

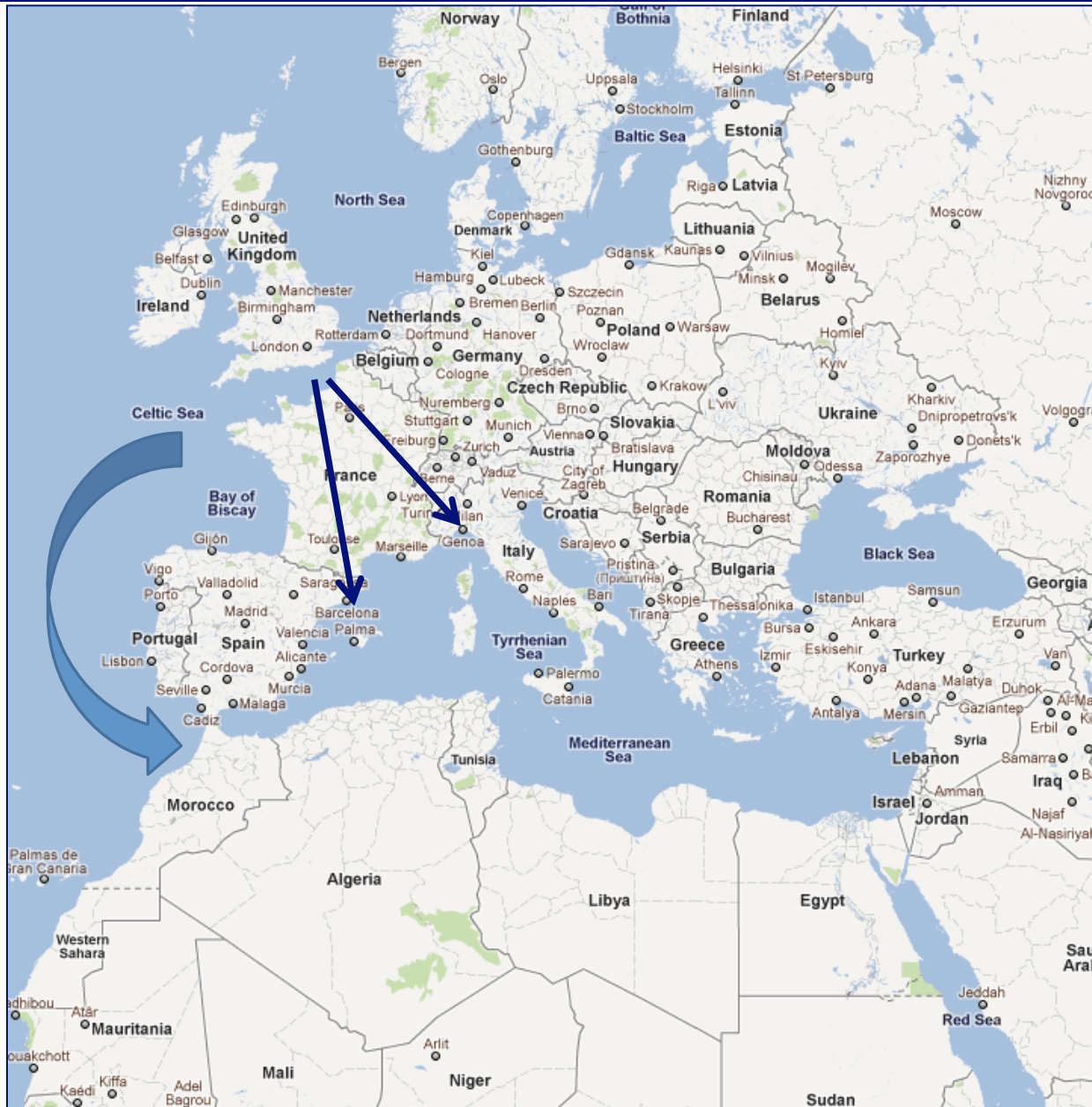
Passenger Shipping Association

UK Winter Cruising in the Mediterranean

Bill Gibbons
Director



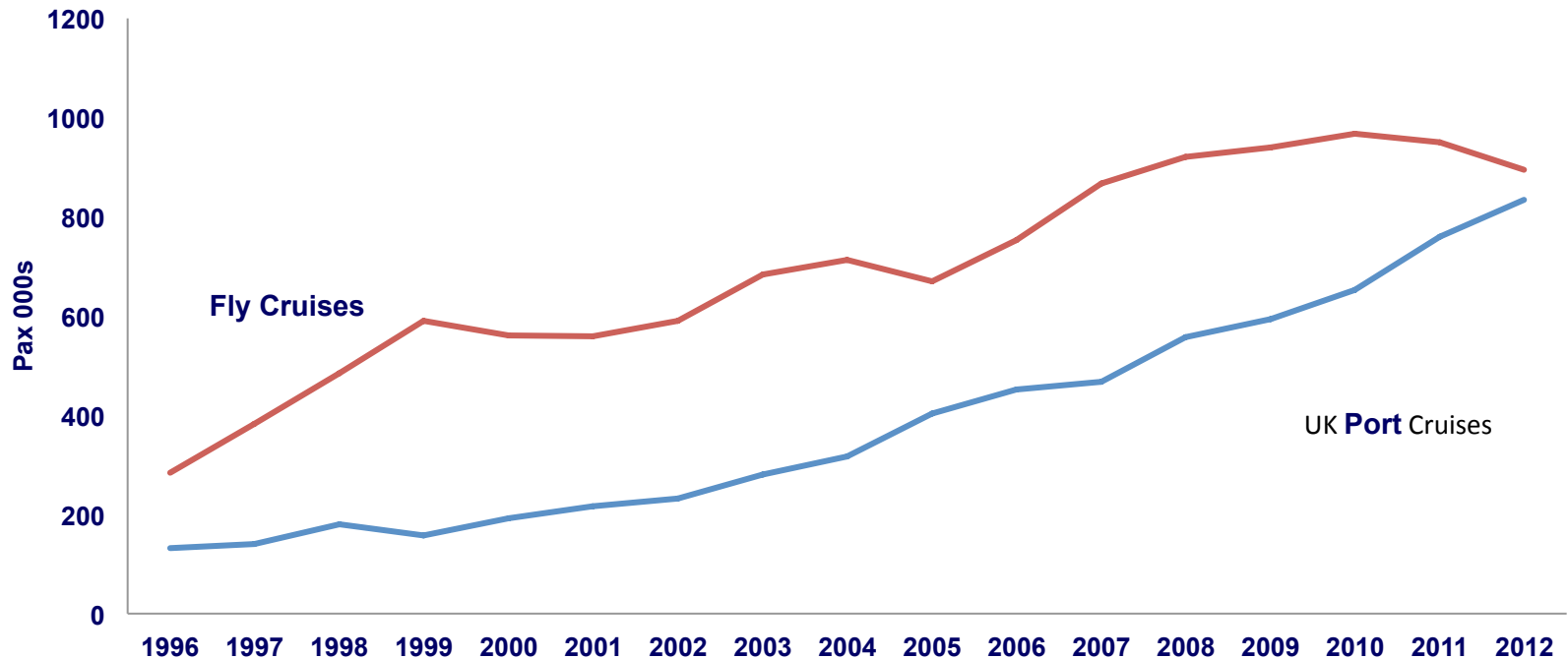
Cruising the Mediterranean



Winter season: 1st November-30th March

UK Cruise Statistics

UK Port Cruises vs. Fly Cruises, 1996 - 2012



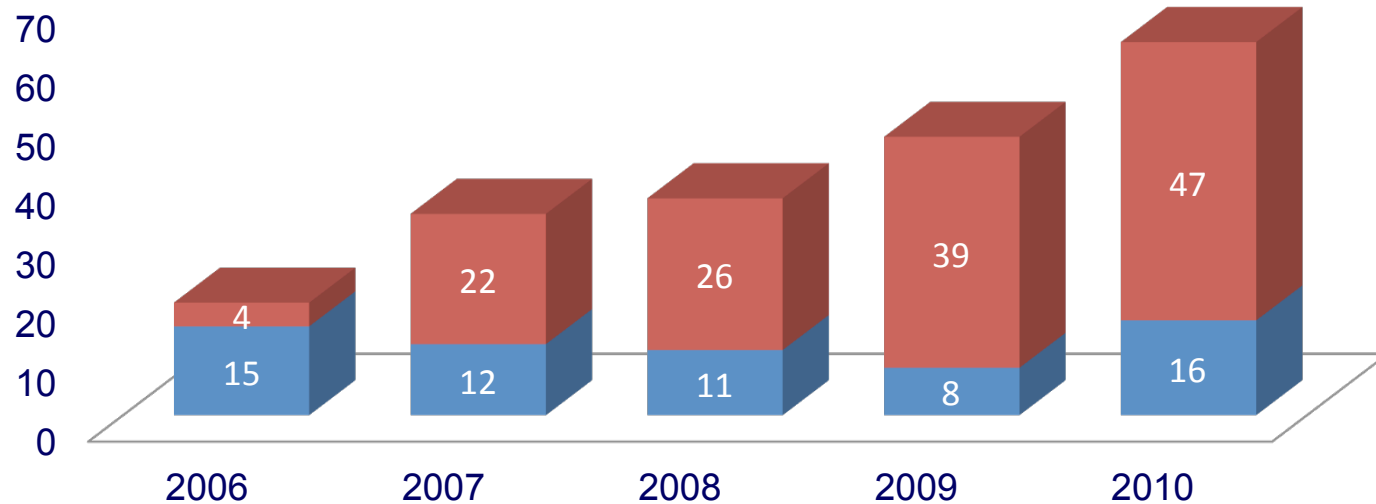
Growth 1996 – 2012. Total 4.2 times to 1.73 million pax
Fly cruises – 3.2 times to 895K. UK Port – 6.2 times 635K
5 Year average - Total 5% per annum, Fly 1%, UK Port 12%

Winter Cruising Statistics

	Summer	% of Total	Winter	% of Total	Total
<u>UK Port Cruises</u>					
Western Med	195	95%	11	5%	206
Eastern Med	55	92%	5	8%	61
<u>Fly Cruises</u>					
Western Med	245	87%	35	13%	280
Eastern Med	137	92%	12	8%	150

Winter Cruising Statistics

Winter Pax (000s) to the Mediterranean, 2006-2010



■ Winter UK port pax to Mediterranean

■ Winter fly pax to Mediterranean

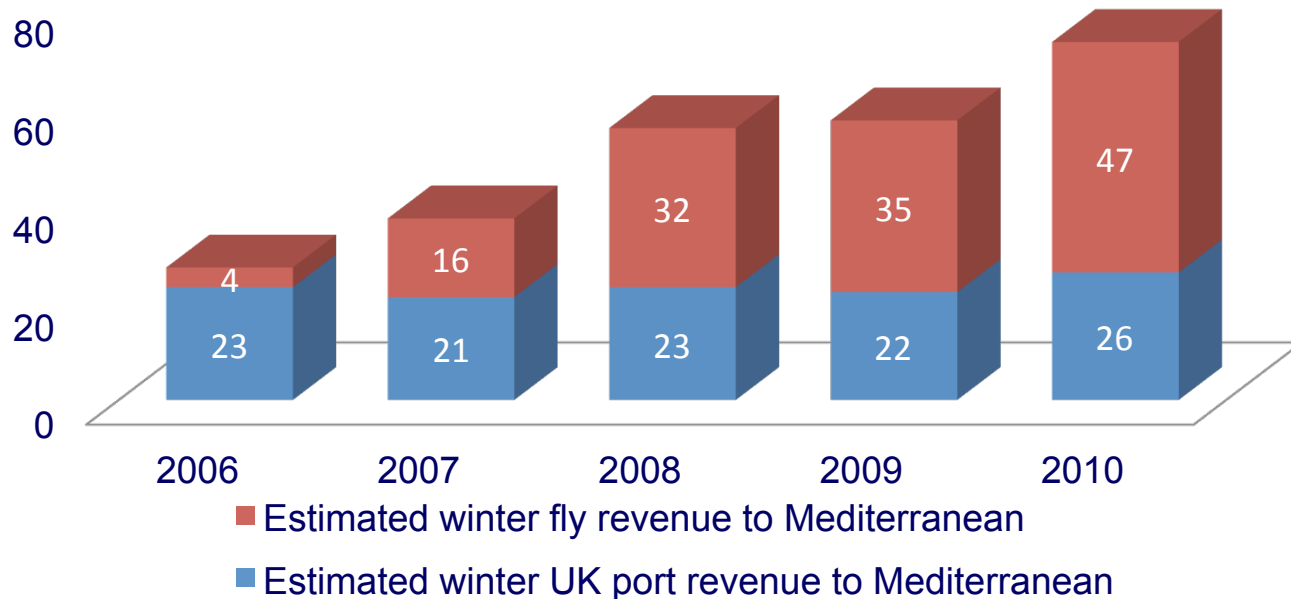
2006 – 19,000 passengers

2010 - 63,000 passengers – 330% increase since 2006



Winter Cruising Statistics

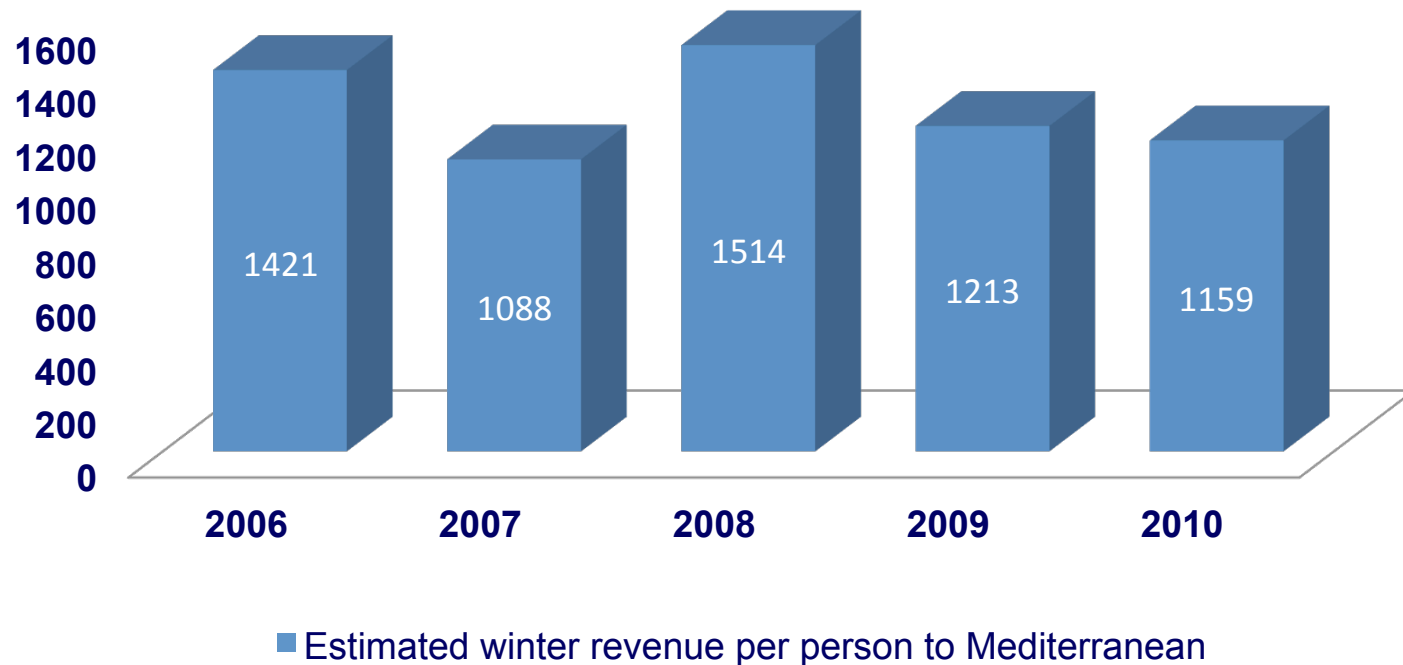
Estimated Winter Revenue (£m) to the Mediterranean,
2006-2010



2010 – estimated £73 million – 270% increase since 2006

Winter Cruising Statistics

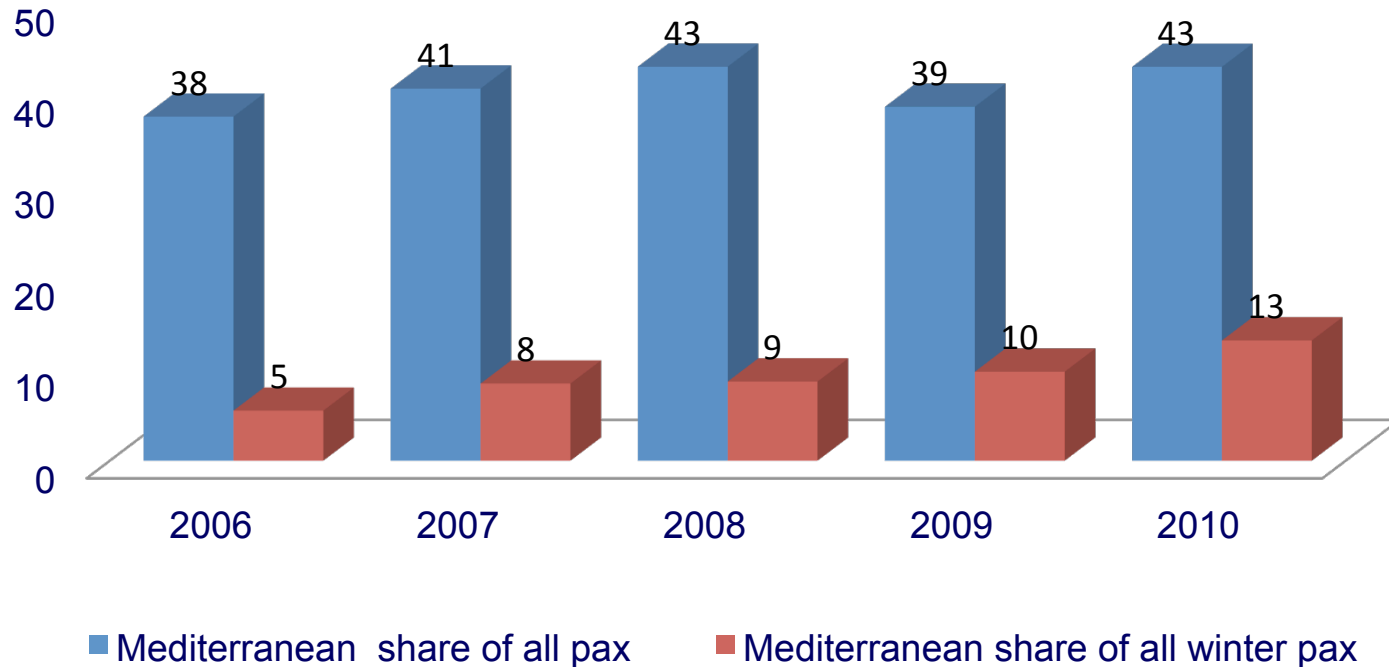
Estimated Winter Revenue per person (£s) to the Mediterranean, 2006-2010



2010 – estimated £1159 in winter vs. £1,298 year average

Winter Cruising Statistics

Mediterranean market share of UK Pax %



2010 – Med 13% of winter passengers and 43% of all passengers

Winter Cruising - Itineraries

Discover Cruises

Quick Search	Latest Offers	Ocean Cruises	River Cruises	No-Fly Cruises	Cruise Lines	Luxury Cruise	Cruise Ships	Singles Cruises	Theme Cruises	Cruise Destinations	Cruise Ports	Cruise Tips
------------------------------	-------------------------------	-------------------------------	-------------------------------	--------------------------------	------------------------------	-------------------------------	------------------------------	---------------------------------	-------------------------------	-------------------------------------	------------------------------	-----------------------------



Greece, Egypt & Italy Cruise on the Splendida fly to Genoa on 05 December 2011



Guide Price Range
From £829 to £1078 fly cruise per person
in lowest grade twin cabin.

To enquire about discounted prices and availability

[Enquire](#)

Region:	Mediterranean		
Vacation Days:	12	Fly to:	Genoa
Pre Cruise:	None	Fly back from:	Genoa
Cruise Nights:	11 nights on board	Ports visited:	7
Post Cruise	None	Theme:	

Cruise Itinerary					
Day	Date	Port	Country	Notes	Highlights
1	05 December 2011	Outward Flight			
1	05 December 2011	Genoa	Italy	Embark	Patrician Palaces, Portofino, Santa Margharita, Milan
2	06 December 2011	At Sea			
3	07 December 2011	Katakolon	Greece		Olympia
4	08 December 2011	Heraklion	Crete, Greece		Knossos, Panaghia Monastery, Palace of Phestos
5	09 December 2011	Marmaris	Turkey		Port, Knidos, Loryma, Dalyan River, Kaunos
6	10 December 2011	Izmir	Turkey		Ephesus, Sardis
7	11 December 2011	At Sea			
8	12 December 2011	Piraeus	Greece		Athens, Acropolis, Parthenon
9	13 December 2011	At Sea			
10	14 December 2011	Palermo	Sicily, Italy		Palatine Chapel, Mt Pellegrino, Monreale
11	15 December 2011	Civitavecchia	Italy		Rome, Vatican, Ostia Antica, Tarquinia
12	16 December 2011	Genoa	Italy	Disembark	Patrician Palaces, Portofino, Santa Margharita, Milan
12	16 December 2011	Return Flight			

Winter Cruising - Itineraries



Eastern Mediterranean Cruise on the Oceana

depart UK on 26 February 2012



Guide Price Range
From £1757 to £2284 cruise only per person
in lowest grade twin cabin.

To enquire about discounted prices and availability

[Enquire](#)

Region: Mediterranean

Vacation Days: 25

Pre Cruise: None

Cruise Nights: 24 nights on board

Post Cruise: None

Sail from: UK

Disembark: UK

Ports visited: 11

Theme:

Cruise Itinerary					
Day	Date	Port	Country	Notes	Highlights
1	26 February 2012	Southampton	UK, England	Embark	Maritime Museum, Medieval Walls
2	27 February 2012	At Sea		3 days	
5	01 March 2012	Cadiz	Spain		Seville, Jerez de la Frontera, La Giralda
6	02 March 2012	At Sea		2 days	
8	04 March 2012	Alexandria (E)	Egypt		Cairo, Pyramids, El Alamein
9	05 March 2012	At Sea		2 days	
11	07 March 2012	Cairo	Egypt		Museum, Pyramids
12	08 March 2012	Limassol	Cyprus		Kolossi castle , Curium ancient theatre, Paphos
13	09 March 2012	Ashdod	Israel		Tel Aviv, Jerusalem, Bethlehem
14	10 March 2012	Haifa	Israel		Nazareth, Galilee, Jerusalem
15	11 March 2012	At Sea			
16	12 March 2012	Piraeus	Greece		Athens, Acropolis, Parthenon
17	13 March 2012	Katakolon	Greece		Olympia
18	14 March 2012	Messina	Sicily, Italy		Taormina, Tindari
19	15 March 2012	At Sea			
20	16 March 2012	Valencia	Spain		Cathedral, Museums, Lonja de la Seda, Peniscola
21	17 March 2012	At Sea			
22	18 March 2012	Lisbon	Portugal		City, Gulbenkian Museum, Jeronimos Monastery, Sintra
23	19 March 2012	At Sea		2 days	
25	21 March 2012	Southampton	UK, England	Disembark	Maritime Museum, Medieval Walls

Ship Design



**Royal Caribbean Cruise Line,
Independence of the Seas based in
Southampton until winter 2012
where it will then relocate to the
Caribbean.
Richard Fain, RCI, “Ahead of its
time”**

**P&O Cruises’ *Oceana* and *Oriana*
sail from Southampton
throughout winter 2012/13 on
cruises of 2 to 35 nights
duration.**



Ship Design

Ships have design features which allow facilities to remain open in summer and winter, such as retracting roofs to cover the outside areas in colder climates.

Ships have more facilities available for passengers and are becoming the destination.



Future of Winter Cruising

Future of Winter Cruising:

Norwegian Cruise Line (NCL) have been planning to have 2 year-round ships in Europe – starting in 2012/13

In Winter one for Canaries and one for Eastern Med.

Eastern Med is a superb destination with Southern Turkey as an add-on, only political situation/unrest could be the issue. Cruise Lines are monitoring situations closely and continuously.

NCL are encouraged by the results this year to carry through with that plan



Winter Cruising Demographics

Guest Profile:

Fewer families
Slightly higher average age
More single travelers



Looking Ahead

**Air Passenger Duty (APD)
plus high cost of flying long
haul = more ex-UK cruising
and fly cruising to the
Mediterranean in Winter**



Thank You!

w.gibbons@psa-ace.org

