



# UK Cruise Port Survey, 2018

February 2019

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## INTRODUCTION

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This report was compiled by IRN Research (trading name of IRN Consultants Ltd). IRN Research is a full-service market research consultancy that was formed in 1991 and has a strong track record in providing market research services to the passenger shipping industry, ranging from small-scale UK-based research project to large-scale, multi-country research projects.

Please contact [ggiddings@irn-research.com](mailto:ggiddings@irn-research.com) for further information about this survey.

## Methodology and Definitions

The statistics collated for this report were gathered between November 2018 and February 2019. Over 70 UK ports were contacted for information on cruise ship visits in 2018. The information requested included

- Name of cruise ship.
- Name of cruise line.
- Passengers embarked as turn round port.
- Passengers disembarked as turn round port.
- Passengers on cruise ship at port of call (transit).

Not all the information requested was available from all ports. Where no information was available, the statistic was estimated with the following regime.

- If a cruise ship was known to have called at a port but no passengers were given an estimate of the passengers was imputed from information given by other ports.
- If the number of ships was known to have called at a port but the name of the cruise ships and passenger figures were not available, sources like crew-center were used to help compile lists of ships visiting a port. If data was completely lacking and to fill in missing information, an estimate of the number of passengers was imputed from the average number of passengers per ship at other ports.

## Definitions

- Number of ports - Number of ports that responded with information that they received cruise ship calls. Over 70 port authorities were contacted
- Turn round pax embarked – Passengers embarked at a turn round port
- Turn round pax disembarked – Passengers disembarked at a turn round port
- Ports of call pax - Total number of passengers on cruises ships on ports of call.
- Number of cruise ships – Total number of individual cruise ships which called at UK ports. Ships that change name counted as one

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- Number of cruise lines – Total number of individual branded cruise lines
- Cruise Calls – the total number of cruise calls at UK ports.

Extra data provided prior to 2017

- Turn round UK pax estimate – UK residents embarking at UK turn round ports for UK – UK cruises courtesy IRN Research UK Cruise Census
- Turn round Overseas pax estimate – Deduced estimate from turn round pax embarked less turn round UK pax estimate

## EMBARKATIONS/DISEMBARKATIONS

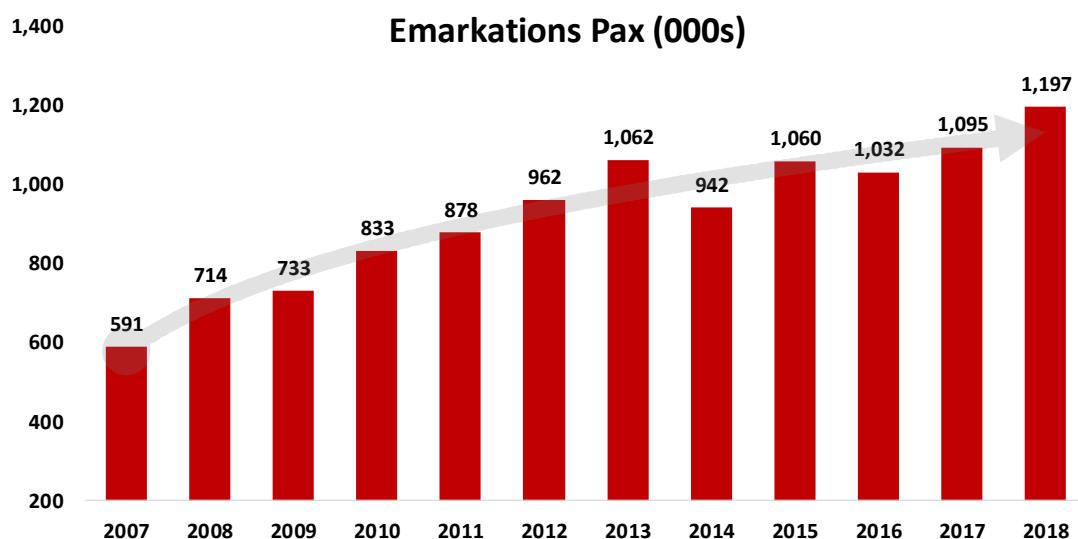
In 2018, the number of embarkations reached almost 1.2 million, compared with around 1.1 million in 2017. Over the past 10 years (2008-2018), embarkation numbers have risen by almost 490,000.

**Figure 1 Trends in Embarkations and Disembarkations (pax 000), 2007-2018**

	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Disembarkations	584	707	740	840	888	951	1,037	933	1,018	1,030	1,097	1,195
Embarkations	591	714	733	833	878	962	1,062	942	1,060	1,032	1,095	1,197
Annual % increase embarkations		20.8%	2.7%	13.6%	5.4%	9.6%	10.4%	-11.3%	12.5%	-2.6%	6.1%	9.3%
UK passenger embarkations	460	557	594	653	729	807	844	739	840	912	na	na
Overseas passenger embarkations	124	157	139	180	149	155	218	203	220	120	na	na
% Overseas embarkations	21	22	19	22	17	16	21	22	21	12	na	na

Source: IRN Research based on Cruise Port Returns and Estimates

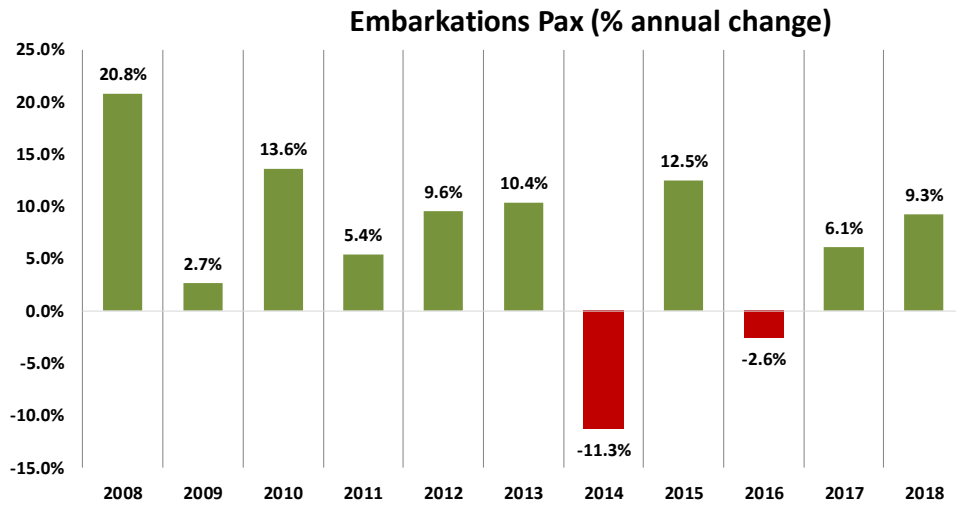
**Figure 2 Embarkations (pax 000), 2007-2018**



Source: IRN Research based on Cruise Port Returns and Estimates

In 2018, the number of embarkations rose by 9.3%. Over the past 10 years (2008-2018), embarkation numbers have risen by almost 68%.

**Figure 3** Embarkations (% annual growth), 2007-2018



Source: IRN Research based on Cruise Port Returns and Estimates

## PORT OF CALL (TRANSIT) PASSENGERS

In 2018, the number of port of call passengers reached 1.64 million, compared with around 1.42 million in 2017.

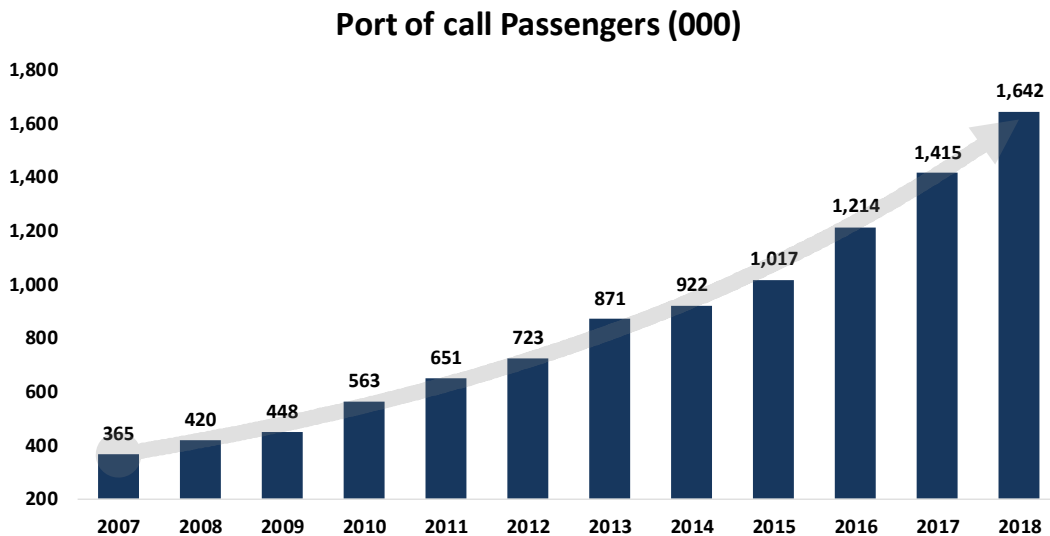
**Figure 4** Ports of call passengers (000), 2007-2018

	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Port of call passengers (000)	365	420	448	563	651	723	871	922	1,017	1,214	1,415	1,642
% annual increase		15.1%	6.7%	25.7%	15.6%	11.1%	20.5%	5.9%	10.3%	19.4%	16.6%	16.1%

Source: IRN Research based on Cruise Port Returns and Estimates

Over the past 10 years (2008-2018), pax transit numbers have risen by almost 1.19 million.

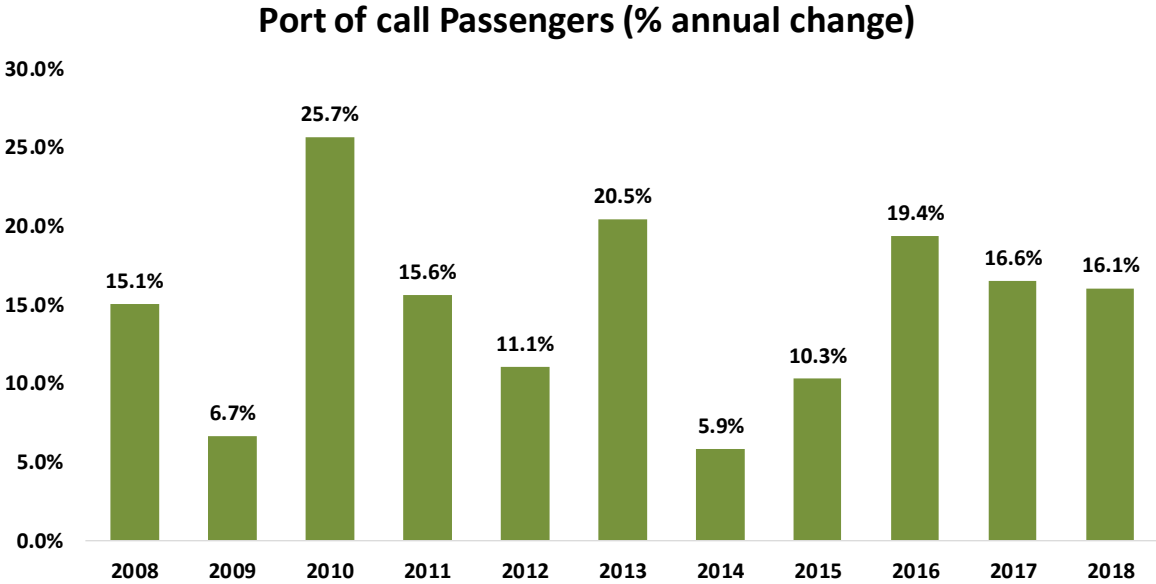
**Figure 4** Trends in ports of call passengers (000), 2007-2018



Source: IRN Research based on Cruise Port Returns and Estimates

The rate of growth of port of call passengers has accelerated in the past three years, compared with the previous two years.

Figure 5 Port of call (transit) pax (% annual growth), 2007-2018



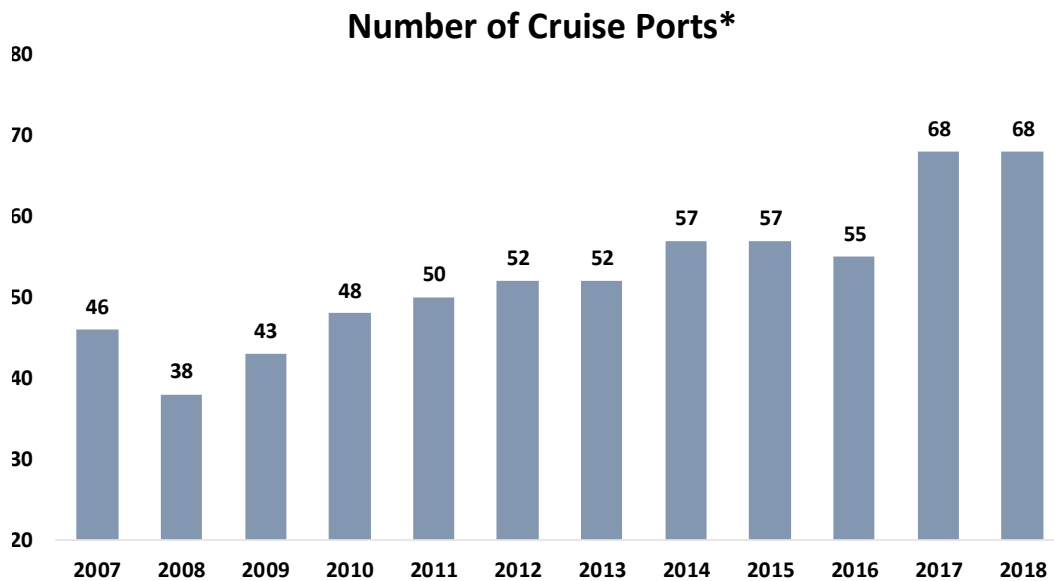
Source: IRN Research based on Cruise Port Returns and Estimates



## PORTS, CRUISE LINES AND CRUISE SHIPS

In 2018, 68 ports in the UK received visits from cruise ships (embarkation/disembarkation or port of call, transit). This is the same as 2017. In total, 74 cruise ports were identified in 2018 but 6 received no visits.

**Figure 6** The number of cruise ports identified as receiving cruise visits, 2007-2018

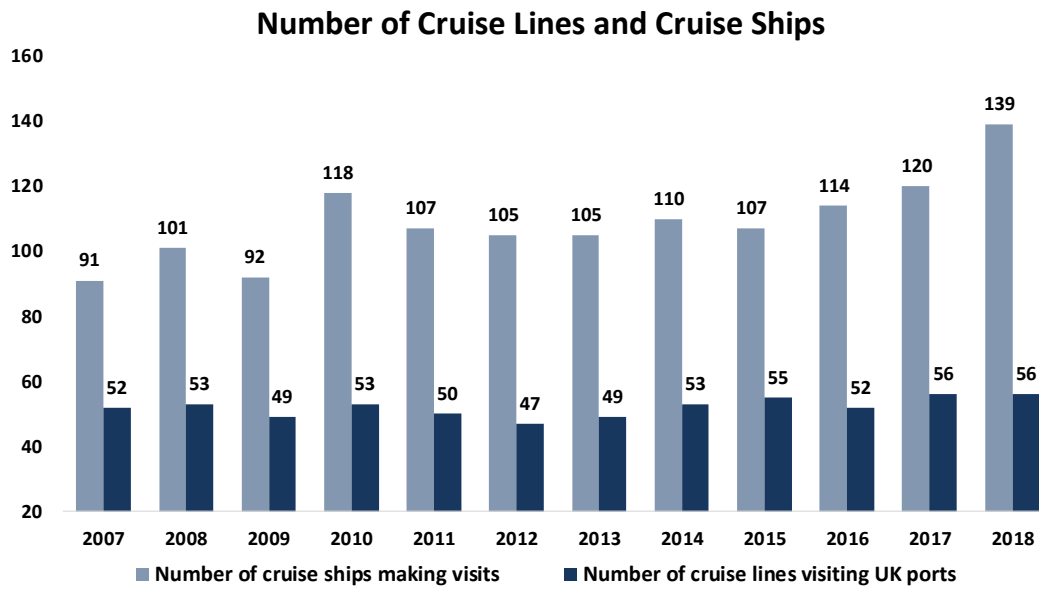


\* 74 Ports identified in 2018, only 68 received visits in 2018

Source: IRN Research based on Cruise Port Returns and Estimates

In 2018, a total of 139 cruise ships made visits to UK ports, compared with 120 in 2017. The number of cruise lines identified as sending ships to UK ports remained the same in 2018 as it was in 2019 (56). Over 2007 to 2018, the number of cruise lines sending ships to UK ports has hovered around the 50-60 mark, while the number ships making visits has risen strongly since 2015.

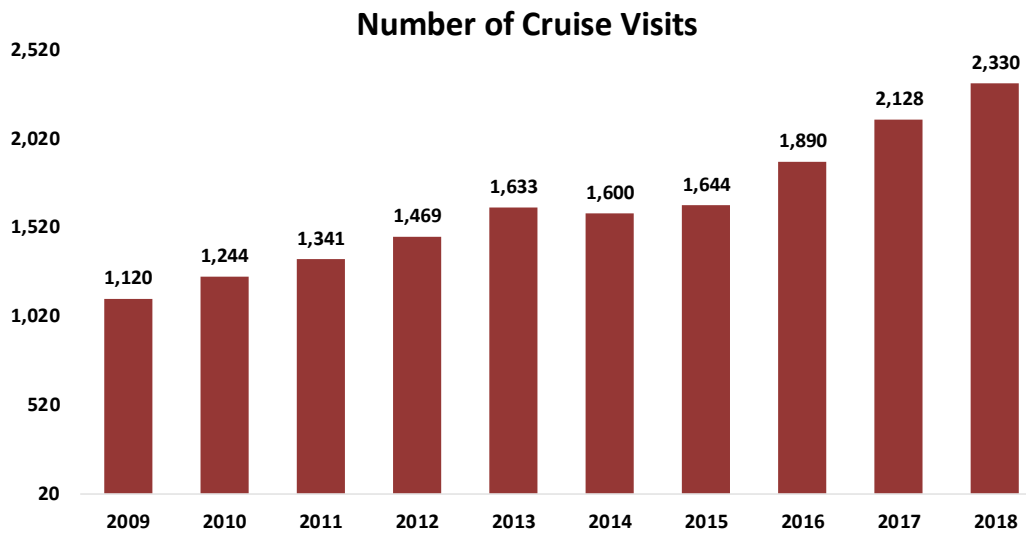
**Figure 7** The number of cruise lines and cruise ships identified as making visits, 2007-2018



Source: IRN Research based on Cruise Port Returns and Estimates

In 2018, IRN identified 2,330 visits to cruise ports by cruise ships, compared with 2,128 in 2017. Over the period 2009-2018, the number of visits has more than doubled.

**Figure 8** The number of cruise ship visits, 2009-2018



Source: IRN Research based on Cruise Port Returns and Estimates