



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



North American Cruise Statistical Snapshot, 2011



Office of Policy and Plans

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North American Cruise Statistical Snapshot, 2011

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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
Canada/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:

AIDA
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 Protection Vessel Entrance and Clearance documents. Destinations are derived from the Official Steamship Guide International and cruise line brochures. Fleet characteristics are derived from Clarkson's Shipping Intelligence Network and the Official Steamship Guide International.

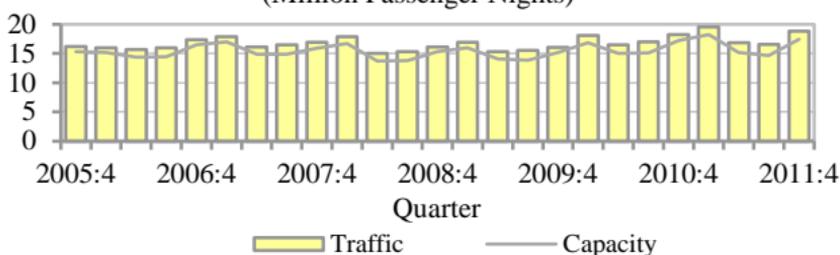
North American Cruise Statistics

Highlights

For the fourth quarter of 2011, a record 18.9 million passenger nights were booked on North American cruises, up 3.3 percent from a year earlier (Figure 1, Table 1). About 2.8 million passengers were carried on 1,075 cruises.

For the year, 71.8 million passenger nights were booked, up 2.8 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 3rd to 4th quarter of 2009 while passengers fell over the same period (Table 1).

The North American cruise market has been capacity driven; that is, cruise lines set fares to fill ships.¹ 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.

¹ For the period 2006:1 to 2011:4, 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 [^]			Traffic		Occupancy %	
	No.	Cruises	Pass. Pass.Nights	Avg. Nights	Pass. Nights	Pass. Nights	Pass. Pass.Nights		
2006	110	4,435	9.13	60.45	6.62	9.97	65.03	109	108
1	99	1,118	2.25	15.15	6.72	2.42	16.01	107	106
2	99	1,065	2.19	14.38	6.55	2.44	15.70	111	109
3	82	1,091	2.27	14.46	6.38	2.53	15.94	112	110
4	103	1,161	2.41	16.46	6.82	2.59	17.38	107	106
2007	116	4,498	9.42	62.59	6.65	10.31	67.39	109	108
1	104	1,206	2.48	16.99	6.86	2.65	17.90	107	105
2	105	1,071	2.27	14.86	6.56	2.50	16.10	110	108
3	80	1,112	2.35	14.85	6.31	2.64	16.46	112	111
4	102	1,109	2.32	15.88	6.84	2.52	16.92	108	107
2008	120	4,239	9.04	59.53	6.59	9.94	64.34	110	108
1	100	1,190	2.50	16.69	6.68	2.71	17.87	108	107
2	93	997	2.14	13.73	6.42	2.38	15.05	112	110
3	79	1,025	2.18	13.76	6.30	2.46	15.29	113	111
4	103	1,027	2.22	15.34	6.91	2.39	16.14	108	105
2009	113	4,126	8.95	59.11	6.61	9.87	63.87	110	108
1	97	1,098	2.35	16.01	6.82	2.54	16.95	108	106
2	97	1,000	2.16	14.07	6.50	2.41	15.33	112	109
3	76	1,023	2.21	13.89	6.29	2.51	15.54	113	112
4	97	1,005	2.23	15.14	6.81	2.41	16.05	108	106
2010	114	4,216	9.60	64.24	6.69	10.63	69.83	111	109
1	96	1,092	2.47	16.88	6.85	2.69	18.12	109	107
2	96	1,007	2.28	15.00	6.58	2.55	16.49	112	110
3	79	1,030	2.35	15.14	6.44	2.67	16.97	114	112
4	103	1,087	2.51	17.22	6.87	2.71	18.25	108	106
2011	115	4,222	9.72	65.50	6.74	10.89	71.82	112	110
1	102	1,160	2.64	18.25	6.90	2.89	19.54	109	107
2	96	992	2.28	15.15	6.63	2.60	16.84	114	111
3	80	995	2.26	14.65	6.48	2.62	16.59	116	113
4	102	1,075	2.53	17.44	6.91	2.79	18.85	110	108

Source: Maritime Administration.

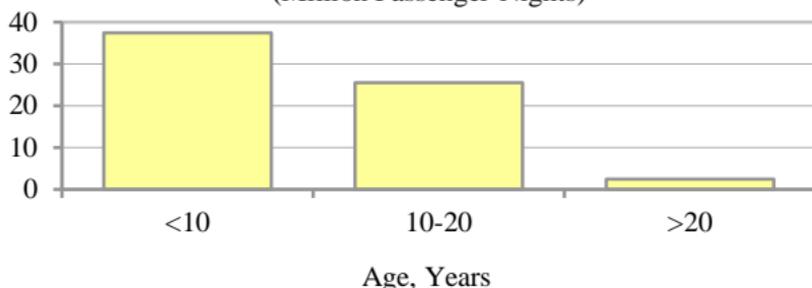
[^] Capacity is based on two passengers per stateroom. Average nights = passenger nights/passengers.

North American Cruise Statistics

Age Profile

For cruise ships offering at least one North American cruise in 2011 the average age (weighted by size) was 8 years. In contrast, the average age of the global fleet was 12 years.¹ In 2011, 57 percent of the North American cruise capacity was offered by vessels less than 10 years old (Figure 2). Only 4 percent of the cruise capacity was offered by vessels older than 20 years.

Figure 2. North American Cruise Capacity by Age of Vessel, 2011 (Million Passenger-Nights)



Source: Maritime Administration.

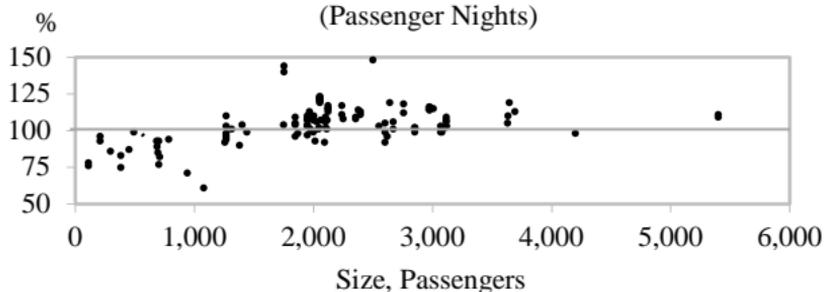
Larger Ships, Higher Utilization

Over the last five years, the average size of ships (per cruise) increased by 9.8 percent to 2,301 passengers. Larger cruise ships tend to have lower average labor costs 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 3). In 2011, for example, 86 percent of the 2000+ passenger cruise ships had utilization above 100 percent, while 39 percent of the smaller ships had utilization above 100 percent. The outliers were Disney's family cruises (highs), and repositioning cruises (lows). The overall utilization rate for 2,000+ passenger cruise vessels was 111 percent, compared to 104 percent for smaller vessels.

¹ The age of the global cruise fleet is based on data from Clarkson's Shipping Intelligence Network.

North American Cruise Statistics

Figure 3. Scatter Plot, Utilization V.
Vessel Size, 2011
(Passenger Nights)

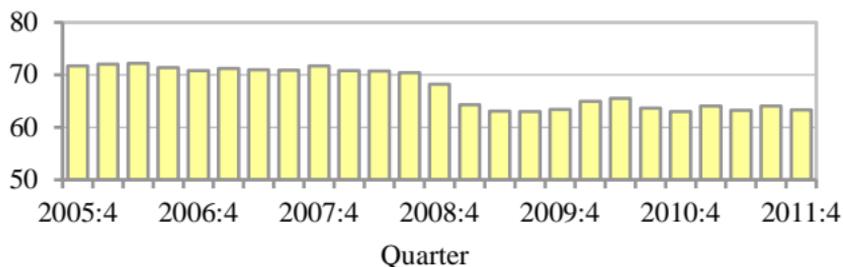


Source: Maritime Administration.

Discounting Continues

The economic recovery spawned a small increase in fares during the first half of 2010, but a 2-year surge in cruise capacity brought fares back to 2009 levels (Figure 4). The discounting not only filled ships, but increased demand for port and other cruise-related services.

Figure 4. U.S. Consumer Price Index,
Ship Passenger Fares



Source: Bureau of Labor Statistics.

Seasonal Variation

For 2011, there was a 10.8 percent difference between first and second quarter cruises, compared to 8.9 percent five years before. The difference has increased steadily over the last five years.

North American Cruise Statistics

During the second and third quarters of each year, cruise lines move vessels from North America to Europe where fares are higher (Table 3). However, North American cruises during the second and third quarters are generally shorter than those during the rest of the year moderating the seasonal decline in passengers. For example, the seasonal decline in passenger-nights from the first to second quarters of 2011 was 14.6 percent (108.9 - 94.3) while the seasonal decline in passengers was 10 percent (105.9 - 95.9).

Table 3. Seasonal Indexes for North America Cruises

Year: Quarter	North American Cruise Capacities			
	Cruises	Passengers	Pass.-Nights	Avg. Nights
2006:1	105.4	103.7	106.5	101.9
2006:2	96.5	97.3	95.5	98.1
2006:3	97.4	98.4	93.9	95.7
2006:4	100.6	100.5	103.9	104.2
2007:1	105.6	104.0	106.8	101.9
2007:2	96.3	97.1	95.3	98.2
2007:3	97.5	98.4	93.9	95.7
2007:4	100.5	100.4	103.8	104.1
2008:1	105.8	104.3	107.1	102.0
2008:2	96.1	96.8	95.1	98.3
2008:3	97.7	98.4	93.9	95.6
2008:4	100.2	100.3	103.6	104.0
2009:1	106.0	104.8	107.7	102.2
2009:2	96.0	96.5	94.8	98.3
2009:3	97.8	98.3	93.8	95.5
2009:4	100.0	100.2	103.5	103.9
2010:1	106.3	105.3	108.3	102.3
2010:2	95.9	96.2	94.5	98.3
2010:3	97.8	98.1	93.7	95.6
2010:4	99.8	100.1	103.2	103.6
2011:1	106.6	105.9	108.9	102.6
2011:2	95.8	95.9	94.3	98.3
2011:3	97.7	97.8	93.4	95.7
2011:4	99.7	100.1	103.2	103.4

Source: Maritime Administration.

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

North American Cruise Statistics

Destinations, Transatlantic Cruises

Transatlantic cruises are largely repositioning cruises. Vessels move to Europe during the second quarter, and return to North America during the third and fourth quarters contributing to the seasonal variation in North America cruises (Figure 5). In 2011, 197 thousand passengers embarked on transatlantic cruises, up 25 percent from the year before (Table 4).

Figure 5. Transatlantic Cruises,
Traffic and Capacity
(Thousand Passengers)

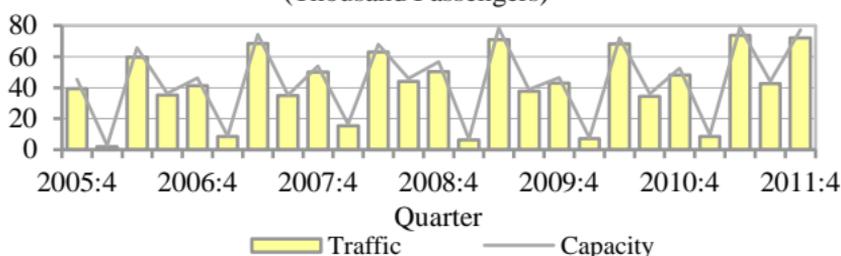


Table 4. North American Cruise Passengers by Destination
(Thousands)

Destination	2011				Year	
	1	2	3	4	2009	2011
Alaska	0	336	548	0	872	884
Bahamas	547	575	580	616	1,972	2,318
Bermuda	0	117	170	50	269	338
CA/New England	0	41	163	65	276	269
Caribbean	1,973	1,185	903	1,662	5,741	5,722
Eastern	487	295	227	400	1,656	1,409
Southern	411	149	75	324	820	958
Western	1,076	741	601	938	3,264	3,355
Hawaii	68	42	34	71	188	215
Mexico (Pacific)	229	156	127	185	878	697
Nowhere	3	3	0	8	17	14
Pacific Coast	0	25	23	4	44	51
S. America	13	0	0	4	19	17
S. Pacific/FE	4	5	11	6	25	27
Transatlantic	8	74	43	72	158	197
Trans-Panama Canal	43	40	15	41	168	139
Total	2,887	2,599	2,616	2,785	10,627	10,887

Source: Maritime Administration.

North American Cruise Statistics

Concentration

The North American cruise market is highly concentrated. In 2011, 4 firms; Carnival, Royal Caribbean, Norwegian and Disney, accounted for 98 percent of the passenger nights (Table 5). By itself, Carnival accounted for seven brands and 54 percent of the passenger nights. With the addition of the 2,500-passenger, DISNEY DREAM, Disney doubled its share of the North America market from 2010 to 2011.

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

Corp./Cruise Line	2011				Year	
	1	2	3	4	2010	2011
Carnival Corporation	10,043	9,335	9,732	9,962	38,469	39,071
AIDA	0	0	57	231	91	287
Carnival	5,529	5,860	5,959	5,923	22,285	23,270
Costa	199	0	0	83	807	282
Cunard	237	122	219	226	658	804
Holland America	1,729	1,413	1,537	1,468	5,794	6,146
Princess	2,321	1,940	1,953	2,016	8,778	8,230
Seabourn	28	0	8	15	55	51
Royal Caribbean Int'l	5,903	4,615	4,051	5,340	21,003	19,909
Azamara	57	7	0	24	96	88
Royal Caribbean	4,195	3,483	3,233	4,022	15,610	14,933
Celebrity	1,651	1,125	818	1,295	5,296	4,888
Norwegian Cruise Line	2,288	2,003	1,947	2,210	7,618	8,448
Disney Cruise	759	707	587	791	1,465	2,844
Other	546	185	274	544	1,273	1,549
Crystal	61	52	66	86	168	266
Fred Olsen	0	0	0	0	0	0
MSC	195	0	68	240	614	503
Oceania	140	58	62	103	93	362
Regent	93	43	44	78	248	258
Seadream	14	4	0	9	31	27
Silversea	44	28	34	26	119	132
Windstar	0	0	0	0	0	0
All Cruise Lines	19,538	16,845	16,591	18,846	69,827	71,821

Source: Maritime Administration.

North American Cruise Statistics

Departure Ports

In 2011, the top ten departure ports accounted for 79 percent of the North American cruise passenger departures. Miami, Fort Lauderdale and Port Canaveral remained at the top (Table 6). Port Canaveral, New Orleans, Baltimore, Charleston, and Vancouver (CN) posted significant gains from 2010 to 2011, with New Orleans moving into the top ten.

Table 6. North American Cruise Passengers by Departure Port (Thousands)

Departure Port	2011				Year	
	1	2	3	4	2010	2011
Miami	651	434	358	527	2,151	1,970
Fort Lauderdale	694	366	209	557	1,759	1,826
Port Canaveral	374	349	345	430	1,299	1,496
New York	67	155	258	131	562	612
San Juan	198	119	72	134	522	522
Galveston	131	114	82	135	440	462
Tampa	138	100	84	137	425	458
Seattle	0	159	280	0	469	439
Long Beach	78	108	117	102	414	405
New Orleans	79	85	85	125	261	373
Vancouver (CN)	0	123	198	2	272	323
Los Angeles	130	57	12	112	378	311
Baltimore	60	68	63	63	215	254
Cape Liberty	30	57	76	55	198	217
Jacksonville	45	49	48	48	172	190
Charleston	40	42	40	43	117	165
Mobile	48	47	48	7	183	150
San Diego	82	26	4	35	244	148
Honolulu	30	32	32	31	126	126
Boston	0	17	47	21	82	85
Seward	0	21	44	0	65	65
Whittier	0	18	44	0	63	62
San Francisco	1	21	23	0	40	44
Southampton	2	10	16	13	32	40
Barcelona	0	0	2	19	13	21
Other Ports	11	22	29	58	129	121
All Ports	2,887	2,599	2,616	2,785	10,627	10,887

Source: Maritime Administration.

