

Nassau confirmed its number one position and drew away from Cozumel, which was one of the ports to lose some business.



# Cruise Insight world's top cruise ports

## Bahamian bonus in challenging year for cruise ports

**T**his table of the world's busiest cruise ports of call in 2012 gives an accurate picture of the kind of year enjoyed – if that is the right word – by the cruise industry.

The various geopolitical issues in the Mediterranean, the devastating Costa Concordia accident and the ongoing economic crises (particularly within the Eurozone) all combined to produce a year when growth slowed right down overall – with some markets actually going into reverse.

As a result there is a fairly even split between those transit ports which saw passenger increases and those which saw numbers fall. So, although the top six ports remained the same as in 2011, four of them did so despite decreases of between 5% and 18%.

Nassau did, though, confirm its number one position and drew away from Cozumel, which was one of the ports to lose some business. The second major Bahamian port, Freeport, was another big winner, moving up from 15th to 10th place with a 24% increase in passengers.

And, although they don't appear individually in this chart, the combined Bahamian Family Out Islands (which include private islands leased by cruise companies) attracted 2.5 million passengers in 2012 – up 6% on 2011.

It was a more mixed picture for Jamaica, which attracted a record 1.32 million cruise passengers in 2012 with a 17% increase over 2011.

This was primarily driven by the new cruise port of Falmouth, which had moved into the Top 50 in 2011; a

26% increase to 581,000 meant 38th place in 2012. Its rise, though, has been partially at the expense of Ocho Rios which is now just outside the Top 50 with 422,000 passengers.

The biggest increases were recorded by Bergen (28%) and Valencia (27%), both moving into the Top 50 for the first time.

Victoria (BC) also moved into the Top 50 with a 15% increase, thanks to more ships homeporting in the US port of Seattle; these needed a non-US call to be able to make Alaskan itineraries without breaking cabotage rules.

Substantial decreases at Sicily's Palermo and Messina and at the BVI's Tortola saw both drop out of the Top 50, while a marginal increase was not enough to stop Tallinn doing the same. Both it and Messina were however fewer than 10,000 passengers behind Bergen's 50th place.

The other major performer in the Top 50 was Marseille, which is developing as both a transit port and a homeport and moved up from 20th to 14th place in 2012 with a 15% increase to 940,000. It expects to reach 1 million this year, which is also the expected result for Grand Turk in 2014 following its 17% increase to 750,000 in 2012 which moved it up seven places to just outside the Top 20.

Other significant movers included Palma (down 31% and five places); Corfu (up 10% and 12 places); Roatan (down 32% and 14 places); Valletta (up 10% and ten places); Funchal (up 10% and eight places); La Goulette (down 21% and 12 places); Barbados (down 17% and 11 places); and Rhodes (down 17% and seven places).

## World's top 50 cruise ports of call ranked by passenger numbers

2012 rank		2012 pax '000	2011 pax '000	2011 rank	% change	Growth rank
1	Nassau, Bahamas*	3,412	3,077	1	+11	8
2	Cozumel, Mexico	2,740	2,871	2	-5	32
3	Civitavecchia, Italy**	2,190	2,590	3	-15	43
4	Piraeus, Greece	2,067	2,515	4	-18	47
5	USVI (primarily St Thomas)	1,904	2,009	5	-5	34
6	St Maarten	1,753	1,656	6	+6	19
7	Grand Cayman	1,507	1,401	8	+8	16
8	Naples, Italy	1,190	1,290	9	-8	37
9	San Juan (Puerto Rico)**	1,052	1,124	10	-6	36
10	Freeport, Bahamas*	1,050	846	15	+24	4
11	Livorno, Italy**	1,038	963	12	+6	15
12	Palma, Majorca**	985	1,420	7	-31	49
13	Dubrovnik, Croatia	951	986	11	-4	31
14	Marseille, France**	930	809	20	+15	7
15	Santa Cruz de Tenerife, Canary Islands**	886	828	16	+7	17
16	Juneau, Alaska	884	827	17	+7	18
18	Ketchikan, Alaska	839	794	21	+6	20
17	Santorini, Italy	839	962	13	-13	42
19	Las Palmas, Canary Islands**	833	761	23	+10	13
20	Key West, USA	808	815	19	-1	29
22	Grand Turk	750	639	28	+17	5
21	Katakolon, Greece	750	820	18	-9	38
23	Skagway, Alaska	718	663	26	+8	14
24	Mykonos, Greece	658	782	22	-16	44
25	Corfu, Greece	656	594	37	+10	9
26	Malaga, Spain**	652	639	28	+2	26
27	Belize	641	725	25	-12	41
29	St Kitts	629	601	34	+5	22
28	Roatan, Honduras	629	928	14	-32	50
30	Kusadasi, Turkey	624	662	27	-6	35
31	Valletta, Malta	623	566	41	+10	10
32	Bari, Italy**	619	587	39	+5	21
33	Labadee, Haiti***	610	597	36	+2	25
34	Istanbul, Turkey**	596	628	31	-5	33
35	Funchal, Madeira	593	540	43	+10	11
36	La Goulette, Tunisia	583	740	24	-21	48
37	Aruba	582	600	35	-3	30
38	Falmouth, Jamaica	581	460	50	+26	3
39	St Lucia	572	630	30	-9	40
40	Izmir, Turkey	553	505	44	+10	12
41	Antigua	551	606	33	-9	39
42	Lisbon, Portugal**	523	503	45	+4	23
43	Barbados**	517	619	32	-17	45
44	Victoria, British Columbia	506	440	Out	+15	6
45	Rhodes, Greece	490	588	38	-17	46
46	Valencia, Spain	480	378	Out	+27	2
47	Stockholm, Sweden**	467	452	47	+3	24
48	St Petersburg, Russia	452	455	46	+0.7	27
49	Bergen, Norway	447	350	Out	+28	1
50	Tallinn, Estonia	441	443	49	+0.5	28

Out = Outside Top 50 in 2011

\* Bahamas port statistics include day/night cruise visitors

\*\* Totals for these ports include a significant number of embarking/disembarking passengers as well as those in transit, but the chart excludes those ports which have at least 50% homeporting traffic – these are instead featured in the World's Top 20 Cruise Homeports chart.

\*\*\* Labadee is on Haiti but is effectively used by Royal Caribbean Cruises as a private island call.

### World's top 50 cruise ports of call ranked by growth

Growth rank		2012 pax '000	2012 rank	2011 pax '000	2011 rank	% change
1	Bergen, Norway	447	49	350	Out	+28
2	Valencia, Spain	480	46	378	Out	+27
3	Falmouth, Jamaica	581	38	460	50	+26
4	Freeport, Bahamas*	1,050	10	846	15	+24
5	Grand Turk	750	22	639	28	+17
6	Victoria, British Colombia	506	44	440	Out	+15
7	Marseille, France**	930	14	809	20	+15
8	Nassau, Bahamas*	3,412	1	3,077	1	+11
9	Corfu, Greece	656	25	594	37	+10
10	Valletta, Malta	623	31	566	41	+10
11	Funchal, Madeira	593	35	540	43	+10
12	Izmir, Turkey	553	40	505	44	+10
13	Las Palmas, Canary Islands**	833	19	761	23	+10
14	Skagway, Alaska	718	23	663	26	+8
15	Livorno, Italy**	1,038	11	963	12	+6
16	Grand Cayman	1,507	7	1,401	8	+8
17	Santa Cruz de Tenerife, Canary Islands**	886	15	828	16	+7
18	Juneau, Alaska	884	16	827	17	+7
19	St Maarten	1,753	6	1,656	6	+6
20	Ketchikan, Alaska	839	18	794	21	+6
21	Bari, Italy**	619	32	587	39	+5
22	St Kitts	629	29	601	34	+5
23	Lisbon, Portugal**	523	42	503	45	+4
24	Stockholm, Sweden**	467	47	452	47	+3
25	Labadee, Haiti***	610	33	597	36	+2
26	Malaga, Spain**	652	26	639	28	+2
27	St Petersburg, Russia	452	48	455	46	+1
28	Tallinn, Estonia	441	50	443	49	+1
29	Key West, USA	808	20	815	19	-1
30	Aruba	582	37	600	35	-3
31	Dubrovnik, Croatia	951	13	986	11	-4
32	Cozumel, Mexico	2,740	2	2,871	2	-5
33	Istanbul, Turkey**	596	34	628	31	-5
34	USVI (primarily St Thomas)	1,904	5	2,009	5	-5
35	Kusadasi, Turkey	624	30	662	27	-6
36	San Juan (Puerto Rico)**	1,052	9	1,124	10	-6
37	Naples, Italy	1,190	8	1,290	9	-8
38	Katakolon, Greece	750	21	820	18	-9
39	Antigua	551	41	606	33	-9
40	St Lucia	572	39	630	30	-9
41	Belize	641	27	725	25	-12
42	Santorini, Italy	839	17	962	13	-13
43	Civitavecchia, Italy**	2,190	3	2,590	3	-15
44	Mykonos, Greece	658	24	782	22	-16
45	Barbados**	517	43	619	32	-17
46	Rhodes, Greece	490	45	588	38	-17
47	Piraeus, Greece	2,067	4	2,515	4	-18
48	La Goulette, Tunisia	583	36	740	24	-21
49	Palma, Majorca**	985	12	1,420	7	-31
50	Roatan, Honduras	629	28	928	14	-32

Out = Outside Top 50 in 2011

\* Bahamas port statistics include day/night cruise visitors

\*\* Totals for these ports include a significant number of embarking/disembarking passengers as well as those in transit, but the chart excludes those ports which have at least 50% homeporting traffic – these are instead featured in the World's Top 20 Cruise Homeports chart.

\*\*\* Labadee is on Haiti but is effectively used by Royal Caribbean Cruises as a private island call.

Miami retained its top ranking in 2012, despite a marginal downturn



# Big Easy bounces back but Florida still has top homeports

It was a similar story of overall consolidation rather than significant growth for the world's Top 20 cruise homeports, with 11 recording increases and the other nine seeing passenger numbers fall.

The big winner was the Big Easy itself, New Orleans, which continued its accelerating recovery from the devastation of Hurricane Katrina with a 32% increase to a record 976,000 passengers, which moved it up eight places to 9th. Recent deployment announcements by several brands suggest that it will have topped a million this year.

However the news for the other big winner of 2012 – Galveston – is not so positive. Although it grew passenger numbers by 32% and moved up to an unprecedented 7th place among the Top 20, it has since lost a couple of cruise clients, due in some part to decisions prompted by the new North American Emissions Control Area (ECA).

Being closest to non-ECA waters, the Florida ports stand to gain from this development; and although the world's busiest homeport, Miami, recorded a marginal downturn in 2012, Port Canaveral grew 20% to move ahead of Port Everglades (+1%) into 2nd place. All three are expected to grow in 2013 and retain their firm grip on those top three places.

The recent European challenge faded a little in 2012 – again due to Costa Concordia and the ongoing Eurozone downturn – with 4th-placed Barcelona slipping back with a 9% drop in passengers. 5th-placed Venice was only marginally down, but while Barcelona looks set for more growth, there are question marks over Venice because of the strong anti-cruise lobby within that Italian city.

Other significant movers in 2012 included Los Angeles which slipped out of the Top 20 following a 29% drop in passengers. It is replaced by New Jersey's fast-growing Cape Liberty in Bayonne, operated by Royal Caribbean Cruises, which is planning a new US\$70 million terminal to handle its new Quantum-class ships.

Meanwhile the boom in Brazilian cruising seems to be over – at least for now – with Santos slipping back to 14th from 8th following a 19% decrease.

And the 3% fall in Singapore passenger numbers which saw it fall from 10th to 13th does underline that the more optimistic timelines for the long-forecast Asian cruise boom may have to be re-thought.

World's top 20 cruise homeports

2012 rank		2012 pax '000	2011 pax '000	2011 rank	% change
1	Miami	3,774	4,100	1	-8
2	Port Canaveral	3,761	3,130	3	+20
3	Port Everglades	3,690	3,664	2	+1
4	Barcelona	2,409	2,642	4	-9
5	Venice	1,775	1,786	5	-1
6	Southampton	1,529	1,455	6	+5
7	Galveston	1,208	924	11	+31
8	New York	1,172	1,243	7	-6
9	New Orleans	976	737	17	+32
10	Tampa	974	876	13	+11
11	Seattle	934	886	12	+5
12	Long Beach	914	816	15	+12
13	Singapore	913	942	10	-3
14	Santos	805	993	8	-19
15	Copenhagen	840	820	14	+2
16	Savona	810	948	9	-15
17	Genoa	797	799	16	—
18	Vancouver	667	663	18	—
19	Baltimore	482	504	20	-5
20	Cape Liberty (New Jersey)	476	440	Out	+8

Out = Outside Top 20 in 2011

Note: All are primarily homeports (passengers counted twice), augmented by varying amounts of transit traffic.