



Learning from statistics

This year's edition of MedCruise's annual statistical report reveals some interesting trends in the regional cruise port industry, says secretary general Thanos Pallis

The 2015 edition of the MedCruise statistical report *Cruise activities in MedCruise ports* details the cruise activities in the Mediterranean and its adjoining seas over the past year.

The total of cruise passenger visits at the 72 MedCruise port members in 2014 reached 25.8 million, and the total of cruise calls stands at 13,716. Comparing these data with those registered in the past reveals some valuable insights.

Let's start with the lessons extracted from the long-term perspective. The trends of the last decade (2005-2015) confirm that the Mediterranean and the adjoining seas, having a remarkable number of destinations in close distance and the potential for a lengthy annual season, have been among the most dynamic cruise regions of the world. The 72 MedCruise member ports registered passenger growth of 11.6 million passenger movements, or 83.4%, within the decade 2005-2014.

A second major conclusion refers to the progressive strengthening of the Association itself. The 40 ports that were members of MedCruise in 2005 registered 9.56 million passenger movements that year. Since then, these ports have benefited from the rise of cruise activities, not least because they acted to generate such activities. Ten years later, they hosted 16.14 million passenger

movements. In the meantime 34 more ports have decided to join MedCruise, realising the benefits of collective action in promoting their interests.

The medium-term trends are also revealing. In the last five years (2010-2014), cruising around the Med has shown resilience in the face of challenges. Cruise passengers' movements of 2014 were 3.3 million, or 4.69%, more than in 2010. Cruise in the Mediterranean and the adjoining seas is performing remarkably well in a demanding economic – and in some rare cases, negative geopolitical – climate.

The medium-term trends also illustrate the changing structures of the cruise industry. A key example is the comparison of the annual total number of cruise calls in MedCruise member ports with the registered total passenger movements that took place the same year. An increase of passenger visits per cruise call has taken place every single year. The growth over the last five years (2010-2014) stands at +13,34%. Even though some caution is essential in interpreting these statistics, on average a cruise call in the Med in 2014 was associated with 1,878 passengers.

Indeed, MedCruise port members have demonstrated commendable adaptability in the recent past. Port infrastructure projects are costly, demanding long-term planning and construction periods. Yet ports in the Med and its adjoining seas have managed to undertake such projects wherever needed, to collaborate with destination institutions and all relevant stakeholders, and to adjust their business

models to the needs of the cruise lines.

The short-term trend, the annual variation of cruise traffic in the Med, is interesting. Compared to the previous year, MedCruise ports hosted 7.28% less passenger movements than in 2013.

True, 2013 stands as the year when all records were broken. Evidently though, the positive long- and medium-term trends are combined with a more demanding short-term trend in terms of fleet deployment. The decision of cruise lines to deploy more vessels in other cruise regions, like Asia and Australasia, in a search for a new dynamic market for cruising, and not least a new source market, have led to a strong growth in markets that until the recent past were only minor market niches.

Mediterranean destinations continue to attract the interest of cruise passengers. Ports and other stakeholders have worked to serve the increasing demand. Yet the short-term trends imply that further efforts are essential in order for the recent growth in the region to sustain.

Empowered by a constantly expanding membership, MedCruise is already accelerating its work to facilitate ports in the Med responding efficiently and effectively to the challenges they face in order to achieve further growth. Lessons extracted from our annual statistical report are a valuable tool towards this direction.

The 2015 edition of *Cruise activities in MedCruise ports* will be presented at Cruise Shipping Miami 2015, at 12.00 on Wednesday 18 March (Stand 1269). **C&F**



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