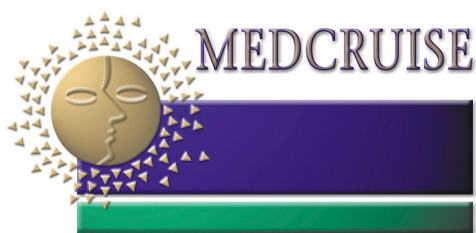


# **MEDCRUISE STATISTICS REPORT**

**1998 – 2002 – 2007 and 2008**

*December, 2008*



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# THE DEVELOPMENT OF THE CRUISE INDUSTRY AT MEDCRUISE MEMBER PORTS<sup>1</sup>

(from 1998 to 2007, and 2008)

## 1. GENERAL STATISTICS

The analysis conducted in this study is based on the data provided by members of the Association of Mediterranean Cruise Ports (MedCruise). MedCruise currently has 52 regular members and 20 associate members representing over 70 ports in the Mediterranean, the Black Sea, the Red Sea and the Near Atlantic. In addition to the yearly statistics provided by member ports between 1998 and 2007, 43 port members<sup>2</sup> made the additional effort this year of preparing monthly statistics, which allowed a more in-depth analysis and, particularly, some first findings on the seasonality of cruise tourism in the Mediterranean.

Some of the ports provided complete monthly statistics for the full-range of years analysed. Most of the ports that weren't able to submit the complete range of 1998-2008 statistics were missing the first few years; therefore, previous MedCruise statistics have been used<sup>3</sup> for certain analyses. The statistics received were more than enough to analyse the state of the cruise industry in the Mediterranean for the past nine years and to give an estimate of its evolution through 2008, the tenth year of the series.

The main purpose of this report is to offer an overall analysis of the cruise market development at MedCruise member ports. It is estimated that, in terms of total passenger figures, MedCruise ports represent approximately 80% all passenger traffic in the Mediterranean. With sets of group averages and figures, each port will be able to compare its figures with the growth numbers herein and therefore determine whether its participation in the region's cruise traffic has increased, dropped or remained stable in comparison. The growth rates employed are cumulative annual percentage rates.

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1 This report was prepared by MedCruise in collaboration with Joan Alemany, professor at the Universitat de Barcelona, with data provided by staff at MedCruise member ports.

2 Alanya, Almeria, Balearic Islands, Barcelona, Bari, Batumi, French Riviera, Cartagena, Castellon, Ceuta, Civitavecchia, Constantza, Cyprus ports, Dubrovnik, Genoa, Gibraltar, Koper, La Goulette, La Spezia, Lattakia, Lisbon, Livorno, Malaga, Messina, Monaco, Motril, Naples, Odessa, Palamos, Palermo, Portoferraio, Ravenna, Sete, Sibenik, Sochi, Split, Tarragona, Toulon, Valencia, Valletta, Venice, Volos, Zadar.

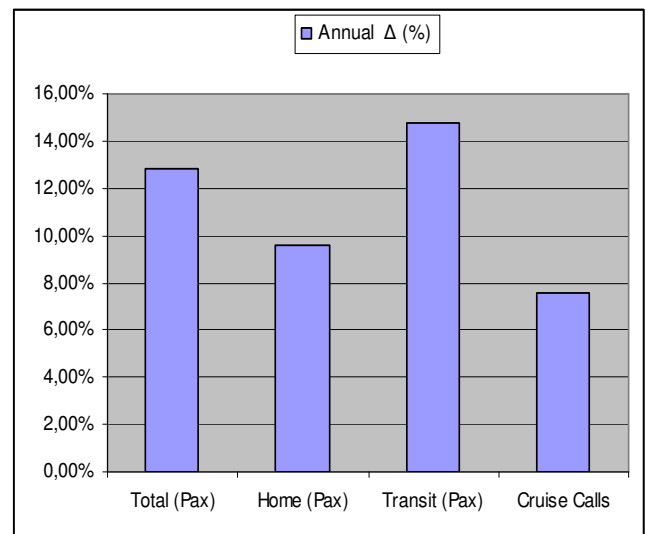
3 We have employed previous MedCruise yearly statistics for some of the big ports in order to obtain data from 1998 when this isn't shown in the monthly statistics submitted between October and November, 2008. As those statistics were provided by the port itself in previous years, are considered to be consistent and valid.

## 2. GENERAL GROWTH OF CRUISE TOURISM WITHIN MEDCRUISE PORTS

Based on the statistics provided by each port, a primary statistics table has been drawn up with the total passengers in Home, Transit, Total and Cruise Calls. The data obtained is shown in Table 1 below. With those statistics from years 1998 and 2007 for the whole of MedCruise ports, the cumulative annual percentage rates have been calculated and are shown in the third column. They represent, therefore, the annual average rates of the whole of the ports. Those average rates will allow us to compare the growth for each port or the different groups of ports (by size or geographical area) to the average growth.

**TABLE 1**

	<u>1998</u>	<u>2007</u>	<u>Annual <math>\Delta</math> (%)</u>
Total (Pax)	4.778.207	14.103.806	12,8
Home (Pax)	2.097.278	4.803.263	9,6
Transit (Pax)	2.680.929	9.300.543	14,8
Cruise Calls	5.285	10.179	7,6



The analysis set out below refers exclusively to MedCruise port' statistics but it can be approximately extrapolated to the whole of the Mediterranean since, when comparing the total statistics from MedCruise with the global for the Mediterranean obtained from different sources, the former represent approximately 80% of the latter. Additionally, among the main Mediterranean ports that are not members of MedCruise, no other trend has been detected that differs substantially from those of MedCruise ports.

The total amount of cruise passengers at MedCruise ports (obtained from the sum of Home and Transit passengers obtained from the statistics submitted by the ports) has increased from 4.778.207 in 1998 to 14.103.806 in 2007, which represents a cumulative annual increase of 12,8%. This growth is much higher than the growth rates of the GDP of the Mediterranean countries, tourism in general or the trade volumes of the ports during the same period. **This confirms a healthy and outstanding dynamic of this economic sector, the cruise industry, during recent years.**

When analysing amounts by categories, it can be noted that Home pax have increased from 2.097.278 in 1998 to 4.803.263 in 2007, which represents a cumulative annual growth of 9,6%,

a figure slightly lower than the average. In Transit pax, however, the increase goes from 2.680.929 in 1998 to 9.300.543 in 2007, which represents a cumulative annual growth of 14,8%. Finally, Cruise Calls have gone from 5.285 to 10.179, which represents a growth of 7,6%. This figure is lower than the passengers figure (overall or for any of the particular categories) therefore implying that cruise vessels are of increasing size and capacity and transport more passengers per call.

This increase of Transit vs. Home could be explained by the growth of the itineraries and number of calls. Nowadays there are more cruise vessels offering 11-days or 14-days cruises than 7-days cruises.

### 3. CRUISING BY GEOGRAPHICAL AREAS

In Table 2 we will see the evolution of cruising by geographical areas:

**TABLE 2**

	1998	2007	Annual $\Delta$ (%)
<b><u>WESTERN MED/ATLANTIC</u></b>			
Total (Pax)	3.462.462	11.162.998	13,9
Home (Pax)	1.245.388	3.609.930	12,6
Transit (Pax)	2.217.074	7.553.068	14,6
Cruise Calls	3.772	7.709	8,3
<b><u>ADRIATIC</u></b>			
Total (Pax)	683.773	2.247.160	14,1
Home (Pax)	408.583	1.008.626	15,5
Transit (Pax)	275.190	1.238.534	18,1
Cruise Calls	488	1.651	14,5
<b><u>EASTERN MED</u></b>			
Total (Pax)	631.557	557.885	-1,4
Home (Pax)	443.307	184.437	-9,3
Transit (Pax)	188.250	373.448	7,9
Cruise Calls	1.023	590	-5,9
<b><u>BLACK SEA</u></b>			
Total (Pax)	415	135.763	90,2
Home (Pax)	-	270	-
Transit (Pax)	415	135.493	90,2
Cruise Calls	2	229	69,3
<b><u>TOTAL MEDCRUISE</u></b>			
Total (Pax)	4.778.207	14.103.806	12,8
Home (Pax)	2.097.278	4.803.263	9,6
Transit (Pax)	2.680.929	9.300.543	14,8
Cruise Calls	5.285	10.179	7,6

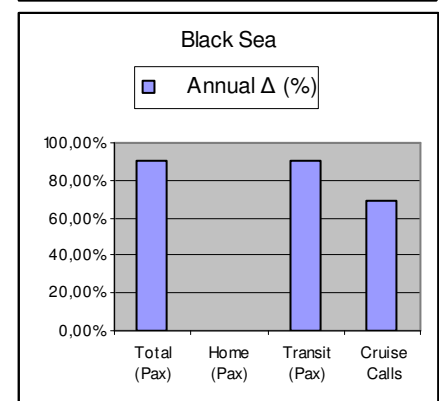
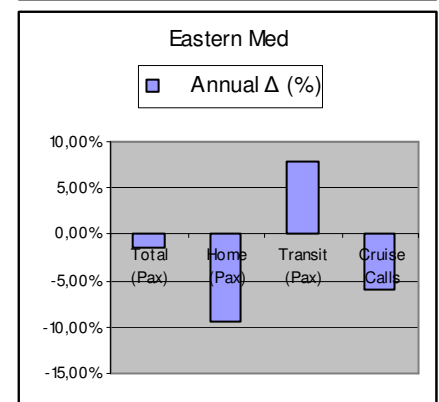
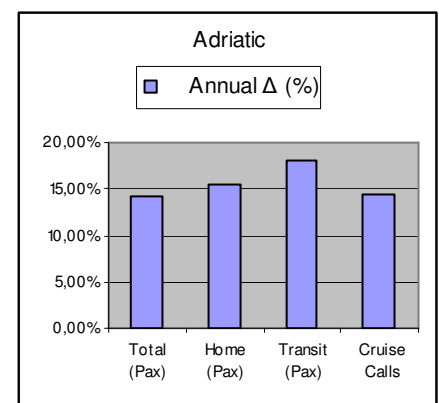
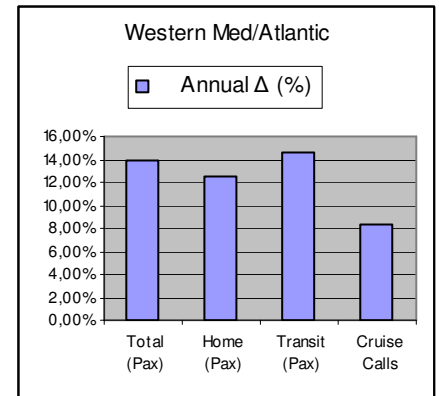


Table 2 shows the progression of cruise traffic among different geographical areas. At the bottom of the table the overall figures of the whole of MedCruise ports (from Table 1) have been included to enable to compare traffic growth. The data analysis from Table 2 leads to the following conclusions:

- The main concentration of cruise ports and the amount of passengers within MedCruise ports occurs in the Western Mediterranean, which represents nearly 81% of transit. The cruise growth in this area is similar, in general, to that of the total of MedCruise ports, with only a clearly higher growth in Home.
- The area grouping the Adriatic ports takes the second position in figures. The main characteristic is that its rate of growth is clearly above the average of all MedCruise ports. This reveals that is a highly dynamic area and that it is becoming more important.
- The data from Eastern Med and Black Sea doesn't allow in-depth analysis as there is a lack of conditions and number of ports to explain the decrease in numbers in the Eastern Med or the large increase achieved in the Black Sea, which on the other hand is not surprising as the Black Sea starts from very low figures.

In terms of growth by area, the figures shown in Table 2 depict a rather unbalanced division in favour of the Western region. We have kept this division as it is the one traditionally managed by MedCruise but we suggest that for future analysis a more balanced division may be used. This could be:

- Western Region: Spain coast and islands, Portugal and Morocco.
- Central Region: France coast and islands, Italian coast and islands, Malta, Tunisia, Libya, Cyprus, Crete.
- Adriatic Region: Adriatic Sea ports (as currently).
- Eastern Region and Black Sea: Combination of ports from the two current areas.

## 4. GROWTH IN NUMBERS OF CRUISE VESSELS BY PORT

The development of cruising in the Mediterranean ports has been so high during the recent years that the amount of passengers and calls should be reconsidered in order to establish the size and capacity of the ports. Until recent years a port with 300.000 cruise passengers per year could be considered a large port in terms of traffic (and it was, in fact, considered large by MedCruise). Ports with less than 100.000 passengers were considered small. Nowadays the growth in traffic has rendered those figures outdated.

In the following analysis, a large port is a port that has over 500.000 passengers in total in the last complete year statistics (2007); medium ports are those with total passengers around 200.000 and 500.000 in 2007; and finally, small ports are those that had less than 200.000 pax in 2007. In the next few years these figures will likely have to be increased substantially so that the resulting groups are better balanced in total figures and by type for each group.

**TABLE 3**

	1998	2007	Annual $\Delta$ (%)
<b><u>LARGE PORTS</u></b> (+ 500.000 Pax)			
Total (Pax)	2.965.388	9.290.410	13,9
Home (Pax)	1.327.949	3.571.486	11,6
Transit (Pax)	1.637.439	5.718.924	14,9
Cruise Calls	2.583	5.764	9,3
<b><u>MEDIUM PORTS</u></b> (200.000-500.000 Pax)			
Total (Pax)	1.554.273	3.449.919	9,3
Home (Pax)	733.675	1.086.792	4,5
Transit (Pax)	820.598	2.413.127	12,7
Cruise Calls	2.005	2.517	2,6
<b><u>SMALL PORTS</u></b> (- 200.000 Pax)			
Total (Pax)	258.546	1.363.477	20,3
Home (Pax)	35.654	194.985	20,8
Transit (Pax)	222.892	1.168.492	20,2
Cruise Calls	697	1.898	11,8
<b><u>TOTAL MEDCRUISE</u></b>			
Total (Pax)	4.778.207	14.103.806	12,8
Home (Pax)	2.097.278	4.803.263	9,6
Transit (Pax)	2.680.929	9.300.543	14,8
Cruise Calls	5.285	10.179	7,6

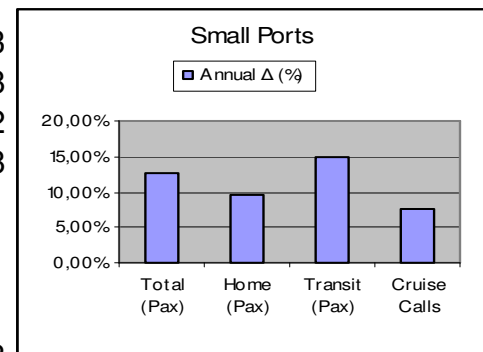
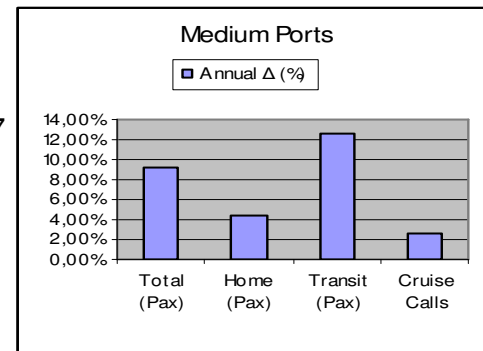
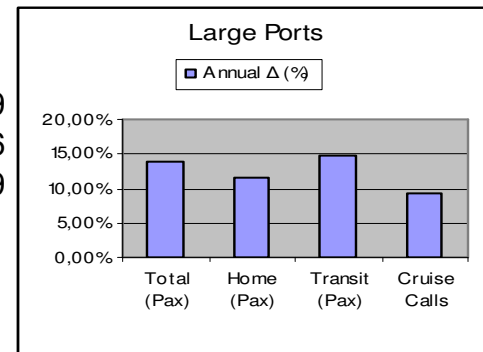


Table 3 shows the cruise evolution between 1998 and 2007. From its analysis we can draw the following conclusions:

- Large ports (over 500.000 pax in total) absorb most of the demand. Globally they present a rate of growth very similar to the average of all MedCruise ports, although slightly higher.
- Medium ports (between 200.000 and 500.000 pax) grow during the period 1998-2007, although at a lower rate than the average in every section covered (Total, Home, Transit, Cruise Calls).
- Finally, the high growth in small ports (less than 200.000 pax) is outstanding. The cumulative annual growth rates for this type of port are remarkably higher than the average. This is partly due to the fact that cruise calls extend to new ports and that most of small ports started out from very low figures in 1998.
- If we analyse ports individually we can compare their annual growth rate with the average of all MedCruise ports shown at the bottom of Table 3. Large ports growing above the average are: Dubrovnik, Civitavecchia, Barcelona, La Goulette, Livorno and Naples. Those ports are growing approximately at the same rate as Palma de Mallorca, Venice and Nice. The rest of large ports were also growing, although below the average. Medium ports growing above the average are: Palermo, Valetta, Messina, Monaco and Gibraltar. Bari and Malaga keep grow rates similar to the average, while the rest of ports show lower rates than the average. Small ports showing growth rates above the average are: Sochi, Odessa, Constantza, Alanya, Ravenna, Split, Trieste, Zadar, Palamos and Valencia. Lattakia maintains growth rates similar to the average. The rest of ports have lower rates.

## 5. CRUISE SEASONALITY DURING THE PERIOD

Since many of the ports submitted monthly statistics for the whole period 1998-2007, we can offer a first analysis on the evolution of seasonality. We've calculated amongst most of the main MedCruise ports the share of total passengers during the so-called high season (May through October) as compared to year round. The results are found in Table 4 below. It can be seen how the proportion of passenger traffic in the Mediterranean during these high season months has decreased within the time period studied. With more cruise lines keeping ships all year in the Mediterranean, this trend may likely continue. This bodes well for the capacity of growth in cruise traffic in the Mediterranean.

**TABLE 4<sup>4</sup>**

TOTAL PAX OF ALL PORTS IN APPENDIX TABLE			
Years	1998	2002	2007
High Season	2 374 485	5 100 844	9 806 912
Year round	2 715 537	6 118 526	12 036 769
Share (%)	87,4	83,4	81,4

In terms of supply and demand in the cruise sector it has been traditionally considered high season the span of six months from May to October (both included). Table 4 has been drawn up comparing high season figures with the whole year's for all large and medium ports that have submitted those statistics. This has been done for years 1998, 2002 and 2007. Using the statistics for each port we calculated the proportion that high season cruising represent compared to the whole year. From the analysis of Table 4 we obtain the following conclusions:

- High seasons concentrates the biggest portion of cruising. In most of the ports high season exceeds 80% of the whole year's cruise activity.

For the same main ports as Table 4, Appendix Table 1 shows the cruise evolution during the months of April and November, which are the months immediately before and after the period of six months traditionally considered high season. Appendix Table 1 concludes that **in most of the ports there is an important growth in cruising during the months of April and November** and for this reason they should be included in the high season, which would go from six to eight months, running from April to November.

In addition to the ports analysed in Table 4 and in the Appendices, many MedCruise ports submitted monthly cruise traffic reports either between the years 1998 and 2007 or the years

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<sup>4</sup> For port-specific analyses, please refer to Appendix Table 1, which lists the principal MedCruise ports that provided consistent monthly traffic data between 1998 and 2007. Also, Appendix Table 2 further illustrates the evolution of cruise traffic at these ports during what we now consider the high season months in the Mediterranean to be , from April through November.)

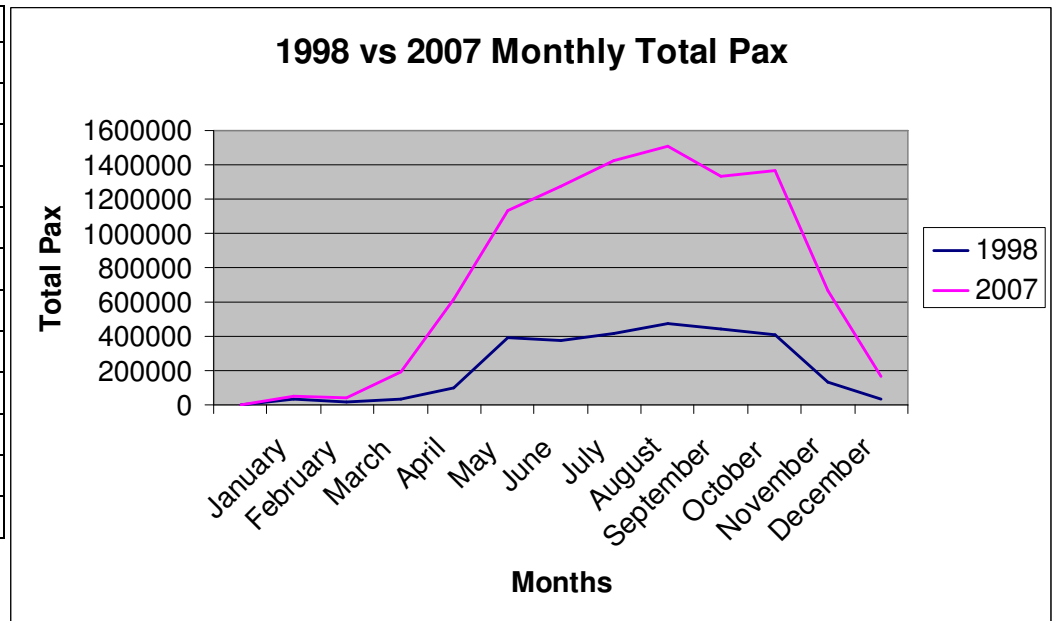
2002 and 2007. Charts have been developed with the data provided by MedCruise ports that confirm the findings demonstrated in Table 4 and in the Appendices. These charts illustrate the clear expansion of the cruise traffic in the Mediterranean and in its regions, both in numbers during the high season, but also an expansion in the months of the year witnessing heavy cruise traffic.

Charts 1 and 2 illustrate the inclusion from 1998 to 2007 of the months of April and November into the annual calendar of heavy cruise activity in the Mediterranean. An interesting aspect of Chart 2 are the peaks in cruise calls that happen during the repositioning periods in and out of the Mediterranean at the beginning and end of the high season. These peaks are absent in the charts graphing passenger traffic. Clearly, itineraries, and perhaps berth occupancy levels, vary during these repositioning periods. This warrants further study. Charts 3 and 4, which illustrate changes from 2002 to 2007, also back up these trends.

**Chart 1 – Monthly Total Pax 1998 and 2007**

	1998	2007
<i>January</i>	29.894	50.407
<i>February</i>	15.106	39.084
<i>March</i>	32.267	187.939
<i>April</i>	103.401	617.680
<i>May</i>	390.753	1.136.888
<i>June</i>	373.399	1.276.880
<i>July</i>	417.041	1.422.728
<i>August</i>	471.221	1.511.271
<i>September</i>	438.213	1.334.459
<i>October</i>	408.198	1.362.605
<i>November</i>	129.732	666.717
<i>December</i>	36.159	162.527

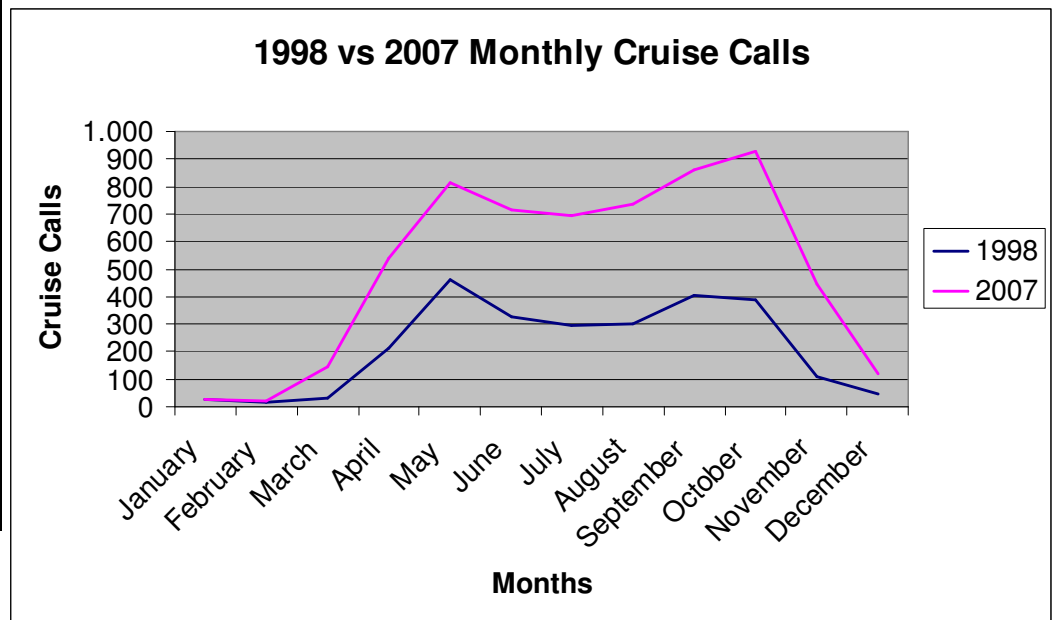
\*24 Ports



**Chart 2 – Monthly Total Cruise Calls 1998 and 2007**

	1998	2007
<i>January</i>	26	25
<i>February</i>	13	23
<i>March</i>	30	144
<i>April</i>	210	538
<i>May</i>	462	815
<i>June</i>	327	713
<i>July</i>	295	695
<i>August</i>	300	734
<i>September</i>	402	862
<i>October</i>	389	928
<i>November</i>	109	447
<i>December</i>	48	120

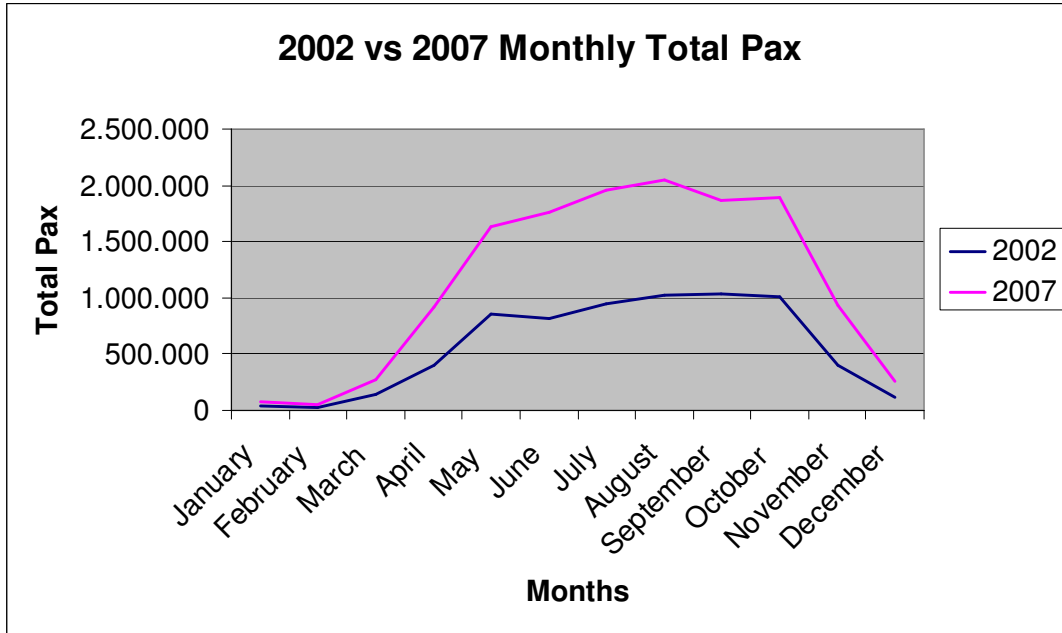
\*22Ports



**Chart 3 – Monthly Total Pax 2002 and 2007**

	2002	2007
<i>January</i>	44.123	83.836
<i>February</i>	25.304	55.230
<i>March</i>	137.222	278.333
<i>April</i>	406.080	914.335
<i>May</i>	849.090	1.632.905
<i>June</i>	815.137	1.756.121
<i>July</i>	947.799	1.950.088
<i>August</i>	1.021.721	2.044.365
<i>September</i>	1.037.115	1.858.954
<i>October</i>	1.013.413	1.896.125
<i>November</i>	401.507	928.868
<i>December</i>	120.692	257.073

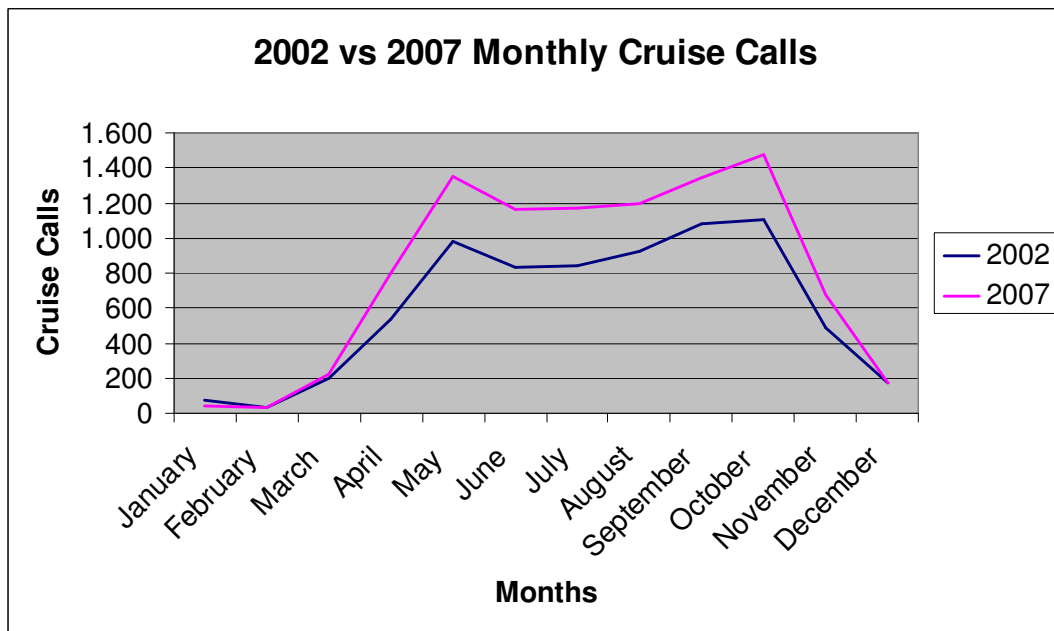
\*39 Ports



**Chart 4 – Monthly Total Cruise Calls 2002 and 2007**

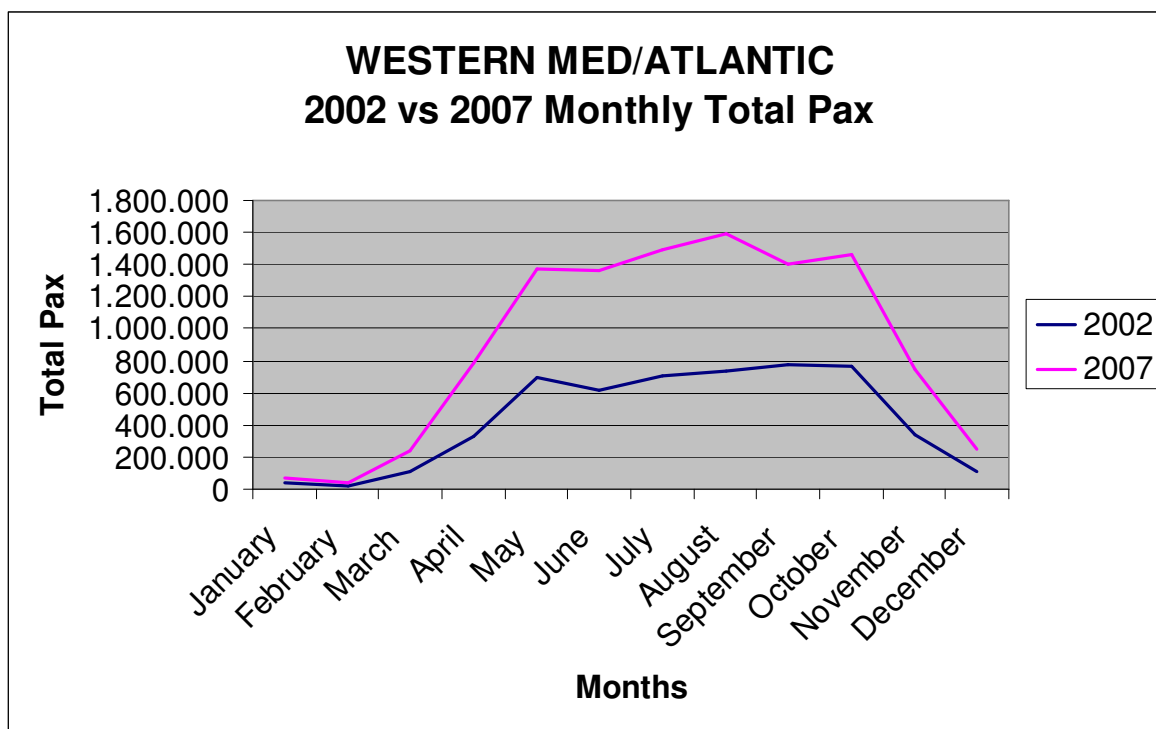
	2002	2007
<i>January</i>	71	44
<i>February</i>	36	37
<i>March</i>	200	219
<i>April</i>	540	804
<i>May</i>	978	1,349
<i>June</i>	835	1,160
<i>July</i>	841	1,174
<i>August</i>	921	1,198
<i>September</i>	1,084	1,345
<i>October</i>	1,105	1,479
<i>November</i>	483	675
<i>December</i>	176	175

\*36 Ports



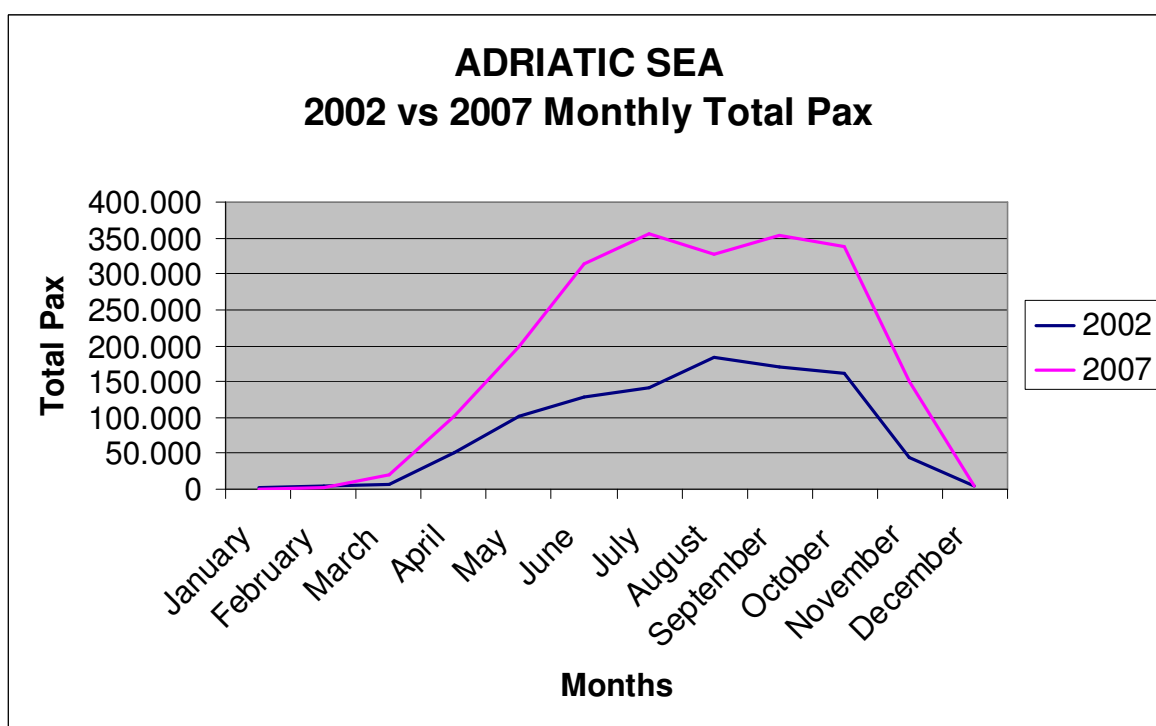
To further illustrate seasonality, below are some charts of the evolution of cruise traffic on a monthly basis from 2002 to 2007 by geographical area. The charts for the Western Med/Atlantic and the Adriatic show the expansion of the number of passengers during high season months, plus the expansion of the high season, starting now in April and ending in November. Also attached are tables for the Eastern Med and the Black Sea, which show interesting patterns. However, as mentioned before, given that sample sizes in these regions are small, these graphs are shown for discussion as further studies utilising additional ports' data is necessary.

**Chart 5 – Monthly Total Pax 2002 and 2007 – Western Med/Atlantic**



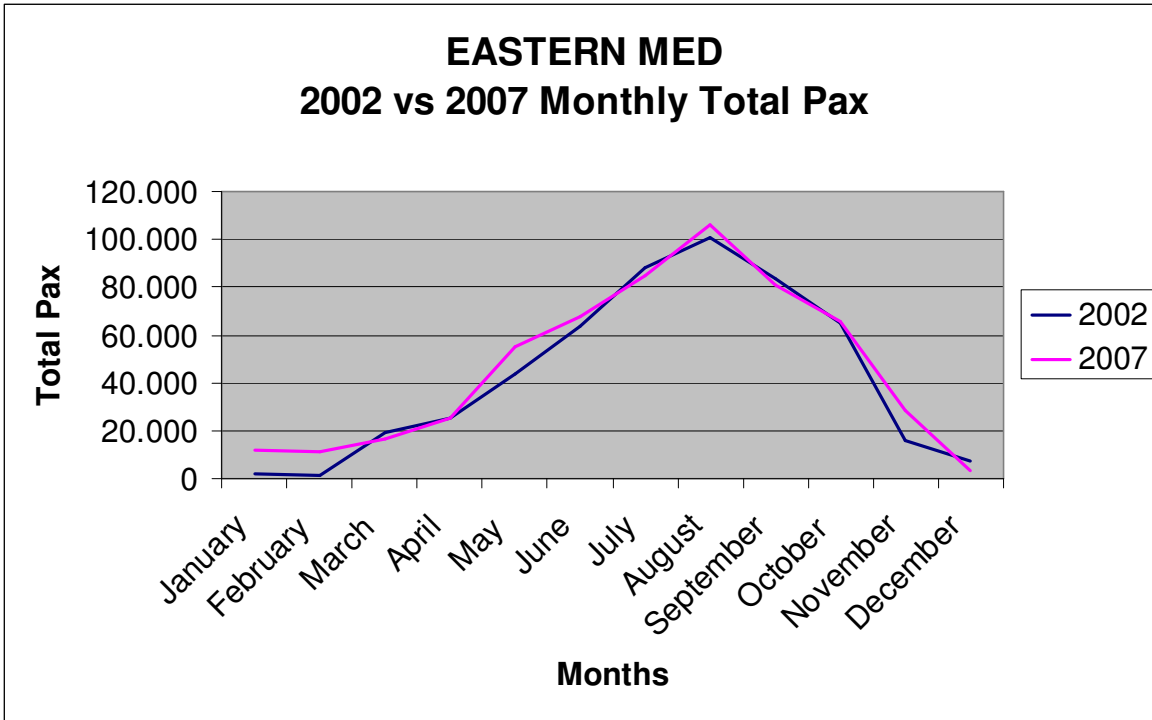
\*26 Ports

**Chart 6 – Monthly Total Pax 2002 and 2007 – Adriatic Sea**



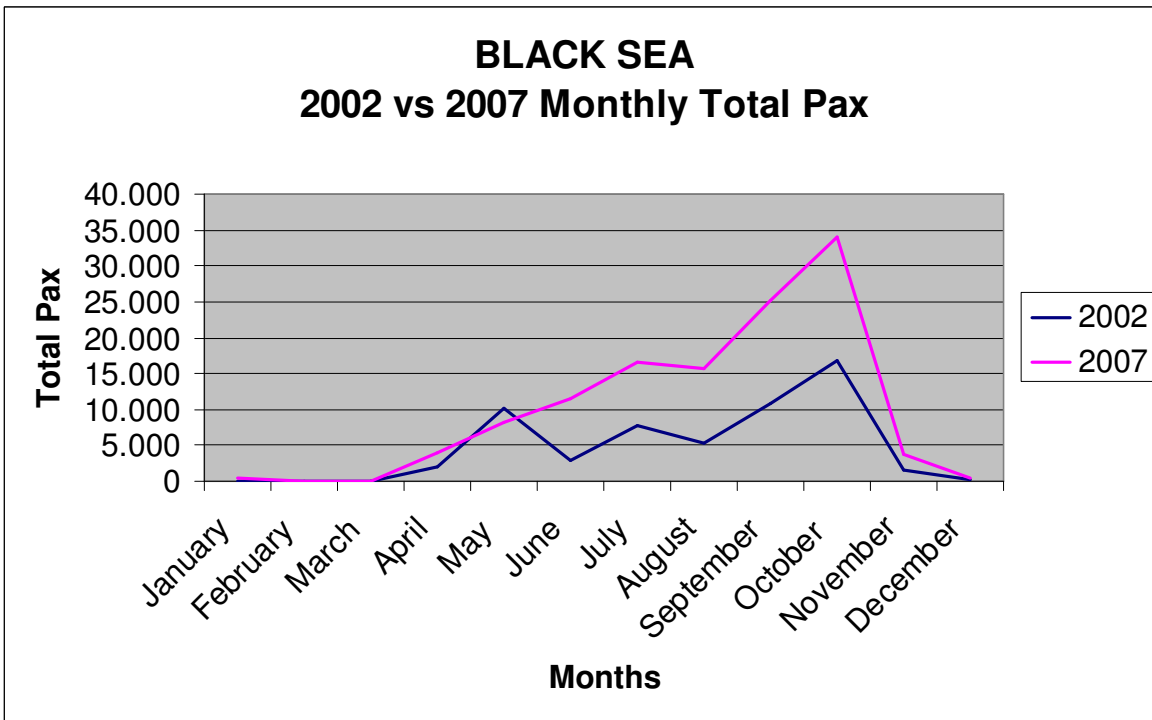
\*6 Ports

**Chart 7 – Monthly Total Pax 2002 and 2007 – Eastern Med**



\*4 Ports

**Chart 5 – Monthly Total Pax 2002 and 2007 – Black Sea**



\*3 Ports

## 6. REPOSITIONING

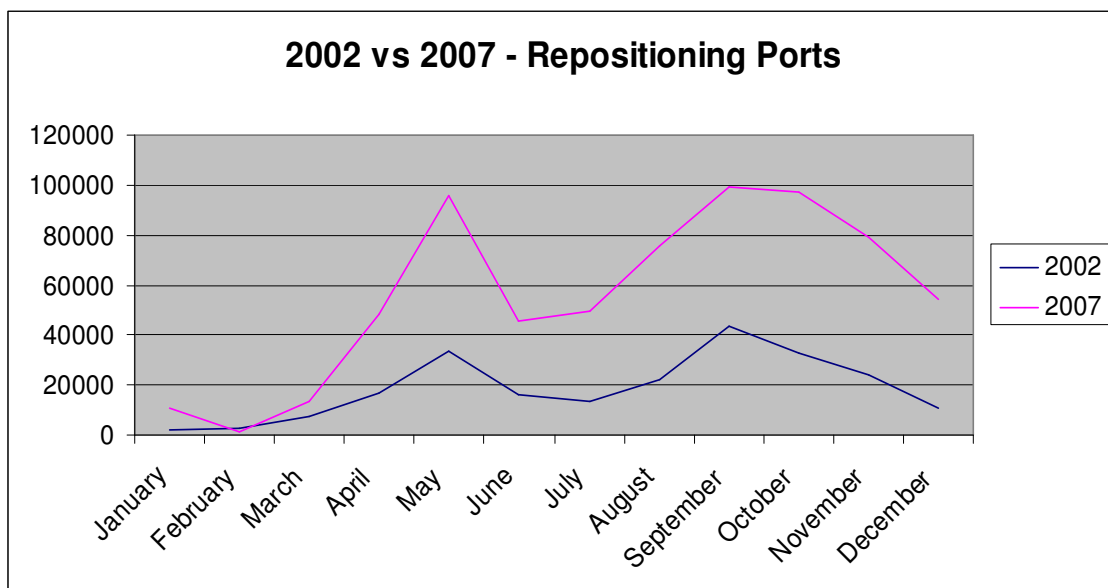
In Chart 6 we can see the monthly trend shown at ports that typically witness more repositioning traffic from ships coming in and out of the Mediterranean before and after the annual season. These ports traffic levels are usually higher at the beginning in spring and in fall, than during the traditional high season. These ports are located in or near the Atlantic Ocean,. The graphic illustrates a flattening curve at the end of fall, extending to the months of October-November in 2007. The ports on which this analysis is based are: Almeria, Cartagena, Ceuta, Gibraltar, Lisbon and Motril.

**Chart 6 – Total Monthly Pax 2002 and 2007 at Repositioning Ports**

**Chart 6 .**

	2002	2007
<i>January</i>	1821	10826
<i>February</i>	3002	1100
<i>March</i>	7458	13276
<i>April</i>	16999	48347
<i>May</i>	33564	95623
<i>June</i>	15964	45364
<i>July</i>	13175	49669
<i>August</i>	21962	75563
<i>September</i>	43785	98974
<i>October</i>	32539	97049
<i>November</i>	23975	79209
<i>December</i>	10632	54570

\*6 Ports



## 7. GROWTH FORECAST FOR 2008

Practically all MedCruise ports have submitted relevant figures for the cruise evolution between January and September, 2008. A few of them have also provided projected traffic figures for the whole of year 2008, this is to say, they have supplied a projection of the number of cruise passengers for the last quarter of year.

For the analysis of the cruise evolution in 2008 we cannot employ the few projections received for the whole year for two reasons: firstly, only a small number of ports have submitted these figures and this doesn't constitute a representation of the sector; and, secondly, because the actual figures of the first three quarters of the year cannot be added to projections that only a few ports issued.

Based on the previous considerations, the method of statistics analysis suitable to be applied to the cruise evolution during 2008 is to compare the actual figures from 2007 with those from 2008. For this purpose, the number of cruise passengers from between January and September 2007 has to be added up and compared to the same variable for 2008. Table 5 offers these two figures for the total of the ports that provided monthly statistics for January through September, 2008.

**TABLE 5**

	<u>2007</u>	<u>2008</u>	<u>'07-'08 Δ (%)</u>
TOTAL PAX	9.541.541	11.092.988	16,30%

The final result of adding the figures of all those ports show a high increase during the first nine months of 2008, 16,3%, which represents a higher rate of growth than the rate obtained between 1998 and 2007 analysed in previous sections.

**APPENDIX TABLE 1****BARCELONA**

	YEARS 1998	2002	2007
<b><u>HIGH SEASON (MAY-OCTOBER)</u></b>			
Total (pax)	413.595	672.977	1.378.288
Home (pax)	209.716	364.871	793.937
Transit (pax)	203.879	308.106	584.351
Cruise calls	362	475	604
<b><u>WHOLE YEAR</u></b>			
Total (pax)	466.268	843.686	1.768.306
Home (pax)	227.554	444.738	969.851
Transit (pax)	238.714	398.948	798.455
Cruise calls	447	633	817
<b><u>PERCENTAGE HIGH SEASON VS. WHOLE YEAR</u></b>			
Total (pax)	88,70	79,77	77,94
Home (pax)	92,16	82,04	81,86
Transit (pax)	85,41	77,23	73,19
Cruise calls	80,98	75,04	73,93

**CIVITAVECCHIA**

	YEARS 1998	2002	2007
<b><u>HIGH SEASON (MAY-OCTOBER)</u></b>			
Total (pax)	219.006	424.923	1.307.040
Home (pax)	54.381	88.316	570.685
Transit (pax)	164.625	336.607	736.355
Cruise calls	148	438	696
<b><u>WHOLE YEAR</u></b>			
Total (pax)	255.953	486.343	1.586.101
Home (pax)	72.459	99.858	685.788
Transit (pax)	183.494	386.485	900.313
Cruise calls	178	526	856
<b><u>PERCENTAGE HIGH SEASON VS. WHOLE YEAR</u></b>			
Total (pax)	85,56	87,37	82,41
Home (pax)	75,05	88,44	83,22
Transit (pax)	89,72	87,09	81,79
Cruise calls	83,15	83,27	81,31

## NAPLES

	YEARS 1998	2002	2007
<u>HIGH SEASON (MAY-OCTOBER)</u>			
Total (pax)	-	402.711	945.761
Home (pax)	-	74.297	112.928
Transit (pax)	-	328.414	832.833
Cruise calls	-	646	1.048

### WHOLE YEAR

Total (pax)	350.000	485.072	1.151.345
Home (pax)	50.000	82.115	133.915
Transit (pax)	300.000	402.957	1.017.430
Cruise calls	700	834	1.298

### PERCENTAGE HIGH SEASON VS. WHOLE YEAR

Total (pax)	-	83,02	82,14
Home (pax)	-	90,48	84,33
Transit (pax)	-	81,50	81,86
Cruise calls	-	77,46	80,74

## PALMA DE MALLORCA

	YEARS 1998	2002	2007
<u>HIGH SEASON (MAY-OCTOBER)</u>			
Total (pax)	373.554	586.743	886.051
Home (pax)	197.695	334.231	467.522
Transit (pax)	175.859	252.512	418.529
Cruise calls	321	378	380

### WHOLE YEAR

Total (pax)	392.552	659.443	1.048.495
Home (pax)	198.719	358.226	552.303
Transit (pax)	193.833	301.217	496.192
Cruise calls	355	461	474

### PERCENTAGE HIGH SEASON VS. WHOLE YEAR

Total (pax)	95,16	88,98	84,51
Home (pax)	99,48	93,30	84,46
Transit (pax)	90,73	83,83	84,43
Cruise calls	90,42	82,00	80,17

## VENICE

	YEARS 1998	2002	2007
<u>HIGH SEASON (MAY-OCTOBER)</u>			
Total (pax)	310.292	442.845	863.042
Home (pax)	257.337	386.377	697.852
Transit (pax)	52.955	56.468	165.190
Cruise calls	203	276	401

### WHOLE YEAR

Total (pax)	335.483	507.547	1.003.529
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Home (pax)	279.217	444.292	821.820
Transit (pax)	56.266	63.255	181.709
Cruise calls	227	332	510

PERCENTAGE HIGH SEASON VS. WHOLE YEAR

Total (pax)	92,49	87,25	86,00
Home (pax)	92,16	86,96	84,92
Transit (pax)	94,11	89,27	90,91
Cruise calls	89,43	83,1	78,63

**LA GOULETTE**

	YEARS 1998	2002	2007
<u>HIGH SEASON (MAY-OCTOBER)</u>			
Total (pax)	-	-	-
Home (pax)	-	-	-
Transit (pax)	87.379	201.219	580.409
Cruise calls	107	174	352

WHOLE YEAR

Total (pax)	100.811	240.593	721.892
Home (pax)	-	-	-
Transit (pax)	100.811	240.593	721.892
Cruise calls	132	216	459

PERCENTAGE HIGH SEASON VS. WHOLE YEAR

Total (pax)	-	-	-
Home (pax)	-	-	-
Transit (pax)	86,68	83,63	80,40
Cruise calls	81,06	80,56	76,69

**LIVORNO**

	YEARS 1998	2002	2007
<u>HIGH SEASON (MAY-OCTOBER)</u>			
Total (pax)	-	-	615.552
Home (pax)	-	-	20.520
Transit (pax)	180.964	253.924	595.032
Cruise calls	246	262	425

WHOLE YEAR

Total (pax)	194.321	297.748	713.114
Home (pax)	-	-	24.200
Transit (pax)	194.321	297.748	688.914
Cruise calls	278	322	510

PERCENTAGE HIGH SEASON VS. WHOLE YEAR

Total (pax)	-	-	86,32
Home (pax)	-	-	84,79
Transit (pax)	93,13	85,28	86,37
Cruise calls	88,49	81,37	83,33

**DUBROVNIK**

	YEARS	1998	2002	2007
<u>HIGH SEASON (MAY-OCTOBER)</u>				
Total (pax)		80.230	230.403	585.864
Home (pax)		-	-	3.500
Transit (pax)		-	-	582.364
Cruise calls		127	287	514

<u>WHOLE YEAR</u>				
Total (pax)		89.830	264.902	677.431
Home (pax)		-	-	3.500
Transit (pax)		-	-	673.931
Cruise calls		146	341	600

<u>PERCENTAGE HIGH SEASON VS. WHOLE YEAR</u>				
Total (pax)		89,31	86,98	86,48
Home (pax)		-	-	-
Transit (pax)		-	-	86,41
Cruise calls		86,99	84,16	85,67

## **GENOA**

	YEARS	1998	2002	2007
<u>HIGH SEASON (MAY-OCTOBER)</u>				
Total (pax)		-	396.131	340.632
Home (pax)		-	244.911	172.350
Transit (pax)		-	151.220	168.282
Cruise calls		-	233	162

<u>WHOLE YEAR</u>				
Total (pax)		270.000	567.506	520.197
Home (pax)		200.000	390.344	330.109
Transit (pax)		70.000	177.162	190.088
Cruise calls		200	359	240

<u>PERCENTAGE HIGH SEASON VS. WHOLE YEAR</u>				
Total (pax)		-	69,80	65,48
Home (pax)		-	62,74	52,21
Transit (pax)		-	85,36	88,53
Cruise calls		-	64,90	67,50

## **NICE**

	YEARS	1998	2002	2007
<u>HIGH SEASON (MAY-OCTOBER)</u>				
Total (pax)		-	242.090	434.723
Home (pax)		-	40.210	38.225
Transit (pax)		-	201.880	396.498
Cruise calls		-	302	333

<u>WHOLE YEAR</u>				
Total (pax)		-	299.467	507.347
Home (pax)		-	62.551	52.064
Transit (pax)		-	236.916	455.283

Cruise calls	-	399	414
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**PERCENTAGE HIGH SEASON VS. WHOLE YEAR**

Total (pax)	-	80,84	85,69
Home (pax)	-	64,28	73,42
Transit (pax)	-	85,21	87,09
Cruise calls	-	75,69	80,43

**VALLETTA**

	YEARS	1998	2002	2007
<b><u>HIGH SEASON (MAY-OCTOBER)</u></b>				
Total (pax)		119.245	294.083	369.240
Home (pax)		4.867	283.768	361.222
Transit (pax)		114.378	10.315	8.018
Cruise calls		165	316	274

**WHOLE YEAR**

Total (pax)	147.484	357.401	489.532
Home (pax)	5.710	346.634	480.752
Transit (pax)	141.774	10.767	8.780
Cruise calls	210	407	377

**PERCENTAGE HIGH SEASON VS. WHOLE YEAR**

Total (pax)	80,85	82,28	75,43
Home (pax)	85,24	81,86	75,14
Transit (pax)	80,68	95,80	91,32
Cruise calls	78,57	77,64	72,68

**PALERMO**

	YEARS	1998	2002	2007
<b><u>HIGH SEASON (MAY-OCTOBER)</u></b>				
Total (pax)	-		173.735	391.766
Home (pax)	-		28.187	60.577
Transit (pax)	-		145.548	331.189
Cruise calls	-		142	171

**WHOLE YEAR**

Total (pax)	95.622	197.434	471.395
Home (pax)	12.451	29.726	67.321
Transit (pax)	83.171	167.708	404.074
Cruise calls	-	178	214

**PERCENTAGE HIGH SEASON VS. WHOLE YEAR**

Total (pax)	-	88,00	83,11
Home (pax)	-	94,82	89,98
Transit (pax)	-	86,82	81,96
Cruise calls	-	79,78	79,91

## CYPRIT PORTS

	YEARS	1998	2002	2007
<u>HIGH SEASON (MAY-OCTOBER)</u>				
Total (pax)		475.062	337.817	341.979
Home (pax)		398.439	283.760	165.761
Transit (pax)		76.623	54.057	176.218
Cruise calls		-	430	356

### WHOLE YEAR

Total (pax)		612.308	398.047	427.707
Home (pax)		493.307	329.726	173.547
Transit (pax)		119.001	68.321	254.160
Cruise calls		956	549	428

### PERCENTAGE HIGH SEASON VS. WHOLE YEAR

Total (pax)		77,6	84,9	79,96
Home (pax)		80,8	86,0	95,51
Transit (pax)		64,4	79,1	69,33
Cruise calls		-	78,3	83,17

## BARI

	YEARS	1998	2002	2007
<u>HIGH SEASON (MAY-OCTOBER)</u>				
Total (pax)		115.158	193.143	322.874
Home (pax)		28.192	45.574	124.515
Transit (pax)		86.966	147.569	198.359
Cruise calls		70	126	107

### WHOLE YEAR

Total (pax)		120.527	203.431	351.897
Home (pax)		29.366	46.759	129.734
Transit (pax)		91.161	156.672	222.163
Cruise calls		76	134	120

### PERCENTAGE HIGH SEASON VS. WHOLE YEAR

Total (pax)		95,55	94,94	91,75
Home (pax)		96,00	97,47	95,98
Transit (pax)		95,40	94,19	89,29
Cruise calls		92,11	94,03	89,17

## LISBOA

	YEARS	1998	2002	2007
<u>HIGH SEASON (MAY-OCTOBER)</u>				
Total (pax)		-	136.922	200.016
Home (pax)		-	22.837	16.399
Transit (pax)		-	114.085	183.617
Cruise calls		155	175	167

### WHOLE YEAR

Total (pax)		139.900	164.259	305.185
Home (pax)		33.468	31.623	31.710

Transit (pax)	106.432	132.636	273.475
Cruise calls	216	218	256

PERCENTAGE HIGH SEASON VS. WHOLE YEAR

Total (pax)	-	83,30	65,54
Home (pax)	-	72,22	51,72
Transit (pax)	-	86,01	67,14
Cruise calls	71,76	80,28	65,23

**MESSINA**

	YEARS	1998	2002	2007
<u>HIGH SEASON (MAY-OCTOBER)</u>				
Total (pax)	-	-	-	243.675
Home (pax)	-	-	-	5.123
Transit (pax)	-	111.178	111.178	238.552
Cruise calls	-	-	140	193

WHOLE YEAR

Total (pax)	-	145.647	145.647	293.296
Home (pax)	-	-	-	6.116
Transit (pax)	-	145.647	145.647	287.180
Cruise calls	-	-	186	238

PERCENTAGE HIGH SEASON VS. WHOLE YEAR

Total (pax)	-	-	-	83,08
Home (pax)	-	-	-	83,76
Transit (pax)	-	76,33	76,33	83,07
Cruise calls	-	75,27	75,27	81,09

**APPENDIX TABLE 2: EVOLUTION OF CRUISING DURING THE MONTHS OF APRIL AND NOVEMBER**

<b>PORTS</b>	<b>1998</b>	<b>1999</b>	<b>2000</b>	<b>2001</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>
<u>BARCELONA</u>											
April	81	23062	38707	33982	59022	49482	56871	70052	118110	118110	133446
November	12658	18515	28712	39646	58673	53976	72754	77584	140599	140599	
<u>CIVITAVECCHIA</u>											
April	10428	9931	19340	24050	19287	27913	37410	32346	59633	89.548	95667
November	15030	16992	27553	23979	23400	19575	23464	48656	73364	94.076	
<u>NAPLES</u>											
April			21018	20571	29856	27465	42086	63614	44264	78670	-
November		24283	22009	34485	29576	54222	42788	54415	71772		
<u>PALMA MALLORCA</u>											
April	7068	14962	15719	10189	28454	20900	30447	52125	56248	78268	104020
November	6237	21128	18389	23140	31936	18545	31692	36866	46371	58892	
<u>VENICE</u>											
April	8575	8660	9475	11187	27367	26259	38913	39082	43745	47834	72893
November	15362	3676	11170	23558	25030	38979	34863	18979	33248	77161	
<u>LA GOULETTE</u>											
April	5590	8641	8776	9865	15864	21141	20152	37745	52227	65150	69941
November	5120	7572	6939	7089	13794	14723	26410	34563	33064	45405	
<u>LIVORNO</u>											
April	7354	7782	10465	12848	12291	14512	22633	12495	30876	43765	43712
November	4784	3778	10703	11161	18043	12236	12203	18598	31218	36515	
<u>DUBROVNIK</u>											
April	3799	-	3277	11428	16954	24141	31946	29084	32686	34921	60139
November	5113	1596	5648	8376	11620	14437	26989	19191	26149	47791	

<b>PORTS</b>	<b>1998</b>	<b>1999</b>	<b>2000</b>	<b>2001</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>
<u>GENOA</u>											
April			34126	45345	50316	51563	24961	30066	46351	53272	-
November			50930	59657	54138	59331	29208	28969	38742	44515	
<u>NICE</u>											
April					25039	15290	19045	19045	22261	24012	20599
November					14331	11937	17909	17909	20655	32587	
<u>VALLETTA</u>											
April	9906	13482	9554	16950	19425	16105	19118	22658		38036	46348
November	14531	12578	13650	22700	26171	22781	30075	34076	38881	57464	
<u>PALERMO</u>											
April			8118	7864	10810	6952	11286	23454	20084	39804	49615
November			1305	6335	7856	4434	7182	23191	22835	29189	
<u>CYPRriot PORTS</u>											
April	37655		52698	48848	21035	12203	18567	23099	30300	17857	23268
November	41495		42022	15988	14877	32434	21911	25188	20173	26583	
<u>BARI</u>											
April	351	845	-	334	4543	3180	10039	11533	14248	10653	29077
November	4748	-	2530	4674	5745	11358	15918	7486	13356	16873	
<u>LISBOA</u>											
April	-	15714	13246	21696	10978	15597	27741	26444	32733	22878	51274
November	-	6207	7540	9720	10671	22324	17001	22930	24368	40254	
<u>MESSINA</u>											
April					14143	14473	14285	11345	12655	21009	18510
November						10145	18345	17031	16246	15770	23059

