# SEASONALITY AND THE DRIVERS OF DEPLOYMENT IN THE WINTER MONTHS: MEDCRUISE STATISTICS AND POINT OF VIEW

Seatrade Winter Cruising Forum
Istanbul 5- 7 December 2011

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# SUMMARY

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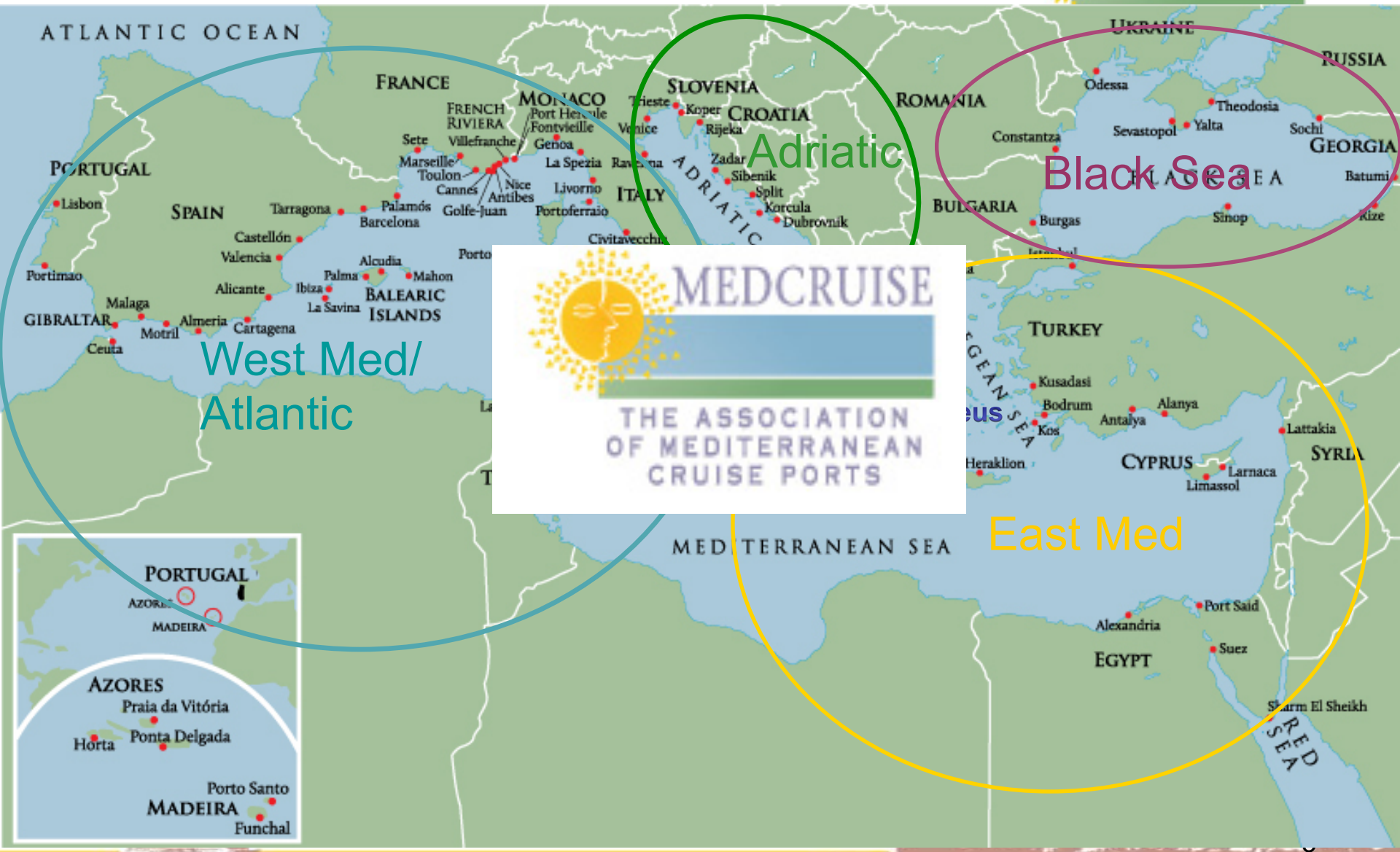
- Medcruise Regions and Ports
- 2010 Cruise Traffic and 2011 Forecast
- Seasonality in the Med: 9 months High Season
- Different kinds of seasonal distribution
- Top 10 Winter Ports
- The 20 Med Ports with the highest concentration per month

# MedCruise keeps the Med together



# MedCruise Ports (2010)

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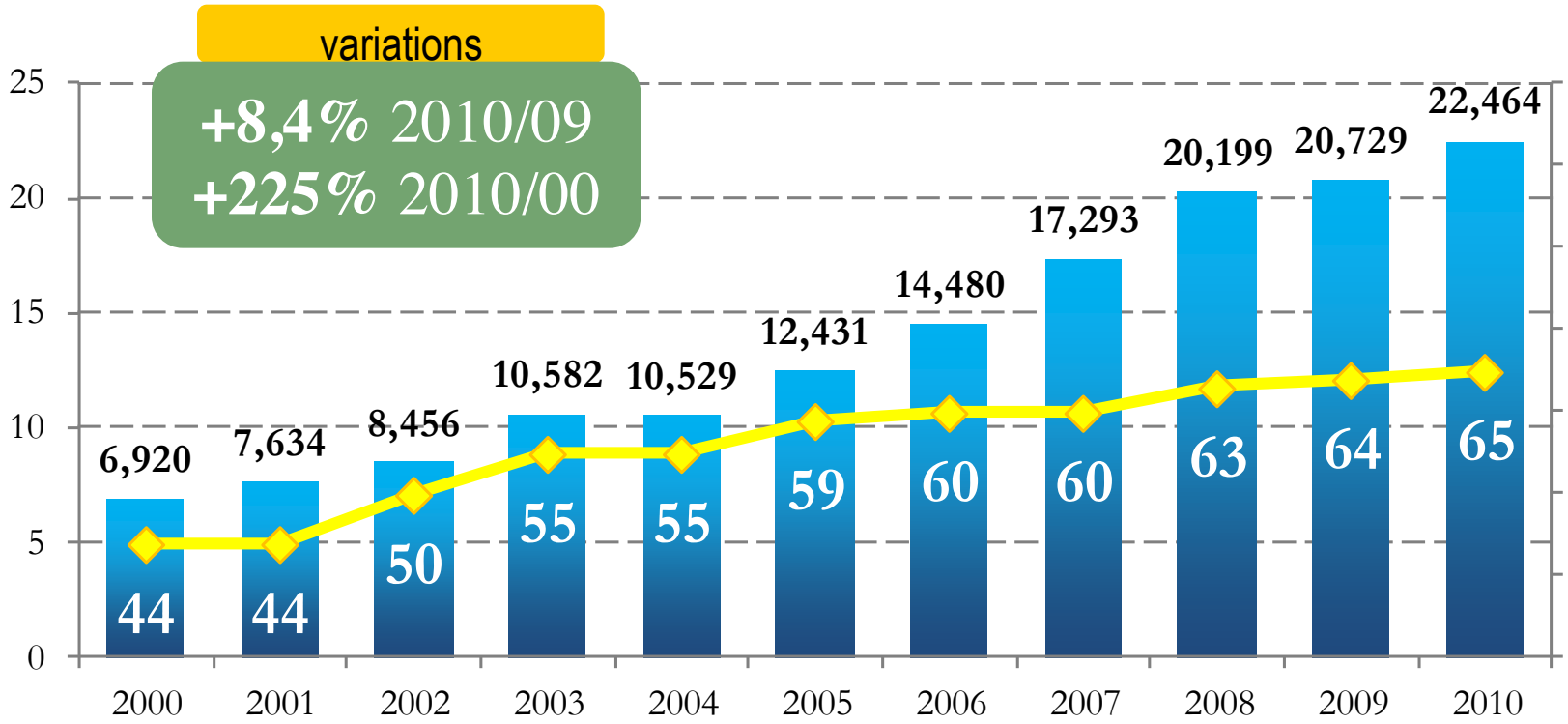
| | less than 100,000 | between 100.000 - 500.000 | between 500.000 - 1.000.000 | between 1.000.000 - 1.500.000 | between 1.500.000 - 2.000.000 | over 2,000,000 |
|---|---|---|---|---|---|---|
| ATLANTIC / WEST MED | ALICANTE<br>AZORES<br>ALMERIA<br>LA SPEZIA<br>PORTIMAO<br>PALAMOS<br>PORTOFERRAIO<br>SETE<br>CEUTA<br>TARRAGONA<br>MOTRIL<br>CASTELLON | VALLETTA<br>MADEIRA ISL.<br>LISBON<br>PALERMO<br>MONACO<br>TOULON<br>GIBRALTAR<br>VALENCIA<br>MESSINA<br>NORTH SARDINIAN P.<br>CAGLIARI<br>CARTAGENA | TUNISIAN P.<br>GENOA<br>LIVORNO<br>MARSEILLE<br>FRENCH RIVIERA<br>MALAGA | NAPLES | CIVITAVECCHIA<br>BALEARIC ISL. | BARCELONA |
| ADRIATIC | KOPER<br>ZADAR<br>TRIESTE<br>RIJEKA<br>SIBENIK<br>RAVENNA | SPLIT | DUBROVNIK<br>BARI | | VENICE | |
| EAST MED | KEFALONIA<br>KOS<br>ALANYA<br>VOLOS<br>THESSALONIKI<br>LATTAKIA<br>KAVALA<br>SOUDA<br>PATRAS<br>IGOUMENITSA | ISTANBUL<br>CYPRIOT P.<br>HERAKLION<br>EGYPTIAN P. | KUSADASI / BODRUM | | PIRAEUS | |
| BLACK SEA | ODESSA<br>YALTA<br>SOCHI<br>CONSTANTZA<br>SEVASTOPOL<br>BURGAS<br>SINOP<br>BATUMI<br>RIZE | | | | | |

# Total MedCruise Passengers movement

(in millions) and no. of members contributing to this data, 2000-2010




SOURCE: The new MedCruise Statistic Report, *2nd edition 2011*

# MedCruise Areas

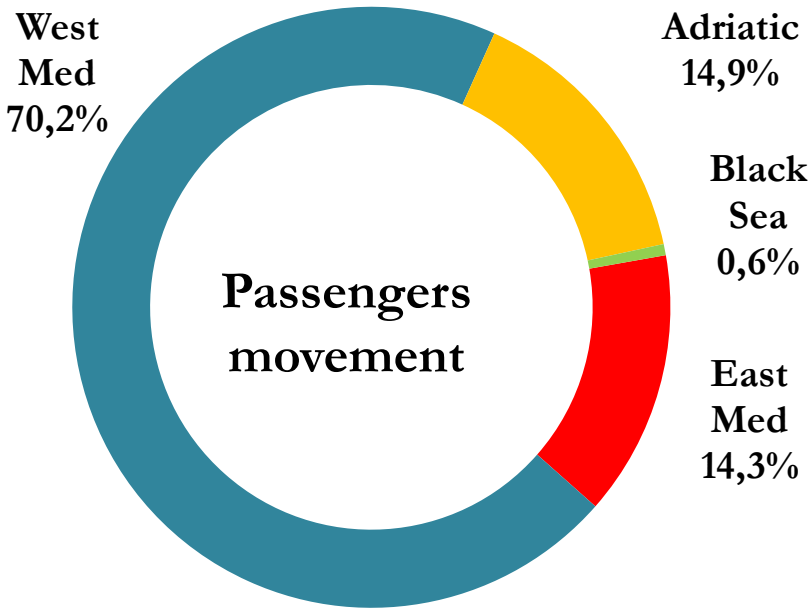
## (total traffic shares of areas, variations 2000/'08 /'09 /2010)

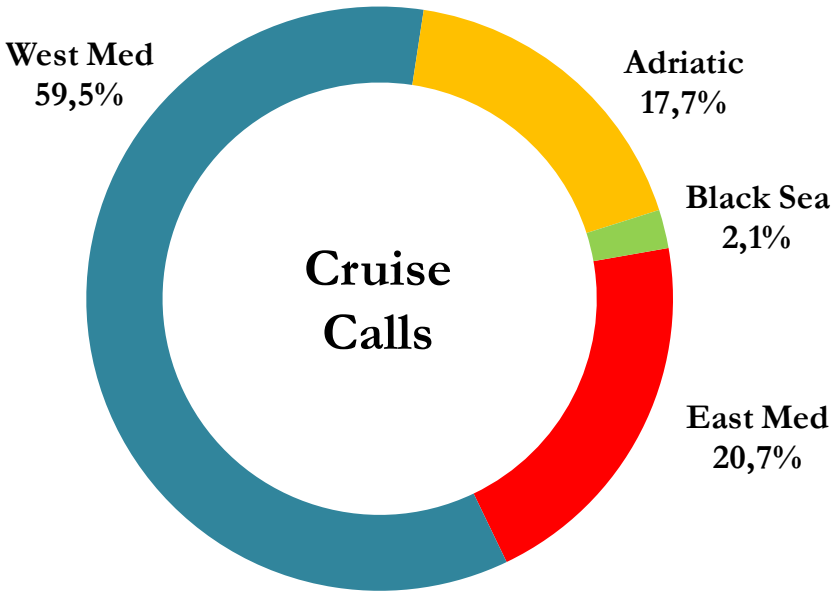
| MedCruise Area | | WEST MED | ADRIATIC | EAST MED | BLACK SEA |
|---|---|---|---|---|---|
| *No. of MedCruise members* | | *34* | *10* | *15* | *8* |
| *Total pax movement* | 2000 | 4.730.676 | 530.468 | 1.606.078 | 52.823 |
| | 2008 | 13.894.537 | 2.852.848 | 3.305.373 | 145.992 |
| | 2009 | 14.209.380 | 3.108.573 | 3.301.074 | 109.820 |
| | 2010 | 15.775.838 | 3.340.610 | 3.212.312 | 134.869 |
| *Share* | 2000 | 68,4% | 7,7% | 23,2% | 0,8% |
| | 2008 | 68,8% | 14,1% | 16,4% | 0,7% |
| | 2009 | 68,5% | 15,0% | 15,9% | 0,5% |
| | 2010 | 70,2% | 14,9% | 14,3% | 0,6% |
| *Variation 2000 -> 2010* | | 233,48% | 529,75% | 100,01% | 155,32% |
| *Variation 2008 -> 2009* | | 2,3% | 9,0% | -0,1% | -24,8% |
| *Variation 2009 -> 2010* | | 11,0% | 7,5% | -2,7% | 22,8% |

SOURCE: The new MedCruise Statistic Report, *2nd edition 2011*

# MedCruise areas shares

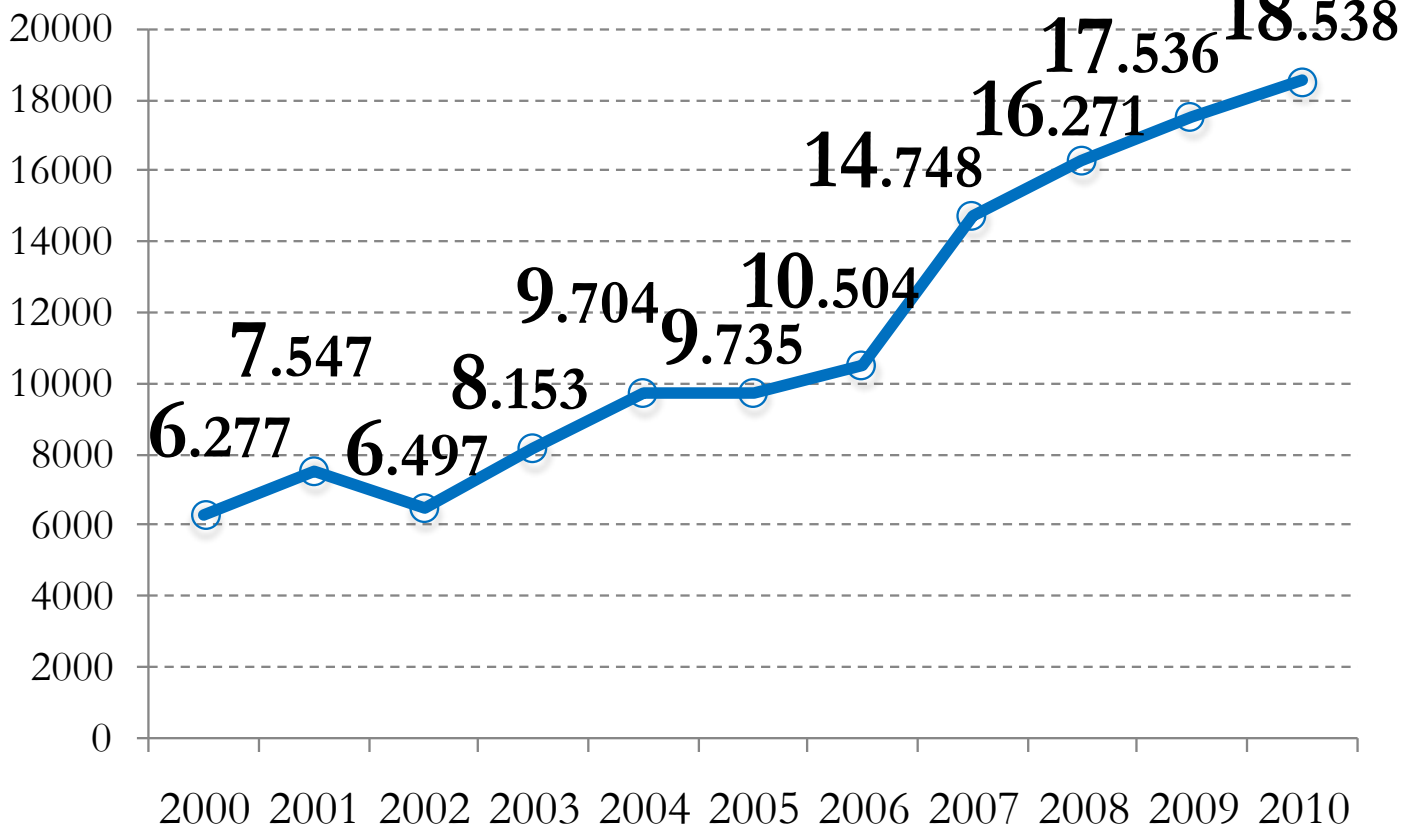
## passengers movement and cruise calls, 2010




SOURCE: The new MedCruise Statistic Report, *2nd edition 2011*

# Bed-day (000) Evolution in the Mediterranean area




**+5,7%**
2010/2009

**+195%**
2010/2000

Source: CLIA; Elaborazione Ca' Foscari Venezia

# Bed-day (000) Evolution in the Mediterranean area

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**+ 10,32 (2008 compared to 2007)**
**+ 7,77 (2009 compared to 2008)**
**+ 5,7 (2010 compared to 2009)**

## 2011 compared to 2010 ?

- Forecast based on last year trend: +4%
- Real number expected: + 15%

Source: Ca' Foscari – Venice on CLIA data

# Cruise Seasonality: the Regions of the Mediterranean

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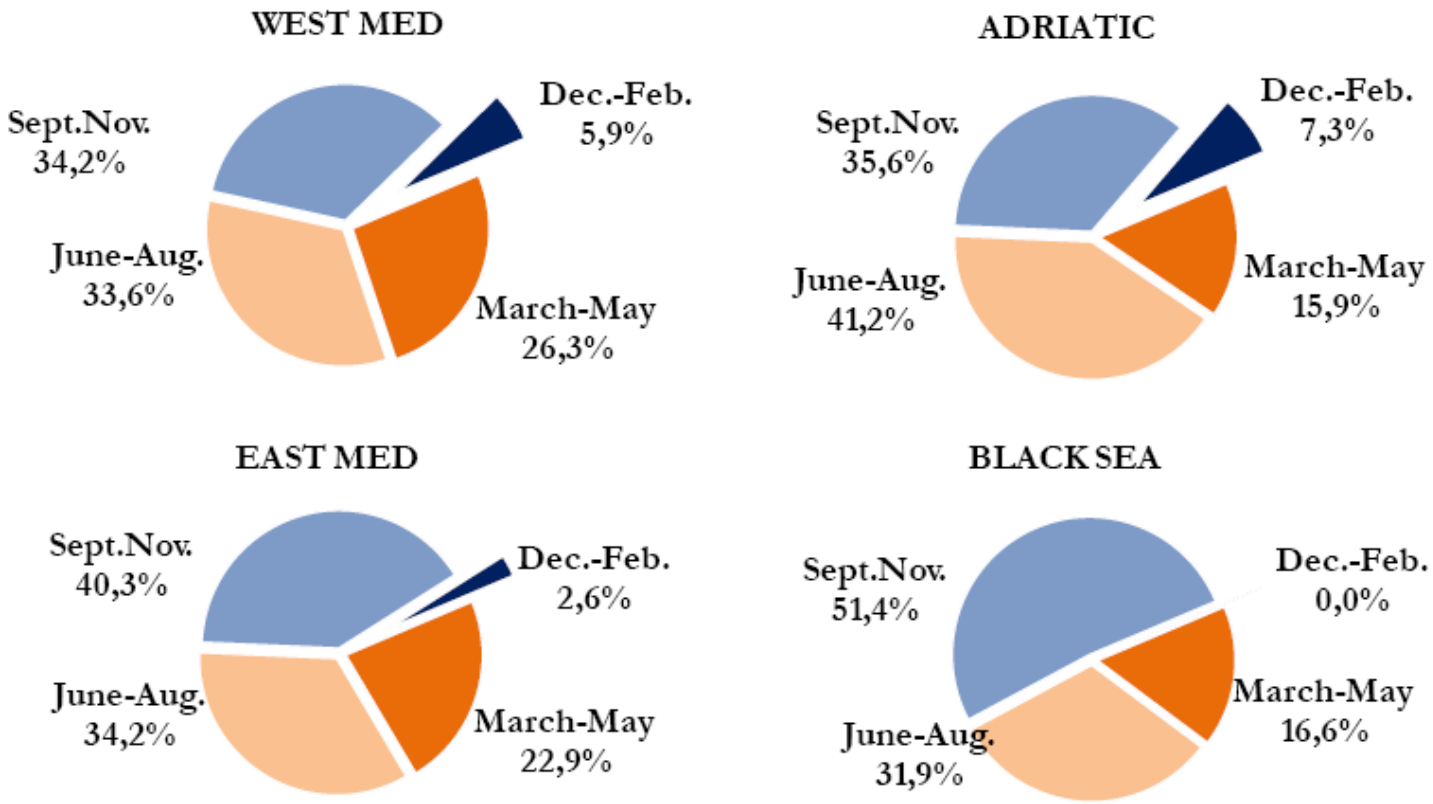
Figure 2.4 - Seasonality 2010, trimester shares per MedCruise Areas




SOURCE: The new MedCruise Statistic Report, *2nd edition 2011*

# Cruise Seasonality in 2010: The Mediterranean regions

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Table 2.1 - Seasonality 2010 (total pax movement, cruise calls and monthly shares)

| Month | Total (pax) | Share | Cruise Calls | Share |
|---|---|---|---|---|
| January | 332.783 | 1,5% | 169 | 1,3% |
| February | 281.528 | 1,3% | 160 | 1,2% |
| March | 569.170 | 2,6% | 328 | 2,6% |
| April | 1.680.662 | 7,6% | 1.071 | 8,3% |
| May | 2.682.539 | 12,2% | 1.710 | 13,3% |
| June | 2.579.809 | 11,7% | 1.496 | 11,6% |
| July | 2.886.290 | 13,1% | 1.488 | 11,6% |
| August | 3.004.245 | 13,7% | 1.586 | 12,3% |
| September | 3.061.334 | 13,9% | 1.850 | 14,4% |
| October | 2.959.456 | 13,5% | 1.868 | 14,5% |
| November | 1.364.354 | 6,2% | 833 | 6,5% |
| December | 574.562 | 2,6% | 285 | 2,2% |
| TOTAL | 21.976.732 | 100% | 12.844 | 100% |

NOTE: in this data 7 cruise ports are excluded from elaborations (3 did not give any seasonality data and 4 ports with no 2010 data at all. Therefore the total slightly differs from other tables.

SOURCE: The new MedCruise Statistic Report, *2nd edition 2011*

# Cruise Seasonality in the Mediterranean: 2008-2009-2010

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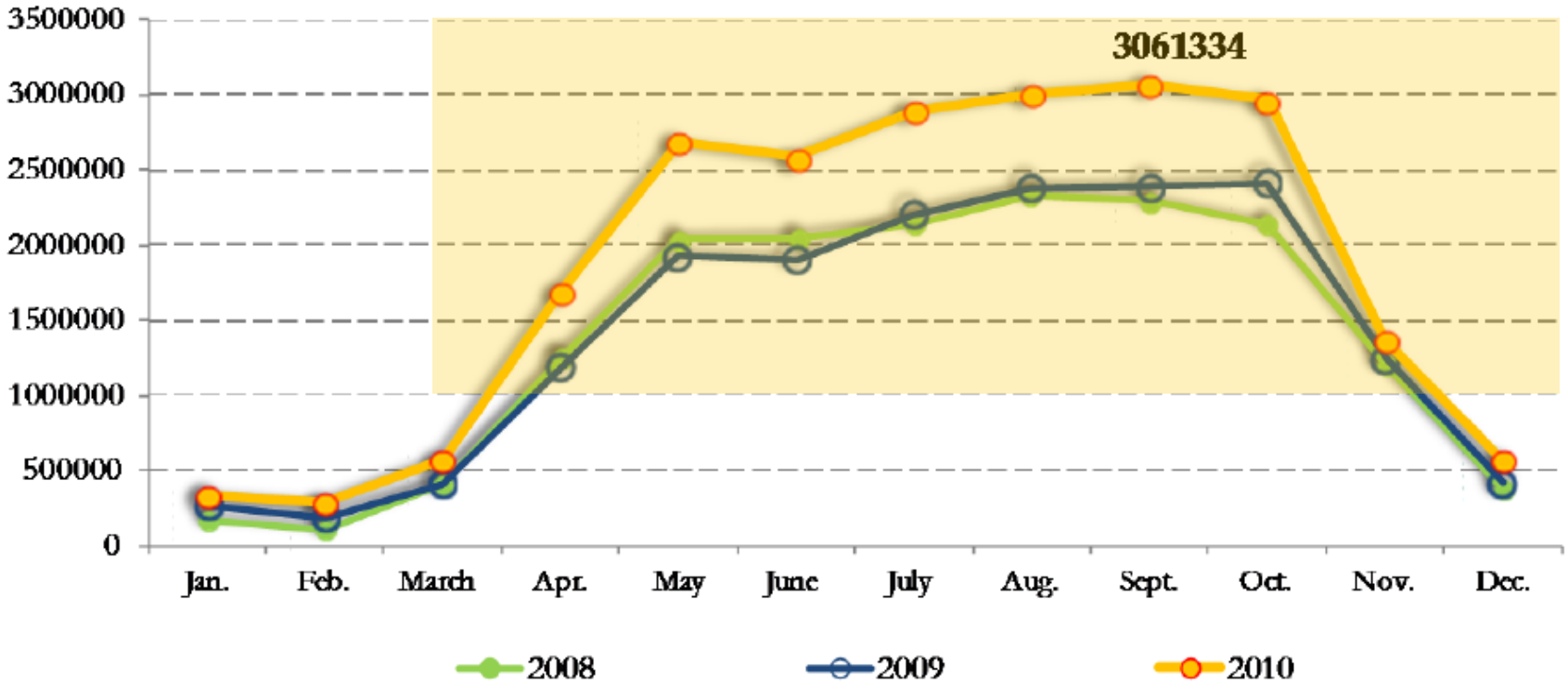
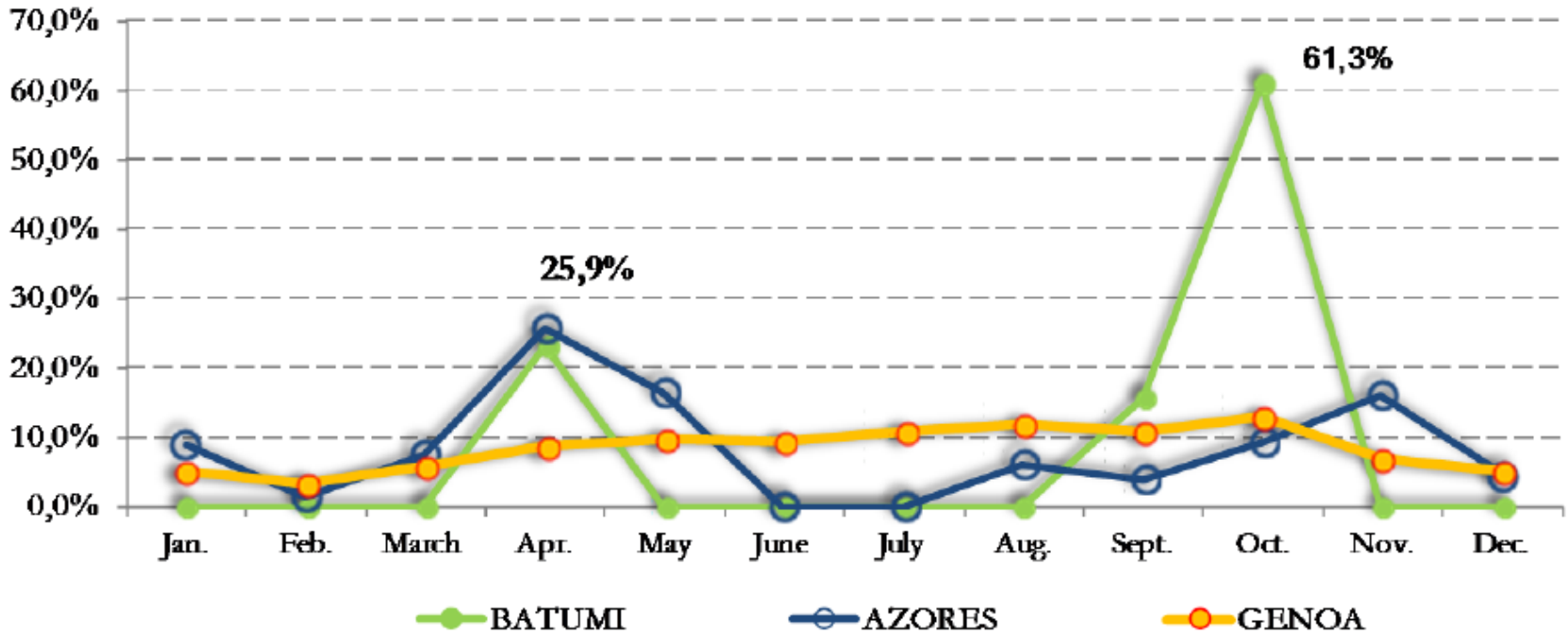
Figure 2.7 - Seasonality 2008, 2009 and 2010 (total passengers movement)




SOURCE: The new MedCruise Statistic Report, *2nd edition 2011*

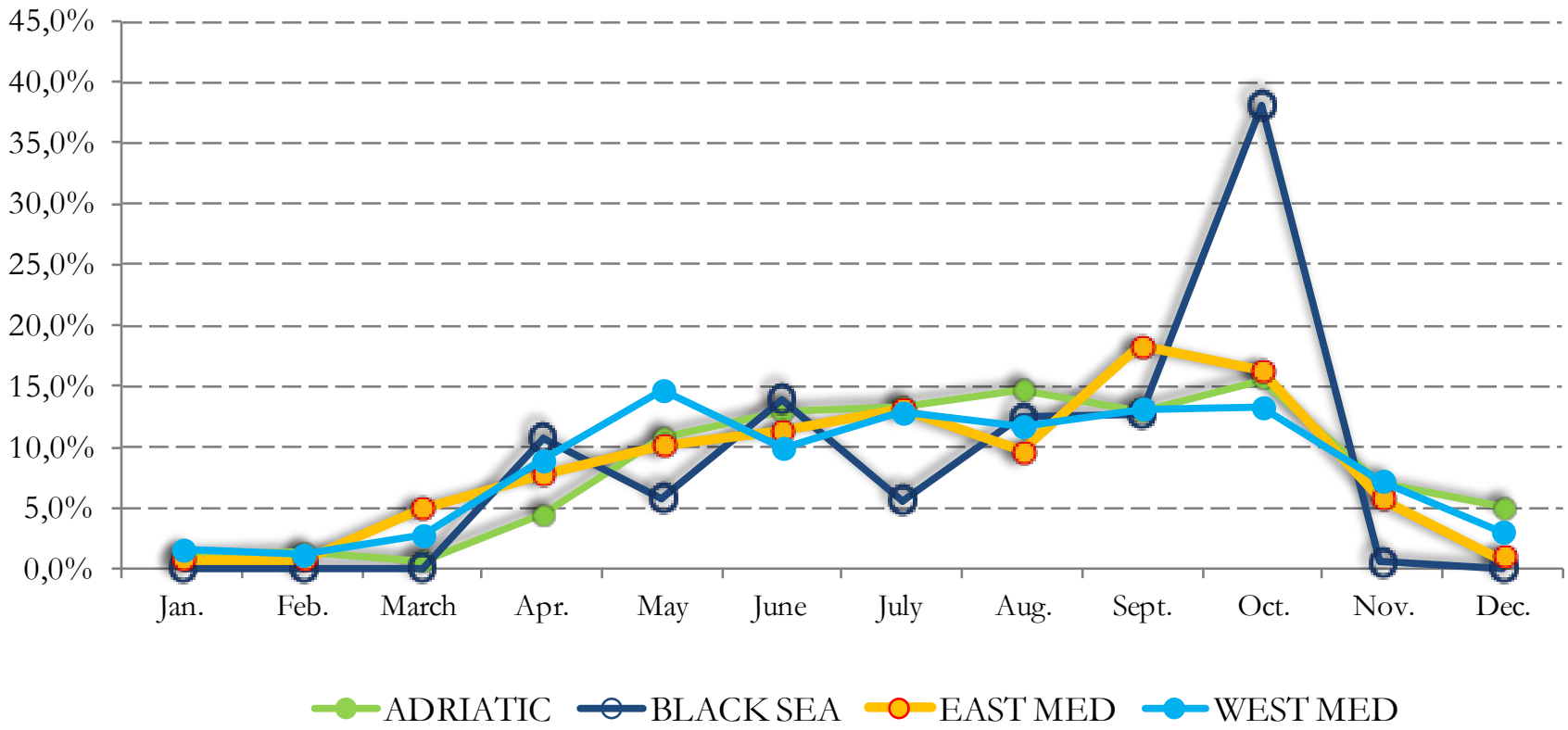
# Three Types of Seasonality in the Mediterranean, 2010

Figure 2.6 Three different degrees of seasonality dependency for passengers, 2010



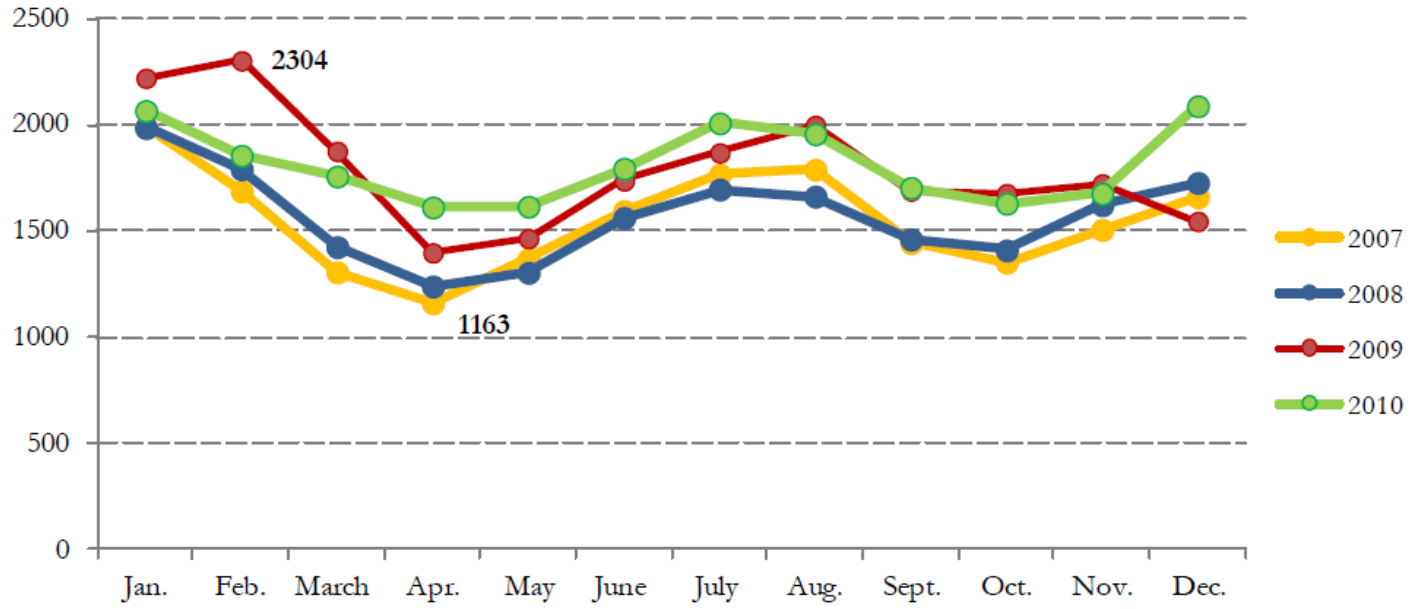

SOURCE: The new MedCruise Statistic Report, *2nd edition 2011*

# MedCruise Areas seasonality passengers movement 2010 per region




SOURCE: The new MedCruise Statistic Report, *2nd edition 2011*

# Three Types of Seasonality in the Mediterranean, 2010




NOTE: in this Figure, new members are excluded from monthly elaborations of previous years as very few gave 2009, 2008 and 2007seasonality data:

SOURCE: The new MedCruise Statistic Report, *2nd edition 2011*

# Highest concentration of passengers per month

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| MedCruise Area | PORT | Hi-Share Month | Share |
|---|---|---|---|
| BLACK SEA | BATUMI | October | 61,3% |
| EAST MED | PATRAS | July | 59,5% |
| BLACK SEA | SINOP | October | 50,5% |
| BLACK SEA | SOCHI | October | 47,3% |
| EAST MED | ALANYA | April | 41,9% |
| EAST MED | PATRAS | October | 40,5% |
| WEST MED | PORTIMAO | October | 40,5% |
| WEST MED | PORTOFERRAIO | May | 34,8% |
| ADRIATIC | TRIESTE | December | 32,7% |
| EAST MED | KAVALA | June | 31,5% |
| EAST MED | ALANYA | March | 31,2% |
| EAST MED | THESSALONIKI | May | 31,0% |
| EAST MED | VOLOS | October | 31,0% |
| BLACK SEA | SEVASTOPOL | October | 30,9% |
| WEST MED | MOTRIL | April | 28,8% |
| ADRIATIC | SIBENIK | October | 26,7% |
| WEST MED | AZORES | April | 25,9% |

SOURCE: The new MedCruise Statistic Report, *2nd edition 2011*

# Top 10 Winter Ports

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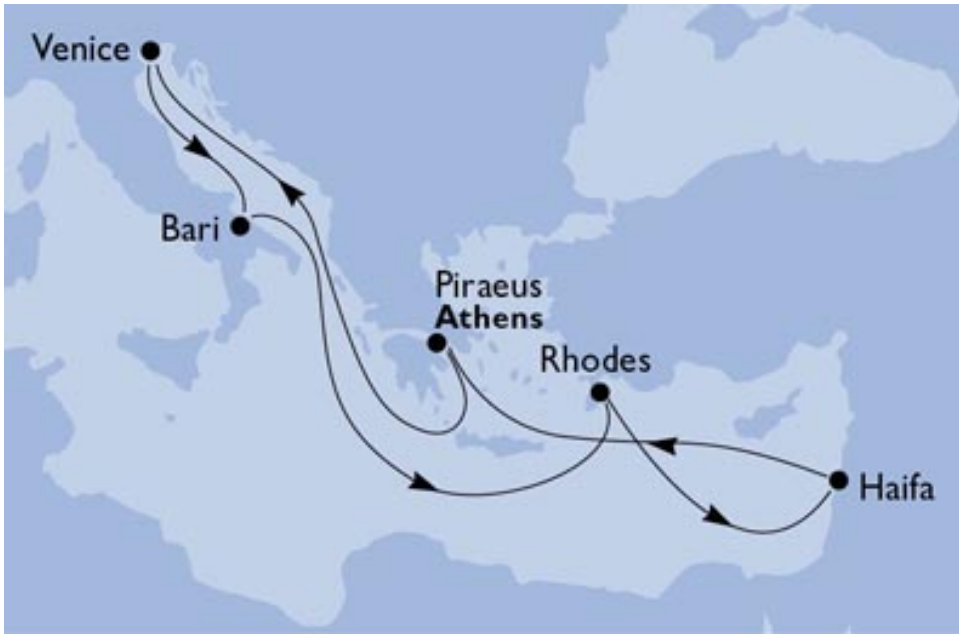
Table 2.3 - Seasonality 2010, TOP 10 Winter Ports for passengers movement share

| Member | Country | TOTAL 09/10 | 2009 | | 2010 | | |
|---|---|---|---|---|---|---|---|
| | | | Nov. | Dec. | Jan. | Feb. | March |
| MADEIRA PORTS | POR | 59,7% | 17,69% | 14,20% | 9,58% | 7,01% | 11,27% |
| ALANYA | TUR | 35,9% | 4,77% | 0,00% | 0,00% | 0,00% | 31,15% |
| CARTAGENA | SPA | 34,2% | 14,86% | 6,93% | 4,80% | 1,88% | 5,76% |
| MALAGA | SPA | 31,9% | 11,25% | 8,85% | 4,11% | 3,86% | 3,85% |
| CEUTA | SPA | 31,2% | 0,17% | 11,31% | 0,00% | 0,00% | 19,76% |
| GENOA | ITA | 30,0% | 9,34% | 6,58% | 4,94% | 3,31% | 5,84% |
| AZORES | POR | 29,9% | 5,06% | 7,27% | 8,83% | 1,33% | 7,43% |
| ALICANTE | SPA | 26,2% | 10,15% | 5,96% | 2,16% | 2,01% | 5,95% |
| LA SPEZIA | ITA | 26,0% | 17,65% | 8,40% | 0,00% | 0,00% | 0,00% |
| SETE | FRA | 26,0% | 26,01% | 0,00% | 0,00% | 0,00% | 0,00% |

SOURCE: The new MedCruise Statistic Report, *2nd edition 2011*

# Winter itineraries in the Med




MSC Magnifica – December 2011-March 2012

Example of 9 days itinerary

# Winter itineraries in the Med

Costa Serena – 2011-2012

Example of 11 days itinerary

# All year round in the Med

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- Keep ships in the Med and surrounding seas in winter:
- Costa, MSC, Seabourn…
- Norwegian Cruise Line's "Norwegian Jade" was one of the first US lines with ships all year in the Med, in 2008/09
- Advantages in winter:
  - Diversity of winter season itineraries
  - Less crowded destination
- Better prices

# MedCruise point of view

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**ENCOURAGING THE TRAFFIC IN WINTER**

The ports might support the cruise lines who intend deploying the ships in the Med during winter by offering low season tariffs (some ports are already doing it).

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# Thank you!

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