

Press Kit

Marseille Provence
Cruise Club



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MARSEILLE PROVENCE CRUISE CLUB

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PRESS RELEASE

MARSEILLE AMONG THE WORLD'S TOP 15 CRUISE PORTS

Marseille, 04th February, 2016 - **With almost 1.5 million passengers and 440 port calls in 2015, Marseille – the no.1 cruise port in France and no. 5 in the Mediterranean- has posted the best performance figures for a Mediterranean port for the second year running and has moved into the world's top 15 cruise ports.**

With 1.44 million passengers passed through the port in 2015, and with 68 ships from 27 companies, more than 5000 passengers/day between April and November and 2000/day in the winter months, Marseille's cruise sector can be said to be steaming full ahead! The indicators are all green, enabling France's leading cruise port to enter the world's top 15.

Benefitting from a marketplace synergy and continued investment from local stakeholders who have managed to anticipate industry trends, Marseille and its entire region are taking full advantage of the opportunities afforded by a booming sector and the attractiveness of the Mediterranean for international clients; double-digit growth that looks set to continue. According to the forecast drawn up by the Marseille Provence Cruise Club, **almost 1.7 million passengers should embark or call at Marseille in 2016.** This will be a real opportunity for tourism industry players, who are increasingly more numerous in taking an interest and adapting to take advantage of the sustainable growth the market is showing.

In 2016, the main market stakeholders – Costa Cruises, MSC Cruises and Cruises de France – will be strengthening their presence in Marseille. Among the highlights of the year will be the June port call of the soon-to-be largest cruise vessel afloat, the *Harmony of the Seas*, due to leave the Saint-Nazaire shipyards next spring, the *Carnival Vista*, the latest addition to the world leader's fleet, and the return of the *Norwegian Epic*, which French and international cruise passengers will be able to board at Marseille.

Given the sustainable growth forecasts, the developments in place at the port that underpin the exceptional performance and ensure the highest quality of service and Marseille's increasing attractiveness as a destination, the Marseille Provence Cruise Club has made its intentions clear: make Marseille one of the world's top 10 cruise ports by 2020.

The Marseille-Provence Chamber of Commerce and Industry, the City of Marseille and Marseille's port authority, the GPMM, came together in 1996 to create the Marseille Provence Cruise Club to develop the cruise sector and establish Marseille as an industry hub. That joint venture gave birth to a dynamic approach that has generated a real synergy between all the economic and institutional players in the local cruise market.

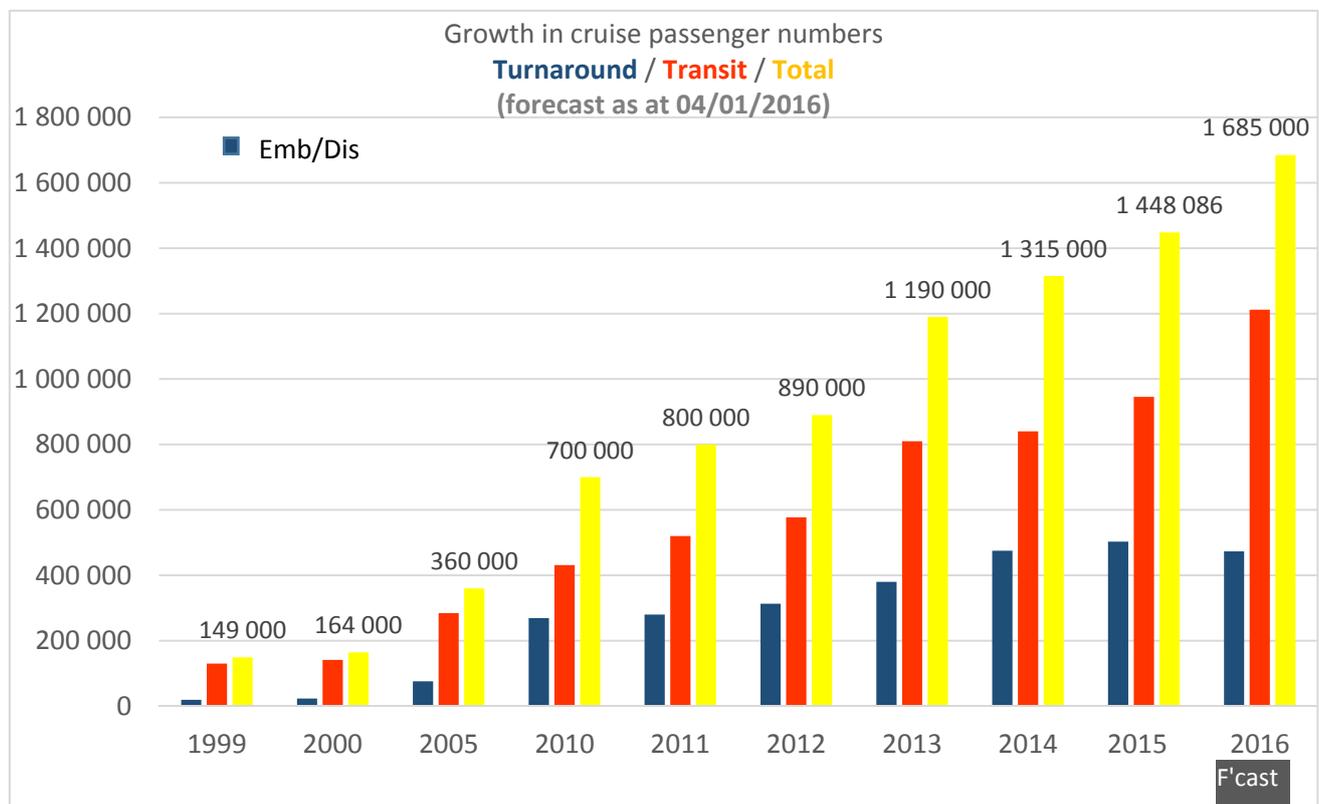


2015 RESULTS

MARSEILLE - A PORT OF EMBARKATION

With consolidated forecasts showing almost 1.5 million cruise passengers and 440 port calls this year, representing 170,000 more passengers than in 2014, Marseille once again has posted the best performance for a Mediterranean port.

A total of 68 ships from 27 companies passed through Marseille and the Gateway to Provence by the end of 2015. Costa Cruises, MSC Cruises and Croisières de France, and to a lesser extent Ponant and Rivages de France, will have offered 338 cruises departing from Marseille and attracted more than 500,000 turnaround passengers. The huge choice of Mediterranean cruises departing from Marseille means passengers can be attracted to book pre-cruise stays.

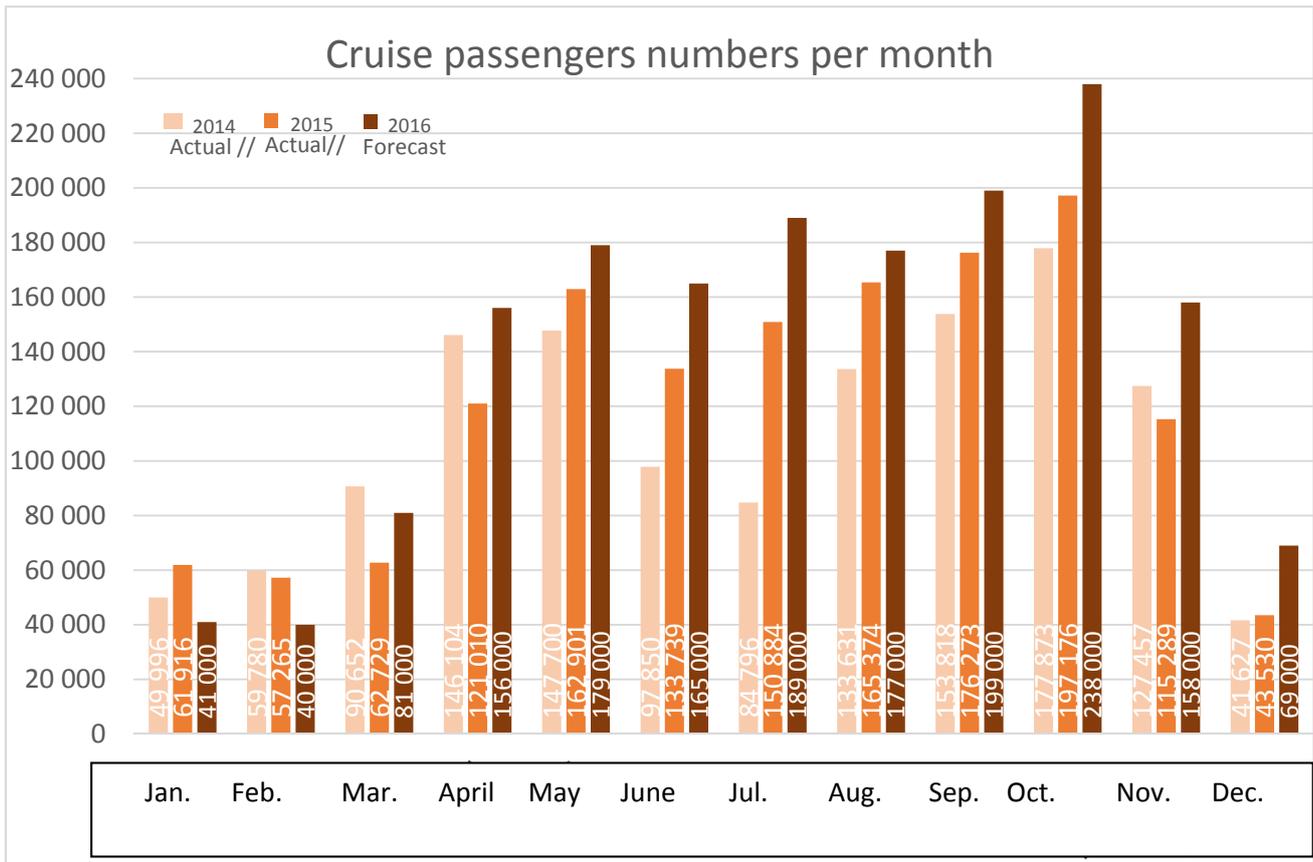


Marseille Provence Cruise Club – Estimations January 2016

Among the **highlights** of the 2015 season in Marseille were the inaugural European port call of the world's largest cruise ship, the *Allure of the Seas* this spring, in summer the simultaneous presence of seven ships with a record 210,000 passengers on Sunday 7th August and a record autumn season including 36,000 cruise passengers in a single weekend on 12th and 13th September and a total of almost 200,000 over the month of October. The Mediterranean remains the most popular destination for French cruise clients, with 63% of the market.



A sign of the general public's appetite for cruises is the disappearance of **seasonality in the Mediterranean**. Cruise companies are no longer reluctant to schedule year-round port calls and departures from Marseille. Consequently, Marseille has seen around 2000 passengers/day pass through its port in the winter months (January, February, March, December) and more than 5000/day the rest of the year.



Marseille Provence Cruise Club – January 2016

Another feature of these results is the **surge in Sunday traffic** –which should continue in 2016 according to current projections - with 485,000 passengers passing through Marseille on Sundays during 2015.



Allure of the Seas - 26.05.2015



Starbreeze – 02.07.2015



MPCT - 07.08.2015



A **dozen inaugural port calls** also marked the season, including the emblematic arrival of the *'Allure of the Seas* preceded by the *Anthem of the Seas* and the *Explorer of the Seas*, the Winstar Cruises ships at the Joliette Terminal, the *Star Breeze* and *Star Legend*, Ponant's *Lyréal* and Princess Cruises' *Caribbean Princess*. To close the year, we had the inaugural port call of the *Costa neoClassica* on 15th December. These 12 new ships in 2015, including those of Royal Caribbean International, once again underline the attractiveness of Marseille Provence.

THE CRUISE SECTOR: A DYNAMIC MARKET...

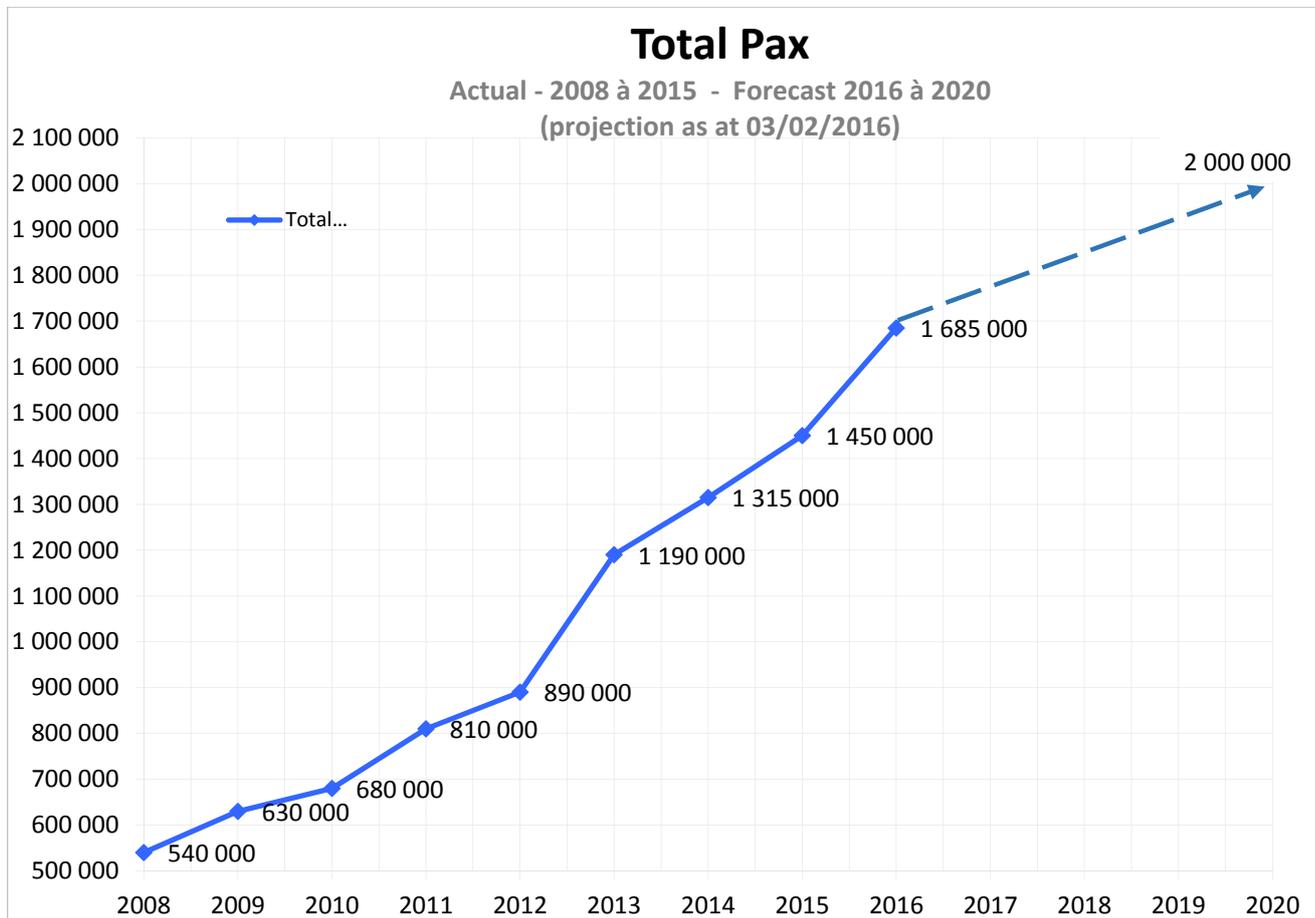
The cruise industry is a dynamic and global industry which, in 2014, represented a total of 22.04 million passengers, an increase of 3.4% over 2013 and 70% over 10 years according to a CLIA (Cruise Line International Association) study. In Europe, a new record was set with a figure of 6.39 million cruise passengers in 2014.

For the French market, the increase was 14%, with almost 600,000 passengers and more than 70,000 new clients in 2014, reinforcing its 4th place in Europe behind Germany, the UK and Italy.

As the no.1 cruise port in France and no.5 in the Mediterranean, Marseille Provence has benefitted from this fervour and once again this year has posted the best growth figures for a Mediterranean port. Growth projections for the sector until 2020 confirm this trend.



Total cruise passenger numbers



Marseille Provence Cruise Club – January 2016

... POWERING THE LOCAL ECONOMY

Benefits for the local economy in 2015 exceeded €180M (excluding investment in ship repair and port infrastructure). Three successive studies carried out in the past few years by the Marseille Provence CCI have provided insights into these indicators and shown the shipping, tourism and retail sectors to be the principal direct beneficiaries. They also show that there is a considerable margin for cruise market growth and optimisation to extend its influence over the wider Aix-Marseille-Provence area.

MORE THAN €30M IN DIRECT ECONOMIC BENEFITS

Estimations comprising the overall monetary flows generated by cruise-related expenditure by ship's agents and reception agencies: salaries, investment, local purchases and taxes

- **68% are generated by expenditure on port services** (GPMM, MPCT, pilots, boatmen, baggage handlers, towing, ship's supplies, bunkering);



- **26% are generated by tourists purchasing services:** organised excursions, the main beneficiaries being bus companies and tour guides;
- **6% are related to expenditure by ship's agents and reception agencies** (salaries, commissions, investment, premises).

MORE THAN €50M IN INDIRECT ECONOMIC BENEFITS

Estimations comprising tourist spending by cruise passengers.

The benefits are calculated from the declared amounts spent on shore and their breakdown, as well as from qualitative data on means of transport and purchase for a representative sample of cruise ship passengers.

- **Passengers calling at Marseille** (in transit) spend between a half and a full day in port. Sixty percent of them spend money in the port, **on average €50 per passenger** (an average basket that increases to €67 for foreign passengers).
- **Turnaround passengers** (joining or leaving the ship) spend money on accommodation or restaurants, parking and shopping. Twenty percent of embarking passengers make purchases against 10% for those disembarking. **The average spending for a turnaround passenger is €160.** Thus, turnaround traffic has two advantages for the local economy: it generates greater income for port service providers (ship's agents etc.) and greater benefits for the local tourism-based due to the longer stopover involved.

MORE THAN €100M IN DERIVED ECONOMIC BENEFITS

This is the lever effect on the local economy, with knock-on spending benefitting various suppliers involved in the service provision chain for cruise customers.

NB: These indicators do not include spending by crew members, estimated by the CLIA at €21/person.



MARSEILLE PROVENCE CRUISE CLUB

The Marseille-Provence Chamber of Commerce and Industry, the City of Marseille and Marseille's port authority, the GPMM, came together as early as 1996 to create the Marseille Provence Cruise Club to develop the cruise sector and establish Marseille as an industry hub.

That joint venture gave birth to a dynamic approach that has generated a real synergy between all the economic and institutional players in the local cruise market.

The Marseille Provence Cruise Club's actions have been a vital factor in increasing the cruise operators' port call frequencies and have always been adapted to the sector's constantly changing conditions and specific needs. With a federating role and the instigator of an active marketing strategy for the Marseille Provence region, the Marseille Provence Cruise Club also acts as a one-stop contact point for all the industry's professionals and as a mediation interface to ensure port calls go smoothly.

The association works daily to strengthen and develop the cruise business in Marseille. To this end, it carries out a number of communication and promotional campaigns in parallel with its work to improve passenger experience and monitor evaluations. For the Marseille Provence Cruise Club, ensuring the satisfaction of cruise operators and their clients is the number one priority.

MARSEILLE PROVENCE CRUISE CLUB MEMBERS & PARTNERS



Founder members

- Marseille Provence CCI
- Grand Port Maritime de Marseille (Port Authority)
- Marseille City Council

Partners

- Marseille Provence Métropole
- Marseille Provence Airport
- Groupement des Porteurs de Bagages du Port de Marseille (Luggage porters)
- Marseille Provence Cruise Terminal
- Société Coopérative du Lamanage des Ports de Marseille et du Golfe de Fos (mooring services)
- Syndicat Professionnel des Pilotes des Ports de Marseille et de Fos (pilotage service)

Professional bodies & institutions

- Bouches-du-Rhône Tourisme
- Comité Régional de Tourisme ProvenceAlpes-Côte d'Azur
- Communauté d'Agglomération du Pays d'Aubagne et de l'Etoile
- Office de Tourisme d'Arles
- Office de Tourisme d'Avignon
- Office de Tourisme de Cassis
- Office de Tourisme et des Congrès de Marseille
- Association des Agents et Consignataires de Navires de Marseille-Fos et du Grand Delta (port agents union)
- Syndicat National des Agents de Voyage Méditerranée (travel agencies union)
- Union Maritime et Fluviale de Marseille-Fos (maritime Professional unions)
- Union Pour les Entreprises des Bouches-du-Rhône (Union of Enterprises)

Member partners

- Accor
- Air France
- Boluda France (tugs)
- Cambiaso & Risso France
- Chantier Naval Marseille
- Cofrapex
- Cruise services
- Culture Espace / Carrieres de Lumière
- Fragonard
- Galeries Lafayette
- Golden Tulip Hotel
- Hammerson / Les Terrasses du Port
- Hard Rock Café
- Intercontinental Hotel Dieu Marseille
- Intercruises
- MSC – Mediterranean Shipping Company
- MuCEM
- NAP Tourisme
- Ponant
- Société Marseillaise de Tourisme
- Train Touristique Marseille 13
- Transdev -Airport Shuttle
- Voyages C. Mathez



On the crest of a wave, Marseille has established itself as France's no.1 cruise port, with almost 1.5 million passengers passing through in 2015 and forecasts showing sustainable growth. The "blue gold" that is the sea has proved to be a powerful and efficient lever for economic attractiveness that has impacted tourism, industry, shipping and even the retail sector.

A driving force sustaining the local economy, the cruise industry also brings clear benefits in terms of enhancing the region's image and visibility. With its partners and businesses in the Marseille Provence area, the Marseille Provence CCI is constantly working to develop the cruise industry through the daily actions of the Marseille Provence Cruise Club of which it is a founder member.

The Marseille-Provence 2013 European Capital of Culture year saw Marseille regain its capacity for excellence, with the entire region riding on its coattails. Its accompanying urban renewal received recognition in the form of several international awards. France's number one cruise port is now one of the top five in the Mediterranean, while its airport now caters for almost 8.5 million passengers each year. A region used to hosting major events, Marseille has been named European capital of Sport 2017 and is preparing to host the Euro2016, with the sailing events at the 2024 Olympics also a possibility. The face of Aix Marseille Provence has changed, becoming a genuine international travel destination. Tourism industry professionals need to rise to new challenges in order to take advantage of this "move upmarket".

To promote Aix Marseille Provence, the Marseille Provence CCI aims to put in place a joint promotion strategy and is working to structure the various industries. Encouraging quality and synergies between stakeholders is the only way to efficiently cater for the needs of an increasingly demanding customer. This drive also requires tools to be adapted to the constant evolution in marketing methods in one of the sectors most impacted by societal changes and technological advances.

The Marseille Provence CCI is increasing the number of initiatives to maintain market share, promote the destination, encourage the creation of tourist events, anticipate and adapt the offer to new modes of consumption and tourists' needs and, lastly, promote business tourism and support the industries of tomorrow. It also works to increase awareness among all professionals in the tourism chain of the importance of customer experience and the opportunities these new clienteles (international, cruise passengers...) bring. The CCIMP is also involved in measures to enhance the competitiveness of some 1500 companies across the region by offering them guidance on topics such as quality, environmental management, ICT training, hospitality and marketing.



2015

PORT ADAPTING TO CATER FOR LARGER CRUISE SHIPS

The Port of Marseille has a dedicated cruise dock and three cruise terminals, the largest of which is operated by a private consortium, Marseille Provence Cruise Terminal. Six mega cruise ships can be handled at the port simultaneously.

Ships may also dock at the Joliette (J4) Cruise Terminal, close to the city centre and the MuCEM esplanade. This terminal is reserved for small or medium-sized luxury cruise ships.

To improve access to the dock for the largest cruise ships, the Port is currently widening the main, northern pass, an investment of €35M. The dismantling of the Mourepiane breakwater this summer has made access easier for the largest ships in high winds. The work is due to be totally completed in 2017. Another, much rarer asset –and a decisive factor for shipowners- is Marseille's *Forme 10* dry dock, the largest in the Mediterranean. Capable of handling cruise ships of more than 330 metres in length, the dry dock allows shipowners to schedule maintenance stops while reducing disruption to operations to a minimum.

A group of industrial and commercial partners (Chantier Naval Marseille, San Giorgio del Porto, Marietta and STYX France) will operate the no.10 dry dock once ongoing refurbishment work has been completed.

The Port of Marseille and Chantier Naval Marseille already have two other dry docks in operation which, together with *Forme 10*, offer cruise companies a wide range of maintenance and repair options.

Lastly, transport has been upgraded in 2015 to allow fast and safe connections to the city centre. A local bus stop has been added at the port entrance, a free shuttle service between the MPCT and La Joliette has been put in place by the GPMM and the cruise companies' shuttle buses can now take the dock roads all the way to J4 (Vieux-Port) to avoid city congestion.

Marseille Provence Cruise Terminal

- Operator MPCT
- Léon Gouret Pier – 4 berths (A, B, C, D)
- Maximum ship length: unlimited
- Draught: 13-14.50m
- Dedicated shuttle, bus, taxi parking
- Services: market, cafeteria, tourist office, ATM, seamen's hostel.

Cruise passenger parking for 850 cars

Terminal 186

- Pier H – 2 berths (2-3 & 186)
- Ships up to 250m in length
- Draught: 11-13 m
- Cruise passenger parking

Joliette Terminal

- 1 berth
- Ships up to 200m in length
- Draught: 6.80m

Forme 10 dry dock: length 450m, width 85m

Forme 8 dry dock: length 320m, width 50m

Forme 9 dry dock: length 250m, width 37m



TOURISM

Tourism is a key economic sector for Marseille. With 300,000 cruise passengers (transit and turnaround) in July and August 2015 (218,000 in 2014), tourists don't just come to see the region's beautiful scenery; they are also looking for a quality offer in the fields of culture and sports.

This year, the number of cruise passengers should pass the 1.5 million mark.

A natural crossroads between the Mediterranean and Europe, Marseille boasts a number of cultural and tourism-related assets that make it a natural gateway to the Euro-Mediterranean region.

Buoyed by its dynamism, Marseille is offering a new environment for its residents, tourists and investors and developers. This role is enabling it to accelerate economic growth and transform its urban landscape.

Attractive Marseille

In response to this growth, the city is undergoing a metamorphosis, offering residents and tourists alike an attractive and accessible city centre with an offer that lives up to their highest expectations.

All the projects initiated by the city council have the same goals: to accelerate Marseille's transformation; adapt its infrastructure to the economic challenges of the 21st century; protect its natural heritage through the setting up of the Calanques National Park, the only combined land and marine park and the first peri-urban national park in Europe; develop new cultural venues, amenities, infrastructure...

All this will increase the city's economic attractiveness, stimulating more growth and enabling it to assume its role as capital of the largest metropolitan region in France.



Tourism – Driving Marseille's economy

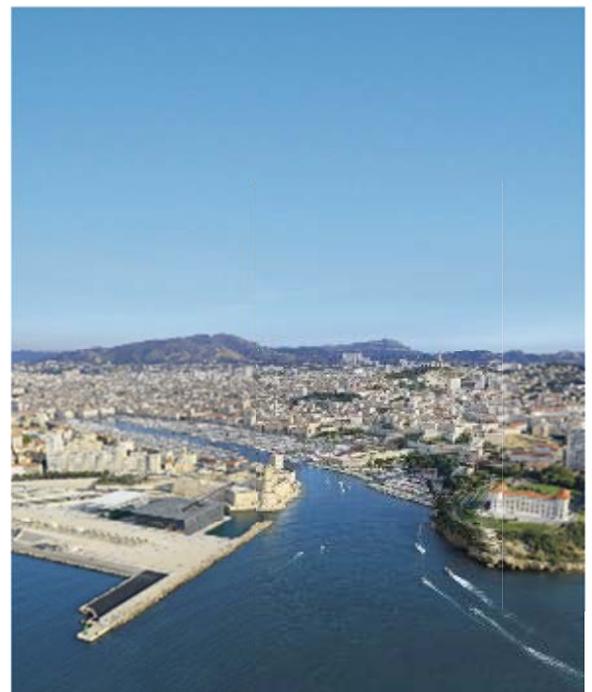
Marseille is famous all over the world for its beautiful scenery, historical sites, cultural venues and gastronomy. Thanks to the MuCEM, History Museum and Palais Longchamp, the city of Marseille is once again making the headlines on tourism websites and in the national and international press!

The city has received numerous awards:

- National Geographic has put it in the world's top 10 seaside cities to visit;
- “The second city to go to in 2013” in the New York Times;
- “Most business-friendly city” in the magazines l'Entreprise and l'Expansion, the no.2 city in France in the ICCA rankings for international congress hosting;
- Academy of Urbanism's “European City of the Year 2014”;
- Trip Advisor, which provides tourist feedback, places Marseille in the top 3 most popular destinations in France for 2014;
- the Council of Europe Museum Award 2015 given to the MuCEM.

All these accolades have been received just as the Eurostar has begun direct services between the South of France and London. The rail link, which opened on 1st may, 2015, confirms Marseille's status as a major European city. A city that will host the Euro2016 football finals and the events planned for its tenure as European Capital of Sport in 2017.

The city of Marseille works tirelessly to strengthen its attractiveness and establish itself as one of the tourism sector's "must go" destinations.





Marseille Provence Cruise Terminal

In April 2009, the Marseille port authorities, Grand Port Maritime de Marseille, handed operational control of its cruise terminals to a consortium of ship owners comprising MSC Cruises and Costa Cruises. The member companies are represented on site by the Marseille Provence Cruise Terminal Company (MPCT).

With its first-rate on-land and port facilities, Marseille is becoming the cruise operators' preferred turnaround port for their French and North European clients.

MPCT offers shipowners extensive facilities, with two large, 6000-sq. m. terminals, each able to handle the largest cruise ships. Parking close to the terminals provides cruise passengers departing Marseille with easy access to their ship.

The facilities can handle 6 cruise ships on turnaround simultaneously.

MPCT is constantly aiming to improve the service offered to its cruise company clients, in terms of both passenger and ship handling and safety and security at the terminals.

Around 20 cruise companies have scheduled port calls at Marseille in 2016... The future looks promising!

APPENDIX



World's top 20 cruise ports

#	Port	2012	Evolution 2012-13	2013	Evolution 2013-14	2014	Evolution # 2013- 14
1	Miami	3 774 000	7%	4 030 000	18%	4 770 000	=
2	Port Everglades	3 690 000	-5%	3 506 000	11%	3 880 000	+2
3	Port Canaveral	3 761 000	0%	3 771 000	2%	3 860 000	-1
4	Nassau	3 412 000	6%	3 602 000	-1%	3 575 000	-1
5	Cozumel	2 740 000	0%	2 751 000	24%	3 405 000	=
6	Barcelona	2 409 000	8%	2 599 000	-9%	2 364 000	=
7	Civitavecchia	2 190 000	16%	2 538 000	-16%	2 140 000	=
8	US VI (St Thomas)	1 904 000	5%	1 999 000	4%	2 084 000	=
9	St Martin	1 753 000	1%	1 779 000	15%	2 054 000	=
10	Venice	1 775 000	2%	1 816 000	-5%	1 734 000	=
11	Grand Cayman	1 507 000	-9%	1 376 000	17%	1 610 000	+1
12	Southampton	1 529 000	10%	1 683 000	-7%	1 570 000	-1
13	San Juan (Porto Rico)	1 052 000	12%	1 176 000	19%	1 396 000	+5
14	Palma	985 000	26%	1 245 000	7%	1 336 000	=
15	Marseille	930 000	28%	1 188 000	10%	1 311 000	+2
16	Galveston	1 208 000	0%	1 209 000	6%	1 280 000	=
17	New York	1 172 000	4%	1 220 000	-3%	1 180 000	-2
18	Shanghai	450 000	29%	580 000	99%	1 152 000	+36
19	Naples	1 190 000	-1%	1 175 000	-5%	1 114 000	=
20	Long Beach	914 000	-34%	602 000	83%	1 100 000	+31

Cruise Insight - 2015