

**AAPA Cruise Seminar
February 9 – 11, 2010**

Challenges facing regional cruising



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Vice-President, Growth & Development
Montreal Port Authority**

GLOBAL CRUISE MARKET

- **16,5 millions passengers in 2006 → 18,4 millions in 2010 → 21,3 millions in 2013**
- **63% North Americans, 28% Europeans, 9% rest of the world**
- **Annual increase rate in North America: + 7 %**
- **Cruise passenger = faithfulness (8 cruises on average during his / her lifetime)**

GLOBAL CRUISE MARKET

- **More and more look for a boarding port close to home**
- **Increasing demand for shorter duration cruises (3 to 4 days)**
- **Increasing demand for thematic, multi-generational and family cruises**
- **90 % of the cruises are sold through specialized cruise travel agencies**

CANADIAN CRUISE MARKET

- **1 000 cruises per year**
- **2 millions passengers**
- **British Columbia = 73 %**
- **Saint-Lawrence = 6 %**

TRENDS IN CRUISE SHIPS

- **Bigger ships (Royale Caribbean and Oasis of the Seas » 5000 + passengers)**
- **BUT demand for smaller luxurious cruise ships (200 to 400 passengers) is increasing**



Allan Line Royal Mail Steamers

ESTABLISHED 1852.

4 DAYS FROM LAND TO LAND.

7 DAYS FROM PORT TO PORT.

W. R. ALLAN.

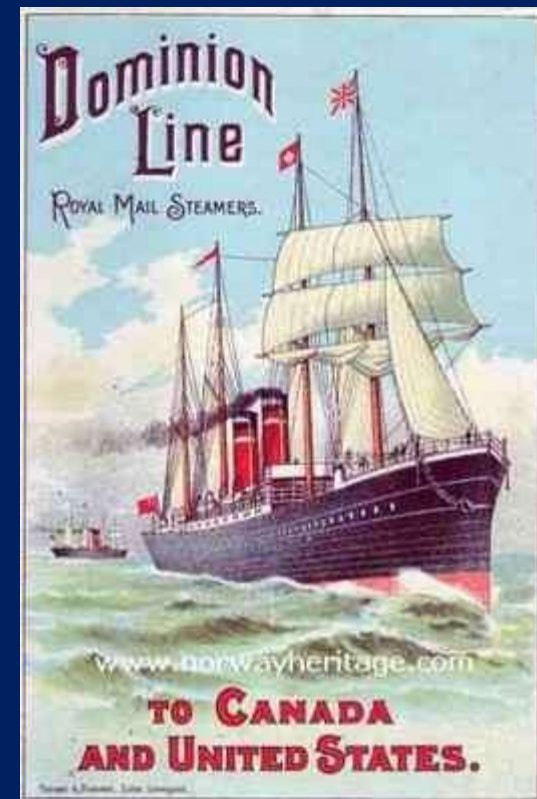
GENERAL AGENT CANADIAN NORTHWEST,
WINNIPEG.

THE ALLAN LINE.

CENTRAL AGENTS FOR ONTARIO,
77 YONGE STREET, TORONTO

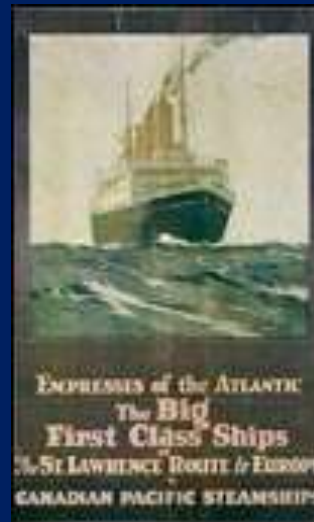
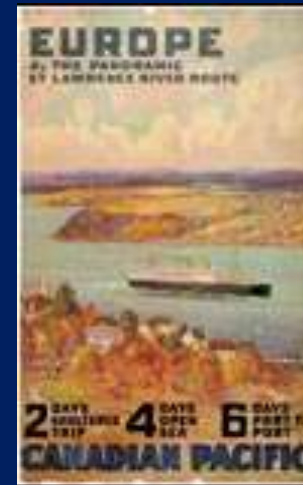
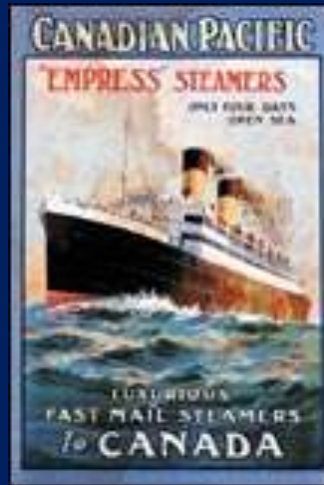
H. & A. ALLAN.

GENERAL AGENTS,
MONTREAL.

[illegible]

1900 – 1960 : The cruises Golden age

Cunard, Canadian Pacific, White Star, Anchor-Donaldson ...



9 stopovers on the Saint-Lawrence



Challenges

- **Port Infrastructure**
- **Ground Logistics**
- **Training**
- **Port Authorities**
- **Branding**

The Saint-Lawrence experience

FJORD, ISLANDS, CLIFFS, LANDSCAPES, WHALES



The Saint-Lawrence experience

HISTORY



The Saint-Lawrence experience

CONTRASTS



Montreal, the ultimate cruise destination



SAINT-LAWRENCE CRUISE MARKET

More than 170 000 passengers in 2010

Origin of passengers (2010 vs 2009)

	2010	2009
USA	54 % ↓	61 %
EUROPE	20 % ↓	23 %
CANADA	14 % ↑	11 %
OTHER	12 % ↑	5 %

INTERNATIONAL CRUISE LINES SERVING MONTREAL (2007 – 2011)

- Aida Cruise Line
- American Canadian Caribbean Line
- Compagnie du Ponant
- Crystal Cruise Line
- Ellevi Shipping
- Fred Olsen Cruise Line
- Hapag-Lloyd TUI
- Helios Cruise Line
- Holland America Line
- Peter Deilmann Cruise Line
- Phoenix Seereisen
- Princess Cruise Line
- Saga Shipping
- Seabourne Cruise Line
- Silver Sea Cruise Line
- Waybell Cruises Inc.
- World Cruise Agency

