

**Workshop “ Promote Sustainable Tourism in the Mediterranean”**  
**Crosière et Plaisance**



# World Cruise Destinations

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Africa;

Alaska;

Antarctica;

Asia;

Australia/New Zealand;

Bahamas, Bermuda;

Baltic;

Britain – Ireland;

Canada;

Caribbean;

Central America;

Europe (Northern Europe);

Florida;

Hawaii;

**Mediterranean;**

Mexico;

Middle East;

Panama Canal, Polynesia;

South America;

South Pacific;

USA;

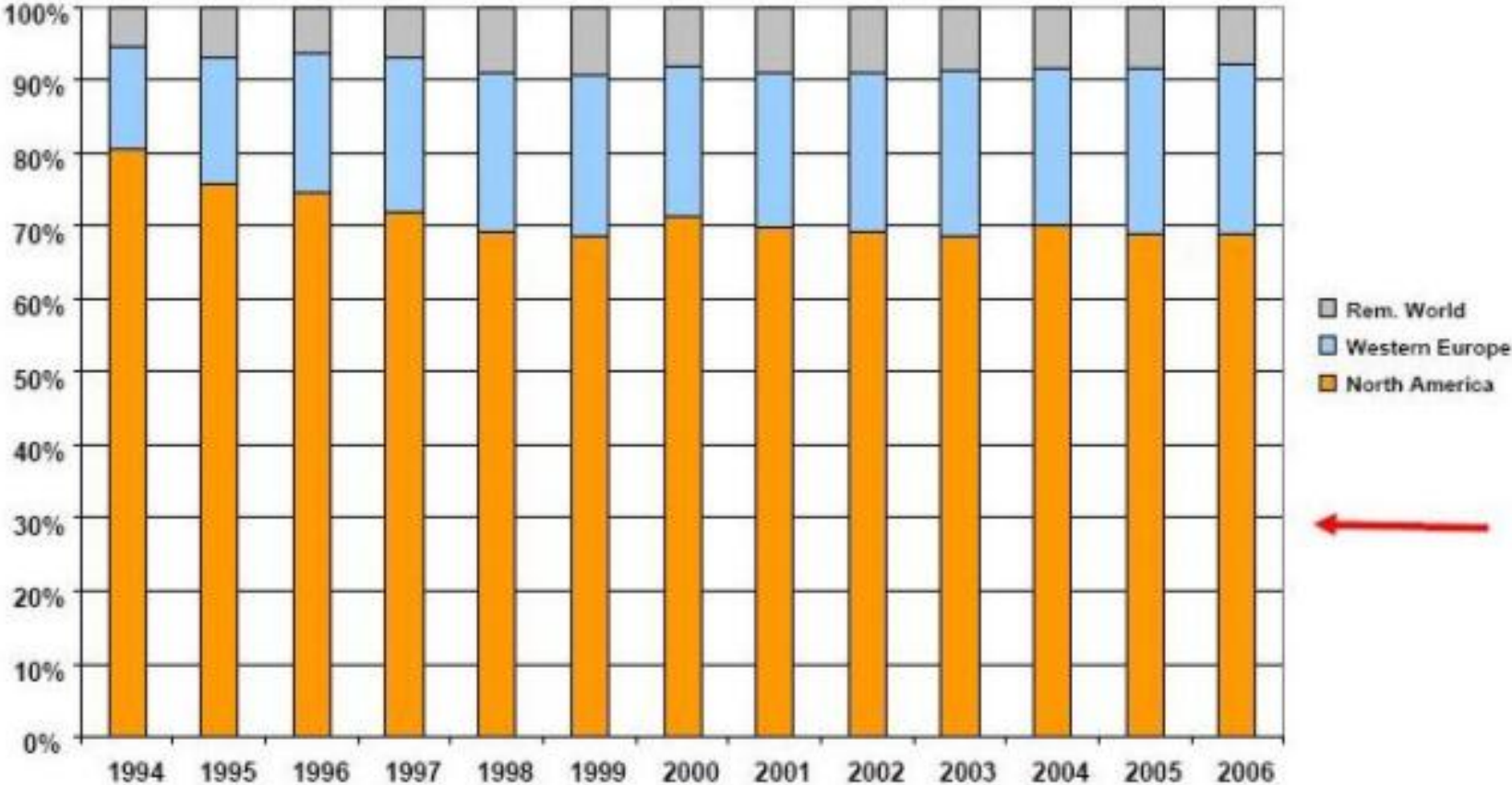
Transatlantic cruises;

River cruises;

New destinations:

**China, Dubai, Mauritius (Costa)**

# World Cruise Destinations



## World Cruise Passengers – evolution since 1995

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Région	1995	1996	2000	2001	2002	2003	2004	2005	2006	2007
Nord Amérique	4,35	4,61	6,88	6,91	7,70	8,23	9,14	9,96	10,38	12,00
Europe	1,00	1,20	2,06	2,14	2,39	2,76	2,87	3,19	3,48	4,00
Autres	0,37	0,44	0,78	0,87	0,97	1,05	1,13	1,21	1,29	1,50
<b>TOTAL</b>	<b>5,72</b>	<b>6,26</b>	<b>9,72</b>	<b>9,91</b>	<b>11,05</b>	<b>12,04</b>	<b>13,13</b>	<b>14,36</b>	<b>15,15</b>	<b>17,50</b>
% Europe	17,5%	19,%	21 %	21,5%	21,5%	23 %	22 %	22,2%	23 %	22,8%

## **The Mediterranean contest** – Cruise market

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The classical itineraries in the Mediterranean Area can be divided into two groups:

### **Eastern Mediterranean:**

**Croatia** (Dubrovnik, Split, Pola, Zadar, Rovinj , Kotor ecc...) **Greece and its islands** (Mykonos, Santorini, Rhodes, Corfu, Crete, Katakolon, Piraeus, etc...) **Turkey**, (Istanbul, Kusadasi, Izmir, etc..) **Cyprus** (Limassol), **Malta** (La Valletta), **Egypt** (Alexandria) **and new destinations i.e. Libya** (Tripoli).

### **Western Mediterranean:**

**Spain** (Barcelona, Almeria, Malaga, Alicante, Balearic Islands), **France**, (Marseille, Nice, St. Tropez, Cannes), **Italy** (Genoa, Savona, Rome (Civitavecchia), Naples, Venice, Leghorn, Bari, Palermo, Messina) **Tunisia** (La Goulette -Tunis), **Algeria** (Algiers), etc...

## Strength points of the Mediterranean

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- Strategic position among Europe, Asia and Africa;
- Greek, Roman and Egyptian history and culture;
- Archaeological sites, churches, museums and palaces;
- Exciting contrast of ancient and modern art;
- Beautiful natural landscapes;
- Pleasant climate;
- Diversification of the product (Caribbean: gambling cruise/ sun & beach).

# The Mediterranean contest

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**17 Millions cruise passengers in the Med (2007) !**  
**145 ports (home/calls)**

## The cruise sector peculiarity

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In the latest 30 years the cruise sector has been characterized by a peculiarity:

**It's the SUPPLY that establishes the DEMAND!**

The cruise market is able to saturate the continuous supply of berths as soon as the new cruise ships are put on duty!

# The Mediterranean cruise market dimension (SUPPLY)

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## Cruise ships fleet operating in the Mediterranean



ca. 138 ships

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## New constructions from 2008 until 2012 in the world

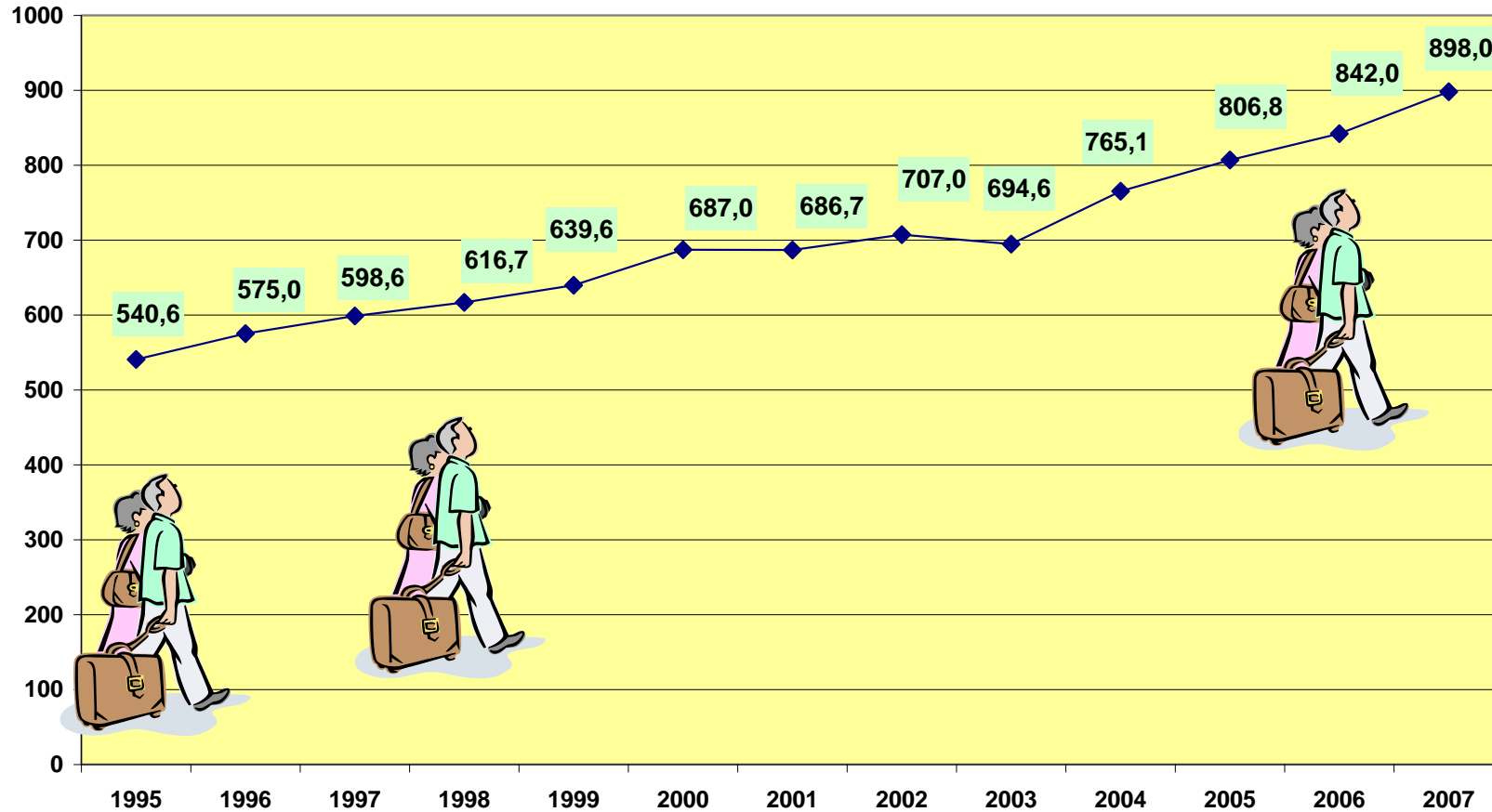


ca. 35 ships

Within 2010 the European shipyards will deliver 10 big cruise ships every year and many of these units will be used in the Mediterranean Sea, enhancing therefore the number of calls.

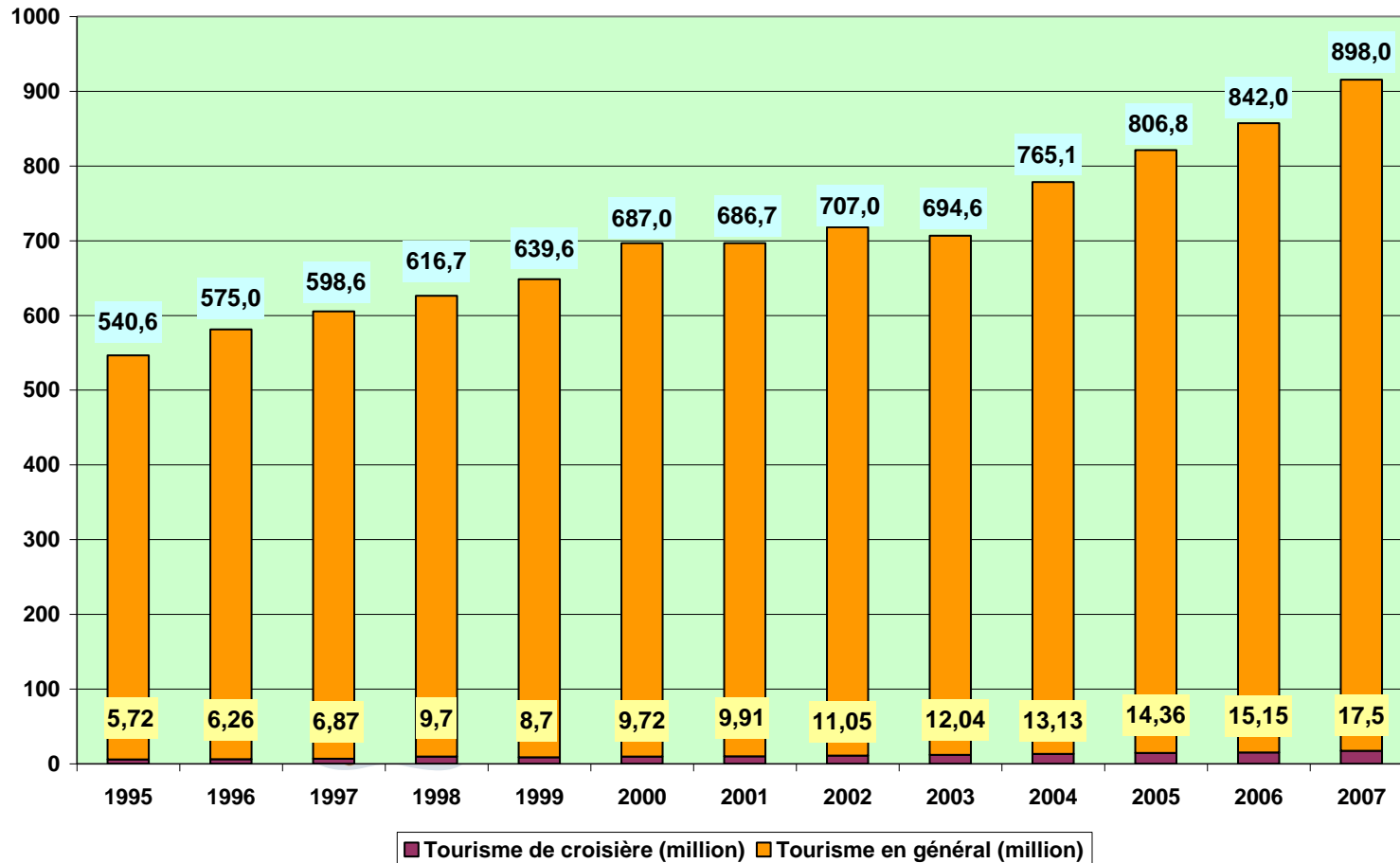
# The tourism market dimension (DEMAND)

Tourisme en général (million)



Source: WTO (World Tourism Organization)

# The Cruise market dimension (DEMAND)

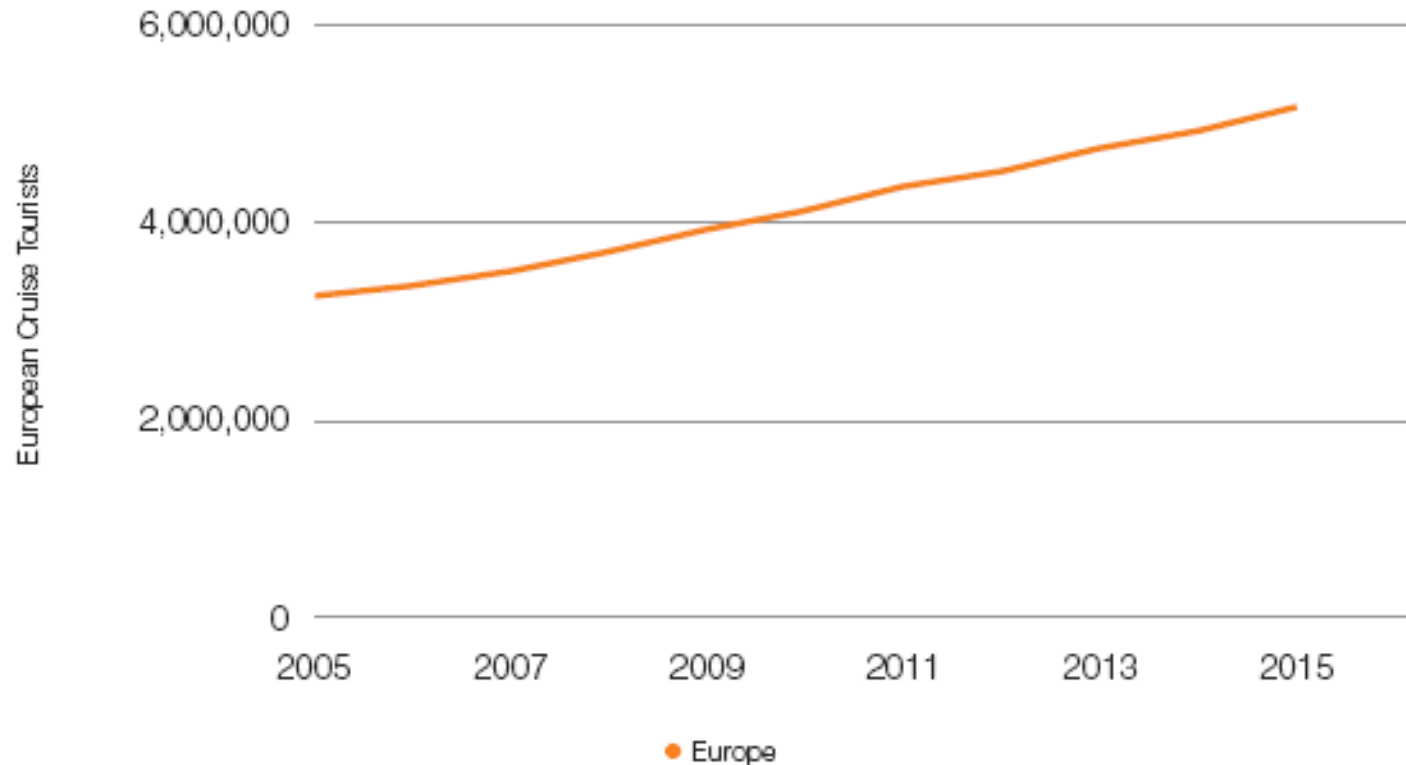


Source: WTO + IIC

# The Cruise market dimension (DEMAND) 2005-2015 in Europe

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## Prospective Growth of European Cruise Tourism to 2015



*Source: ECC – European Cruise Council – Report 2007)*

## The cruise market dimension (DEMAND)

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- Fast and fundamental change;
- High level growth above all in the Mediterranean;
- The quickest expanding sector in the tourism business.

Between 1995 and 2007, the worldwide demand for the cruise product is more than doubled changing up from 5,7 to 17,5 millions of passengers.

It appears a huge number but it means that cruise market is nearly **4% OF INTERNATIONAL TOURISM IN 2007!!!**

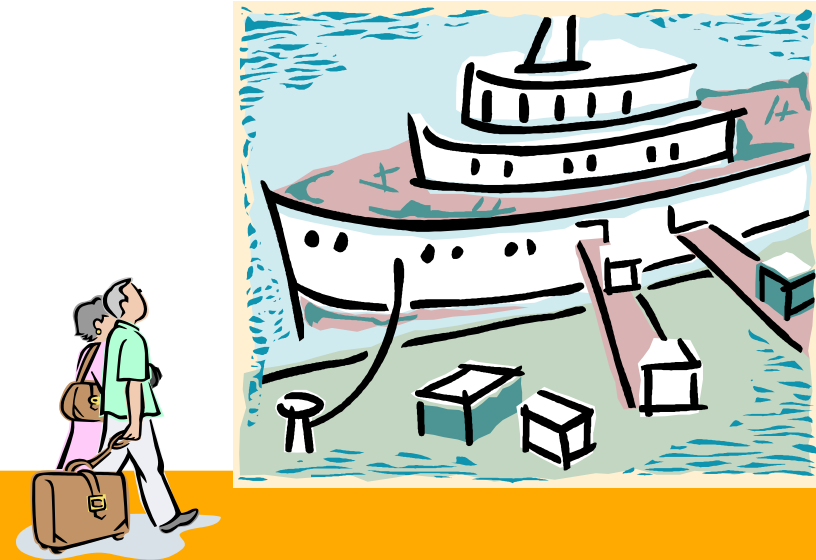


## The cruise market dimension (DEMAND)

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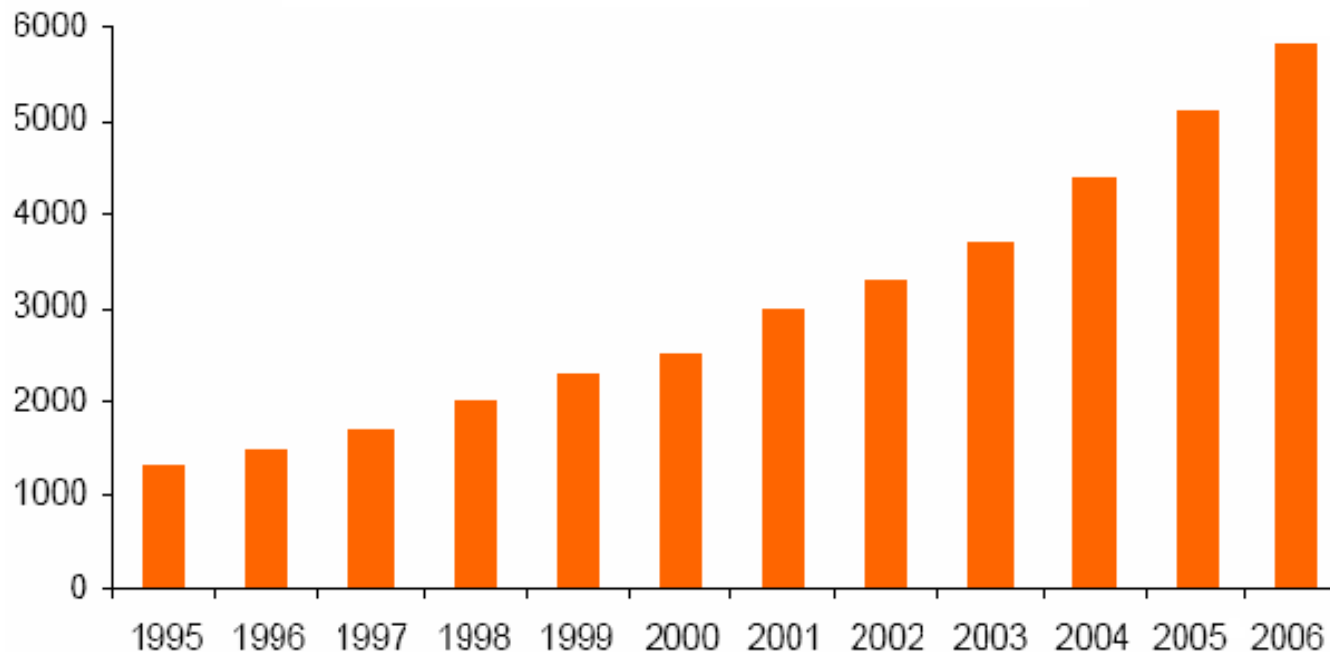
The forecasts for 2008 announce more ships, more passengers and more brands visiting more European ports than ever before.

Currently, Europe is the fastest growing market for cruise passengers in the world.



## The Mediterranean cruise market dimension (DEMAND)

Italy is in pole position as the first Mediterranean cruising destination (6 millions of passengers in 2006; Spain, - 2°- 4,5 millions)

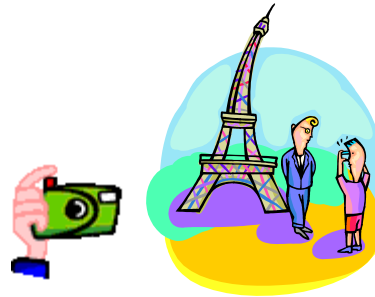


# The cruise and tourism market dimension (DEMAND)

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16 millions of cruise passengers in the world in 2006 =

= 21,3%



(75 millions in 2006)

= 43,2%



(37 millions in 2006)

= 29,6%



(54 millions in 2006)

# The cruise product (DEMAND)



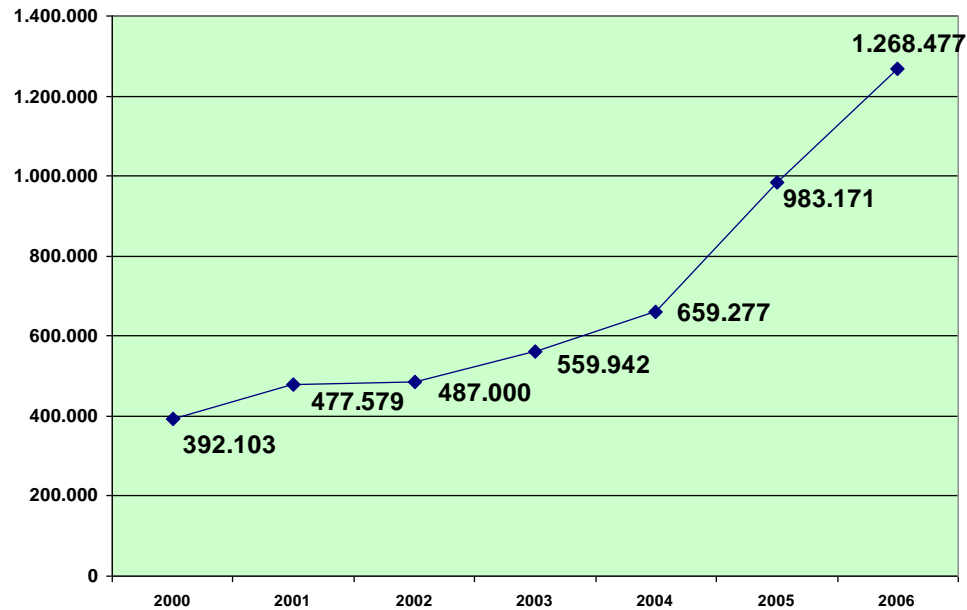
Before joining a cruise holiday the passenger concentrates his attention on:

- Cruise geographic area;
- Length of the trip;
- Period of the year;
- Balance between quality and price;
- Motivation (leisure/business);
- Cruise target (young, single, elder, honeymooners, etc.).



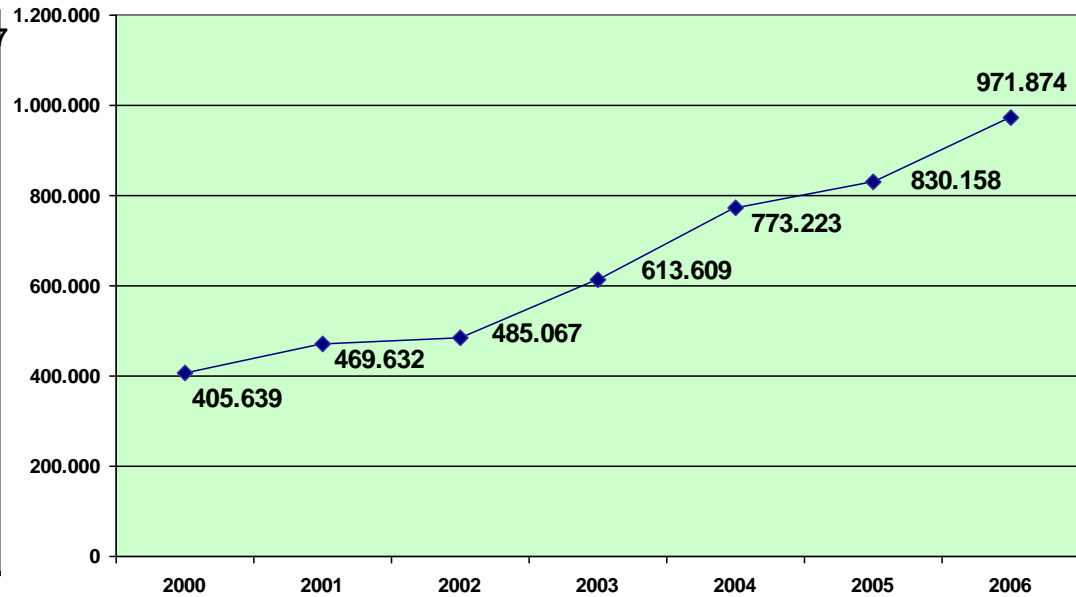
# Cruise passengers movement in the main Italian ports

## Port of Civitavecchia



**+223,5%**

## Port of Naples



**+139,6%**

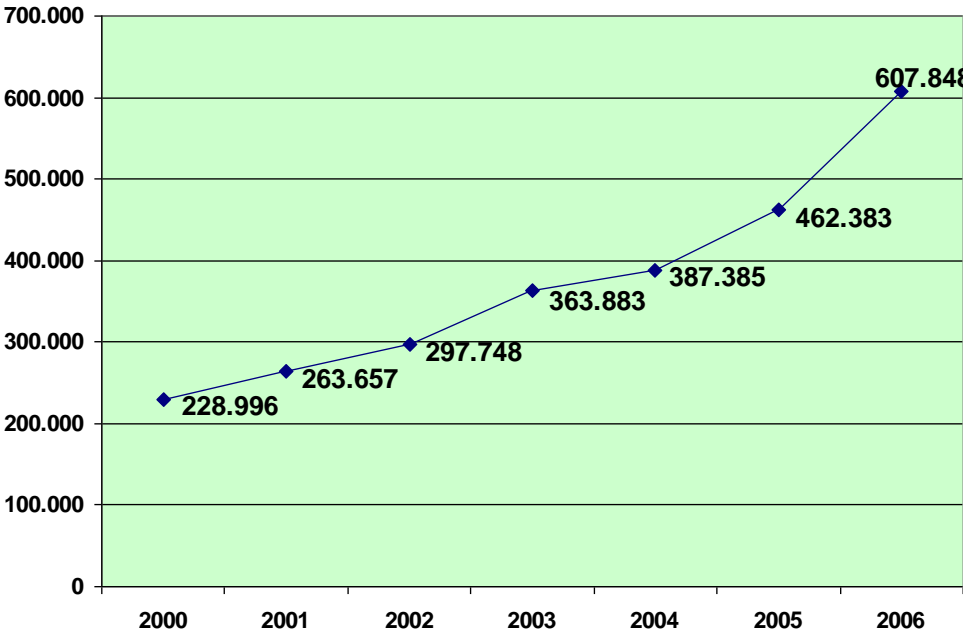
# Cruise passengers movement in the main Italian ports

## Port of Venice



**+162,4%**

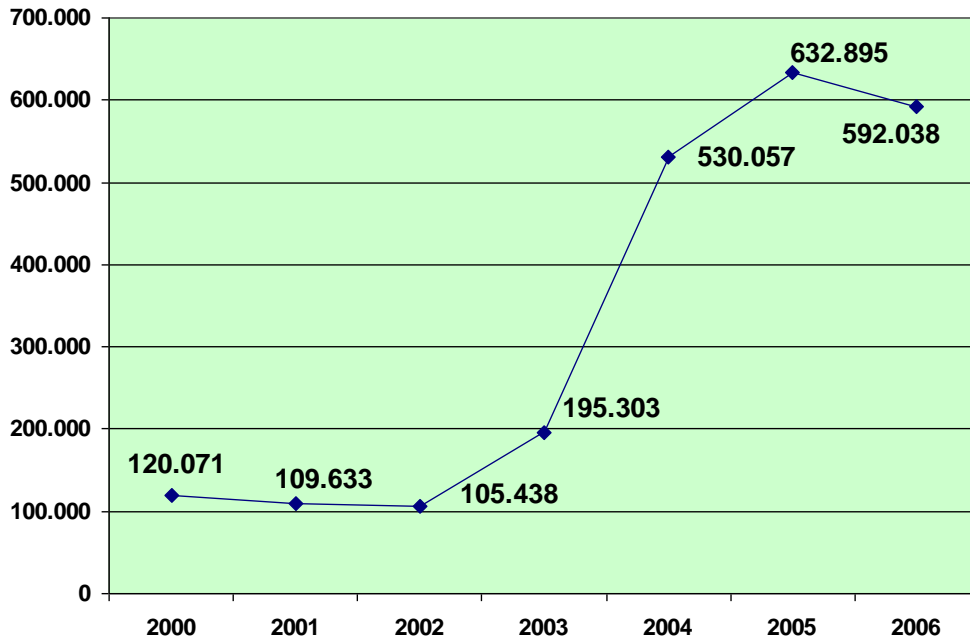
## Port of Leghorn



**+165,4%**

# Cruise passengers movement in the main Italian ports

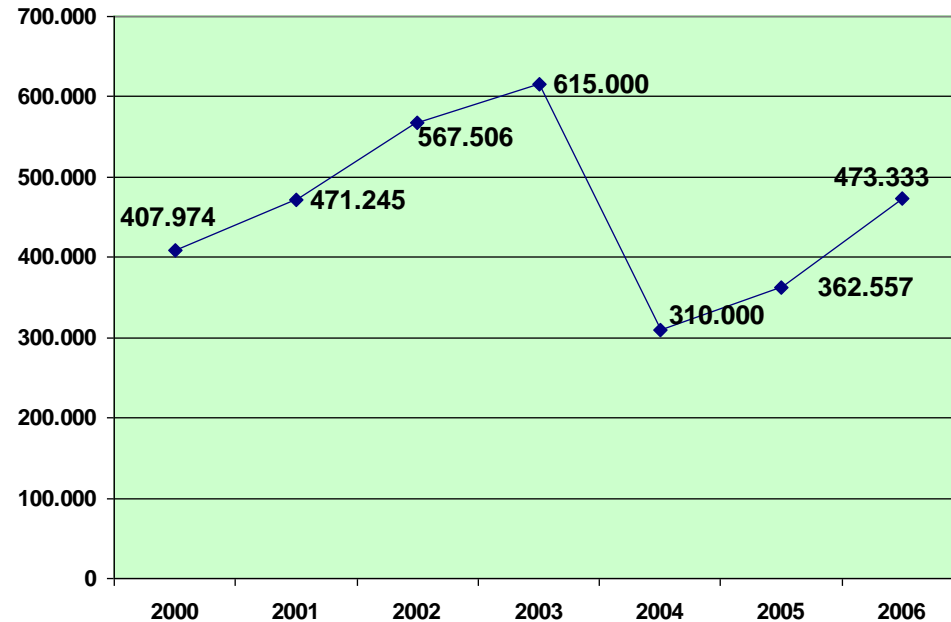
## Port of Savona



**+393,1%**

**2003 – 2004: +171,4%**

## Port of Genoa



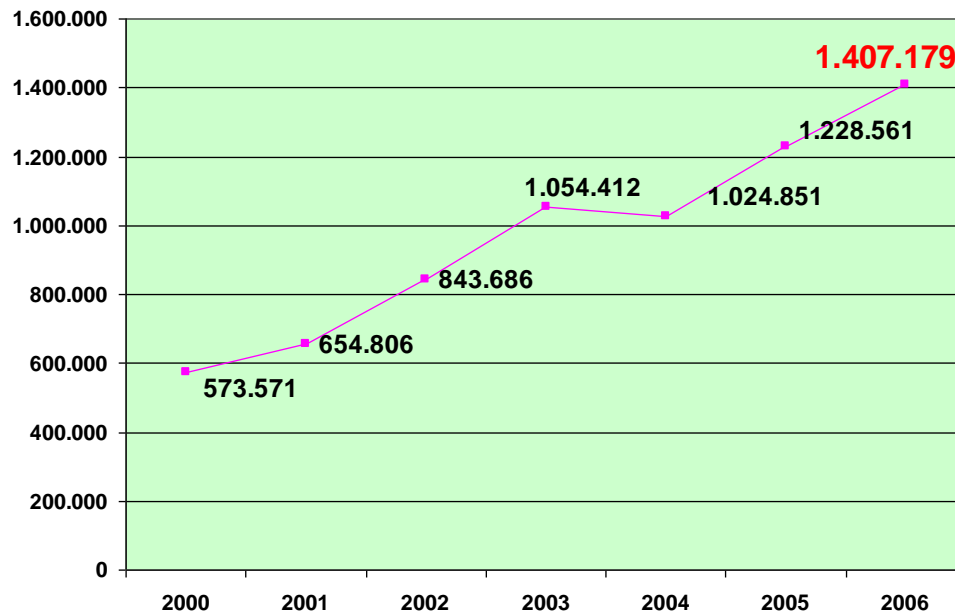
**+16,0%**

**2003 – 2004: -49,6%**



# Cruise passengers movement in other Mediterranean ports

## Port of Barcelona:



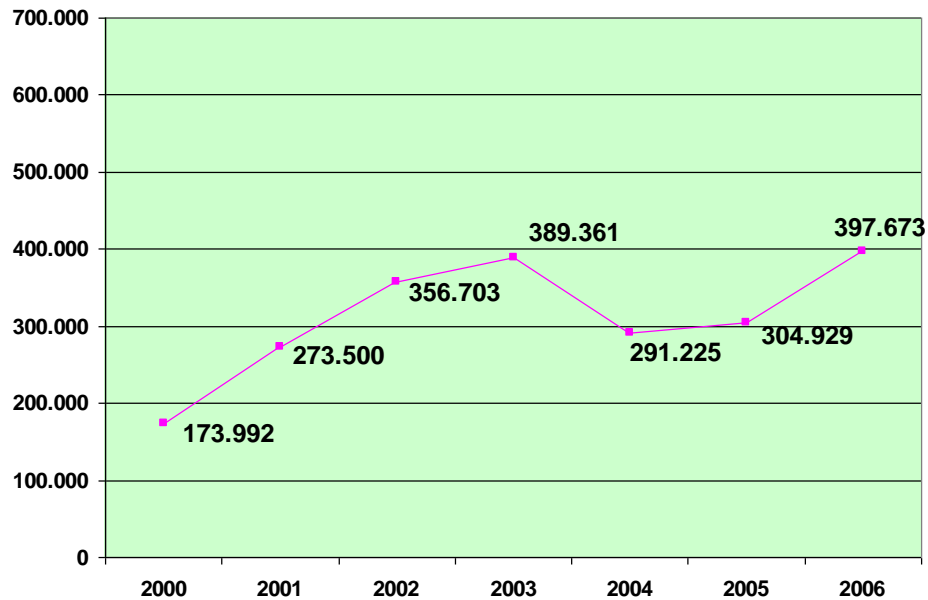
**+145,3%**

- privileged position
- efficient International Airport
- new terminal “Palacruceros” set up and managed by Costa

Barcelona is a “must” for the cruise lines and the first cruise passengers port in 2006 of the Mediterranean!

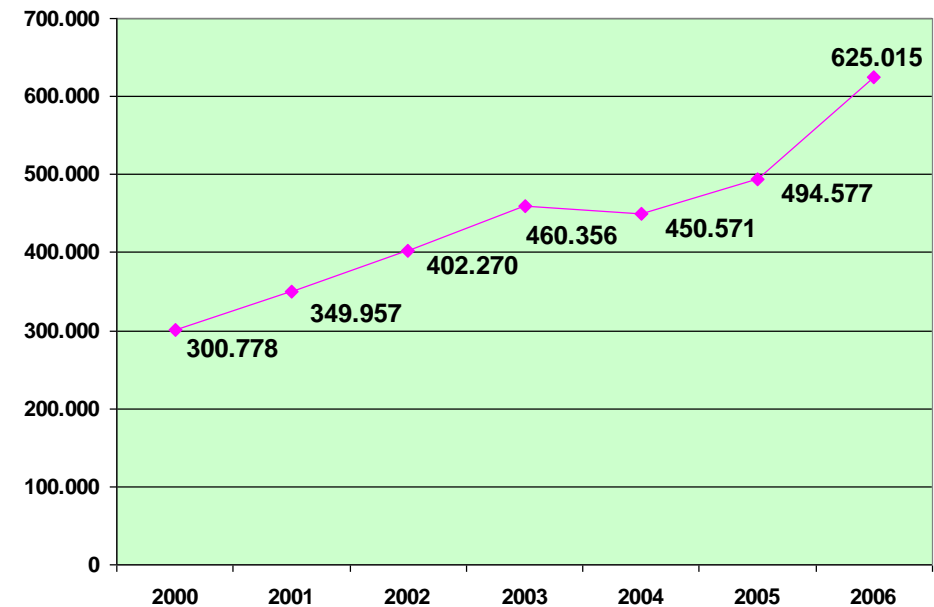
# Cruise passengers movement in other Mediterranean ports

## Port of La Valletta



**+128,5%**

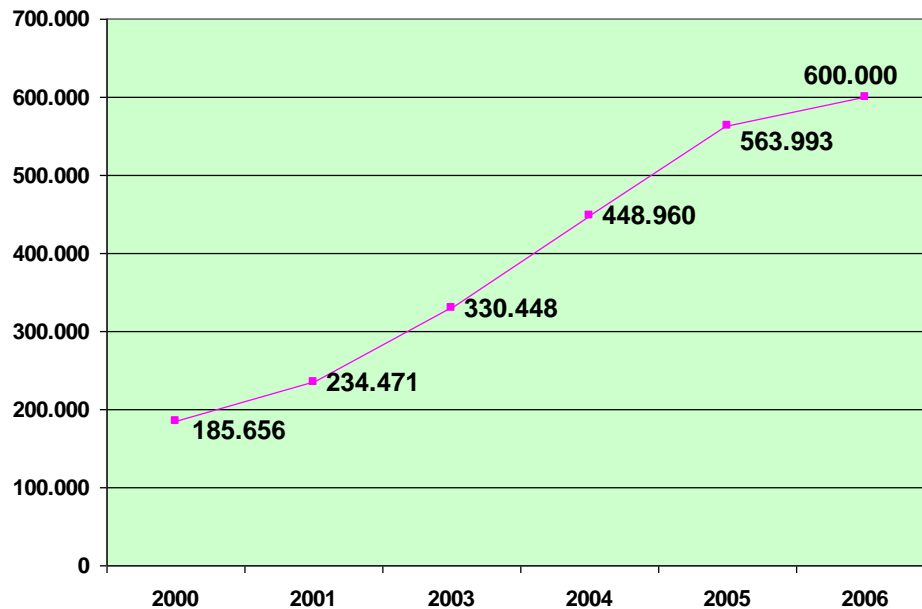
## French Riviera ports (Nice, Cannes, Villefranche)



**+107,8%**

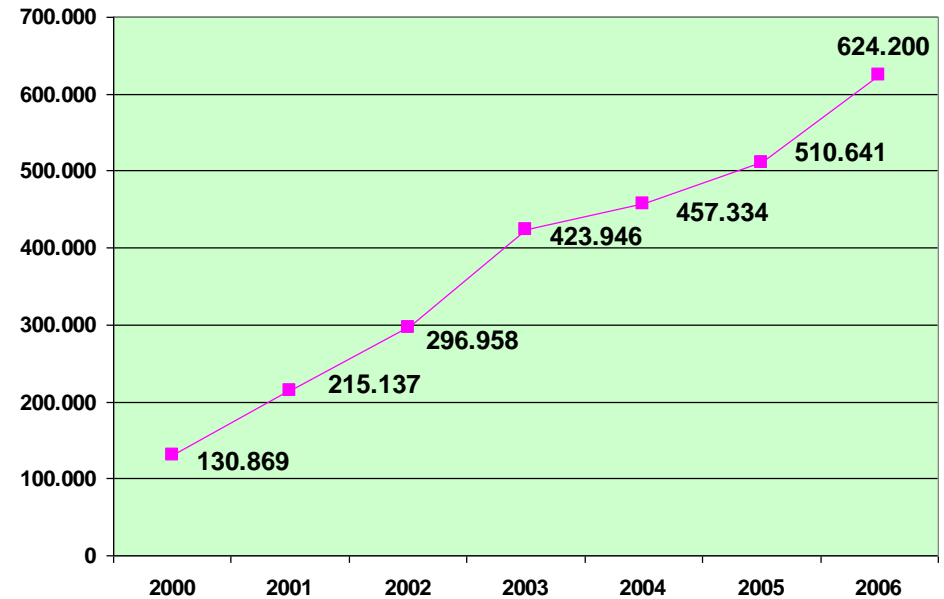
# Cruise passengers movement in other Mediterranean ports

## Port of La Goulette (Tunis)



**+123,2%**

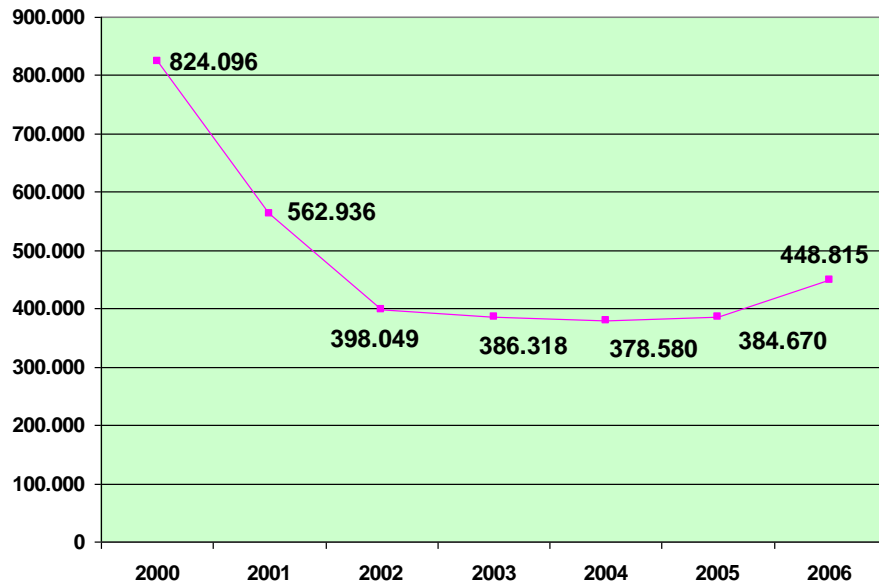
## Port of Dubrovnick



**+376,9%**

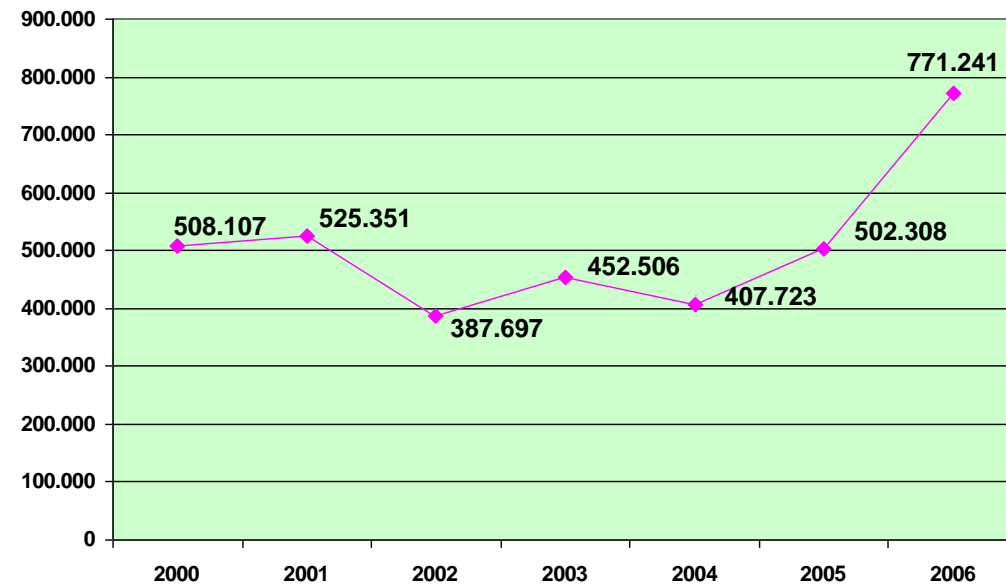
# Cruise passengers movement in other Mediterranean ports

## Cyprus ports (Limassol – Larnaka)



**-45,54%**

## Port of Pyraeus



**+51,78%**

## **New exigencies of the cruise market**

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The high level of growth of the Mediterranean cruise market is creating new requirements for the ports:

- **TECHNICAL AND INFRASTRUCTURAL EQUIPMENTS**
- **QUALITY ASSETS**

## **New exigencies of cruise market ports**

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- **TECHNICAL AND INFRASTRUCTURAL EQUIPMENT:**

- Suitable quays;
- Functional passengers terminals (above all for *home port* cruises);
- High security levels (ISPS code, x-ray, metal detectors);
- Efficient cruise companies' supply-chain;
- Well-organized luggage handling;
- Optimized terminal and ship's check-in;
- Optimized land transfers thanks to well connected airports / railway stations (above all for *home port* cruises).

# New exigencies of cruise market ports

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## QUALITY ASSETS:

### Port services:

- High level of welcoming (assistance and tourist information);
- Accessibility to public and private transport means;
- High care of port viability focusing on personal safety.

### Tourist supply:

- Tourist signage (above all *for free cruise passengers*);
- Pedestrians itineraries;
- Efficiency public transport services;
- Flexible working hours' shops and stores;
- Local support to the cruise company's excursions.

## **Cruise market risks and threats**

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From a logistical and structural point of view, not all the Mediterranean ports will be able to manage and sustain a high passenger movement.

This is the reason why a new political evaluation is necessary in this area, programming calls on the basis of actual possibilities.

## **Cruise market opportunities**

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The Mediterranean ports must counterbalance the exponential demand of the market.

Many European ports have begun a process of restructuring in order to support the market's growth in accordance with the new generation of cruising vessels.

# Cruise market opportunities

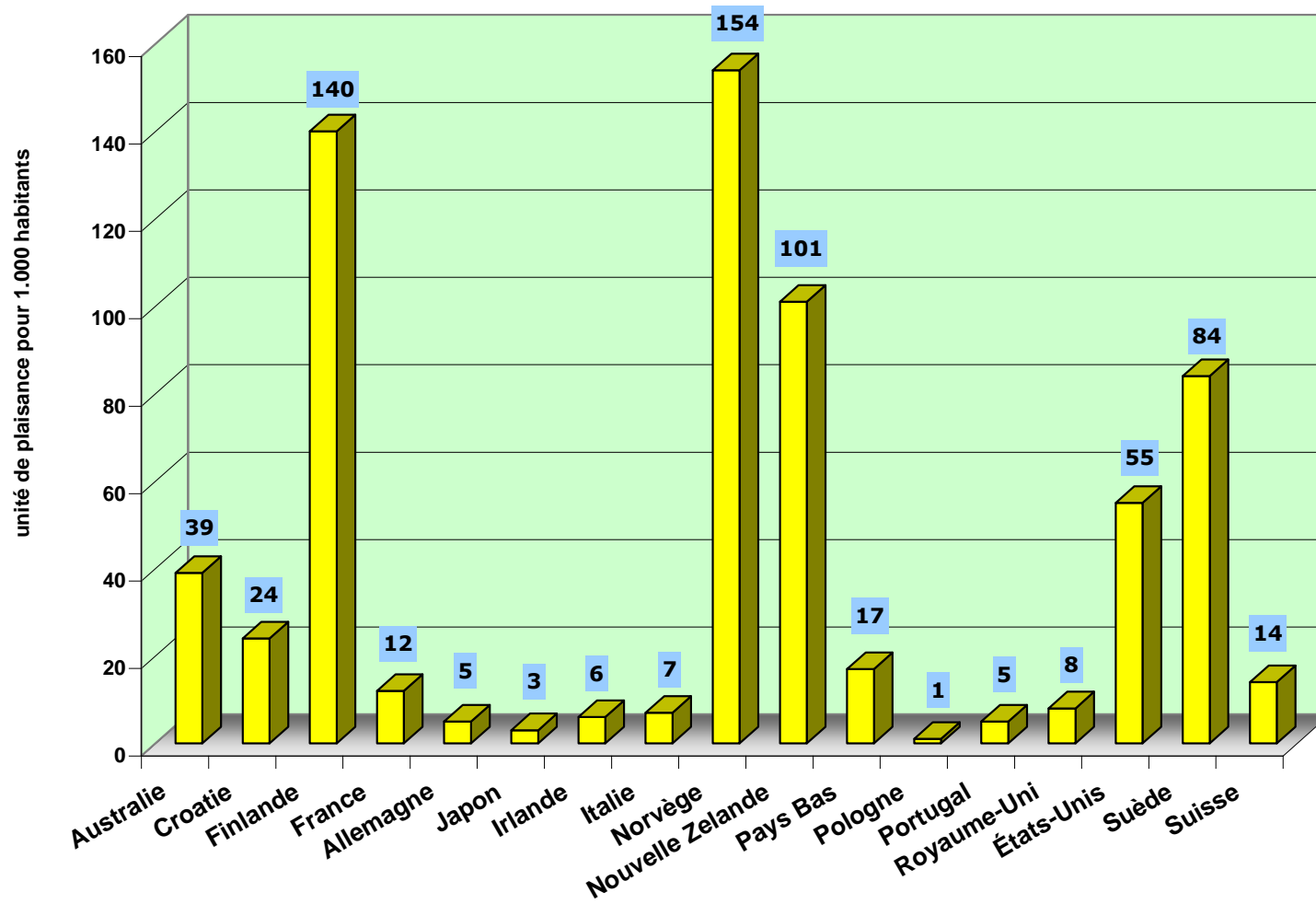
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## National and local economic impact on:

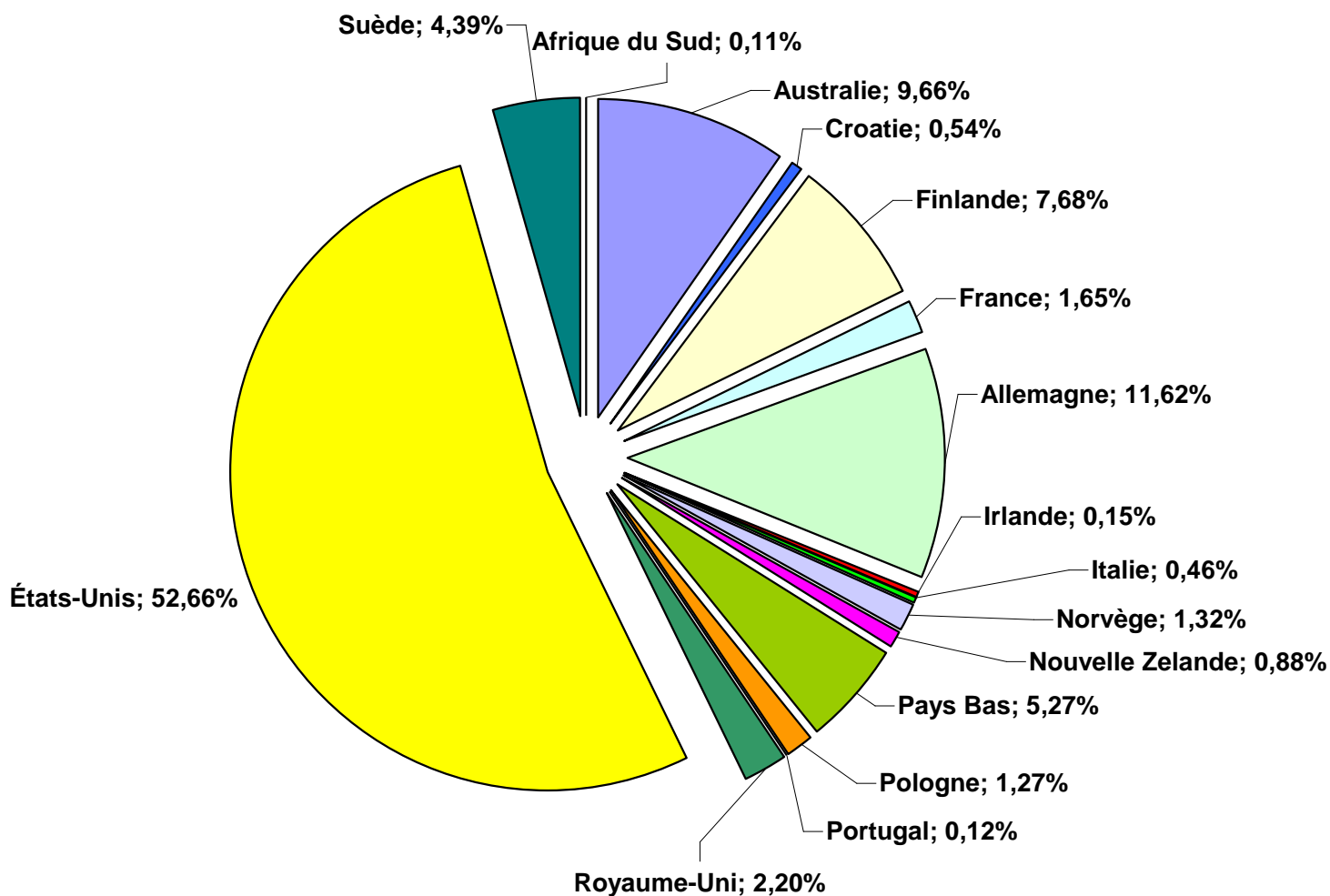
- Jobs occupancy;
- Port authority (port fees);
- Cruise terminals;
- Maritime agents;
- Pilots, tugboats, other services (fresh water, garbage, etc.);
- City councils and other local institutions;
- Travel agents tour operators;
- Shops and stores;
- Food and beverage manufacturers (bunker fuels and paints, metal goods and machinery);
- Financial and business services.



# Yachting

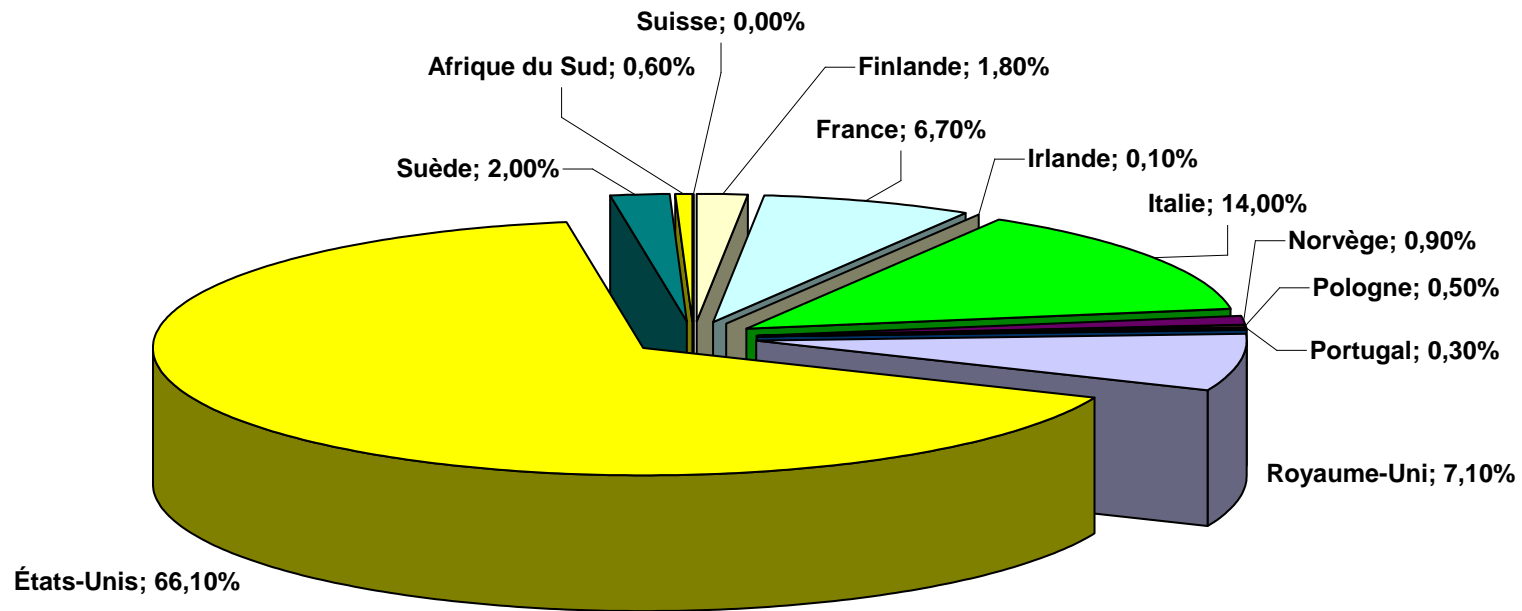


# Yachting (distribution of places in marinas)



# Yachting – the supply

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# Facilities in Mediterranean yachting ports 1/2

Nombre de ports	Nation	Banque	Eau potable	Bar/Restaurant	WiFi Wireless Fidelity	Electricité	Station service
		Données non disponibles: 33 OUI:173 NO:684	Données non disponibles: 30 OUI: 793 NO:67	Données non disponibles: 31 OUI: 661 NO:198	Données non disponibles:31 OUI:52 NO:807	Données non disponibles:30 OUI:660 NO:200	Données non disponibles: 30 OUI:186 NO:674
		173; 20,2%	793; 92,21%	661; 76,95%	52; 6,05%	660; 76,74%	186; 21,63%
11	ALBANIE	nd	nd	nd	nd	nd	Nd
24	ALGERIE	0; 0%	2; 0,48%	3; 0,72%	0; 0%	0; 0%	0; 0%
4	CHYPRE	0; 0%	3; 75%	4; 100%	2; 50%	3; 75%	1; 25%
76	CROATIE	2; 2,74%	53; 72,6%	49; 67,12%	2; 2,74%	51; 69,86%	20; 27,39%
4	ÉGYPTÉ	0; 0%	3; 75%	3; 75%	1; 25%	3; 75%	0; 0%
177	ESPAGNE	53; 30,28%	173; 98,86%	149; 85,14%	18; 10,28%	170; 97,14%	57; 32,57%
117	FRANCE	10; 8,55%	117; 100%	103; 88%	10; 8,55%	112; 9,57%	26; 22,22%
3	GIBRALTER	1; 33,33%	3; 100%	1; 33,33%	0; 0%	3; 100%	1; 33,33%
133	GRÈCE	54; 40,60%	125; 93,99%	112; 84,21%	5; 3,76%	36; 27,07%	8; 6,01%
8	ISRAËL	1; 12,5%	8; 100%	4; 50%	1; 12,5%	6; 75%	1; 12,5%
233	ITALIE	43; 18,45%	230; 98,71%	164; 70,38%	5; 2,14%	204; 87,55%	41; 17,60%
3	LIBAN	0; 0%	2; 66,66%	3; 100%	0; 0%	2; 66,66%	0; 0%
15	LYBIE	nd	nd	nd	nd	nd	Nd
6	MALTE	0; 0%	6; 100%	5; 83,33%	0; 0%	6; 100%	4; 66,66%
9	MAROC	0; 0%	5; 55,55%	4; 44,44%	0; 0%	5; 55,55%	2; 22,22%
2	MONTENEGRO	0; 0%	2; 100%	1, 50%	1, 50%	2; 100%	1, 50%
3	SLOVENIE	0; 0%	3; 100%	3; 100%	0; 0%	3; 100%	0; 0%
3	SYRIE	0; 0%	3; 100%	2; 66,66%	0; 0%	1; 33,33%	0; 0%
29	TUNISIE	3; 10,34%	26; 86,65%	23; 79,31%	0; 0%	25; 86,21%	17, 58,62%
30	TURQUIE	6; 20%	28; 93,33%	28; 93,33%	7, 23,33%	27; 30%	6; 20%

# Facilities in Mediterranean yachting ports 2/2

Nombre de ports	Nation	Marché	Hivernages	Laverie	Service médical	Pharmacie	Récolte des eaux résiduelles	Récolte des eaux de fond de cale
		Données non disponibles:31 OUI:599 NO:260	Données non disponibles:31 OUI:42 NO:817	Données non disponibles:31 OUI:181 NO:678	Données non disponibles:31 OUI:99 NO:760	Données non disponibles: 31 OUI:43 NO:816	Données non disponibles: 31 OUI:87 NO:772	Données non disponibles:31 OUI: 112 NO:747
		599; 69,73%	42; 4,89%	181; 21,07%	99; 11,52%	43; 5,00%	87; 10,13%	112; 13,04%
11	ALBANIE	nd	nd	nd	nd	nd	nd	Nd
24	ALGERIE	3; 0,72%	0; 0%	0; 0%	0; 0%	0; 0%	0; 0%	0; 0%
4	CHYPRE	4; 75%	0; 0%	0; 0%	0; 0%	0; 0%	0; 0%	0; 0%
76	CROATIE	51; 69,86%	0; 0%	21; 28,77%	3; 4,11%	0; 0%	2; 2,74%	0; 0%
4	ÉGYPTÉ	2; 50%	1; 25%	0; 0%	1; 25%	0; 0%	1; 25%	1; 25%
177	ESPAGNE	121; 69,14%	11; 6,28%	68; 38,86%	50; 28,57%	4; 2,28%	13; 7,43%	23; 13,14%
117	FRANCE	90; 76,92%	2; 1,71%	18; 15,38%	10; 8,55%	2; 1,71%	8; 6,84%	12; 10,25%
3	GIBRALTER	2; 66,66%	0; 0%	1; 33,33%	2; 66,66%	0; 0%	0; 0%	0; 0%
133	GRÈCE	117; 87,97%	4; 3,00%	13; 9,77%	9; 6,76%	3; 2,25%	7; 5,26%	9; 6,77%
8	ISRAËL	6; 75%	0; 0%	1; 12,5%	1; 12,5%	0; 0%	0; 0%	1; 12,5%
233	ITALIE	143; 61,37%	16; 6,87%	46; 19,74%	14; 6,00%	38; 16,30%	53; 22,75%	53; 22,75%
3	LIBAN	2; 66,66%	0; 0%	0; 0%	0; 0%	0; 0%	0; 0%	0; 0%
15	LYBIE	nd	nd	nd	nd	nd	nd	Nd
6	MALTE	5; 83,33%	0; 0%	1; 16,66%	0; 0%	0; 0%	2; 33,33%	2; 33,33%
9	MAROC	2; 22,22%	2; 22,22%	0; 0%	0; 0%	0; 0%	1; 11,11%	1; 11,11%
2	MONTENEGRO	1, 50%	1, 50%	1, 50%	0; 0%	0; 0%	0; 0%	0; 0%
3	SLOVENIE	2; 66,66%	0; 0%	0; 0%	0; 0%	0; 0%	0; 0%	0; 0%
3	SYRIE	3; 100%	0; 0%	0; 0%	0; 0%	0; 0%	0; 0%	0; 0%
29	TUNISIE	20; 60,96%	5, 17,24%	4; 13,79%	4; 13,79%	2; 6,89%	0; 0%	1; 3,45%
30	TURQUIE	26; 86,66%	0; 0%	0; 0%	5; 16,66%	0; 0%	0; 0%	3; 10%



**Thank you for your time  
and your attention!**