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The Association of Mediterranean Cruise Ports

Advancing Cruise Activities in the Med

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Pan European Dialogue between cruise operators, ports and coastal tourism stakeholders
Brussels 6 March 15

MedCruise: The Association of Cruise ports in the Med and its adjoining seas (est. 1996)

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www.medcruise.com

MedCruise in 2014

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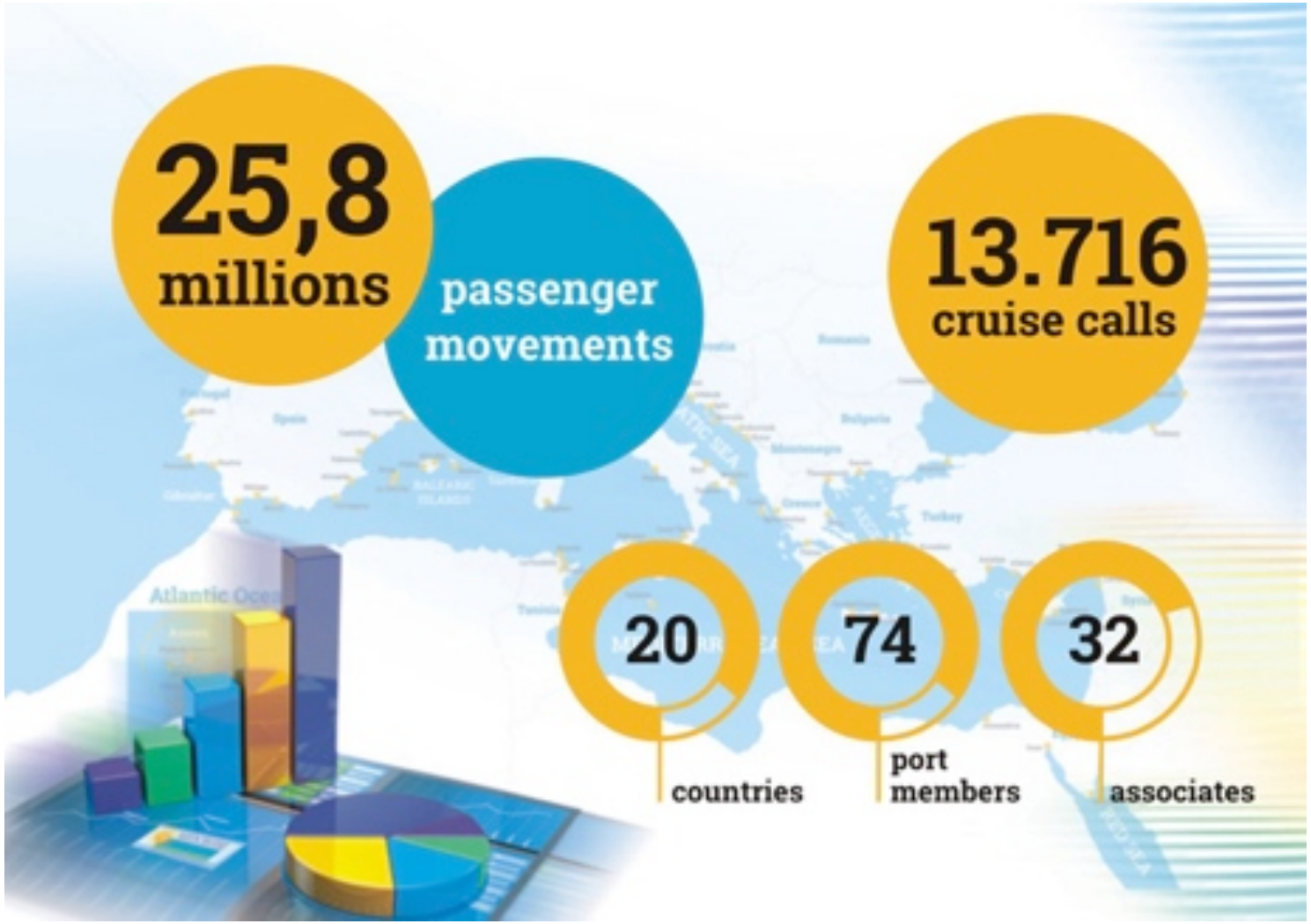

A long-term growth, that needs to sustain

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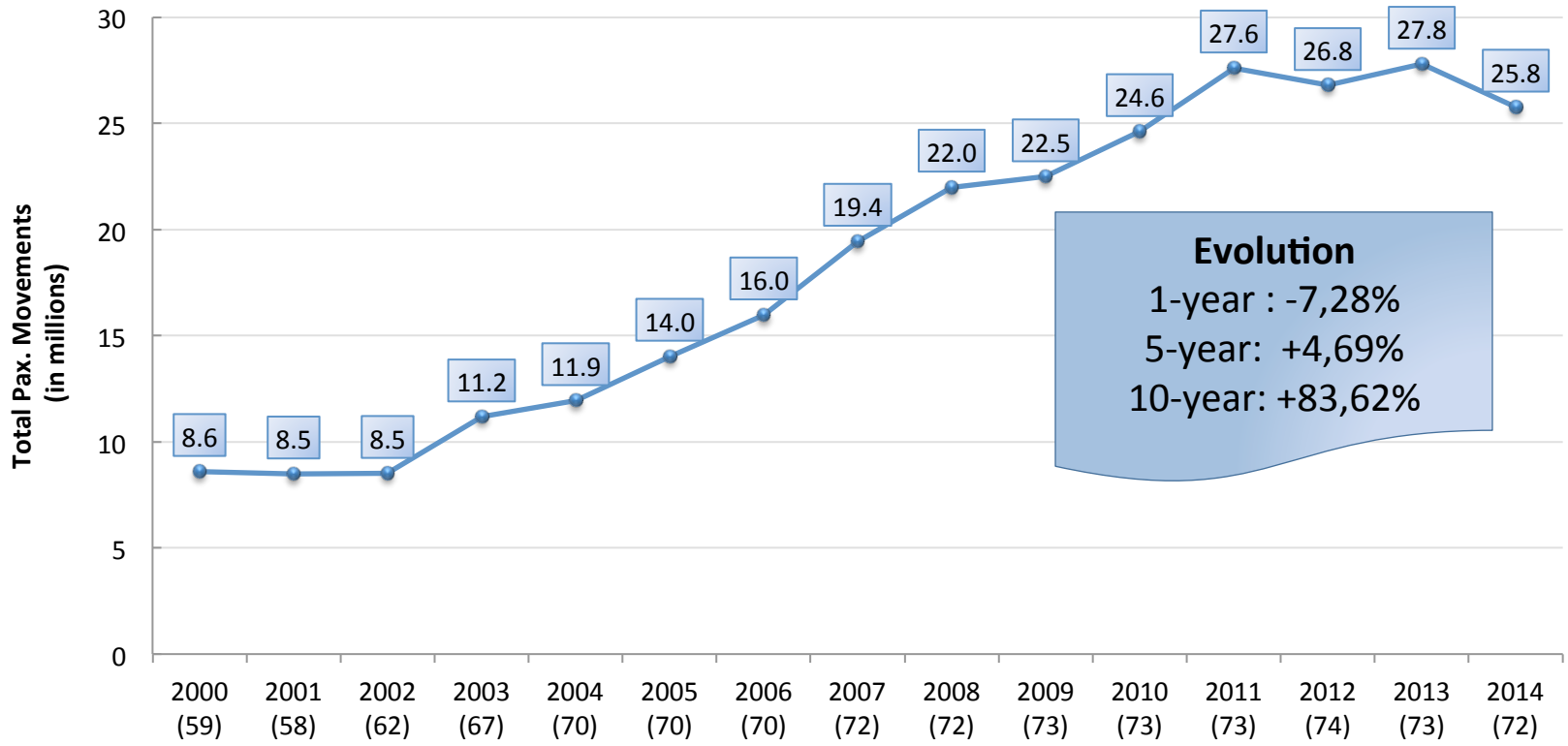

Port Major Challenges

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	Level of importance (scale 1-5)	Not a challenge	Most Important Challenge
1. Relationship with the cruise lines	**3.70**	**17.4**	**60.9**
2. The development of other regions as new cruise destinations	**3.50**	**4.5**	**31.8**
3. Exploiting the potential of winter cruising	**3.35**	**4.3**	**21.7**
4. Bigger cruise ships (in size)	**3.22**	**17.4**	**47.8**
5. Connectivity of the destination with source markets	3.14	4.5	13.6
Relationship with people and businesses around the ports	3.13	8.7	17.4
The competition with other (neighbouring) cruise ports	3.13	4.3	21.7
Infrastructure (other than transport) in the port	3.13	8.7	39.1
Becoming a homeport	3.09	17.4	30.4
The relationship with the city of arrival and local authorities	3.04	17.4	30.4

Relationships with Cruise Lines: The challenges

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	Level of importance (scale 1-5)	Not a challenge	Most Important Challenge
Port tariffs	**3.22**	**4.3**	**30.4**
Shore excursions	**3.13**	**8.7**	**30.4**
Cancelation of calls	**3.09**	**8.7**	**34.8**
Agreeing Long time engagement	**3.00**	**13.6**	**27.3**
Other port services (mooring, MARPOL...)	**2.83**	**17.4**	**21.7**
Lack of cooperation when scheduling/ planning itineraries	**2.74**	**17.4**	**13.0**
Pressures for berth allocation	2.65	8.7	8.7
Taxi and other public transport availability	2.61	13.0	8.7
Operational coordination (visa procedures, electronic services, etc)	2.35	26.1	21.7
Frequently changing demands by cruise lines	2.26	8.7	8.7
Suppliers	2.26	17.4	8.7
Emissions limitations	2.23	27.3	9.1
Pilotage	2.05	31.8	18.2
Shore electricity supply	1.86	36.4	13.6
Confusion in responsibilities	1.55	27.3	9.1

Berthing Allocation in Practice

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	Do cruise lines and/ or ships agents have the option to book a berthing slot in the port?	Do cruise lines and/ or ships agents have the option to book a specific berthing place (terminal/ pier) in the port?
2 years before	**52.2**	22.7
Between 1-2 years before	13.0	9.1
Between 6 to 12 months before	13.0	13.6
Between 3 to 6 months before	0	4.5
Less than a week before	8.7	4.5
Not applicable	13.0	45.5
Total	100.0	100.0

40.9%: the berthing allocation policy is publicly available

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Berthing Booking Practices

Berth booking basis	%
First come-first served	45.0
Based on the cruise segment the port targets	15.0
Medcruise berthing policy	10.0

The 'cancellation' issue

How many planned calls are **cancelled per year**-for reasons other than serve weather, acts of God, or force majeure?	%
0	13.0
1-4	43.5
5-10	30.4
11-20	8.7
More than 20	4.3

Berthing Booking Practices

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Berthing policy and practice are discussed	Within a formal procedure	Informally
Internally	57.1	40.0
With Cruise lines	42.9	52.4
With Cruise ship agents	57.1	38.1
With Travel agents	14.3	19.0
With Destination representatives	4.8	19.0
With Other stakeholders	14.3	9.5
With none	4.5	8.7

Users' Satisfaction

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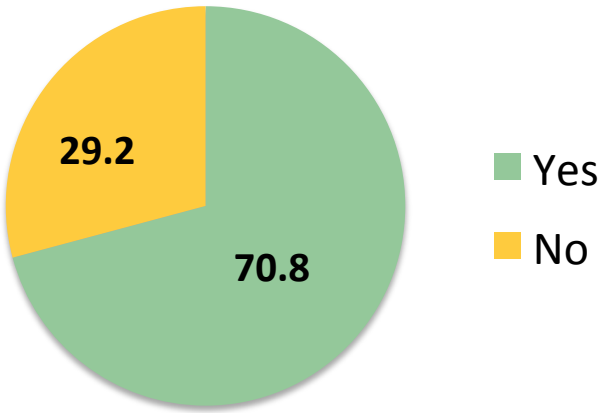
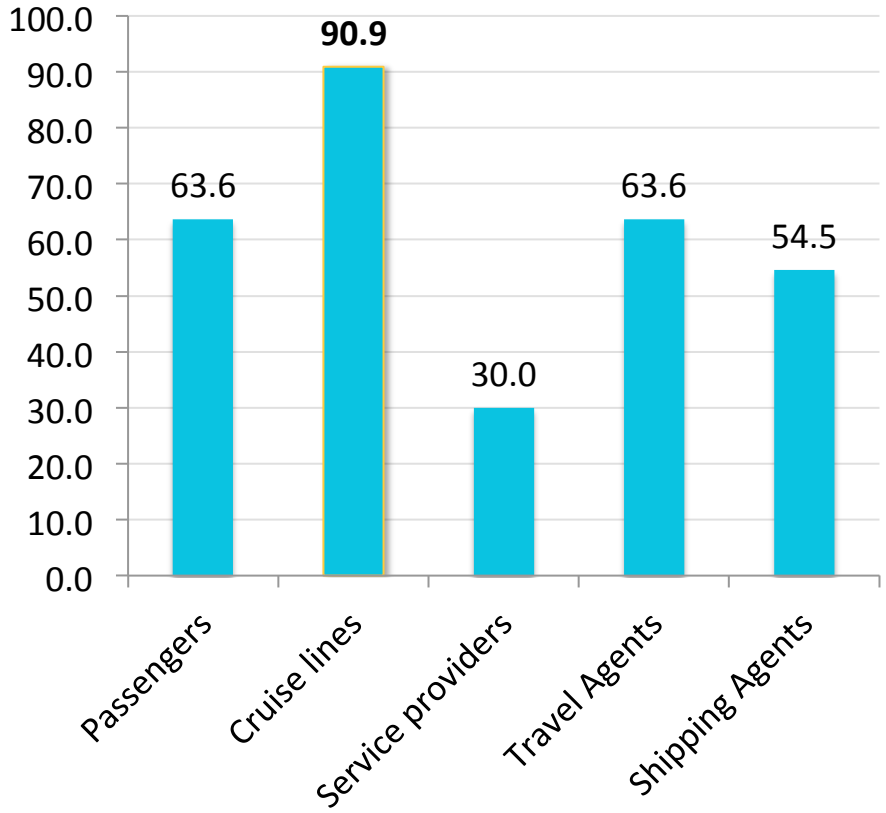
Does your port receive feedback on users' satisfaction?



From whom do you receive users' satisfaction feedback?



User's Satisfaction

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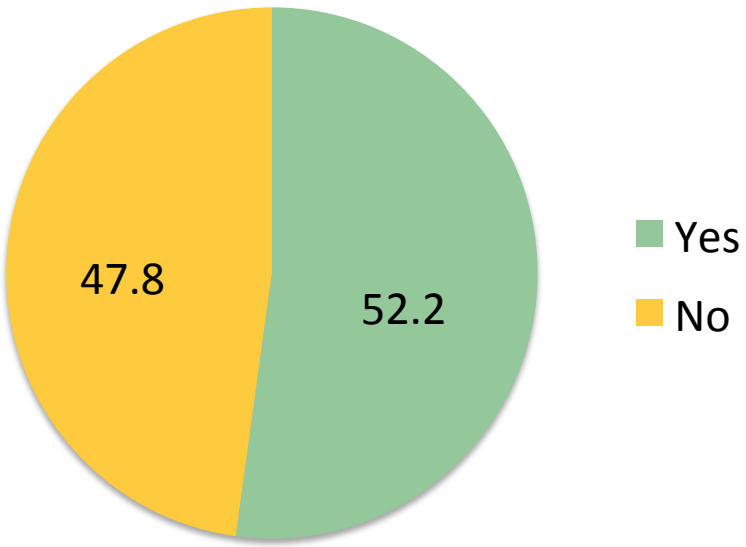
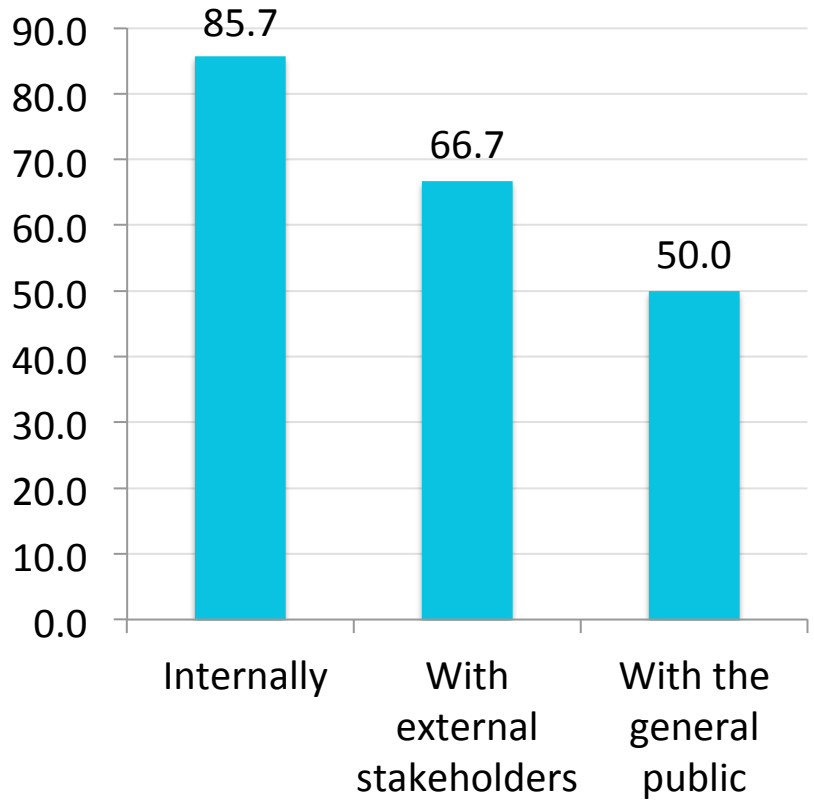
Does the port share the results?



With whom do you share the results?



Criteria in the formation of cruise companies perceptions on port performance

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	Average (scale 1-5)	Most important (%)
1. Passenger satisfaction	4.8	81.0
2. Security	4.7	68.2
3. Efficiency of operations	4.5	68.2
4. Cost	4.5	54.5
5. Quality of port infrastructure	4.3	50.0
6. Accessibility	4.2	40.9
7. Availability of services to cruise ships and passengers	4.2	36.4
8. Responsiveness	4.1	40.9
9. Provision of adequate information	4.1	28.6
10. Quality of port superstructures (cruise terminal building etc)	4.0	40.9
Efficiency of documentary process	4.0	38.1
Connectivity - Landside	3.8	23.8
Crew satisfaction	3.5	27.3

Operational issues

Is your port certified with	Yes, %
ISO 9001	61.9
ISO14001	42.9
Neither of the above	19.0
Other certifications	28.6

Airport services available at the cruise port	Yes, %
Flight "check in" of cruise passengers	15.0
Automatic transfer of cruise passengers luggages to the airport	25.0
None	60.0

Challenging immigration procedures

% of ports ranking their importance

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	Crew visas	Passenger visa	Checking/ stamping of crew passports	Checking/ stamping of passenger passports	Procedures for crew arriving/ moving in/ out Schengen areas	**Passengers arriving/ moving in/ out Schengen areas**
Not a challenge	31.6	31.6	22.2	26.3	25.0	30.0
Least important	21.1	26.3	27.8	31.6	20.0	25.0
Rather important		10.5	5.6	5.3	5.0	
Important	**10.5**		**16.7**	**10.5**	**10.0**	**15.0**
Very important	**21.1**	**26.3**	**11.1**	**21.1**	**15.0**	**10.0**
Most Important	**15.8**	**5.3**	**16.7**	**5.3**	**25.0**	**20.0**

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Regular visa need

	Yes (%)
Embarking - Arrival from Schengen countries	6.7
Embarking - Arrival from non-Schengen countries	**78.6**
Disembarking - Schengen countries	13.3
Disembarking - Arrival from non-Schengen countries	**76.9**
Transit - Arrival from Schengen countries	12.5
Transit - Arrival from non-Schengen countries	**46.7**

Pax passport control/ stamping

	Yes (%)
Passengers are controlled before embarkation	36.8
Passengers from Schengen countries are controlled before disembarkation	20.0
Passengers from non-Schengen countries are controlled before disembarkation	35.0
Checking and stamping passengers passports and lists can also be done onboard	**50.0**
Never	20.0

Average Pax/Call in MedCruise port members

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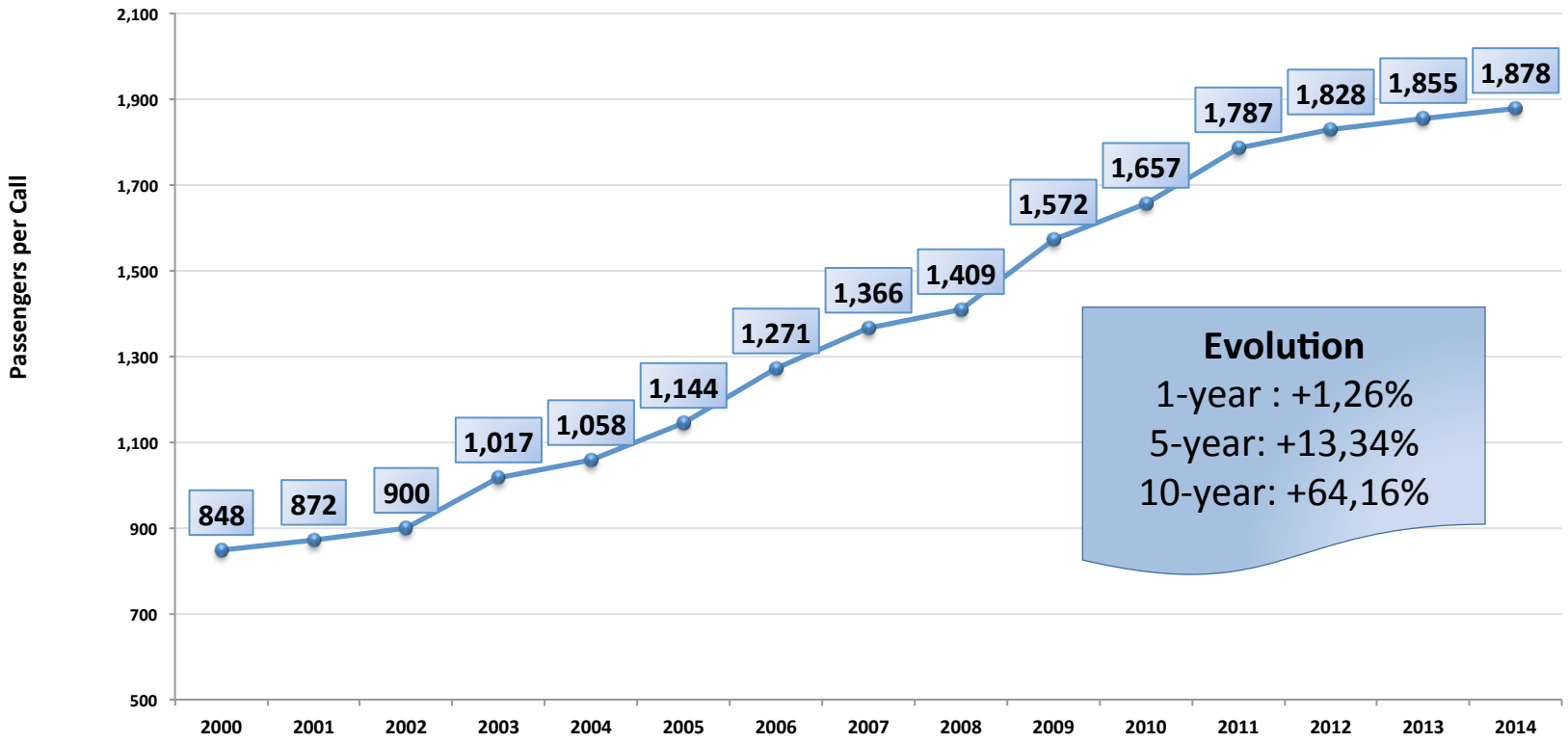

How best to organise growth?

What needs to be done?

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- **Organize, coordinate, train & review**
  - Better manage popular destinations (coordination with local officials
- **Innovative practices**
- **Prepare port cities**
- **Expand the ports (more facilities)**
  - Subject to fiscal and physical constraints
  - Limited berth space demands huge Investment
- **Develop new ports and destinations to vary itineraries**

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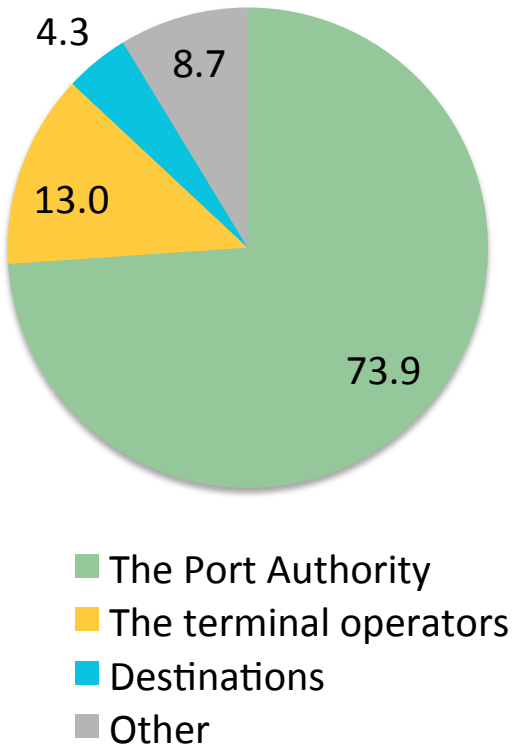
Overall promotion and marketing actions leader

Economic impact studies for cruise business	%
Internally	24.0
Outsourcing	20.0
in cooperation with other public bodies in the region (i.e. Municipality, Chambers etc.)	40.0
No	16.0



Strategic partnerships and Formal collaboration

Strategic partnerships	%
Other port authorities	25.0
Tourist organisations	36.0
Cruise terminal operators	8.0
Organisations representing the destination	41.7
With other stakeholders	20.0
With cruise companies	4.2
With cruise companies (direct investments)	8.3

French Riviera Cruise Club

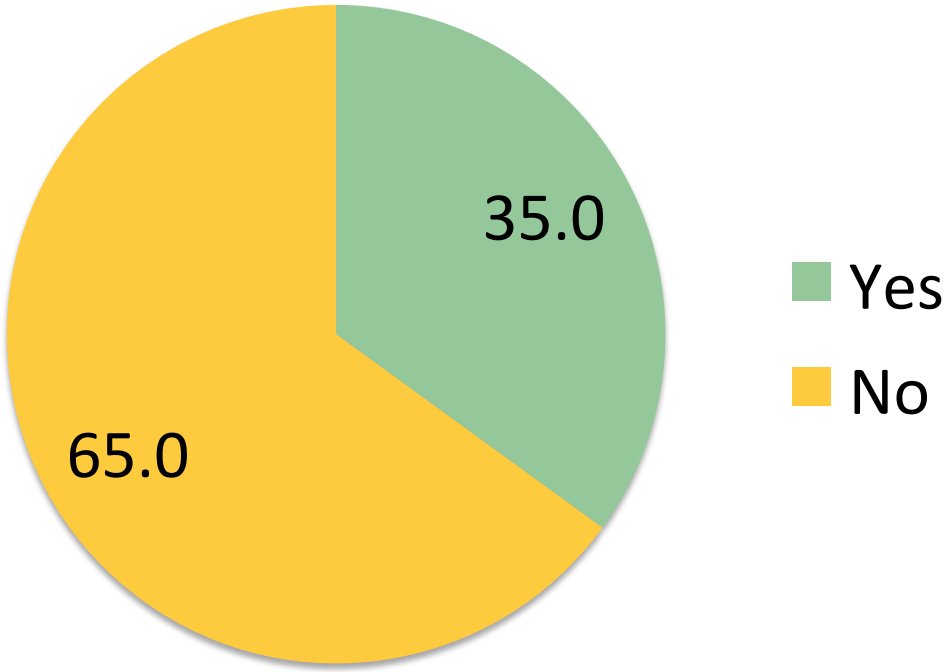
Local tourism network

- **Founding members**

  French Riviera Tourist Board
  Riviera Ports Authority, Chamber of Commerce,
  Cannes, Nice and Villefranche Tourism Boards
  Cities of Cannes, Nice, Villefranche

- **Partners – 200 members**

  All professionals who work in the cruise industry such as:

  Tourism Boards
  Port & Shore agents
  Privately-operated tourist attractions
  Shopping & Wallcenters, Hotels
  Transport
  Travel agencies

Has the cruise port infrastructure benefited by EU contribution?