A long-term growth, that needs to sustain

- Evolution
  - 1-year: -7.28%
  - 5-year: +4.69%
  - 10-year: +83.62%

Total Pax. Movements (in millions)
I. Maturing vs emerging markets

- Is Med maturing?
- Is Asia really emerging?

I. Source markets

- Potential new ones
- Limitations of present ones
III. Capacity Issues (blue-side)

Ports in the Med and its adjoining seas that allow berth alongside a quay

Percentage of ports that allows the option to berth alongside a quay for a transit call

blue = allowed, red = not allowed

- Small ship (N=51): 92% allowed, 8% not allowed
- Medium ship (N=51): 88% allowed, 12% not allowed
- Large ship (N=45): 76% allowed, 24% not allowed
- Mega ship (N=42): 67% allowed, 33% not allowed

MedCruise Benchmarking Report 2013
IV. Capacity Issues (lands ide)
Average Cruise Passengers per Call

Source: MedCruise Statistics 2014
V. Image does matter

- 2,300 tons of water in its swimming pools
- 12,000 plants on board including hundreds of palm trees
VI. Operational Issues

- Shorex activities
- Interporting
- Schengen (rules & implementation)
- Visa issues

VII. Vertical integration of cruise lines:

- Revenues of CL are already high
- Port dues are already low
VIII. Building Successful Experiences

• Do you believe that cities & touristic destinations in the region are aware of the importance of cooperation?

• Do ports cooperate effectively with cities?

• What needs to happen (destination level) to build successful program(s)?
## Major challenges for cruise ports

*(top of list)*

(0=Not a challenge, 1= Lowest importance, 5=Highest importance)

<table>
<thead>
<tr>
<th>Port Challenges</th>
<th>Nota an issue (%)</th>
<th>Of highest importance (%)</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relationship with the cruise lines</td>
<td>11.9</td>
<td>54.2</td>
<td>3.83</td>
</tr>
<tr>
<td>Exploiting the potential of winter cruising</td>
<td>6.7</td>
<td>30</td>
<td>3.35</td>
</tr>
<tr>
<td>Relationship with people and businesses around the ports</td>
<td>5.1</td>
<td>22</td>
<td>3.32</td>
</tr>
<tr>
<td>The relationship with the city of arrival and local authorities</td>
<td>11.7</td>
<td>31.7</td>
<td>3.25</td>
</tr>
<tr>
<td>Bigger cruise ships (in size)</td>
<td>13.6</td>
<td>32.2</td>
<td>3.2</td>
</tr>
<tr>
<td>Security</td>
<td>16.7</td>
<td>40</td>
<td>3.17</td>
</tr>
<tr>
<td>Infrastructure (other than transport) in the port</td>
<td>11.9</td>
<td>37.3</td>
<td>3.15</td>
</tr>
<tr>
<td>Becoming a homeport</td>
<td>15</td>
<td>30</td>
<td>3.12</td>
</tr>
<tr>
<td>Transport infrastructure to and from the port</td>
<td>10.2</td>
<td>27.1</td>
<td>3.12</td>
</tr>
<tr>
<td>Connectivity of the destination with source markets</td>
<td>5.1</td>
<td>15.3</td>
<td>3.1</td>
</tr>
<tr>
<td>The competition with other (neighbouring) cruise ports</td>
<td>5</td>
<td>18.3</td>
<td>3.08</td>
</tr>
<tr>
<td>People with reduced mobility</td>
<td>16.7</td>
<td>28.3</td>
<td>3.03</td>
</tr>
<tr>
<td>The relationship with the travel agents</td>
<td>13.3</td>
<td>25</td>
<td>3.0</td>
</tr>
<tr>
<td>The development of other regions as new cruise destinations</td>
<td>10.7</td>
<td>19.6</td>
<td>3.0</td>
</tr>
<tr>
<td>The mobility to and from the port</td>
<td>15</td>
<td>18.3</td>
<td>2.85</td>
</tr>
</tbody>
</table>
The X-Factor: ‘Working together’
The dynamics of cooperation

Why:

• **Resources available to some but not all;**

• **Cruise lines deploy ships to a ‘region’ not to a ‘port’**
  – They choose itineraries, including several ports
  – ‘Classic deployment’: 4 ports - 4/7 days cruise
The MedCruise way: Logic of “Collective Action”

- Provide marketing, networking and professional development tools & forums
- Develop & foster good relations and collaboration among cruise ports of the region (and beyond !!!) & liaison with cruise lines!
- Reflect on policy developments
- Reaching the entire port community: cities, cruise-lines, travel agents, passengers, etc…
The MedCruise way: Creating Solutions

• **Collaborate on solutions:**
  – Operational issues
  – Port Finances
  – Environment
  – Training

• **Information sharing**
  – Newsletter - a key publication
  – Directories – (hard copies /on line,
  – Press relations
  – Economic studies (statistics reports, benchmarking etc..)
MedCruise tools

• Reaching together source markets
  - Classic markets (i.e. Europe, US)
  - New markets (i.e. China; rest of Asia)

• Professional development courses

• Dissemination of good practices

• Development of common practices
  - MedCruise guidelines on berth booking process

www.medcruise.com
MedCruise is

• A well-balanced Association serving ports of different sizes, and from diverse regions, countries and cultures

Scope

• To balance the ‘maritime’ and the ‘tourism’ dimensions that are part of cruising
Thank you

We are social!  f  tw  in