

3 THE *Cruise passengers* WHO ARE THEY?



*** Maritime Cruises**

50% of sea cruise passengers visiting the Provence-Alpes-Côte d'Azur region are aged between 21-50, tend to travel as a couple (61% of embarking passengers) or as a family and come from affluent socio-professional categories.

Nationalities (transit): The majority are British, American, Italian, Spanish and German.
Nationalities (embarkation port): 3/4 French.



*** River cruises**

Nearly 3/4 of the river cruise passengers surveyed are seniors and tend to travel as a couple or with friends.

Nationalities: The majority are British, American, Australian and German.

4 THE *Destination* WHAT MAKES IT SO ATTRACTIVE?

The cruise industry is a strong driver when it comes to enticing tourists to explore: the cruise passenger of today is our customer of tomorrow for a few days, a few weeks or even longer!



A POSITIVE IMAGE

98% of cruise passengers are satisfied with their visit to the Provence-Alpes-Côte d'Azur region and will maintain a positive image of their travels.



THE PORT OF CALL THAT MAKES THE DIFFERENCE

For 55% of sea cruise and 61% of river cruise passengers, the port of call is a decisive factor when it comes to choosing a cruise.

63% of sea cruise and 39% of river cruise passengers would like to come back within 3 years. Better yet, 71% of sea cruise and 67% of river cruise passengers are "repeaters".

* A "repeater" is a cruise passenger who has already taken this kind of trip.

5 THE *Strength* OF THE REGIONAL NETWORK



Ideally situated on the coast and on the major Mediterranean cruise itineraries, the Provence-Alpes-Côte d'Azur region benefits from a network of maritime and river ports allowing visitors to discover the destination both around the coastline and inland. Many cruise itineraries also combine up to 3 ports in the region.



Building on a market that has been growing for several years, a united network formed by the State, the Provence-Alpes-Côte d'Azur region, the Chambers of Commerce and Industry – Regional, Marseille Provence, Var and Nice Côte d'Azur – and the 3 Cruise Clubs – Marseille Provence, Var Provence and French Riviera – has ambitions for Provence-Alpes-Côte d'Azur, endorsed by a "Cruise Tourism Sector Contract"



Network objectives:

- * Support the environmental transition process for an eco-friendly cruise tourism industry
- * Strengthen the leading position of Provence-Alpes-Côte d'Azur as a cruise destination in France and abroad
- * Make cruise tourism a driver for the overall development of the regional economy from the Rhone and the Mediterranean to inland areas
- * Shape the cruise tourism of tomorrow by inviting passengers and crews to become ambassadors for our destination
- * Foster loyalty: the cruise passenger of today is the tourist of tomorrow

Sources: BVA survey conducted from June to October 2017, financed by the FNADT-Directe and the Région Sud, led by the Var CCI on behalf of the network of CCIs of Provence-Alpes-Côte d'Azur and the Cruise Clubs / Study on economic benefits conducted in 2017 by the Marseille Provence CCI and the Marseille Provence Cruise Club.

THE CRUISE INDUSTRY

IN THE *Provence-Alpes-Côte d'Azur*



17 SEA PORTS
2,8 MILLION PASSENGERS *
 * Passenger movements

6 RIVER PORTS
95 000 PASSENGERS *
 * or 227,000 passenger movements

Placed at the forefront of the most attractive destinations for cruise companies, the Provence-Alpes-Côte d'Azur region alone accounts for 45% of cruise traffic in France and 9.11% in the Mediterranean.

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PROVENCE-ALPES-CÔTE D'AZUR

- * An ideal geographical location on the coast and in the heart of the Western Mediterranean
- * A varied destination, and therefore exceptionally attractive

- * The leading region for the cruise industry on the French market
- * 3 Cruise Clubs: Marseille Provence, Var Provence and Côte d'Azur act as unique gateways to the region

1 2019 KEY FIGURES FOR THE CRUISE INDUSTRY Provence-Alpes-Côte d'Azur

	Maritime Cruises	River cruises
	* 2,8 million pax* +11,22% compared to 2018	* 95 000 pax* (equivalent to 227,000 passenger movement) +3,46% compared to 2018
	* 522 489 embarking passengers +7,2% compared to 2018	
	* 1 048 calls -1,23% compared to 2018	* 1 700 calls
	* 17 ports	* 6 ports
	9,11% of Mediterranean traffic	
	45% of traffic in France	

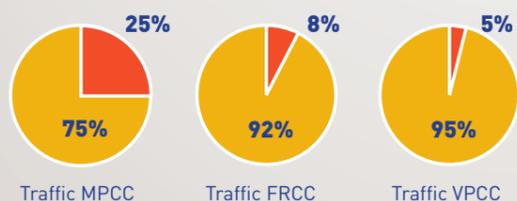
Worldwide
Maritime Cruises:
30.7 million pax

France
Maritime Cruises:
6.2 million pax including
878 535 embarking passengers

River cruises:
215 000 pax
excluding cruises on the Rhine

→ Regional ports under the microscope

Marseille Provence MPCC	1 866 000 pax
French Riviera FRCC	697 361 pax
Var Provence VPCC	232 745 pax
Total	2 796 106 passengers

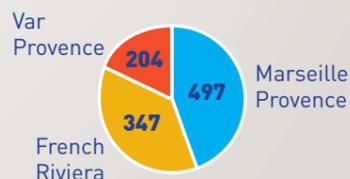


Total : 2 796 106 passengers
(2 273 617 passengers in transit / 522 489 passengers embarking)

■ TRANSIT ■ Embarkation port



1 048 CALLS



2018/2019 EVOLUTION
+11.22% pax -1.23% calls

*pax = passengers

2 AN ECONOMIC IMPACT AT ALL Levels

The economic benefits generated by the cruise industry – direct, indirect and induced – positively impact the entire value chain involved in Provence-Alpes-Côte d'Azur.

	430 million euros Direct, indirect and induced €191 / pax Based on the number of individual passengers	2 450 jobs full-time equivalent port agents, pilots, tugboats, shipping agents, tour-operators, bus drivers, taxi drivers, guides, etc.
	Direct / €57 M Activity of port and tourist service providers	250 jobs full-time equivalent
	Indirect / €91 M Activity generated by passengers	600 jobs full-time equivalent
	Induced impact / €282 M Activity that generates job creation (Multiplying factor 1,9)	1 600 jobs full-time equivalent

Sources: 2017 BVA study / CCIMP study (Marseille Provence Chamber of Commerce and Industry)

→ Maritime cruise expenditure

83% of passengers spend money during their call
In transit: **€36/pers.** (on average) / Embarking: **€52 /pers.**

More than ¾ of spending concerns personal consumer goods and catering

Excursions
93% of cruise passengers take part in a tourist activity once on land at their destination.

24% of passengers arrive the day before embarking and more than 3/4 of them stay in a hotel.

- * **More than ¾ visit attractions individually** by taxi, bus or on foot
- * **Nearly ¼ combine an excursion** purchased with an individual visit, which is a potential multiplier of financial benefits at the destination. **41% of passengers** spend an average of 4 hours at the destination, and **23% spend an average of 6 hours!**

→ River cruise spending

In transit: **€23 /pers.** (on average)

The cruise industry also positively impacts...

- * **the destination's international profile** = visibility
- * **fostering tourist loyalty** = many are passengers taking several cruises and those wishing to return to the region
- * **extending the tourist season** = "deseasonalisation"
- * **developing other sectors of activity** = enhancing our entire economic, social and cultural fabric