



Dokuz Eylül Üniversitesi
5. ULUSAL DENİZ TURİZMİ
SEMPOZYUMU

Dünyada, Akdeniz'de ve Ülkemiz'de
Kruvaziyer Turizmi

Aziz Güngör
Global Ports Holding
Doğu Akdeniz Limanları Bölge Direktörü

CRUISE INDUSTRY 2020

Worldwide

The Cruise Fleet: **423** ships

Passenger Capacity: **29.5** million

Estimated Sales Revenues: **\$49.3** billion

(Estimated revenues are based on the average revenue generated by each passenger for the major cruise companies over the past year, which is approximately **\$1,675** per cruise.)



North America

The Cruise Fleet:

235 ships

Passenger Capacity:

16.3 million

Estimated Sales Revenues:

\$27.2 billion

Worldwide Market Share (\$):

55.2 percent

Europe

The Cruise Fleet:

143 ships

Passenger Capacity:

8.7 million

Estimated Sales Revenues:

\$14.5 billion

Worldwide Market Share (\$):

29.4 percent

Asia/Pacific

The Cruise Fleet:

45 ships

Passenger Capacity:

4.5 million

Estimated Sales Revenues:

\$7.6 billion

Worldwide Market Share (\$):

15.4 percent

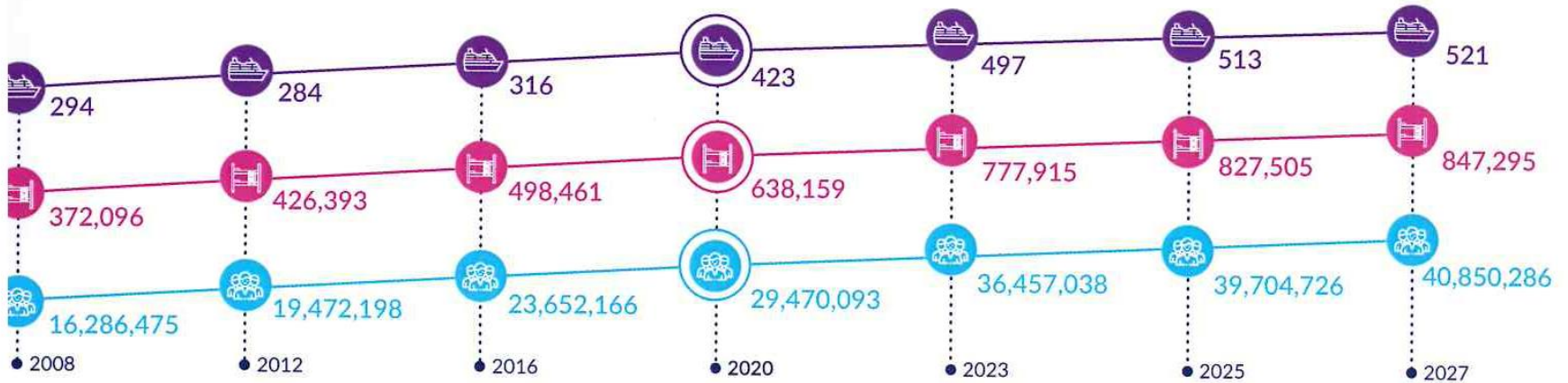


Presented by Cruise Industry News

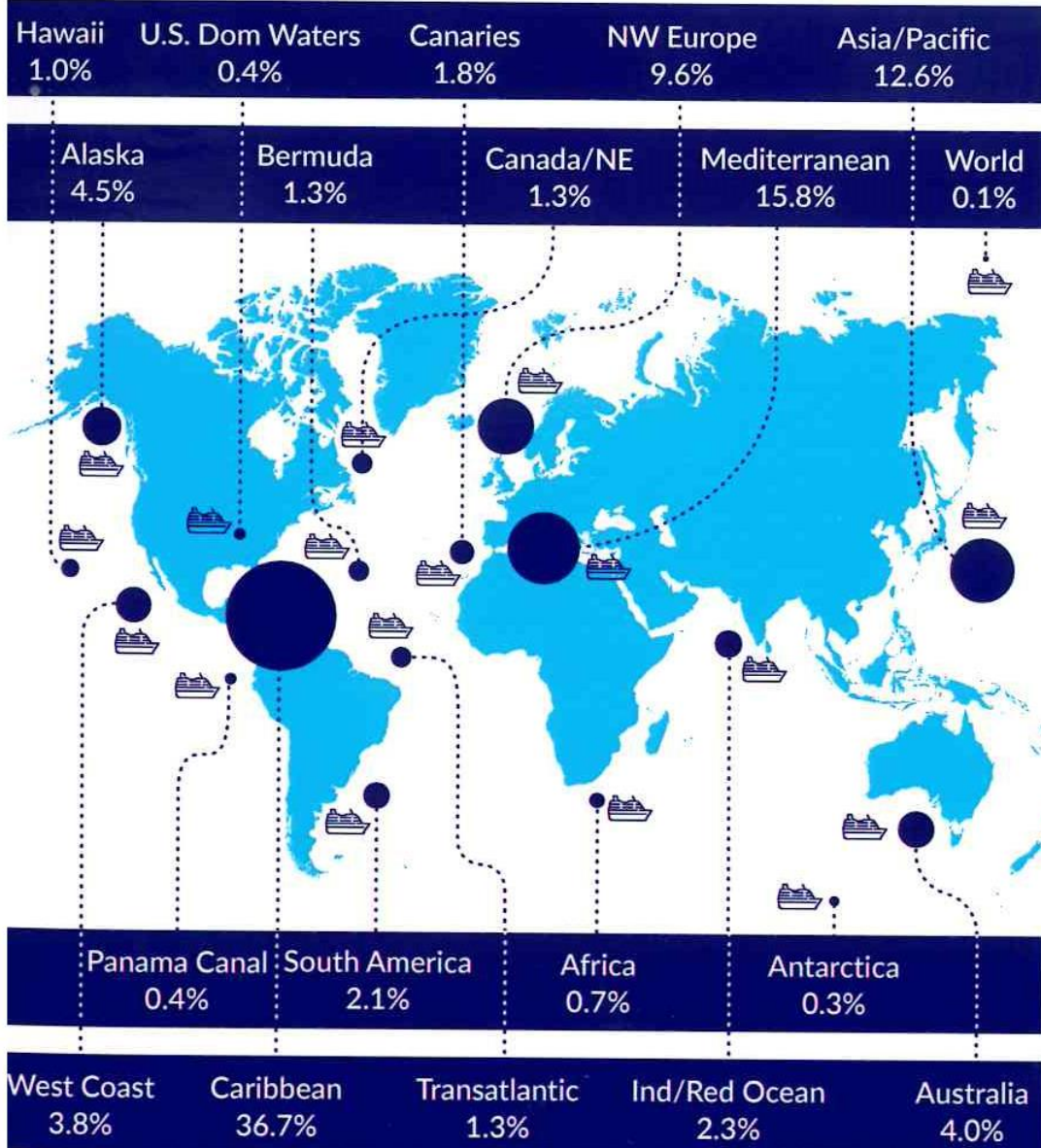
2020 Cruise Industry

Cruise Industry Worldwide

 Ships  Berths  Market Capacity






Major Sailing Regions



Biggest Companies




 **Carnival Corporation**
42.3%

 109  271,008  12,487,283

 **Royal Caribbean**
22.9%

 63  146,654  6,765,996

 **MSC Cruises**
9.3%

 18  58,916  2,729,434

 **Norwegian Cruise Line**
8.6%

 28  59,796  2,523,438

 **Genting Hong Kong**
3.2%

 9  13,893  921,611

MAJOR CRUISE PRODUCT GROUPS 2020

Source: 2020 Cruise Industry News Annual Report

PREMIUM

The premium segment tends to offer longer cruises than the contemporary segment; with per diem rates typically above the contemporary segment; and appeals to more experienced travelers/cruisers.



21.5%
6,000,000+
Passengers

68.9%
20,000,000+
Passengers

CONTEMPORARY

The contemporary market segment has an average cruise length of mostly seven days or shorter, at competitive prices and appeals to passengers of all ages and income categories (frequently first-time cruise passengers). This market segment features the largest ships.



4.7%
1,350,000+
Passengers



4.9%
1,450,000+
Passengers

BUDGET

The budget segment is still a large portion of the European market and somewhat active in North America. The ships tend to be older and have often been retired from mainstream cruise brands.

EXPEDITION

The expedition segment of the industry offers long itineraries to far-flung destinations such as Antarctica and the Arctic on smaller ships, commanding some of the highest ticket prices in the business.

LUXURY

The luxury segment offers cruises ranging from seven nights and up; per diem rates are among the highest in the industry; the ships are either medium-sized or small, but spacious, and tend to sail worldwide. They offer superb food and service.

NICHE

These are products that generally do not fit into the other categories, such as U.S. domestic waterway cruising and some soft-adventure cruises.

Akdeniz Kruvaziyer Pazarına Genel Bakış

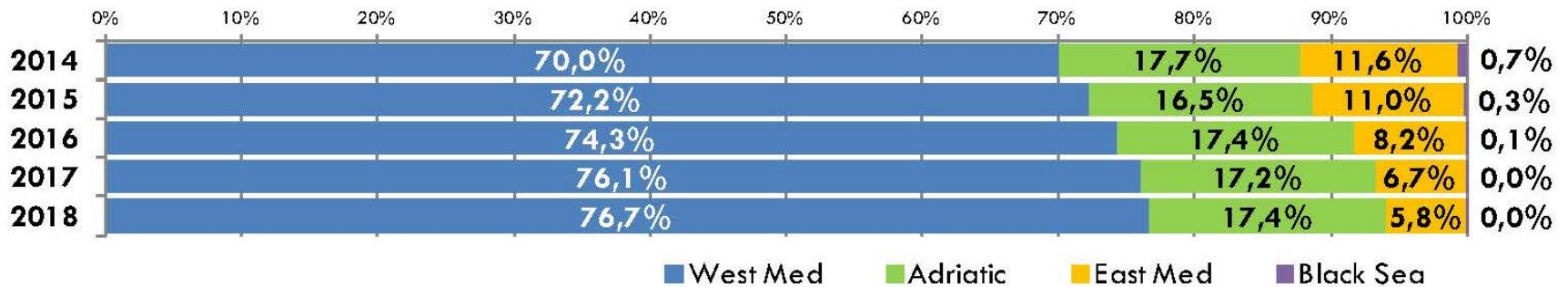


>> 2 REGIONS GROW, 2 REGIONS DROP

Region	2018	2017	Variation 2018/2017	2014	Variation 2018/2014
West Med	21.507.804	19.721.802	9,06%	18.029.458	19,28%
Adriatic	4.889.351	4.447.033	9,95%	456.528	7,21%
East Med	1.638.816	1.740.289	-5,83%	2.980.148	-45,01%
Black Sea	2.565	6.449	-60,23%	188.118	-98,64%
Total	28.038.536	25.915.573	8,19%	25.758.252	8,85%

Figure 4.3 Cruise passenger movements Evolution per Region

>> THE WEST MED SHARE IS INCREASING



>> DOUBLE DIGIT GROWTH FOR THE FIRST 2 COUNTRIES

Country	2018	% Share in 2018	2017	Variation 2018/2017	2014	Variation 2018/2014
Italy	10.714.843	38,2%	9.535.688	12,4%	9.725.259	10,2%
Spain	7.829.451	27,9%	7.074.594	10,7%	5.809.122	34,8%
France	2.583.538	9,2%	2.498.725	3,4%	2.315.942	11,6%
Greece	2.184.350	7,8%	2.068.308	5,6%	2.098.652	4,1%
Portugal	1.319.930	4,7%	1.227.277	7,5%	1.087.226	21,4%
Croatia	1.252.740	4,5%	1.159.203	8,1%	1.153.788	8,6%
Malta	711.018	2,5%	778.596	-8,7%	517.594	37,4%
Montenegro	492.475	1,8%	541.017	-9,0%	309.322	59,2%
Gibraltar	406.998	1,5%	404.995	0,5%	299.923	35,7%
Turkey	321.85	0,1%	201.714	-84,0%	1.403.997	-97,7%
Monaco	170.571	0,6%	168.017	1,5%	200.039	-14,7%
Cyprus	31.089	0,1%	123.397	-74,8%	183.507	-83,1%
Slovenia	101.415	0,4%	72.175	40,5%	58.970	72,0%
Israel	20.633	0,1%	26.757	-22,9%	n.a.	n.a.
Morocco	31.250	0,1%	23.550	32,7%	n.a.	n.a.
Ukraine	2.565	0,0%	1.636	56,8%	8.506	-69,8%
Cape Verde Ports	47.094	0,2%	n.a.	n.a.	n.a.	n.a.
Egypt	106.391	0,4%	9835	981,8%	n.a.	n.a.

Türkiye Kruvaziyer Pazarına Genel Bakış



TÜRKİYE KRUVAZİYER PAZARI - GEMİ VE YOLCU HAREKETLERİ 2015 - 2019

YILLAR	GEMİ SEFERİ SAYISI	Performans %	TURNAROUND (İNDİ-BİNDİ) YOLCU SAYILARI	TRANSİT YOLCU SAYILARI	TOPLAM YOLCU SAYISI	Performans %
2015	1.456		526.773	1.362.597	1.889.370	
2016	590	-59%	150.463	477.570	628.033	-67%
2017	311	-47%	118.385	188.502	306.887	-51%
2018	247	-21%	85.697	128.074	213.771	-30%
2019	344	39%	86.915	213.981	300.896	41%

(Deniz Ticareti Genel Müdürlüğü-Planlama ve İstatistik Dairesi Başkanlığı)

2015 : 15 Temmuz 2016 dahil olmak üzere Turizm sektöründe yaşanan kriz öncesi dönemi referans yılıdır.

LİMAN BAŞKANLIKLARI BAZINDA KRUVAZİYER GEMİ VE YOLCU İSTATİSTİKLERİ (2019 YIL SONU)

LİMAN BAŞKANLIĞI	YOLCU GEMİSİ TİPİ	KRUVAZİYER YOLCU SAYISI			
	KRUVAZİYER TİPİ YOLCU GEMİSİ	GELEN YOLCU	GİDEN YOLCU	TRANSİT YOLCU	TOPLAM YOLCU
KUŞADASI	197	9.164	18.650	153.379	181.193
MARMARİS	44	11	7	35.812	35.830
ÇEŞME	31	24.761	23.940	752	49.453
ALANYA	26	4	0	15.402	15.406
BODRUM	15	760	796	4.663	6.219
İSTANBUL	13	588	831	6.094	7.513
ÇANAKKALE	6	1	0	2.818	2.819
GÖCEK	5	0	0	1.078	1.078
DİKİLİ	4	0	0	776	776
FİNİKE	2	0	0	598	598
YALOVA	1	0	11	0	11
TOPLAM	<u>344</u>	<u>35.289</u>	<u>44.235</u>	<u>221.372</u>	<u>300.896</u>



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