Pan-European Dialogue between cruise operators, ports and coastal tourism stakeholders

Brussels, March 6 2015

Workshop (3)

Challenges and Opportunities for Cruise Tourism in the Mediterranean Sea and the Black Sea

Francesco di Cesare

Risposte Turismo

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ADRIATIC SEA FORUM | CRUISE FERRY SAIL & YACHT

ITALIAN CRUISE DAY

Cruising in the Med:
from a review of its recent past and present to an analysis of factors which may drive its future

Francesco di Cesare
Risposte Turismo

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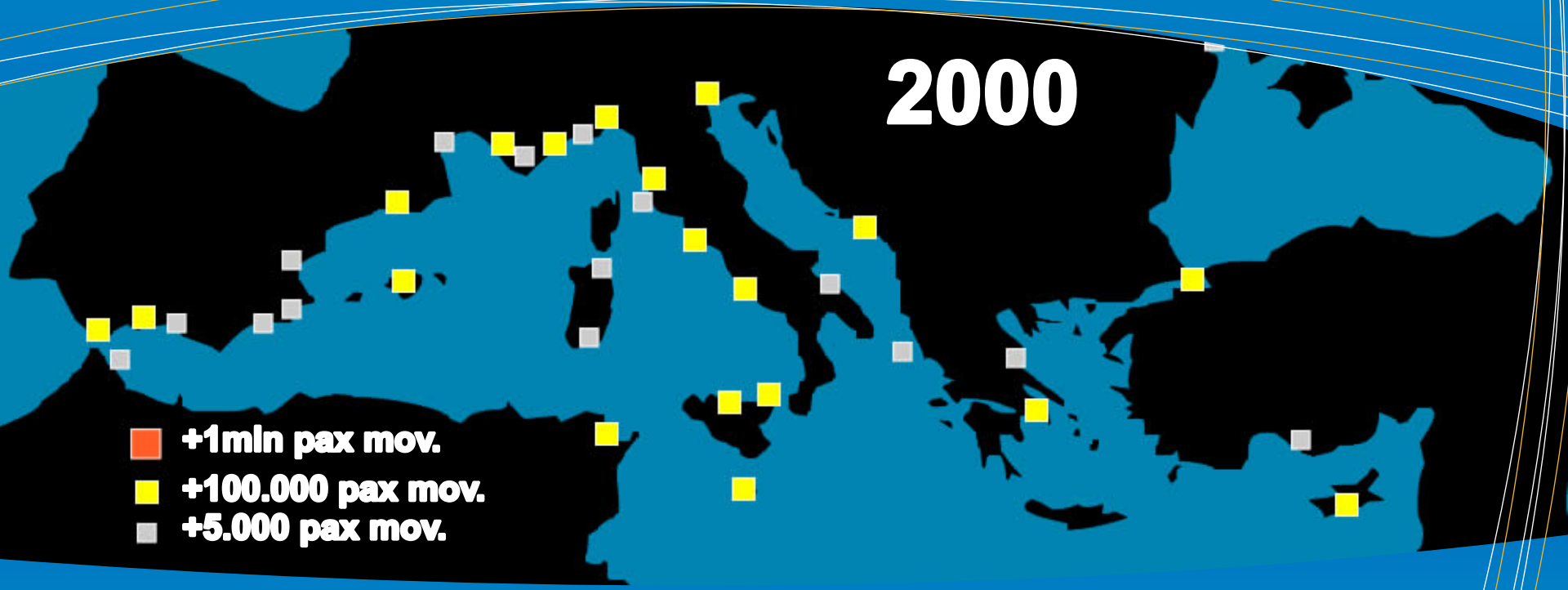
An evolving Med geography (1/3)

~ 40 cruise ports



Source: Risposte Turismo (2015)

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An evolving Med geography (2/3)

~ 65 cruise ports

Source: Risposte Turismo (2015)

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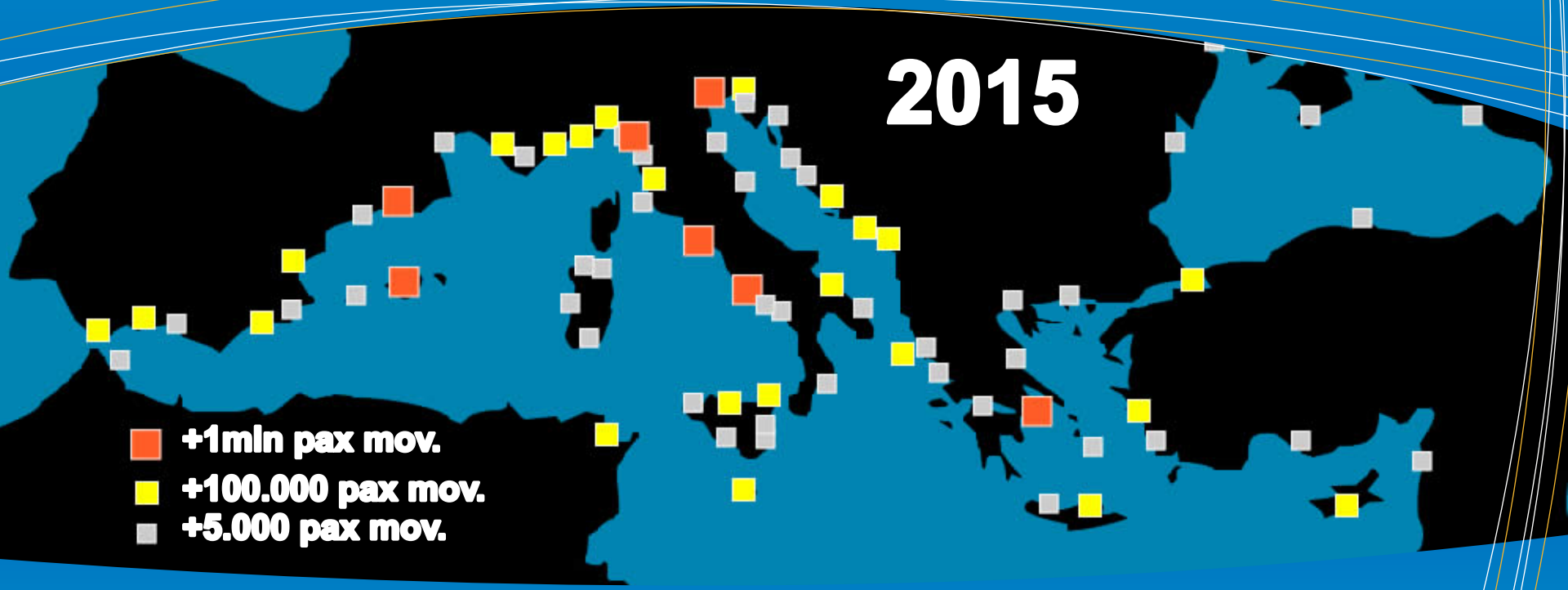
An evolving Med geography (3/3)

~ 85 cruise ports



Source: Risposte Turismo (2015)

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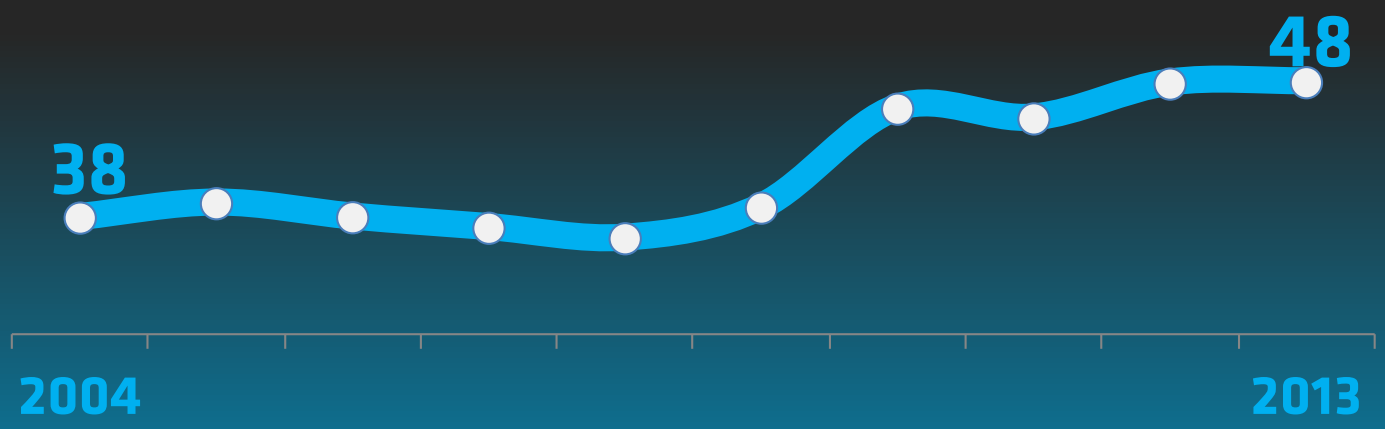
Getting indications from other experiences to forecast the future of the Med

GLOBAL DEPLOYMENT OF CAPACITY IN THE CARIBBEAN (milllions of bed-days)



Avg Annual Grow Rate (2004-2013)

+2,8%

Source: adapted Risposte Turismo (2015) from CLIA & G.P. Wild data (various edition)

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Which factors may push the Mediterranean in a global competition?

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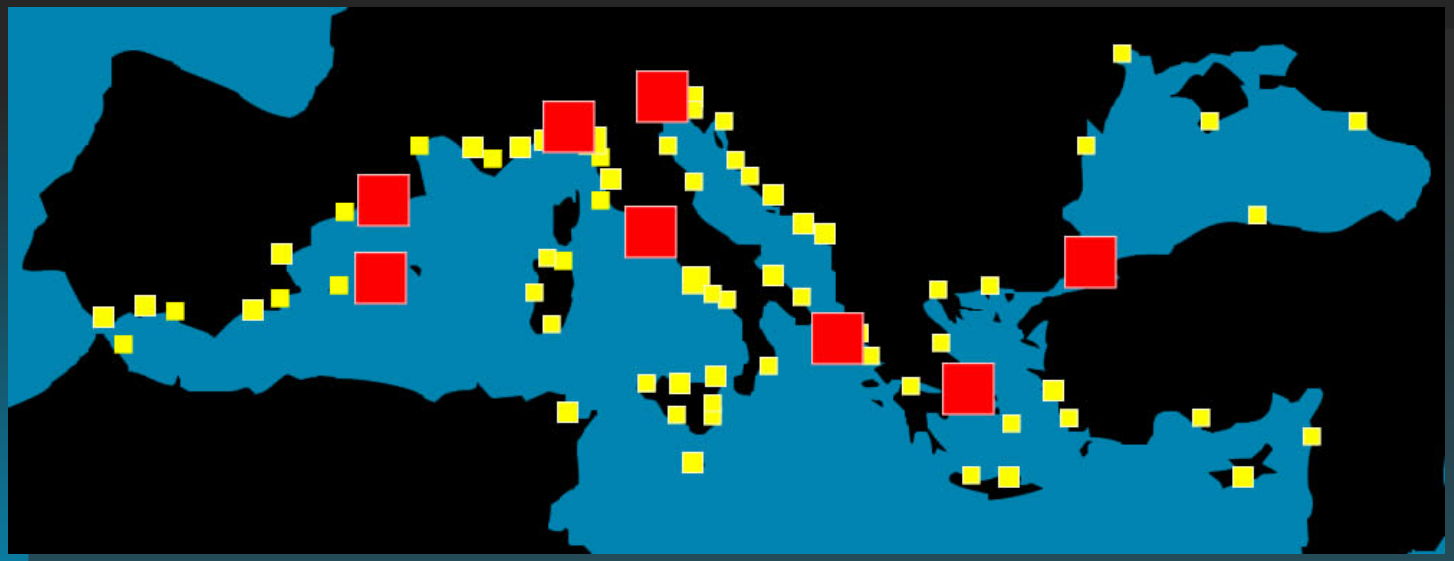
large variety of options both in homeports and ports of call to skip kinds of instability

(geopolitical, airconnections, weather, ..)



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Heterogeneity of cruise destinations/ports & shore experiences

Cruise companies often affirm:
"We bring tourists where they want to go"

Part of the new offer will be deployed in the Med

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Although cruising in the Med has already celebrated 30 years, there is still a lot of attention on the sector, industry investments, and a desire shared by many stakeholders to draw a development path

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Which factors may slow down, or even compromise, the future development of the Med?

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the (new) global source market looks elsewhere (1/2)

Chinese Travel Trends

Chinese travelers' preferred destinations in 2015 vs 2014

Ranked the same | Ranked higher in 2015 | Ranked lower in 2015

Rank	2015 Survey		Rank	2014 Survey	
1	Japan	39.60%	1	Japan	29.20%
2	U.S.	31.40%	2	U.S.	28.90%
3	New Zealand	26.80%	3	Taiwan	26.00%
4	Australia	25.60%	4	New Zealand	24.70%
5	Taiwan	24.90%	5	Thailand	24.40%
6	Thailand	22.40%	6	Maldives	23.70%
7	Maldives	21.30%	7	Australia	22.90%
8	China domestic	18.20%	14	China domestic	12.70%
23	Hong Kong	8.70%	17	Hong Kong	11.90%
28	Malaysia	5.80%	20	Malaysia	9.90%

0

2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013

*Long haul defined as tourist arrivals to destinations outside Northeast Asia

Source: Tourism Economics & ETC (2014)

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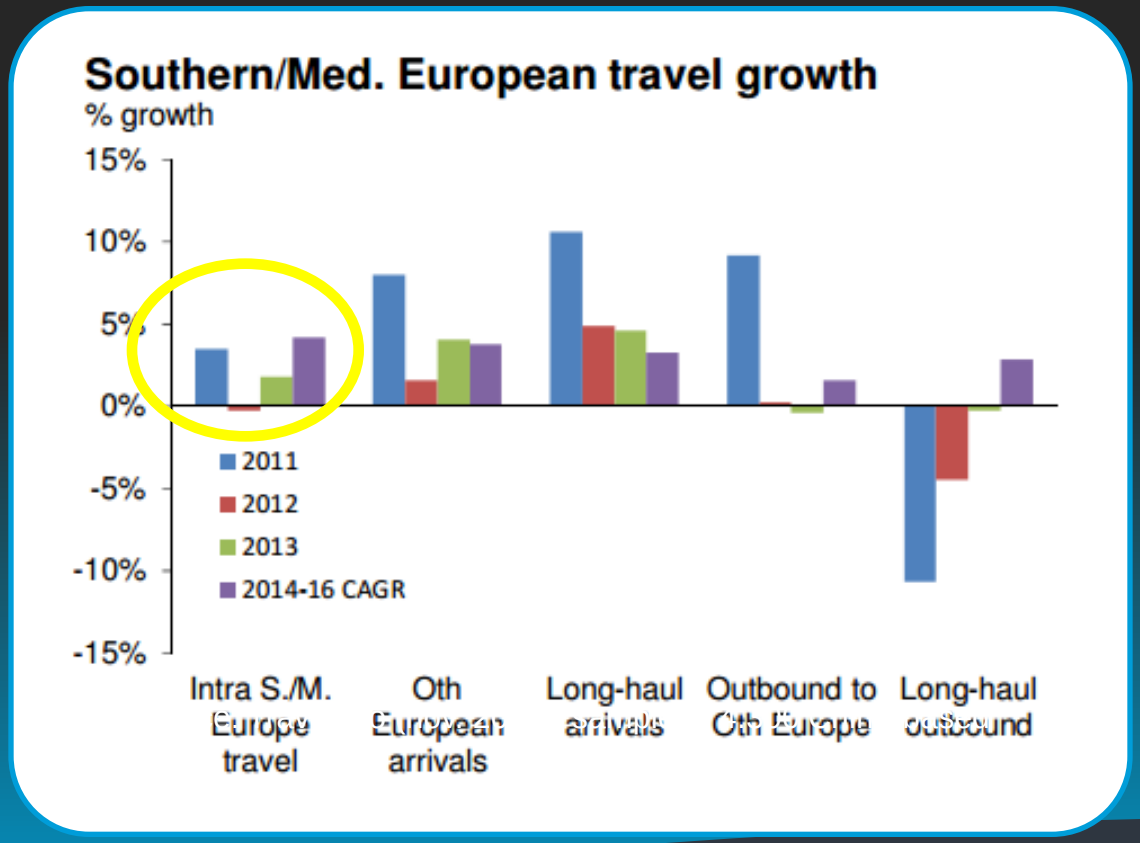
the (new) global source market looks elsewhere (2/2)



Source: Tourism Economics & ETC (2014)

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Uncertainty

over 200mln euro of potential drop for the Adriatic area's economy due to traffic's restriction
Source: RT for VTP (2014)

ECA: slowing down spead for less cruise calls and possible deployment shifting

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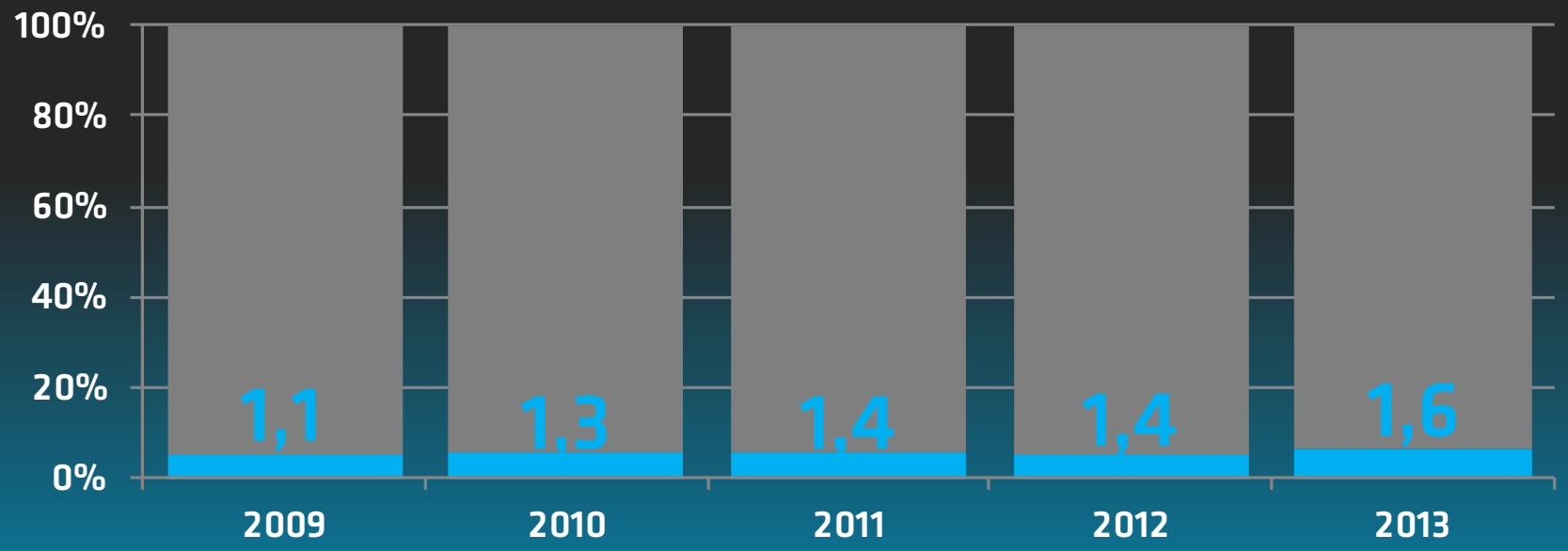
winter cruising doesn't seem to be the "big chance"

Cruise passenger movements in Med ports during December+January+February



Source: Risposte Turismo elaborations (2015) on MedCruise data (various editions).

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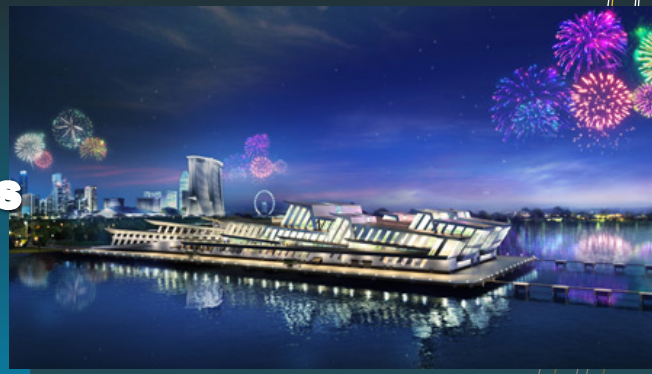
Lack of reliable and satisfying port infrasctructures

berthing in cargo areas

Unrealistic expectations

Inadequate berths for cruise ships

Increasing global cruise terminals competition



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Considering these highlighed factors and others to move the scenario…

…which could be a realistc target and a next future for the Med?

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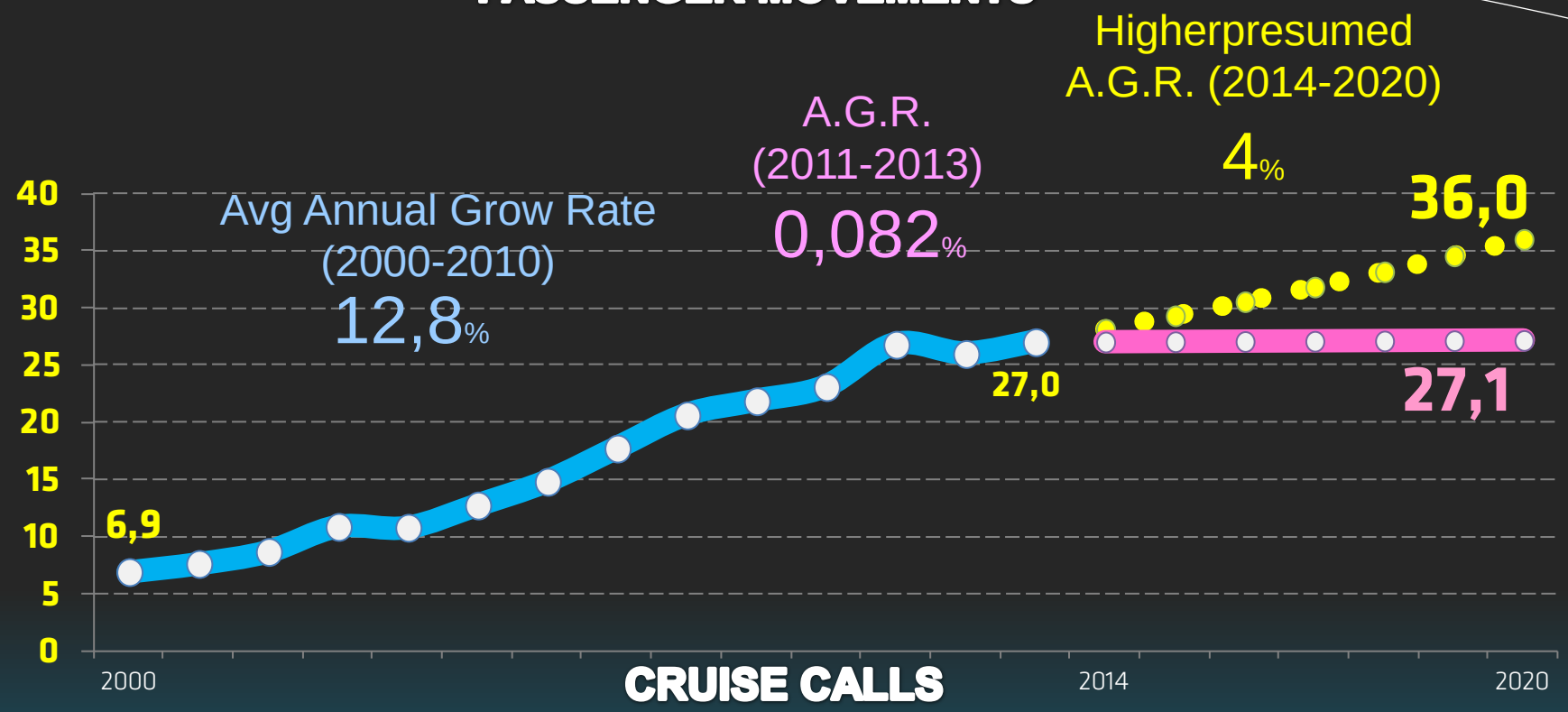
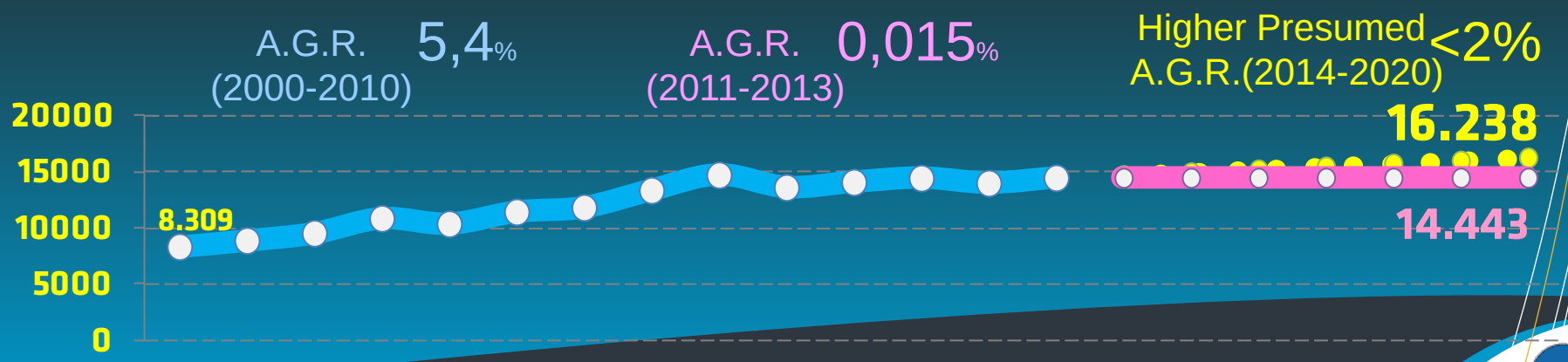
PASSENGER MOVEMENTS



CRUISE CALLS



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and could we refer to growth just in terms of traffic movements?

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MANY INDEXES OF GROWTH TO BE CONSIDERED

+JOBS

+ SUPPLIERS ENGAGEMENT

LOCAL SOCIO-ECONOMIC CONDITIONS

+

SHIP CALLS IN PORTS

+ CRUISE TRAFFIC
SHIPS & PAX MOVEMENTS

+

PASSENGER MOVEMENTS IN CRUISE PORTS

+ SHORE INVESTMENTS (w/ sustainability)

+ SHORE INVOLVEMENT (pre-post & excursions)

benefits' distribution vs. concentration

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