
	No.	Cruises	Pass. Pass.Nights	Avg. Nights		Pass. Pass. Nights		Pass. Pass.Nights	
2005	114	4,462	8.88	59.03	6.64	9.74	63.71	110	108
1	102	1,209	2.35	15.83	6.75	2.54	16.92	108	107
2	101	1,096	2.18	14.20	6.50	2.41	15.41	110	109
3	84	1,062	2.16	13.71	6.36	2.42	15.20	112	111
4	100	1,095	2.20	15.30	6.96	2.37	16.18	108	106
2006	110	4,435	9.09	60.26	6.63	9.97	65.03	110	108
1	99	1,118	2.25	15.11	6.73	2.42	16.01	108	106
2	99	1,065	2.19	14.33	6.56	2.44	15.70	111	110
3	82	1,091	2.26	14.41	6.38	2.53	15.94	112	111
4	103	1,161	2.40	16.41	6.83	2.59	17.38	108	106
2007	116	4,498	9.38	62.40	6.65	10.31	67.38	110	108
1	104	1,206	2.47	16.94	6.87	2.65	17.90	107	106
2	105	1,071	2.26	14.82	6.56	2.50	16.10	111	109
3	80	1,112	2.34	14.80	6.31	2.64	16.46	113	111
4	102	1,109	2.31	15.83	6.84	2.52	16.92	109	107
2008	119	4,235	9.00	59.30	6.59	9.93	64.29	110	108
1	100	1,192	2.49	16.65	6.69	2.71	17.87	109	107
2	93	997	2.13	13.69	6.43	2.38	15.05	112	110
3	78	1,022	2.17	13.68	6.31	2.46	15.26	113	112
4	102	1,024	2.21	15.28	6.91	2.38	16.12	108	105
2009	112	4,120	8.91	58.91	6.61	9.86	63.82	111	108
1	97	1,098	2.34	15.99	6.82	2.54	16.95	108	106
2	97	1,000	2.16	14.03	6.50	2.41	15.33	112	109
3	75	1,020	2.20	13.82	6.29	2.50	15.52	114	112
4	96	1,002	2.21	15.07	6.81	2.40	16.02	109	106
2010	112	4,208	9.56	63.94	6.69	10.61	69.67	111	109
1	95	1,091	2.46	16.84	6.84	2.69	18.10	109	107
2	96	1,007	2.27	14.96	6.58	2.55	16.49	112	110
3	78	1,027	2.34	15.05	6.44	2.67	16.90	114	112
4	101	1,083	2.49	17.09	6.86	2.70	18.18	108	106

Source: Maritime Administration.

<sup>^</sup> Capacity is based on two passengers per stateroom. Average nights = passenger nights/passengers.

# North American Cruise Statistics

## Larger Ships, Higher Utilization

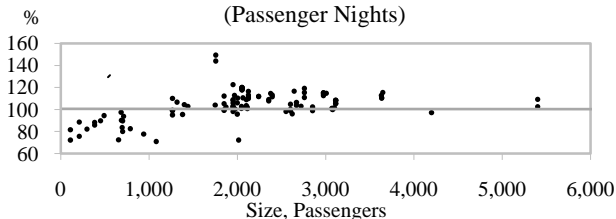
In 2010, the world’s largest cruise ships entered the North America cruise market. These four ships accounted for 10 percent of the 4<sup>th</sup> quarter 2010 North America cruise passenger capacity (Table 2).

Table 2. World’s Largest Cruise Ships

Vessel	Cruise Line	Pass.	Year Built
OASIS OF THE SEAS	Royal Caribbean	5,400	2009
ALLURE OF THE SEAS	Royal Caribbean	5,400	2010
NORWEGIAN EPIC	NCL	4,200	2010
CARNIVAL DREAM	Carnival	3,646	2009

Over the last five years, the average size of ships (per cruise) increased by 14.2 percent to 2,272 passengers. Larger cruise ships tend to have lower average operating expenses than smaller ships. For example, the 5,400-passenger ALLURE OF THE SEAS has one crew member for every 2.6 passengers, while the 1,870-passenger CELEBRITY CENTURY has one crew member for every 2.1 passengers. The cost advantage presumes ships are fully booked. In fact, utilization tends to increase with vessel size (Figure 2). In 2010, for example, 42 percent of the less than 2000-passenger cruise ships had utilization above 100 percent, while 90 percent of the larger ships had utilization above 100 percent. The outliers in the 1,700 – 2,100 passenger range were Disney’s family cruises (highs), and repositioning cruises (lows). The overall utilization rate for 2,000+ passenger cruise vessels was 110 percent, compared to 106 percent for the smaller vessels.

Figure 2. Sactter Plot, Utilization V.  
Vessel Size, 2010  
(Passenger Nights)



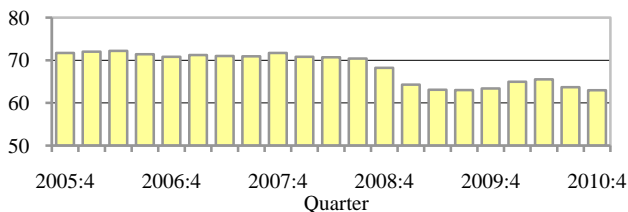
Source: Maritime Administration.

# North American Cruise Statistics

## Discounting Spurs Recovery

The economic recovery spawned a small increase in fares during the first half of 2010, but a second half surge in cruise capacity brought fares back to 2009 levels. For 2010, fares were up just 1.5 percent from a year earlier, and down 8 percent from the 2008 levels (Figure 3). The discounting not only filled ships, but increased demand for port and other cruise-related services.

Figure 3. U.S. Consumer Price Index,  
Ship Passenger Fares



Source: Bureau of Labor Statistics.

## Seasonal Variation

During the second and third quarters of each year, cruise lines move vessels from North America (Caribbean) to Europe where fares are higher (Table 3). However, North American cruises during the second and third quarter are generally shorter than those during the rest of the year moderating the seasonal decline in passengers.

Table 3. Seasonal Indexes for North America Cruises

Indicator	2010			
	1	2	3	4
Vessels	104.7	104.8	83.1	107.4
Cruises	106.2	96.5	98.3	99.0
Capacities				
Passengers	105.7	96.4	98.4	99.4
Passenger nights	109.0	94.5	93.7	102.7
Cruise Length	102.6	98.2	95.6	103.6

Source: Maritime Administration.

Note: Estimated with Census X-12 Seasonal Adjustment software.

# North American Cruise Statistics

## Destinations

In 2010, 5.7 million passengers embarked on Caribbean cruises, up 18 percent from the year before (Table 4). The four mega-ships accounted for 12 percent of the passengers to Caribbean destinations.

For the same period, passengers on Bahamas cruises increased by 13 percent as demand for shorter, less expensive cruises increased.

Table 4. North American Cruise Passengers by Destination (Thousands)

Destination	2010				Year	
	1	2	3	4	2009	2010
Alaska	0	345	527	0	1,011	872
Bahamas	430	496	486	559	1,741	1,970
Bermuda	0	125	127	17	264	269
CA/New Eng.	0	32	165	68	226	265
Caribbean	1,836	1,180	1,083	1,643	4,879	5,742
Eastern	508	349	353	452	1,249	1,661
Southern	328	122	74	290	801	815
Western	999	708	655	901	2,828	3,264
Hawaii	55	37	41	55	193	188
Mexico (Pac.)	286	215	155	219	1,095	875
Nowhere	7	0	2	8	18	17
Pacific Coast	0	17	20	7	63	44
S. America	11	3	0	5	35	19
S. Pacific/FE	7	5	9	4	29	25
Transatlantic	7	68	34	47	158	157
Trans-Canal	54	29	16	67	146	166
Total	2,691	2,553	2,665	2,699	9,858	10,609

Source: Maritime Administration.

## Concentration

The North American cruise market is highly concentrated. In 2010, 3 firms; Carnival, Royal Caribbean, Norwegian and Disney, accounted for 96 percent of the passenger nights (Table 5). By itself, Carnival

## North American Cruise Statistics

accounted for six brands and 55 percent of the passenger nights. Royal Caribbean accounted for 30 percent of the passenger nights, up from 27 percent a year earlier.

Table 5. North American Cruise Passenger Nights by Cruise Line (Millions)

Corp./Cruise Line	2010				Year	
	1	2	3	4	2009	2010
<b>Carnival Corp.</b>	9.51	9.35	9.89	9.60	36.35	38.36
Carnival	5.31	5.71	5.93	5.34	21.04	22.29
Costa	0.49	0.10	0.06	0.16	0.52	0.81
Cunard	0.11	0.10	0.19	0.26	0.66	0.66
Holland America	1.25	1.34	1.55	1.63	5.73	5.77
Princess	2.33	2.10	2.17	2.19	8.36	8.78
Seabourn	0.02	0.00	0.00	0.03	0.04	0.06
<b>Royal Caribbean Int'l</b>	5.90	4.97	4.61	5.50	17.25	20.98
Azamara	0.06	0.01	0.00	0.03	0.08	0.10
Royal Caribbean	4.33	3.79	3.52	3.95	13.72	15.59
Celebrity	1.51	1.18	1.09	1.52	3.45	5.30
<b>NCL</b>	1.72	1.67	2.00	2.23	7.12	7.62
<b>Disney Cruise</b>	0.47	0.29	0.25	0.44	1.83	1.45
<b>Other</b>	0.50	0.21	0.16	0.41	1.27	1.27
Crystal	0.07	0.00	0.02	0.08	0.17	0.17
Fred Olsen	0.00	0.00	0.00	0.00	0.11	0.00
MSC	0.23	0.10	0.06	0.22	0.55	0.61
Oceania	0.06	0.00	0.00	0.03	0.08	0.09
Regent	0.09	0.06	0.04	0.05	0.22	0.25
Seadream	0.02	0.01	0.00	0.01	0.03	0.03
Silversea	0.04	0.03	0.03	0.02	0.09	0.12
Windstar	0.00	0.00	0.00	0.00	0.01	0.00
All Cruise Lines	18.10	16.49	16.90	18.18	63.82	69.67

Source: Maritime Administration.

# North American Cruise Statistics

## Departure Ports

In 2010, the top five departure ports accounted for 59 percent of the North American cruise passenger departures, up from 55 percent the year before. The top three were Florida ports: Miami, Fort Lauderdale and Port Canaveral (Table 6). Fort Lauderdale was the home port for Royal Caribbean's new 5,400-passenger ships. Miami and Port Canaveral were the home ports for the NORWEGIAN EPIC and CARNIVAL DREAM.

**Table 6. North American Cruise Passengers by Departure Port**

(Thousands)

Departure Port	2010				Year	
	1	2	3	4	2009	2010
Miami	648	474	444	585	2,044	2,151
Fort Lauderdale	600	341	246	572	1,277	1,759
Port Canaveral	333	309	307	350	1,189	1,299
New York	39	149	250	117	403	556
San Juan	199	114	71	137	507	522
Seattle	0	177	291	1	430	469
Galveston	131	102	95	101	386	429
Tampa	127	91	83	124	401	425
Long Beach	104	111	112	87	415	414
Los Angeles	125	93	51	106	412	374
Vancouver (CN)	0	102	166	4	425	272
New Orleans	78	56	56	71	243	261
San Diego	106	53	6	77	413	242
Baltimore	39	37	65	73	166	215
Cape Liberty	26	63	75	34	156	198
Mobile	45	47	47	43	135	183
Jacksonville	30	47	47	47	188	172
Honolulu	29	32	33	32	127	126
Charleston	9	27	42	38	37	117
Boston	0	25	43	15	83	82
Seward	0	23	42	0	76	65
Whittier	0	23	40	0	105	63
San Francisco	2	11	23	4	51	40
Southampton	0	11	13	8	31	32
Norfolk	0	20	0	8	26	27
Other Ports	20	17	16	64	131	118
All Ports	2,691	2,553	2,665	2,699	9,858	10,609

Source: Maritime Administration.

