Cruise Port Profile: Marseille

Understanding Cruise Activity & Economic Impacts in Marseille

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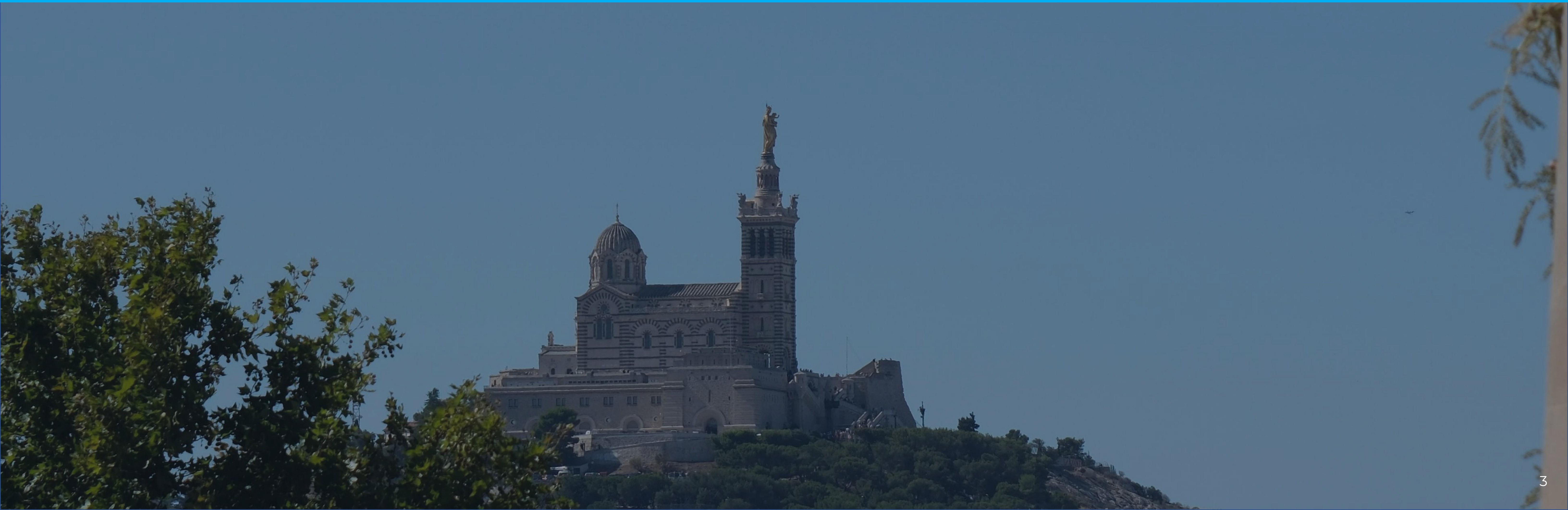
INTRODUCTION



Introduction

2024 marked another stellar year for global cruising as passenger numbers increased to record high levels. As a result, the cruise industry is playing an increasingly important role for local economies across the globe. However, there is limited consistent information available at local level to enable a more thorough understanding of these impacts. While studies are periodically undertaken which document the impacts of cruise activity in destinations, there are often inconsistencies between approaches which limit the extent to which comparisons and inferences can be made to truly understand trends within the industry.

To address this issue, Cruise Lines International Association (CLIA) commissioned Tourism Economics to develop and implement a consistent framework for measuring and understanding cruise activity at individual ports. The CLIA Port Profile project was launched in 2024 for ten ports around the world, consisting of five ports in Europe and five ports in North America's Pacific Northwest (PNW) coast.

This report discusses the findings of the Port Profile study conducted in Marseille. The report is comprised of the following sections which, collectively, enable a detailed and thorough understanding of cruise activity and impacts in the city:

- **Visitor activity:** Key trends and attributes relating to the cruise industry in Marseille and Europe as a whole.
- **Visitor profile:** Insights regarding the types of cruise visitors that come to Marseille, including their demographic characteristics.
- **Destination engagement:** Understanding the behaviours of different types of cruise visitors, including the activities they undertake.
- **Passenger & crew spending:** The spending behaviour of cruise visitors in the city.
- **Economic impact:** Analysis of the economic impact of cruise-linked activity in Marseille to the local region of Provence.
- **Local business survey:** Views and attitudes towards cruise visitors and the broader industry among local businesses.

A technical appendix is included at the end of the report which provides additional detail regarding the research.

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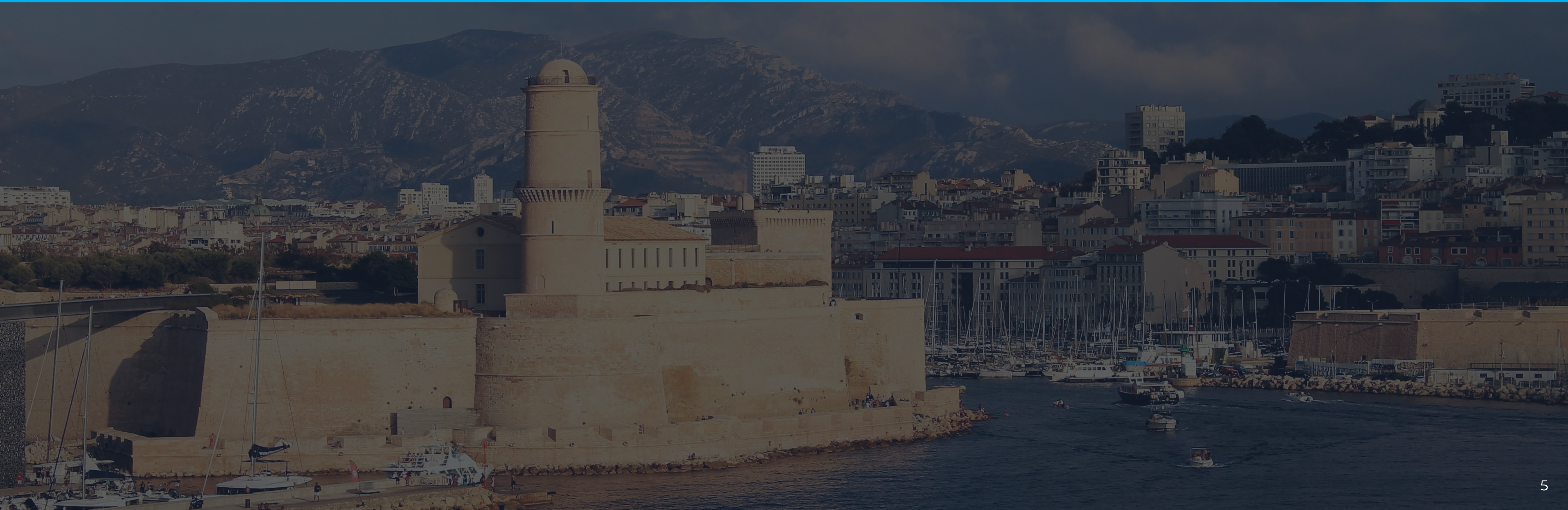
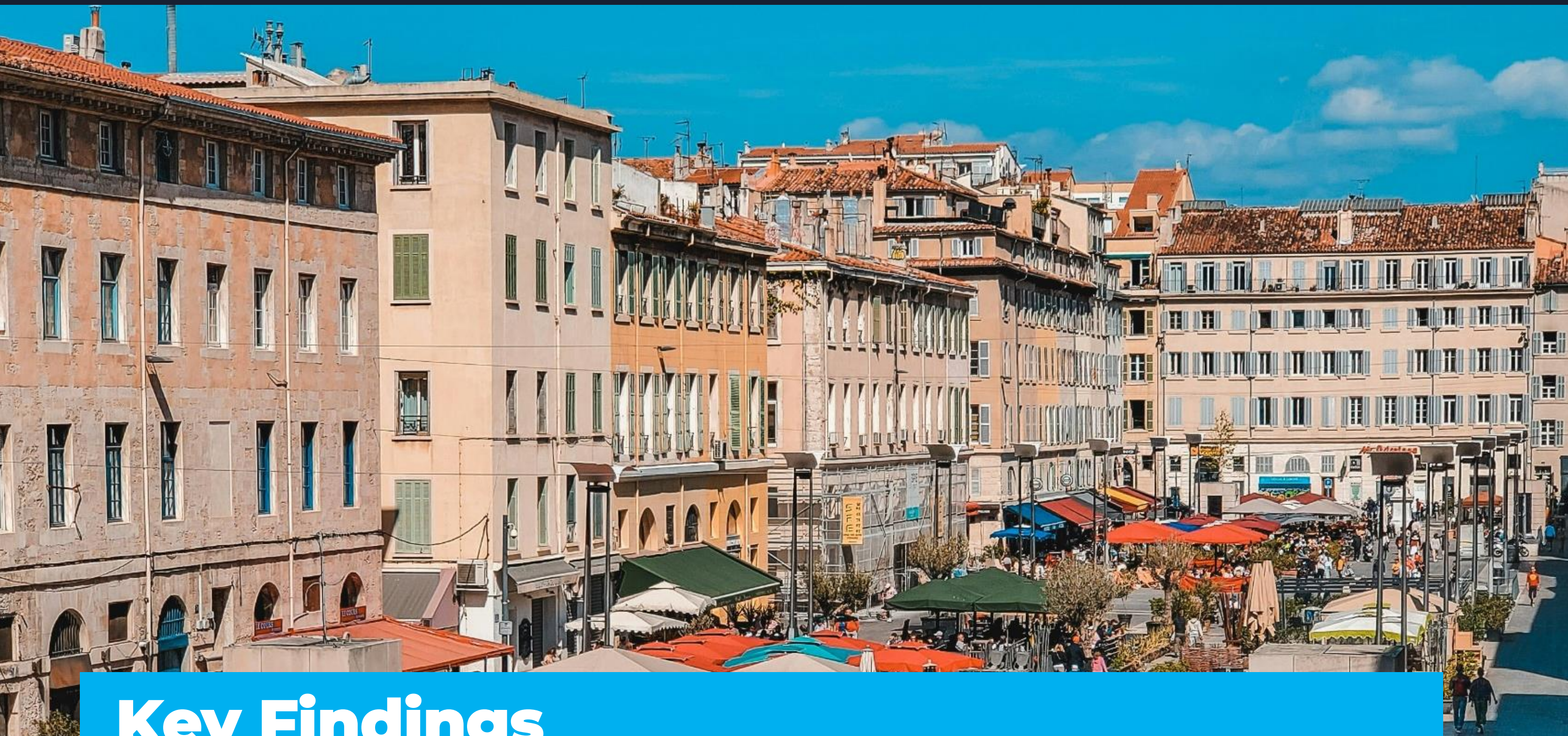
KEY FINDINGS





Key Findings

VISITOR ACTIVITY

Marseille welcomed around 2.4 million cruise passengers in 2024 with transit passengers significantly outnumbering turnaround passengers.

2.4M
Total Passengers

0.4M
Total Crew Members

73%
Share of Transit Passengers

27%
Share of Turnaround Passengers

Marseille Provence Cruise Terminal (MPCT) welcomed almost 1.8 million transit passengers in 2024, offering them access to the city for day visits during their cruise. An additional 660,000 passengers either embarked or disembarked on a cruise from MPCT during the year. In addition to the passengers, the city also benefitted from around 350,000 crew member visits in 2024 which further supported the local visitor economy.

Cruise Activity in Marseille

Marseille enjoys relatively stable cruise tourism demand year-round, with the busiest month of May seeing around three times as many cruise visitors as February, the quietest month. This sets it apart from many Mediterranean destinations, where seasonal fluctuations are more pronounced. Cruise demand in Marseille also experiences less seasonal variation compared to overall tourism flows in the Provence region as tourism visits are more heavily concentrated in the peak season summer months.

Note: Scaling is approximate for visualization purposes.

Cruise Brands and Class Segments

Costa Cruises and MSC Cruises dominate MPCT's cruise traffic, accounting for approximately 80% of passenger arrivals in 2024. Consistent with attracting many large and very large vessels and the heavy reliance on these two cruise brands, over 90% of both transit and turnaround passengers at MPCT undertook contemporary class cruises.

80%
Share of Arrivals Costa Cruises and MSC Cruises

90%
Share of Contemporary Class Cruises

Visitor Profile

Cruise visitors demonstrated different behaviours while in Marseille. Their activities were influenced by the nature of their trip. Transit passengers explored more than turnaround passengers, while crew members were most active during their time ashore.

	Turnaround Visitors	Transit Visitors	Crew Members
Source markets	**>80%** French	European mix	Italy and International
Age	**41%** 35-54 years	**44%** 35-54 years	**74%** <35 years
Visit patterns	**29%** first time visitors to Marseille and **6%** to France	**75%** first time visitors to Marseille and **41%** to France	**61%** recent visitors **7** average visits per year
Activities	**39%** Dining **27%** Stay overnight	**69%** Dining **54%** Explore	**67%** Dining **49%** Explore

Visitor Profile and Destination Engagement

Understanding variations in the profile and behaviour of different cruise segments is critical to inform the city's strategies for developing and enhance its cruise offering.

Source Markets

European markets were dominant among Marseille's cruise passengers. French travellers represented over 80% of turnaround passengers and the majority of transit passengers were from Europe. There was greater diversity among crew members with a fifth of the total from Italy and another 30% from Brazil and India.

Age Demographics

The most common age group among cruise passengers was 35-54. Transit visitors were slightly younger compared to turnaround passengers as more were more aged 18-34. Meanwhile, crew members stand apart demographically as nearly three quarters were aged below 35.

Visit Patterns

Highlighting the importance of cruise expanding the city's reach to new audiences, there were high levels of first-time visitation among cruise passengers. Three-quarters of transit passengers were discovering Marseille for the first time and 41% were visiting France for the first time. Among turnaround passengers, around 30% were new to the city and 10% were visiting France for the first time. Meanwhile, Marseille's importance as a port call for crew was underlined as 61% had visited on average around 7 times within the last 12 months.

Activity Profiles

Eating & drinking was a key activity for all types of cruise visitors, undertaken by 69% of transit visitors, 39% of turnaround visitors, and 67% of crew members. Crew showed particularly high engagement with the city as they undertook a high proportion of activities during shorter visits. Around a quarter of turnaround passengers stayed in the city, typically for one night before their cruise.

Visitor Spending and Economic Impact

Total direct spending by cruise passengers, crew members and cruise lines was €407 million.

Passengers and crew injected €146 million directly into Provence's economy, with over two-thirds concentrated in the retail and food & beverage sectors. Cruise lines contributed an additional €261 million, with 35% of this related to port charges and other fees. Together, this spending generated €407 million in direct cruise-related economic impact for the region.

€146M Passenger and Crew Spend + **€261M** Cruise Line Spend = **€407M** Cruise-related Spending

Direct visitor spending injects revenue into businesses, which then purchase from suppliers (indirect effects) and pay wages to employees who then spend their income in the wider economy (induced effects). Taken together, cruise-related spending resulted in a total economic impact of €610 million in the Provence economy in 2024, supporting €279 million in GDP. In the labour market, this equates to just under 4 thousand jobs and €179 million in linked wages.

€610M

Total Output from Cruise-related Spending in Provence in 2024

Economic Impacts of Marseille Cruise Activity

	Direct		Indirect		Induced		Total
Output	€407M	+	€102M	+	€101M	=	€610M
GDP	€176M	+	€48M	+	€55M	=	€279M
Employment	2,716	+	582	+	627	=	3,925
Wages	€121M	+	€29M	+	€28M	=	€179M

Note: Values may not sum due to rounding.

Local Business Survey

Most local businesses surveyed agreed the cruise industry has a positive impact on their organisation and the local economy.

Among the businesses surveyed, cruise visitors account for a sizeable share of their annual sales (circa 40% to 50%) and there was optimism this segment of their business could grow in the coming five years.

The surveyed businesses recognised positive impacts of the cruise industry in Marseille as around 80% agreed that cruise tourism is important for the local economy and over 60% appreciated the additional benefits that cruise tourism can generate through future non-cruise visits. Meanwhile, there was limited evidence to suggest negative impacts associated with cruising as around 60% disagreed that cruise visitors led to increased congestion or decreased cleanliness in the city.

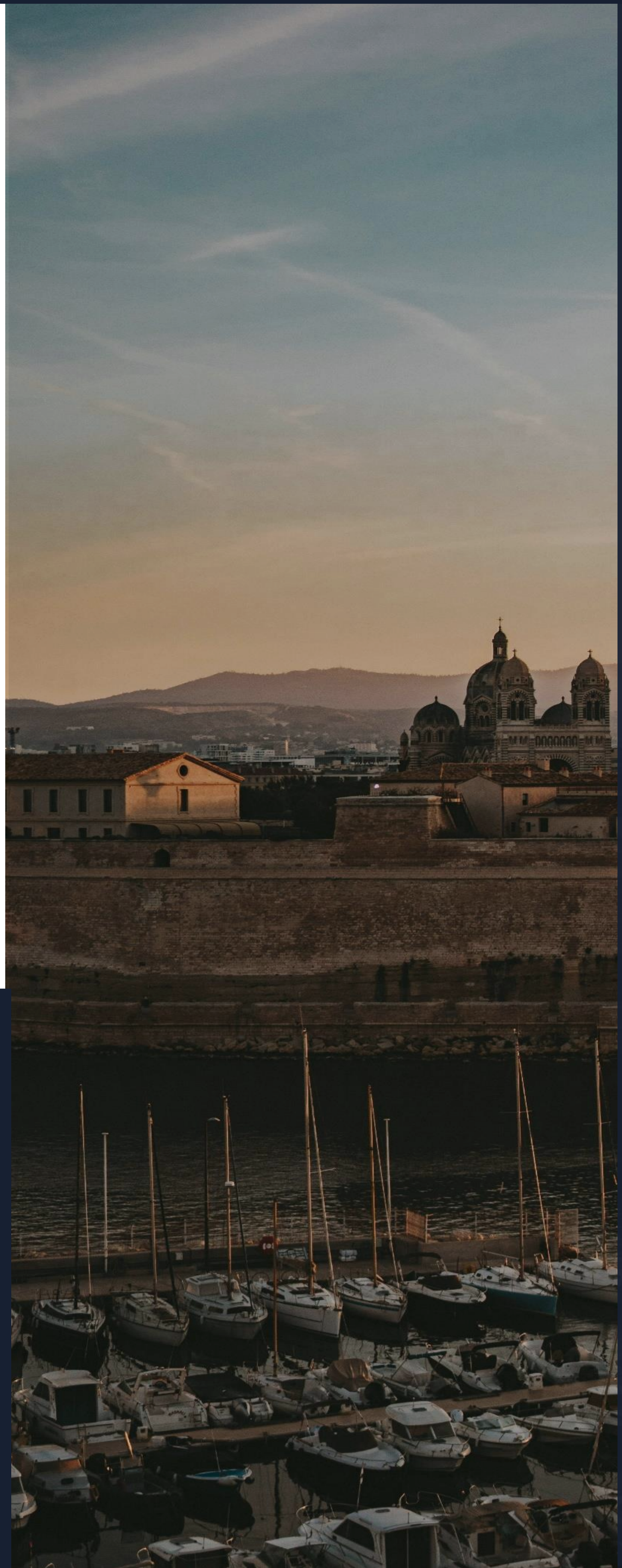
Overall, reflective of these positive perceptions, most businesses (79%) were satisfied with the current impact of cruise tourism in Marseille. However, when asked about suggestions to grow or improve cruise tourism impacts, businesses highlighted the need to develop more partnerships and co-ordination with cruise lines. This included efforts to encourage ships to stay longer in the city and spreading call visits more evenly during the season, with both ideas mentioned in about 60% of responses.

Current financial year: Estimate % of sales due to cruise visitors

49% Average

'Cruise visitors are important to the local economy in Marseille'

79% Agree



68% of businesses are confident that **sales linked to cruise visitors will grow** over the next five years.

79% of businesses are **satisfied** with the current visitor impact in Marseille

64% suggested longer stays by cruise lines would **improve cruise tourism impacts**

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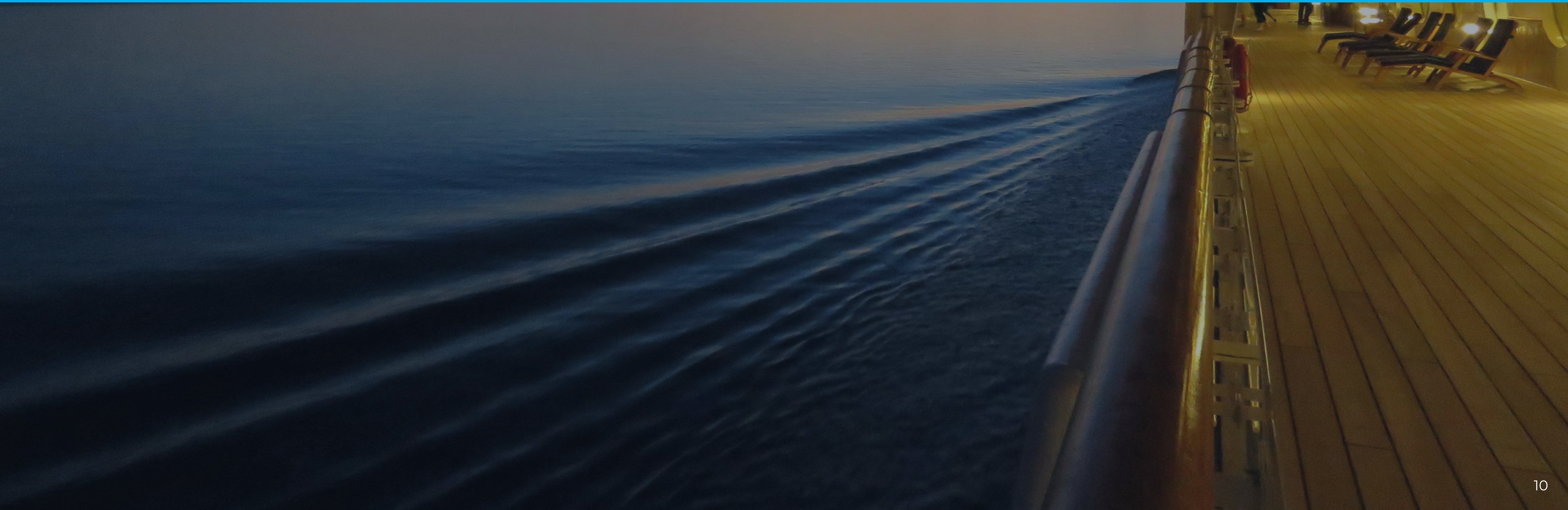
VISITOR ACTIVITY



3. Visitor Activity

Global Overview

The cruise industry has rebounded strongly since the end of the pandemic with global demand in 2024 around 20% above the previous high-water mark of 2019.

The cruise industry delivered an exceptionally strong performance in 2024, marking a full recovery to pre-pandemic occupancy levels. This was achieved alongside a more than 20% expansion in industry capacity over the same period, underscoring the impressive growth of global cruising in recent years. The strong rebound is particularly striking compared to other tourism sectors, such as U.S. hotel demand and international travel, which have struggled to achieve their 2019 benchmarks.

One factor which has contributed to drive up demand is cruising's growing reputation as a value offering. This has been particularly important in recent years as many consumers have become increasingly price conscious and value-driven when evaluating travel decisions. Expanding supply has also played an important role fuelling growth. This has been influential in attracting newer audiences to cruise, especially younger consumers. Consequently, total passenger demand has risen robustly from 30 million in 2019 to 35 million in 2024.

The industry's momentum has also reignited activity in cruise ship construction with a growing orderbook signalling strong confidence in future growth. Projections for 2025 indicate another positive year as global cruise deployment is expected to expand by an additional 5%.

European Cruise Demand Forecast

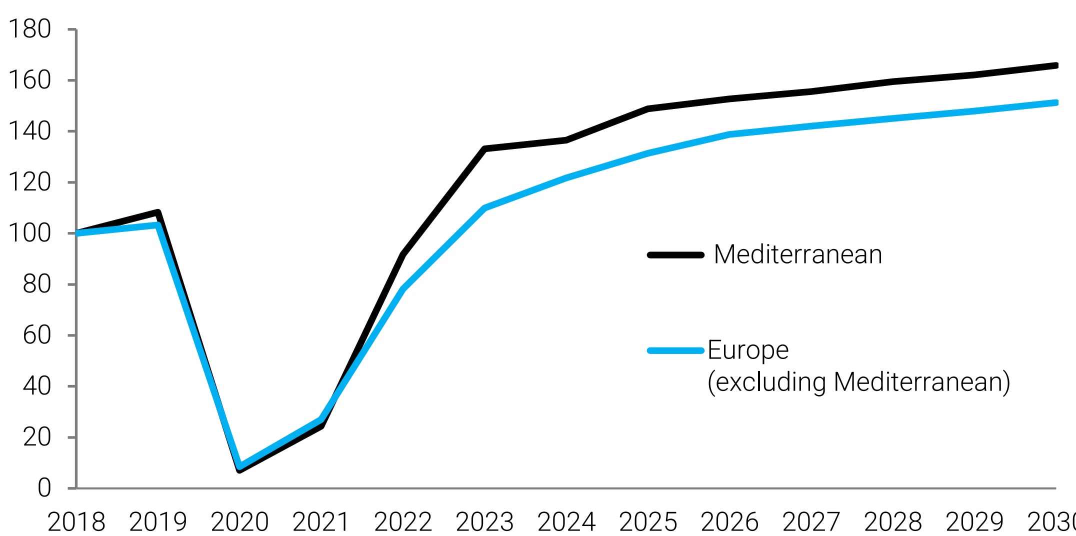
Cruise demand has recovered strongly in Europe with growth forecasted to continue, driven by accelerating interest in the Mediterranean.

The volume of cruises in the Mediterranean has grown at a faster pace than the industry overall as the region has enjoyed a stronger uplift in deployment since 2019. As a result, the number of cruisers visiting the region increased from 4.4 million in 2019 to 5.8 million in 2024, which marked particularly healthy growth of over 30% compared to global growth of around 20% during the same period.

Limited deployment opportunities in other parts of the world have driven the region's rising market share in recent years. However, as new supply enters the market, this trend is likely to soften the existing growth trend and activate new demand for Caribbean cruises. While growth in the next few years may be more subdued compared to recent highs, the region remains well-positioned with healthy levels of activity. In particular, the Mediterranean remains a dominant force in the luxury cruise segment. This segment is expanding at a rate two to three times faster than the overall industry, with the premium segment also contributing to regional growth.

Cruise demand

Index, 2018 = 100



Source: Cruise-IP, Tourism Economics

Marseille Cruise Visitor Activity

In 2024, Marseille welcomed around 2.4 million cruise passengers. While seasonality influences the flow of passengers during the year, Marseille has a protracted and balanced cruise season between April and November.

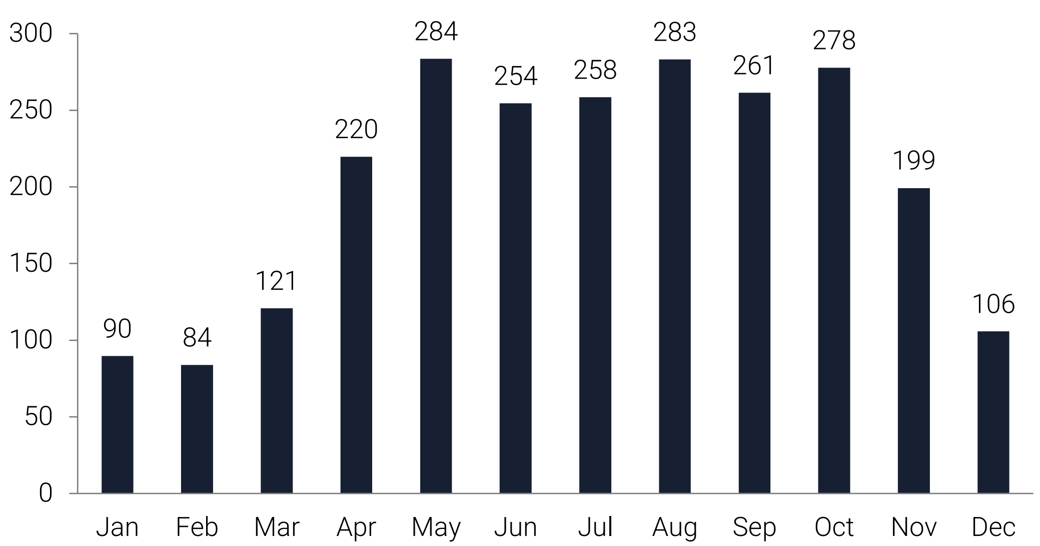
Cruise activity accelerated in April 2024 and reached its peak level in May with around 284,000 visitors. Visitation remained relatively stable during the summer and early autumn period, before slowing down in November with 199,000 visitors.

Visitation falls significantly during the colder period of December to March, with an average of around 100,000 visitors per month. Although this is less than half the levels seen during peak season months, this still represents a significant level of activity. Overall, we estimate visitation to Marseille in 2024 at close to 2.4 million.

According to Eurostat data based on overall tourism activity in the Provence region, travel activity peaks in July and August, which reflects the strong seasonality of the summer travel period and sees significantly lower volumes outside of these peak summer months. This contrasts with cruise tourism, which maintains more consistent demand throughout the year.

Number of visitors to Marseille's port by month in 2024 [1]

000's



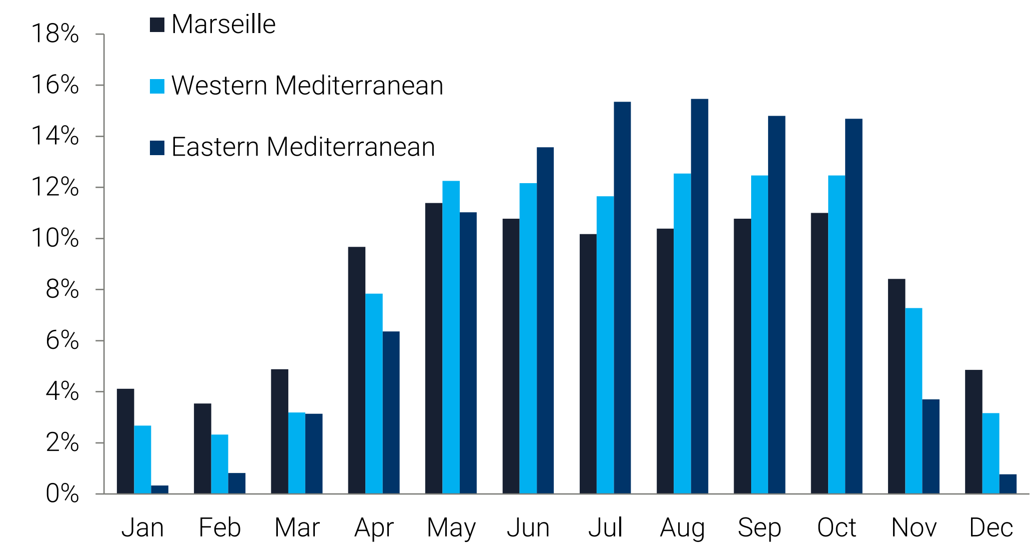
Source: Port of Marseille, Tourism Economics

1. Note: No data on visitors for November or December, so data is forecast by taking the low season port visitation as a percentage of capacity and assuming these trends will apply for November and December 2024 capacity forecasts.

Marseille's cruise demand is considerably less seasonal than the rest of the Western Mediterranean or the Eastern Mediterranean region, with the amount of capacity changing less between the winter and summer months. As an example, Marseille's busiest month in terms of cruise activity had around 3 times the volume of its quietest month. This compares to around 5 times in Western Mediterranean, and nearly 50 times in the Eastern Mediterranean, where winter activity is very low.

Monthly capacity compared to the rest of the Mediterranean

Monthly capacity as a share of annual capacity in 2024



Source: Cruise-IP, Tourism Economics

Cruise Seasonality by Region (2024)

Busiest month as a multiple of quietest month

Marseille	Western Mediterranean	Eastern Mediterranean
3x	5x	47x

Marseille Cruise Visitor Segmentation

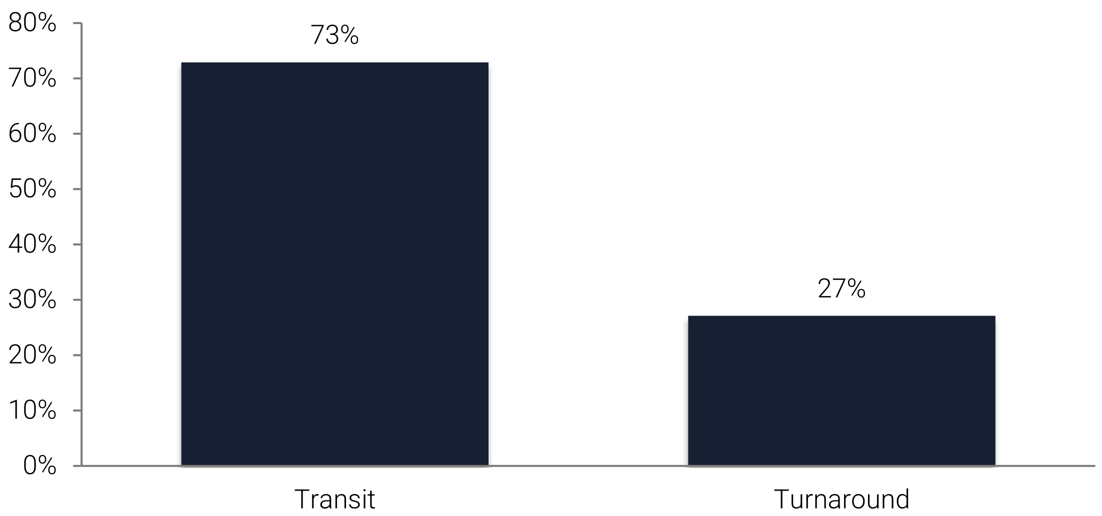
Marseille attracts both transit and turnaround cruise passengers, with transit visitors forming most arrivals. The vast majority of all passengers arrive on contemporary vessels carrying over 2,500 passengers.

Transit passengers are those that come ashore for a day to visit local attractions, shop, eat and drink, and carry out other tourism-related activities. Turnaround passengers embark or debark at the beginning or end of their cruise itinerary. These passengers typically incur additional expenses, including transport costs to reach Marseille, and accommodation costs, if they choose to stay overnight before and/or after their cruise.

Advantageously for Marseille, a mix of both transit and turnaround passengers interact with the city. That said, reflecting the popularity of Marseille as part of the Western Mediterranean cruise itinerary, most cruise passengers are transit visitors who spend the day visiting the city.

Passenger arrivals by visit type

% of total passengers

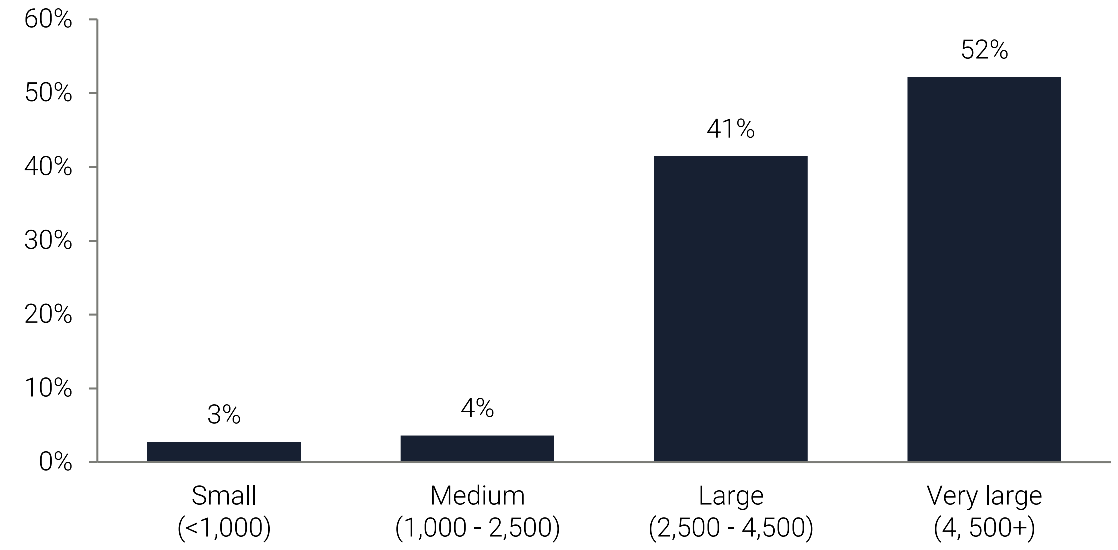


Source: Port of Marseille, Tourism Economics

In 2024, over half (52%) of cruise passengers that sailed through the Port of Marseille did so on very large cruise ships, with capacity of more than 4,500 passengers. Large cruise ships – vessels with a capacity of between 2,500 and 4,500 passengers – contributed a further 41% of cruise traffic. Of the remaining passengers, 4% travelled on medium-sized cruise ships, with a capacity between 1,000 and 2,500 passengers, and 3% were on small cruise ships, which can carry fewer than 1,000 passengers.

Passenger capacity by cruise ship size

% of passengers

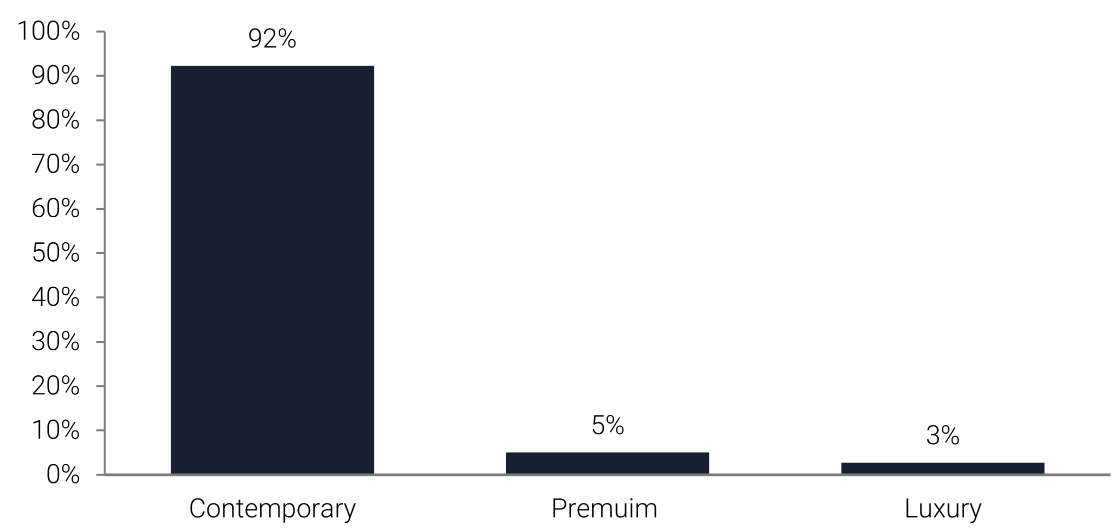


Source: Cruise-IP, Tourism Economics

Cruise brand segmentation by class reflects size differences, as premium and luxury operators typically use smaller vessels with higher crew-to-passenger ratios. Consistent with attracting many large and mega-sized vessels, Marseille welcomes a high proportion of contemporary class cruise brands. Indeed, this segment represented over 90% of passenger capacity in Marseille in 2024. This was largely driven by significant call activity at the port by MSC Cruises and Costa Cruises brands. Meanwhile, premium and luxury cruise segments collectively accounted for just 8% of passenger capacity during the year.

Passenger capacity by cruise brand class

% of passengers



Source: Cruise-IP, Tourism Economics

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CRUISE VISITOR RESEARCH

4. Cruise Visitor Research

Introduction

Comprehensive primary research was carried out among passengers and crew visiting Marseille between May and October 2024, providing detailed insights into how cruise visitors engage with the city, including their spending patterns.

Primary research was undertaken to evaluate and understand the behaviour, experience, and spending profile of three different cruise segments - transit passengers, turnaround passengers and crew members – visiting the city.

Increased understanding of the needs and behaviours of specific cruise segments provides opportunities for the city's business community to develop effective initiatives aimed at growing and improving the economic footprint of the cruise industry in the city.

As well as capturing insights to better understand the needs and behaviours of cruise visitors, the survey captured critical information about the expenditure behaviours of different types of cruise visitors. This spend data was utilised to inform our economic impact analysis for Marseille which is set out later in this report.

Methodology

The survey was conducted using face-to-face interviews at MPCT. Overall, 1,011 interviews among passengers and 61 among crew were achieved.

A survey was undertaken among cruise passengers and crew via face-to-face interviews conducted by fieldworkers at MPCT between May and October.

The questionnaire was developed to enable a comprehensive understanding of the behaviour, experience, and spending impact of cruise visitors to Marseille. The final questionnaire was developed and agreed after consultation with representatives of MPCT.

The interviews were carried out using tablets and mobile devices with questionnaires translated into German, Italian, and French.

Sampling days were scheduled to achieve a balanced representation of feedback from different visitor types, cruise lines and brand segments. In total, 1,011 interviews among cruise passengers were achieved including 671 transit interviews and 340 turnaround interviews. Meanwhile, 61 interviews were captured among cruise line crew during the sampling period.[1]

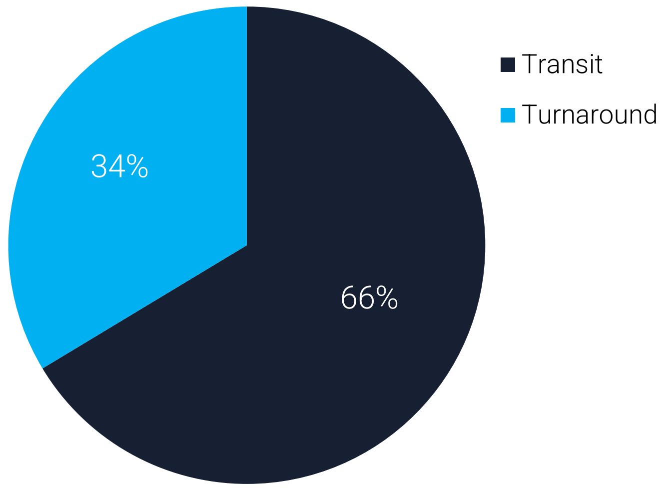
Cruise Passenger Survey Sample

The survey achieved a representative sample across travel types (transit and turnaround), cruise brands (notably Costa and MSC), and brand classes (mainly contemporary).

Reflecting the underlying distribution of cruise passengers who come to Marseille, most of the interviews achieved were among transit visitors (66%) with the remainder (34%) among turnaround visitors, typically about to embark on a cruise from Marseille.

Cruise passengers by visitor type

% of respondents



Source: Tourism Economics

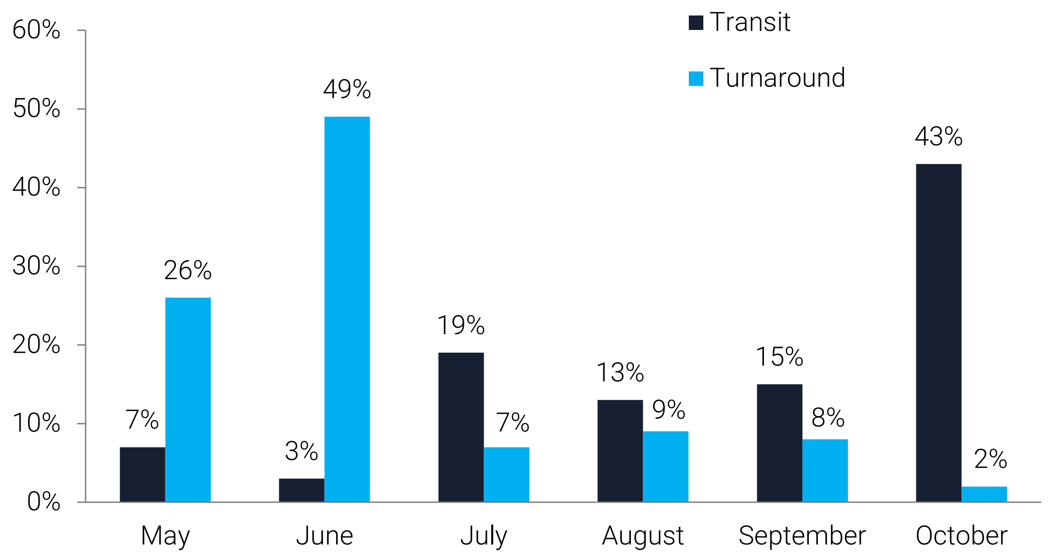
1. Note: Initiatives were implemented during the period to achieve a higher sample of crew members in the research. Efforts included targeting crew at specific locations in and around MPCT and undertaking communications to raise awareness of the research among the cruise lines calling at the port.

Cruise Passenger Survey Sample (cont.)

Feedback from both transit and turnaround visitors was collected between May and October 2024. Turnaround passengers were more represented early in the first two months, while efforts later focused on transit visitors, leading to a higher share of transit responses in October.

Cruise passenger monthly interviews

% of respondents



Source: Tourism Economics

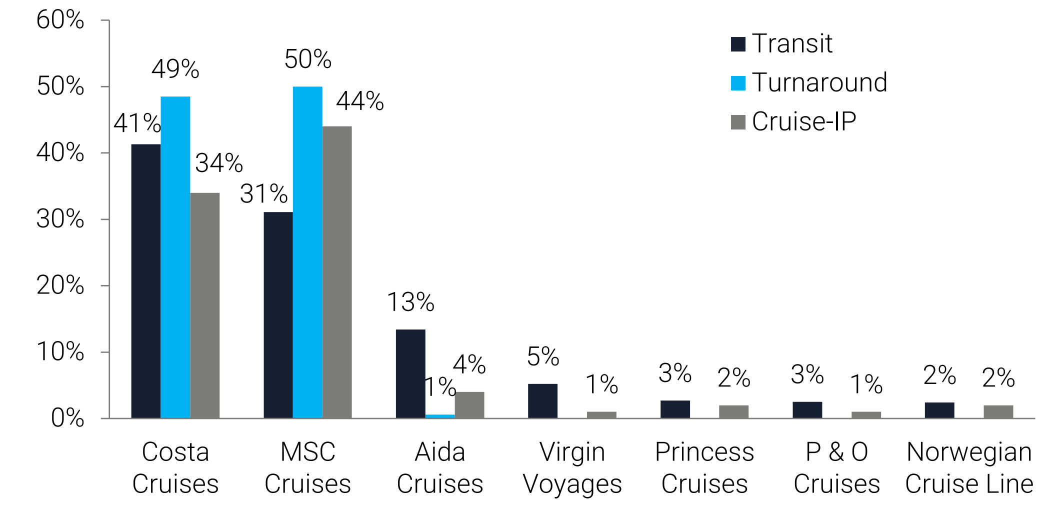
Reflecting the sampling approach of the survey, the responses broadly aligned with the overall distribution of deployment by brand according to Tourism Economics' Cruise-IP, the most comprehensive cruise industry database available, covering current and future global performance.

As a result, the most popular cruise line brands were Costa Cruises and MSC Cruises. Used by 41% of transit visitors, Costa Cruises was the dominant brand facilitating transit visits. This was followed by MSC Cruises (31%) with a range of other operators, including AIDA Cruises and Virgin Voyages, accounting for an additional 18% of transit visitor responses.

Among turnaround visitors, the importance of Costa Cruises and MSC Cruises was particularly pronounced as these two brands made up 99% of the sample of interviews achieved among turnaround visitors.

Cruise passenger cruise brand

% of respondents and % of passenger capacity

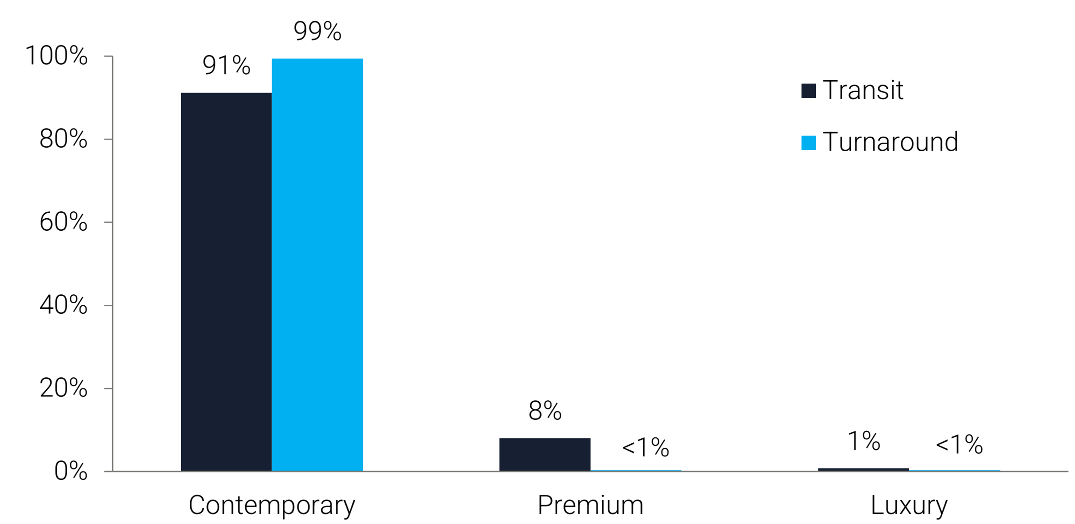


Source: Tourism Economics, Cruise-IP

Heavily influenced by the importance of Costa Cruises and MSC Cruises, 91% of transit passenger respondents and 99% of turnaround passenger respondents travelled on a contemporary cruise. Of the remaining transit passengers, 8% sailed with a premium class cruise brand and 1% with a luxury operator.

Cruise passenger cruise brand class

% of respondents



Source: Tourism Economics

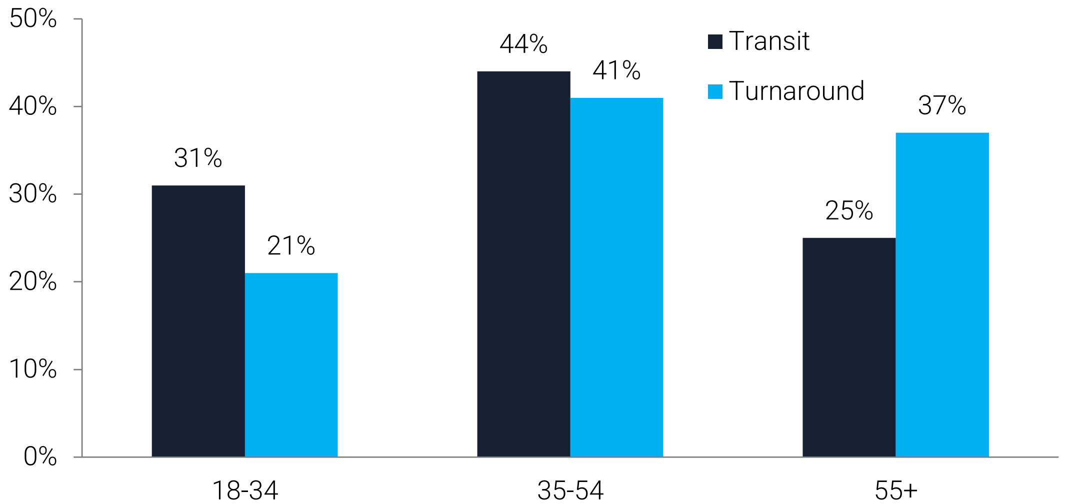
Cruise Passenger Visitor Profile

The primary age group was 35-54, with most cruisers travelling as couples. The French market dominates turnaround passengers, while non-French passengers—particularly Italians and Germans—are more prevalent among transit passengers.

The largest share of respondents for both transit and turnaround passengers were aged 35 to 54 at 44% and 41%, respectively. Turnaround passengers tended to be older, with 37% aged 55 or above compared with 25% of transit passengers, reflecting the younger profile of transit cruisers.

Cruise passenger age group

% of respondents

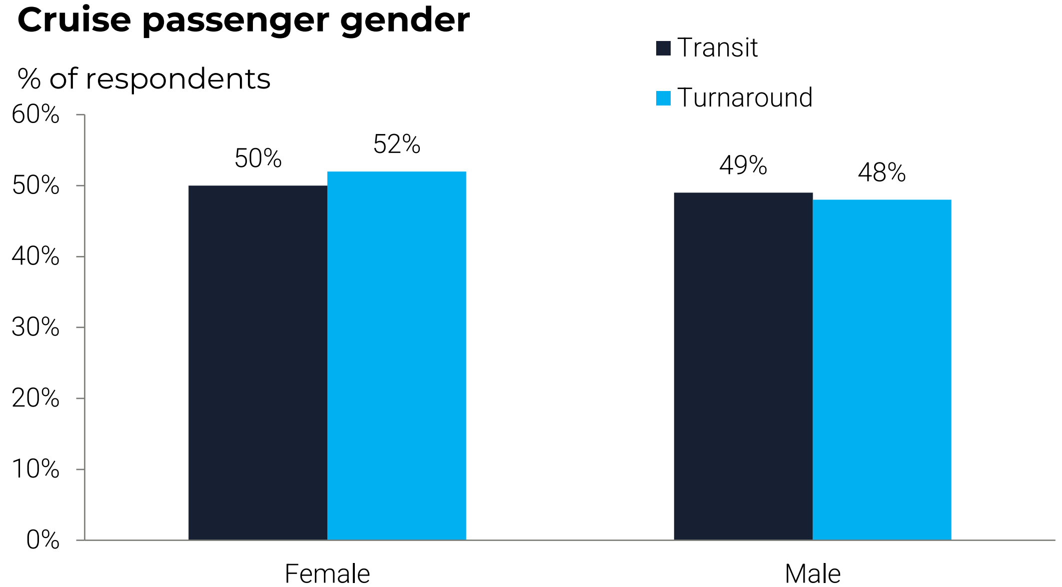


Source: Tourism Economics

There was little difference in the gender split with a broadly even share of male and female respondents among both transit and turnaround visitors.

Cruise passenger gender

% of respondents

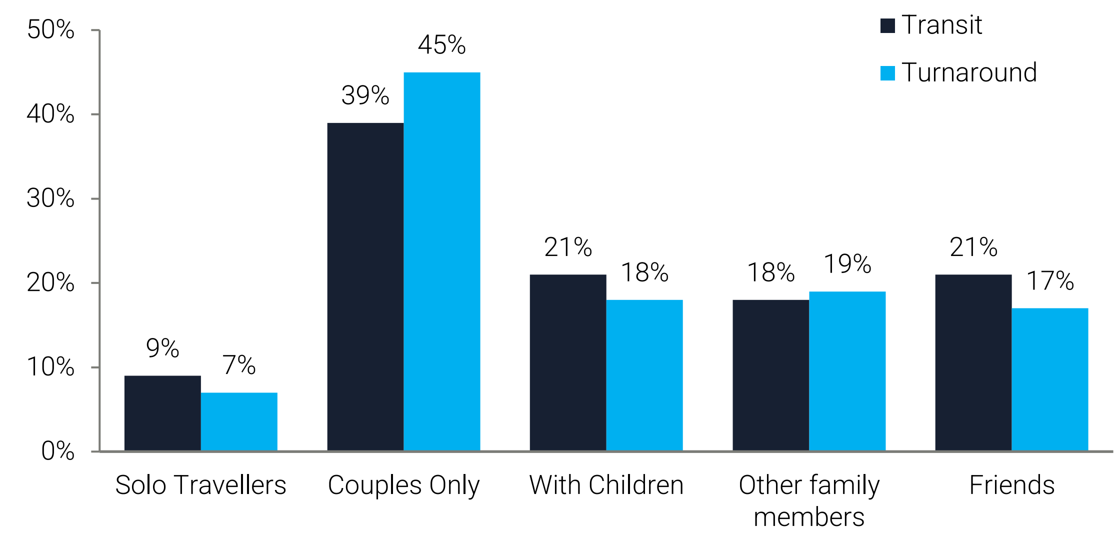


Source: Tourism Economics

Most passengers cruised as couples without other companions, comprising around 40% of cruise passengers overall and slightly more among turnaround. The next most common travelling party included children (circa 20%), while just under 10% cruised on their own. The remainder were with other family members or friends. The composition of travel parties was similar across transit and turnaround passengers, with a slightly higher proportion of couples among turnaround visitors (45% vs. 39%). This is consistent with the older age profile and greater share of domestic visitors among turnaround passengers.

Cruise passenger travelling party

% of respondents



Note: Multiple response question hence sum may exceed 100%.
Source: Tourism Economics

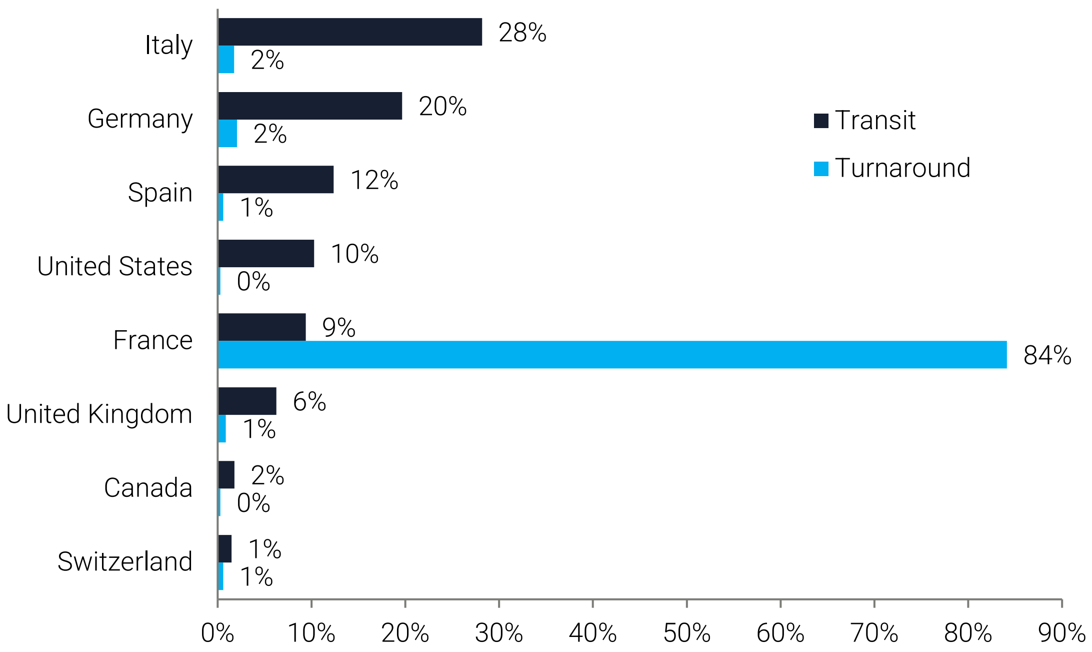
Cruise Passenger Visitor Profile (cont.)

The vast majority of transit cruise visitors to Marseille were international, with less than 10% from France. Most came from other European countries, primarily Italy and Germany. A significant share also came from Spain, the United States and the United Kingdom.

In contrast, 84% of the turnaround visitors were from France, with the rest mainly from Italy and Germany. These findings underscore Marseille's role as a key embarkation port for French travellers as well as its appeal to international passengers seeking to embark on a Mediterranean cruise.

Cruise passenger country of origin

% of respondents

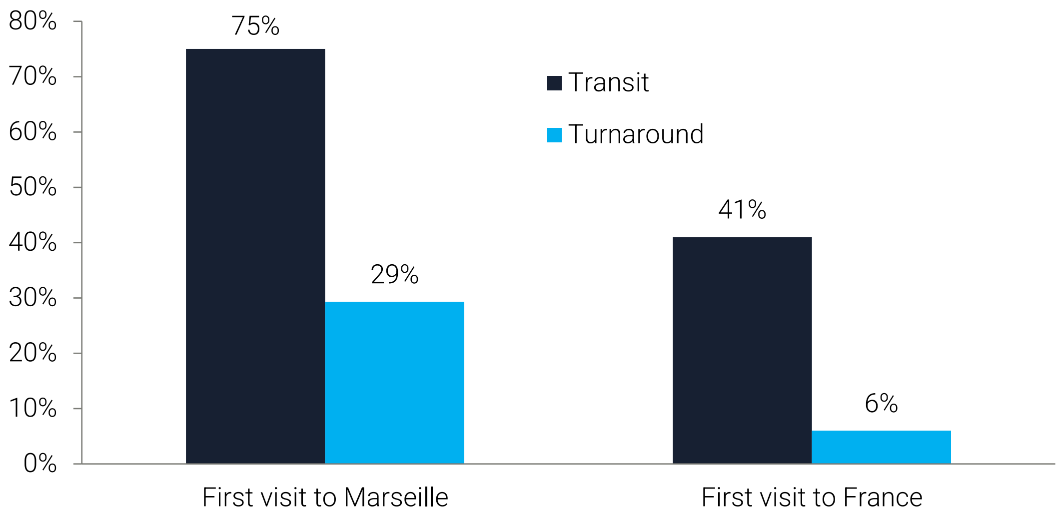


Note: Only markets with 1% or more of responses are displayed.
Source: Tourism Economics

Survey respondents were asked whether it was their first time in France and in Marseille. Most turnaround passengers had visited both before—94% had been to France and 71% to Marseille, respectively—reflecting the fact that most of them are French residents. On the other hand, many transit visitors were new to both: 75% of respondents were visiting Marseille for the first time and 41% were on their first visit to France. This highlights the role of transit visits in introducing the city and France to new audiences.

Cruise passenger first time visit to Marseille or France

% of respondents



Source: Tourism Economics

84% of turnaround visitors were from France. Meanwhile, around **90%** of transit visitors were international.

75% of transit visitors were visiting Marseille for the first time which highlights the importance of cruises in attracting new audiences.

Cruise Passenger Destination Engagement Activities & Dwell Time

The most common activity undertaken was eating and drinking. Transit visitors were more likely to engage in activities overall, but turnaround visitors typically spent more time in Marseille due to overnight stays.

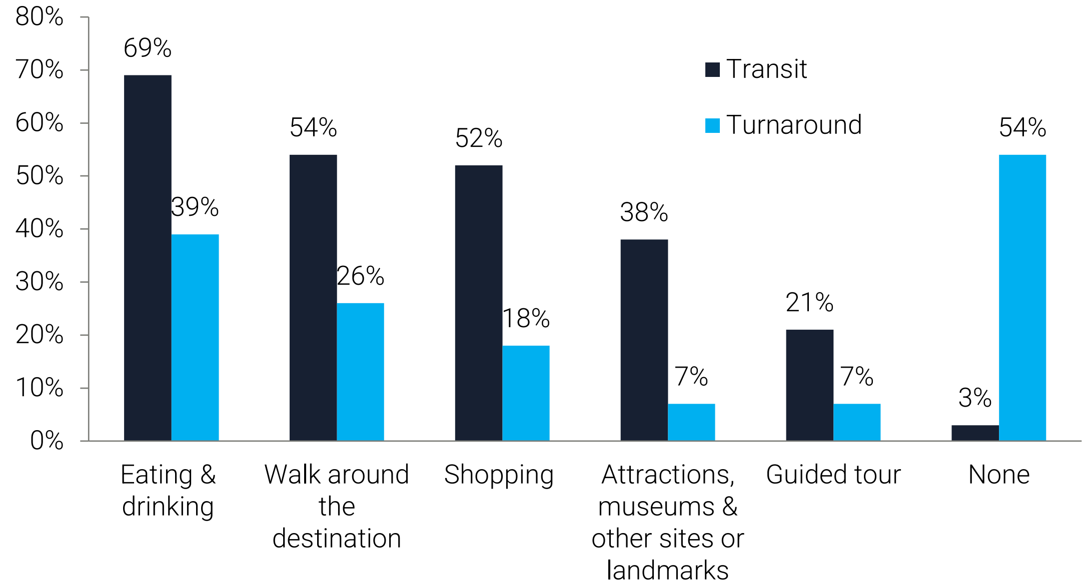
The survey asked passengers about the activities they engaged in while visiting Marseille, offering valuable insights into the cruise industry's local impact.

Eating and drinking was the most common activity across both visitor types, followed by walking around, an important aspect of a visit which activates different types of activities such as visits to local businesses, and shopping.

Transit visitors reported having engaged with a wider range of activities compared to turnaround visitors. For example, nearly 70% of transit visitors ate or drank while in the city compared to around 40% of turnaround visitors. These results are reflective of the nature of turnaround visits, which are often focused on starting or ending a cruise. Nevertheless, a significant share of around 40% of turnaround visitors still engaged in at least one activity while in the city.

Cruise passenger activities undertaken

% of respondents

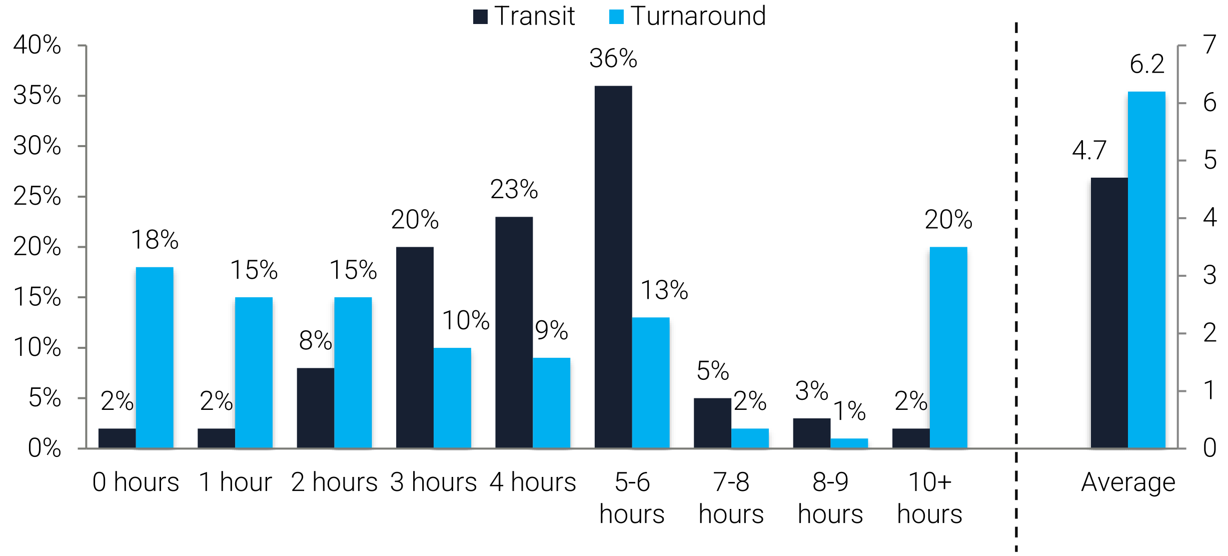


Source: Tourism Economics

The survey also gauged how much time visitors spent in the city. Reflecting that some turnaround visitors stayed overnight before and/or after their cruise, the average dwell time for turnaround visitors was higher compared to transit visitors at circa 6 hours versus circa 5 hours for transit visitors. Interestingly, around a third of turnaround passengers spent under 2 hours in Marseille compared to just 4% of transit passengers. This suggests that some turnaround visitors were primarily focused on connecting with their cruise and had limited time to engage in activities.

Cruise passenger dwell time in Marseille

Average hours, distribution (LHS) and average number of hours (RHS)



Source: Tourism Economics

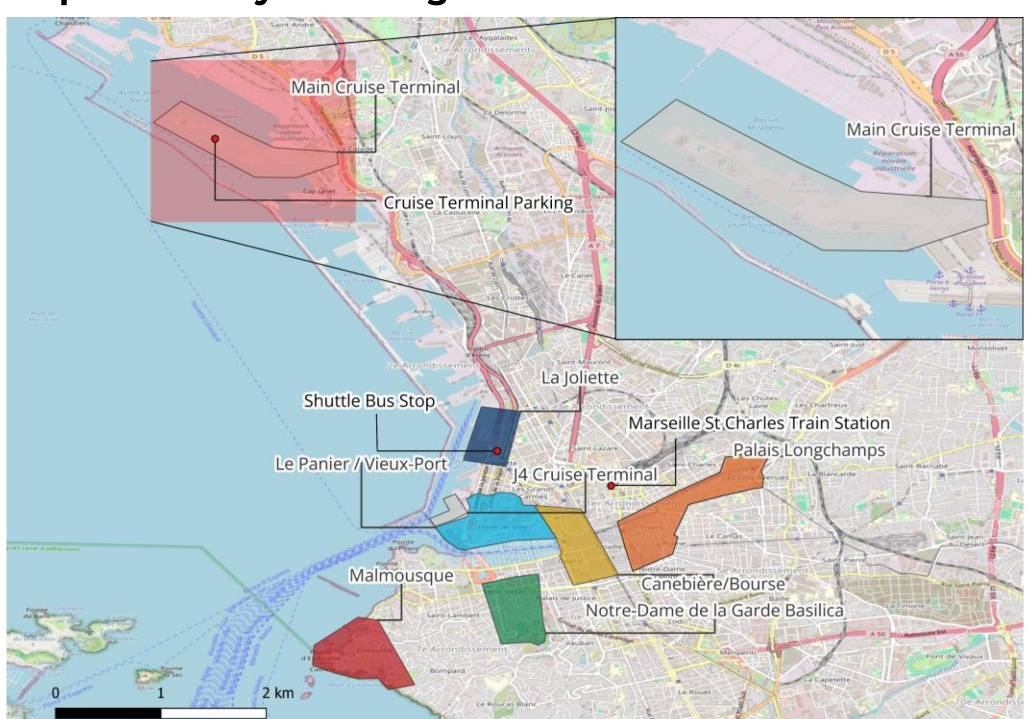
Geolocation Analysis

Mobile device data highlights significant tourism dispersal among cruise visitors. Le Panier/Vieux-Port and Canebière\Bourse were the most popular areas. However, cruisers tend to spend longer in destinations further away, such as Avignon.

Leveraging mobile device signal data provides valuable insights into visitation patterns to Marseille and the surrounding area by cruise visitors. Overall, the results suggest that cruise visitors explore a range of locations in and around the city, suggesting their impact is geographically dispersed across the wider area.

Based on defined locations which were agreed in partnership with MPCT, the most visited area for transit passengers was Le Panier, Marseille's oldest district, with narrow streets and cultural sites. Le Panier attracted 52% of transit passengers who had their devices tracked and 56% of turnaround passengers. These visitors spent around 2 hours in the district which indicates a high level of engagement with the area. The second most visited site for transit passengers and the most visited site by turnaround passengers was Canebière\Bourse, a mile-long historic avenue. This area attracted around 40% of tracked devices among transit passengers and over 50% among turnaround passengers. Other popular destinations were La Joliette, with its shopping district and art galleries; Norte-Dame de la Garde, a Catholic basilica; Malmousque, a former fishing harbour in Marseille with a small port and picturesque cove; and Palais Longchamp, a park surrounding a historical monument.

Map of the city outlining the terminal and main visitation points

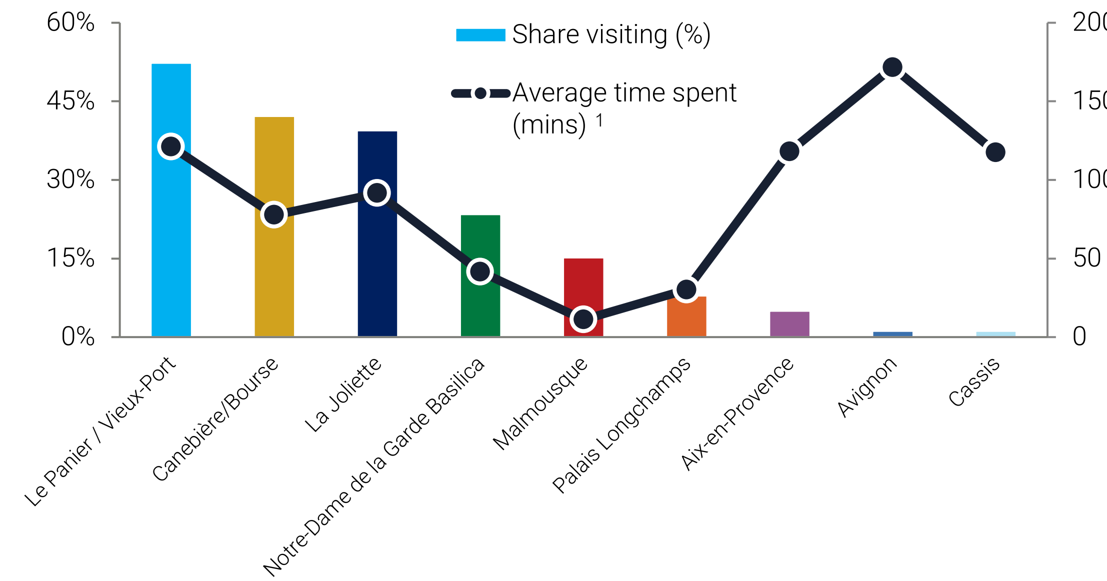


Source: Tourism Economics

Note: Aix-en-Provence, Arles, Avignon, and Cassis are not included in the map.

Transit passenger movements in Marseille and nearby areas

Percentage of cruise devices tracked (LHS) and average time at each location in minutes (RHS)

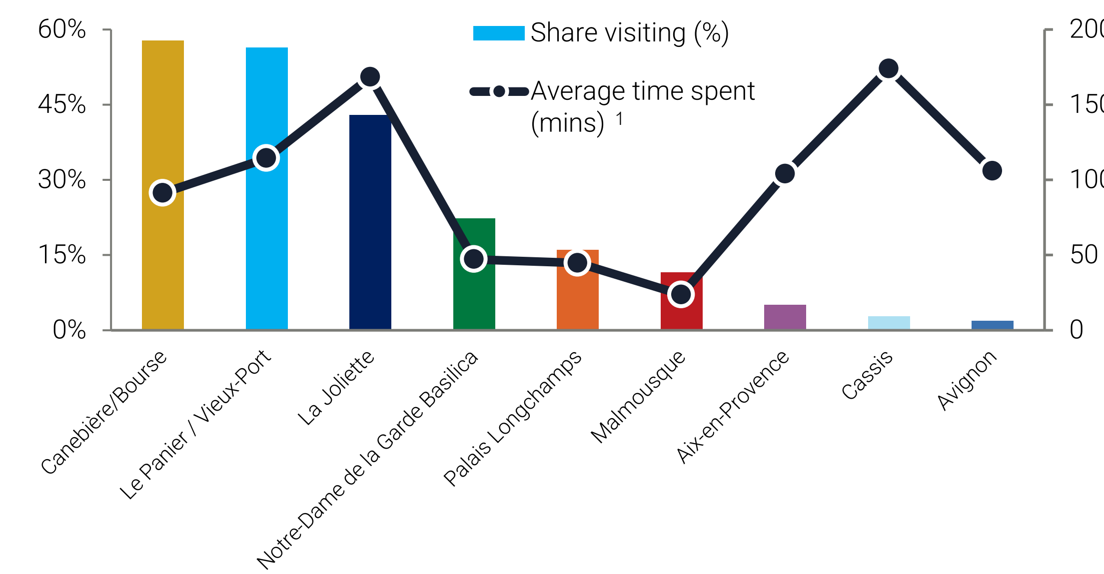


Source: Tourism Economics

The three destinations not shown on the map are: Aix-en-Provence, a city near Marseille; Cassis, a popular tourist destination known for its coves; and Avignon, a location known for its significant history. Although a notably smaller proportion of tracked devices visited these areas, the average time spent at these locations was high. This implies that cruise visitors undertook activities and experiences in these locations which again helps to underscore their importance to the area.

Turnaround passenger movements in Marseille and nearby areas

Percentage of cruise devices tracked (LHS) and average time at each location in minutes (RHS)



Source: Tourism Economics

1. Note: Estimates of time spent in locations depend on phone signals and data roaming settings and should be considered as indicative. As a result, the true time spent in these areas may be higher.

Accessing the Port (Turnaround Visitors)

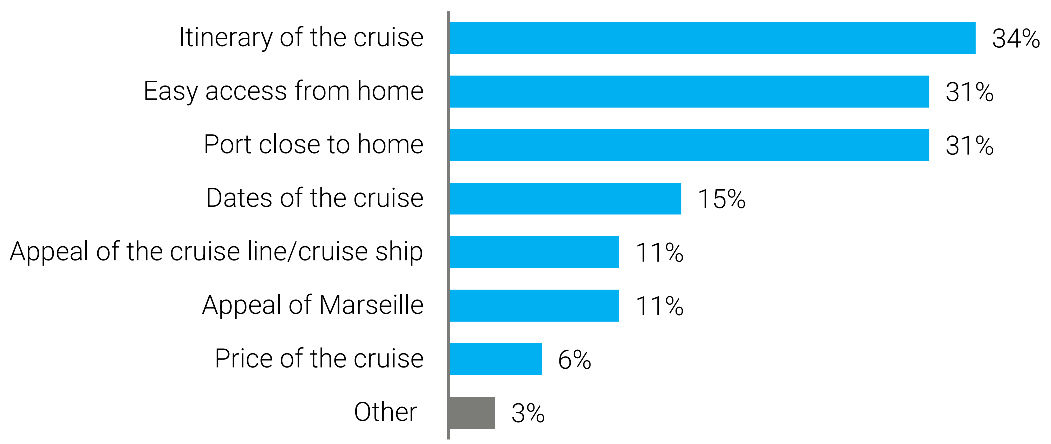
Most turnaround visitors chose Marseille for its convenient connections to Mediterranean cruises. Reflecting the high share of domestic visitors, most arrived into the city by private car or train.

Turnaround passengers were asked about their reasons for choosing Marseille as an embark port. The most common reason, mentioned by 34% of respondents, was the cruise itinerary and specifically interest in cruising in the Mediterranean. This was followed closely by practical factors such as 'easy access from home' and 'port close to home', mentioned by around 30% of respondents. The relevance of these motives is unsurprising given the high proportion of turnaround passengers that live in France (84%).

Overall, practical considerations dominated the choice of Marseille, with only about 10% attracted by the cruise ship or brand. Attracting additional cruise brands and/or new vessels to the city may help drive up interest among new audiences seeking cruise experiences. Meanwhile, around 10% mentioned an underlying interest in wanting to visit Marseille itself. Efforts to raise the city's profile could increase appeal, encouraging more passengers to visit as part of their cruise and potentially extend their stay before or after the cruise, activating additional benefits.

Cruise passenger reasons for choosing Marseille as embark port

% of respondents

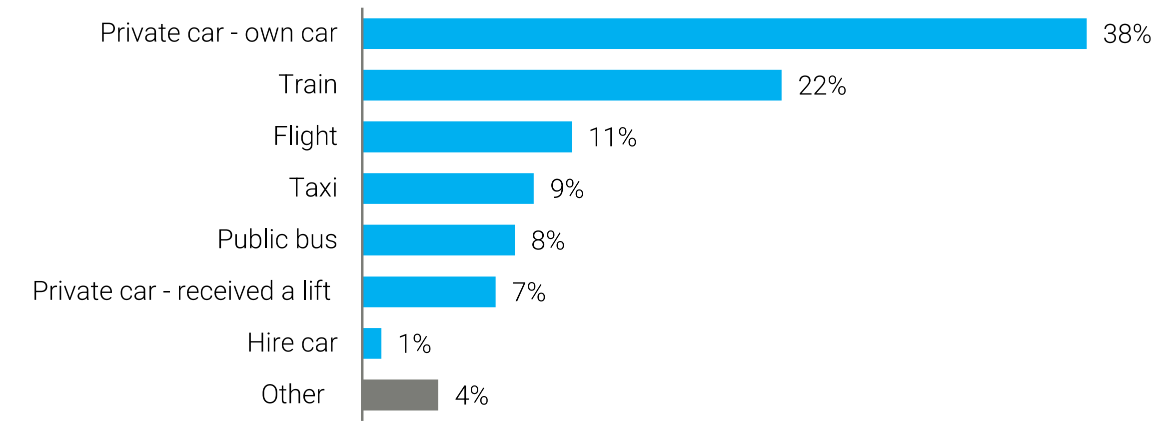


Source: Tourism Economics

The high proportion of French passengers among turnaround visitors underlines the importance of road and rail connections to the city. This is reflected in the research, with over 40% arriving by private car (either driving themselves or as passengers) and around 20% arriving by train.

Cruise passenger form of transport to get to Marseille

% of respondents

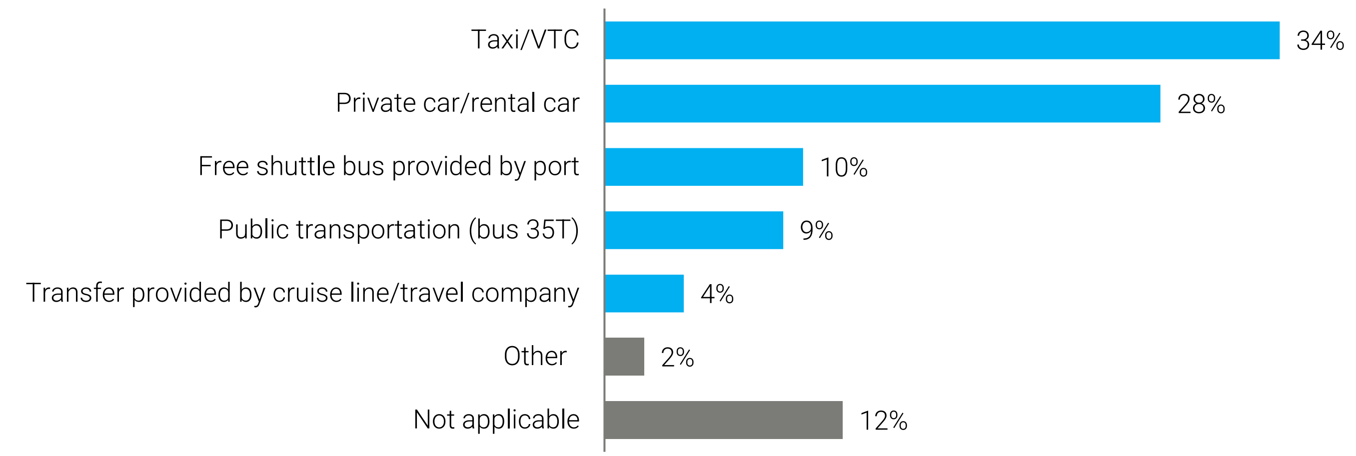


Source: Tourism Economics

In a follow up question, turnaround visitors were asked how they arrived at the port from the city centre. While private car was the dominant form of arrival into the city, visitors were more likely to rely on taxis than private cars to access the terminal itself. Meanwhile, other forms of transportation such as the free shuttle bus and public buses were used occasionally.

Cruise passenger form of transport to get to port

% of respondents



Source: Tourism Economics

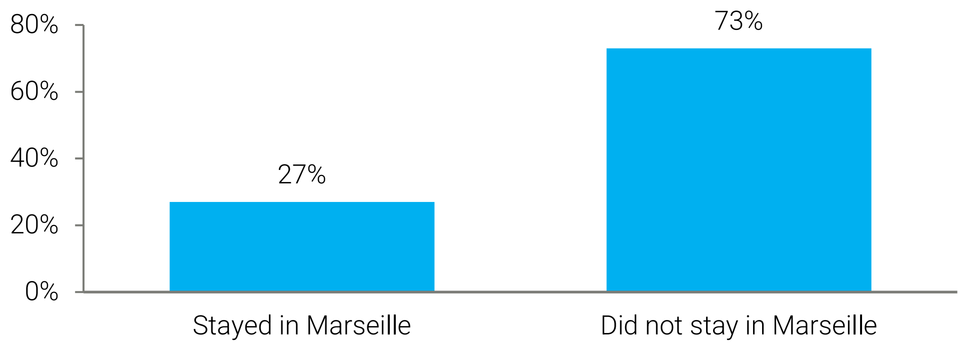
Overnight Visitation (Turnaround Visitors)

Around a quarter of passengers stayed in Marseille before or after their cruise. While international visitors were most likely to stay overnight, many domestic visitors also chose to stay. The typical stay was one night in a hotel prior to the cruise.

Turnaround visitors were asked if they had stayed or planned to stay in overnight in Marseille as part of their cruise trip. Overall, 27% confirmed they stayed or intended to stay. While international visitors were more likely to stay, with around half spending at least one night in the city, the role of domestic visitors is also significant, with 20% choosing to stay overnight. These findings highlight Marseille's appeal to both domestic and international visitors who stay in the city as part of a cruise trip.

Cruise passenger overnight visitation in Marseille

% of respondents

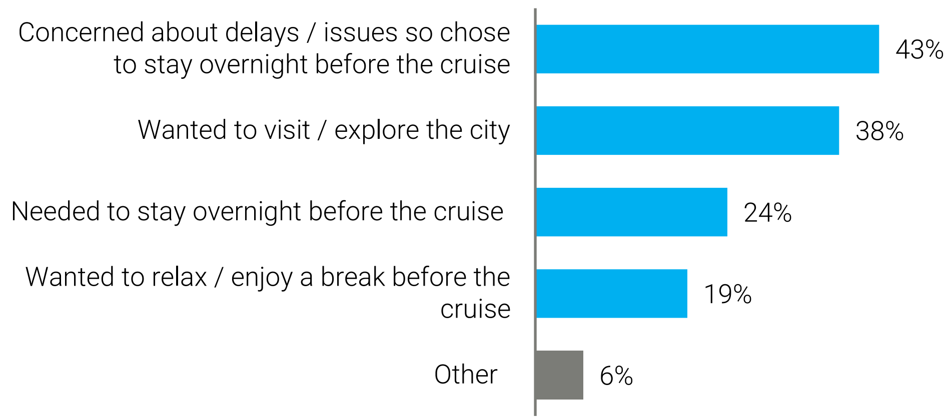


Source: Tourism Economics

Among those who stayed in the city, the vast majority (92%) were staying before embarking on their cruise. The main reason was convenience to avoid potential issues connecting with the cruise. Meanwhile, a sizeable portion of nearly 40% opted to stay in Marseille because they wanted to explore and experience the city before embarking on their cruise.

Cruise passenger reasons for staying in Marseille before the cruise

% of respondents

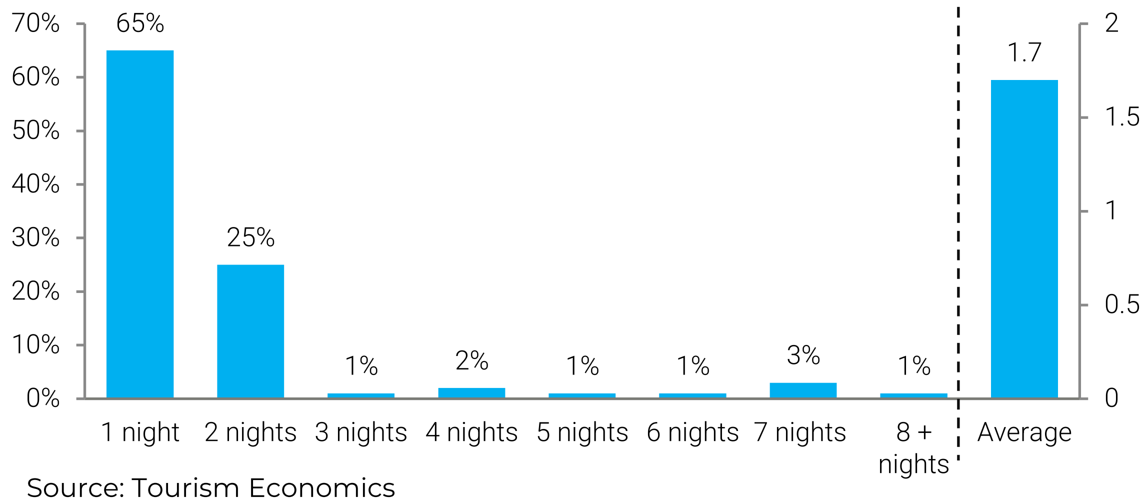


Source: Tourism Economics

Those who decided to stay in Marseille before and/or after their cruise tended to stay for 1 night although the average length of stay was 1.7 nights as some stayed multiple nights.

Nights in Marseille

Average nights, distribution (LHS) and average number of nights (RHS)



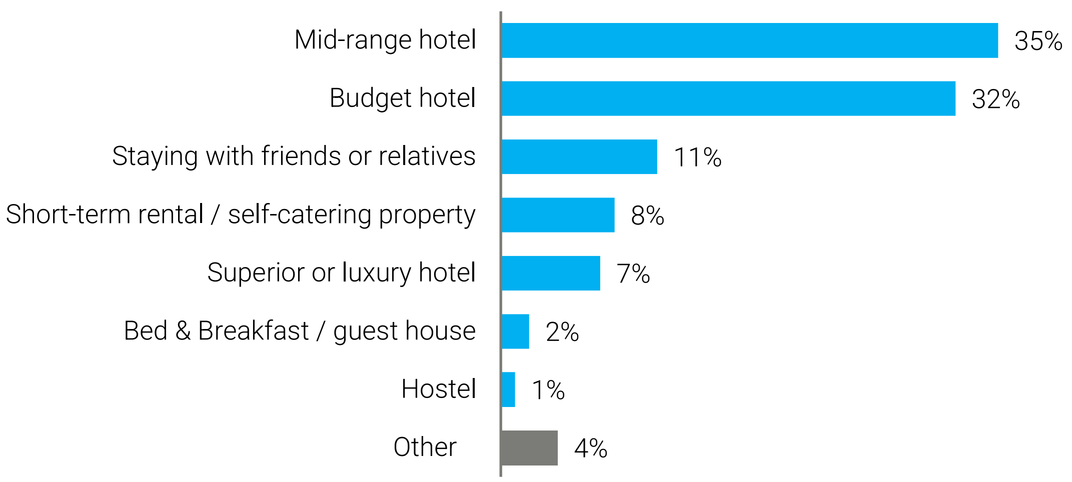
Source: Tourism Economics

Around a fifth (19%) of turnaround visitors reported staying or planning to stay overnight elsewhere in France, outside Marseille. These visitors stayed an average of five nights, highlighting the extended travel associated with cruise trips and the additional economic benefits for other regions.

Among those staying in Marseille, the majority chose mid-range or budget hotels, which together accounted for 60% of responses. A notable 11% stayed with friends or relatives, reflecting the significant domestic cruiser population. The least common accommodations were hostels (1%) and Bed & Breakfasts or guest houses (2%).

Cruise passenger form of accommodation in Marseille

% of respondents



Source: Tourism Economics

Passenger Spending

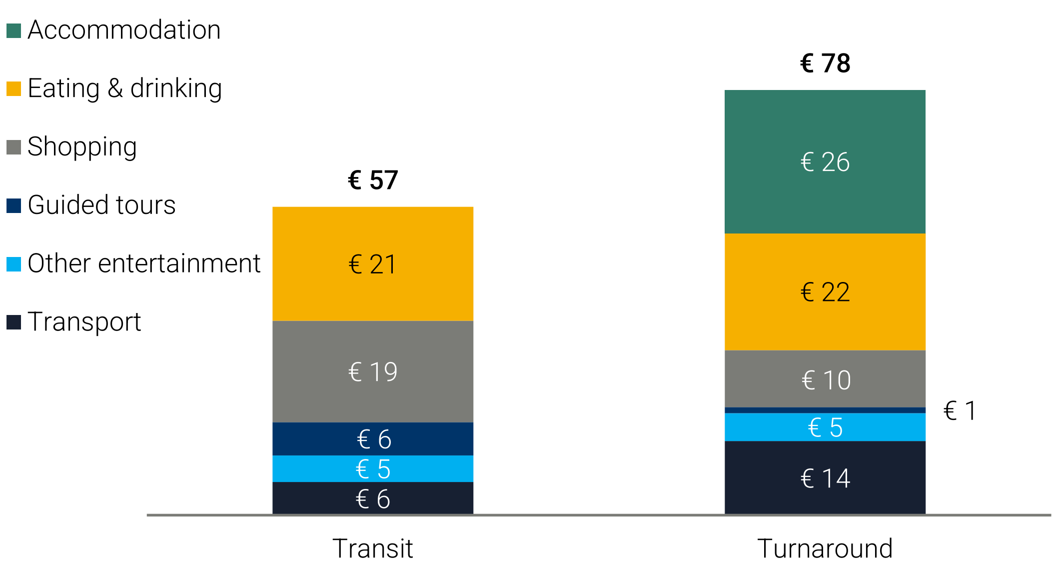
Turnaround passengers spent more on average (€78) than transit visitors (€57), mainly due to accommodation costs. However, transit visitors tended to spend more on activities and shopping.

Turnaround passengers spent an average of €78 per person, compared to €57 for transit passengers. This higher spend per person among turnaround visitors was largely driven by accommodation costs, which averaged to €26 per person, regardless of whether they stayed in the city.

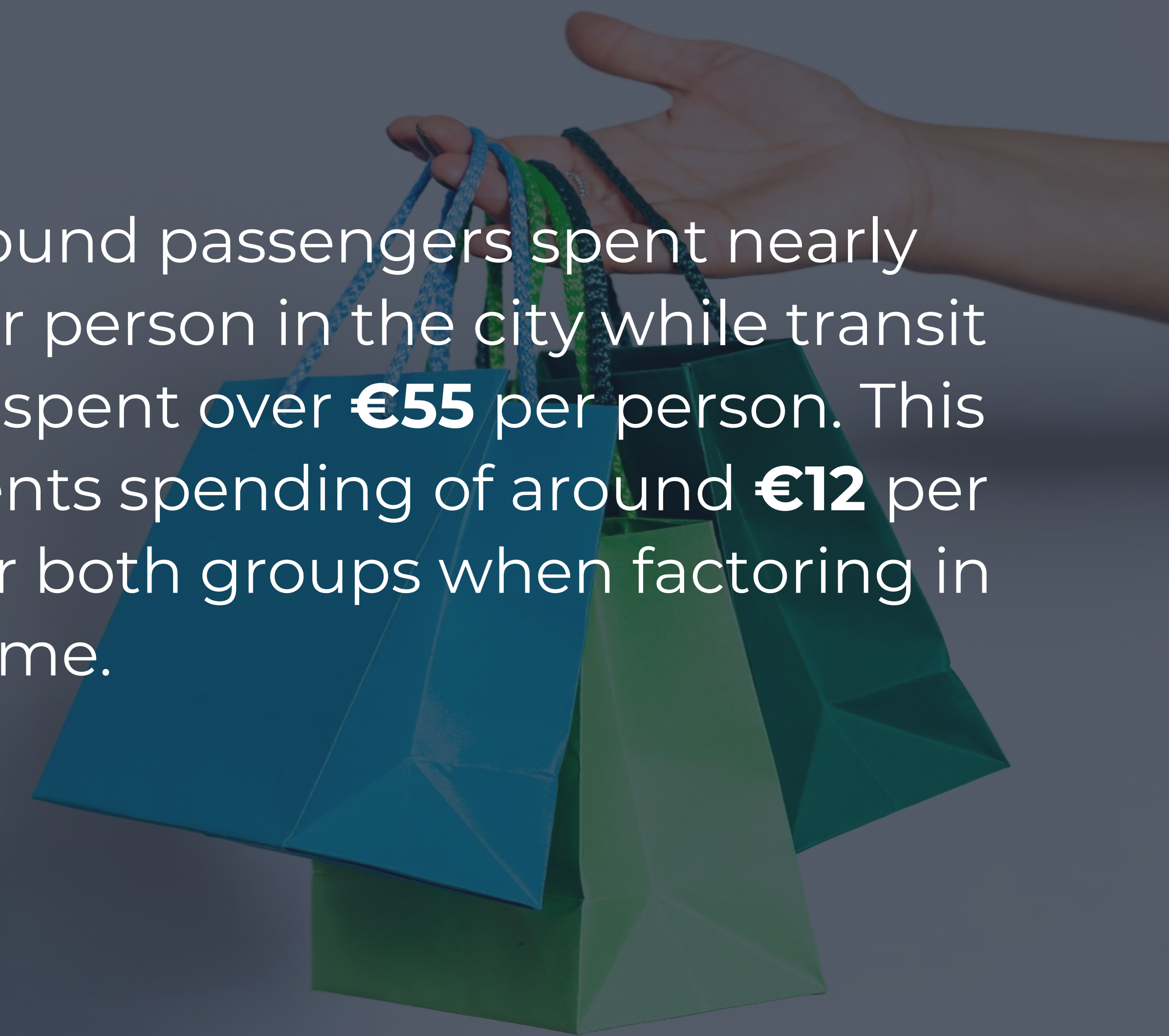
Excluding accommodation costs, transit passengers spent more per person than turnaround passengers. This aligns with earlier findings showing that transit visitors engage in a wider variety of activities while in Marseille. Transport costs, however, were significantly higher for turnaround passengers, who often relied on public transport, taxis to reach the port or travelled by private car, incurring fuel and parking expenses. Conversely, transit passengers spent notably more on shopping and guided yours than turnaround passengers.

While turnaround passengers generate a larger overall economic footprint in the local economy, it is noteworthy that spend intensity, which factors in both dwell time and expenditure, was similar for both types of cruise visitors at around €12 per hour.

Cruise passenger expenditure on goods and services
Euros



Source: Tourism Economics



Turnaround passengers spent nearly **€80** per person in the city while transit visitors spent over **€55** per person. This represents spending of around **€12** per hour for both groups when factoring in dwell time.

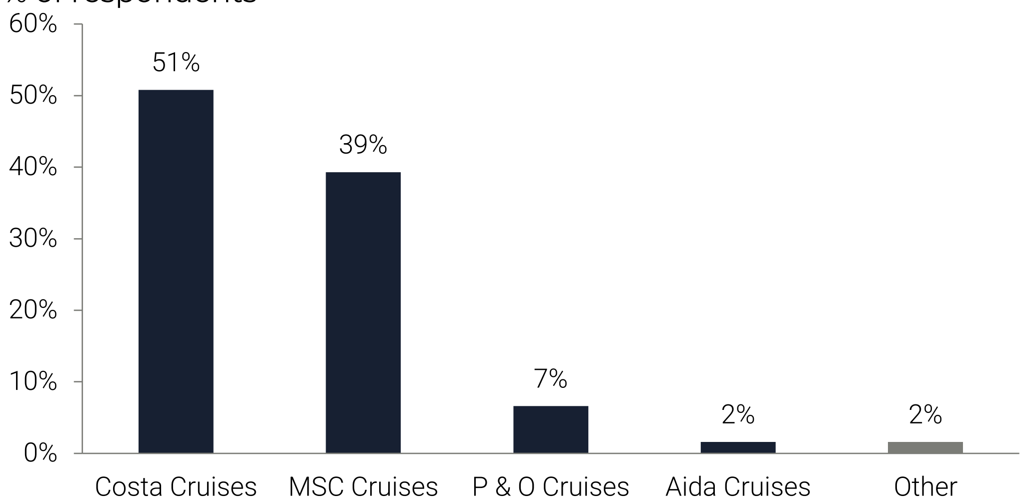
Crew Member Survey Sample & Profile

Cruise employees who come ashore at Marseille are internationally diverse, typically younger and more likely to be males than cruise passengers.

Consistent with the passenger survey and reflecting the importance of the two brands that call most regularly at the port, the vast majority (90%) of crew members surveyed worked for Costa Cruises and MSC Cruises. The remainder were from P&O Cruises (7%), Aida Cruises (2%) and other unspecified cruise brands.[1]

Crew member cruise brands

% of respondents

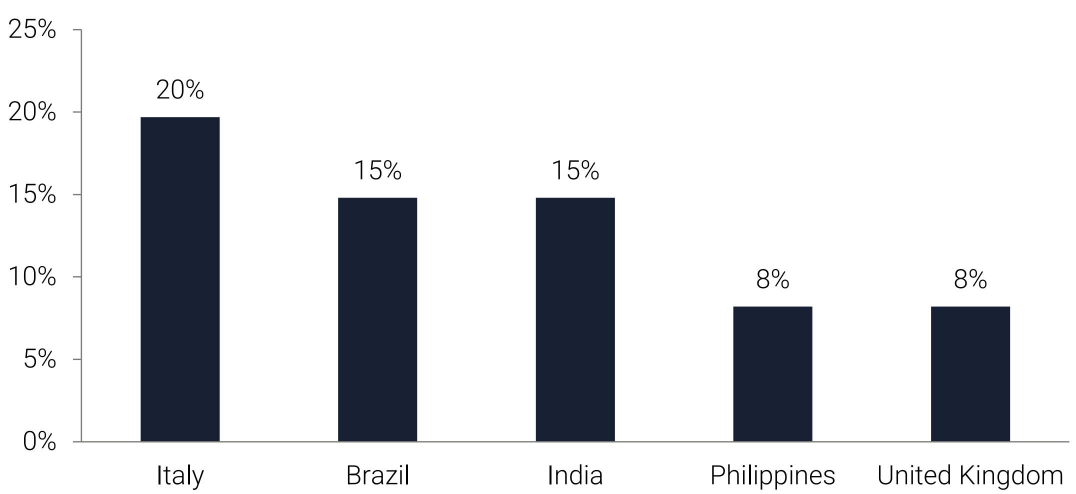


Source: Tourism Economics

Among the 61 crew members surveyed, 21 different nationalities were represented, which highlighting the diversity of this group. The most common origins were Italy (20%), followed by Brazil and India (both 15%).

Crew member country of origin

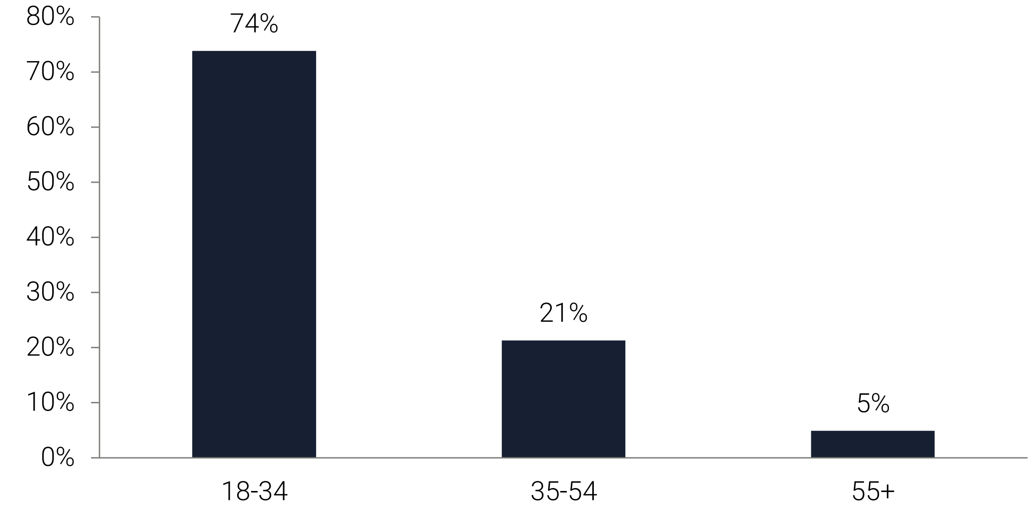
% of respondents



Source: Tourism Economics

Crew member age group

% of respondents

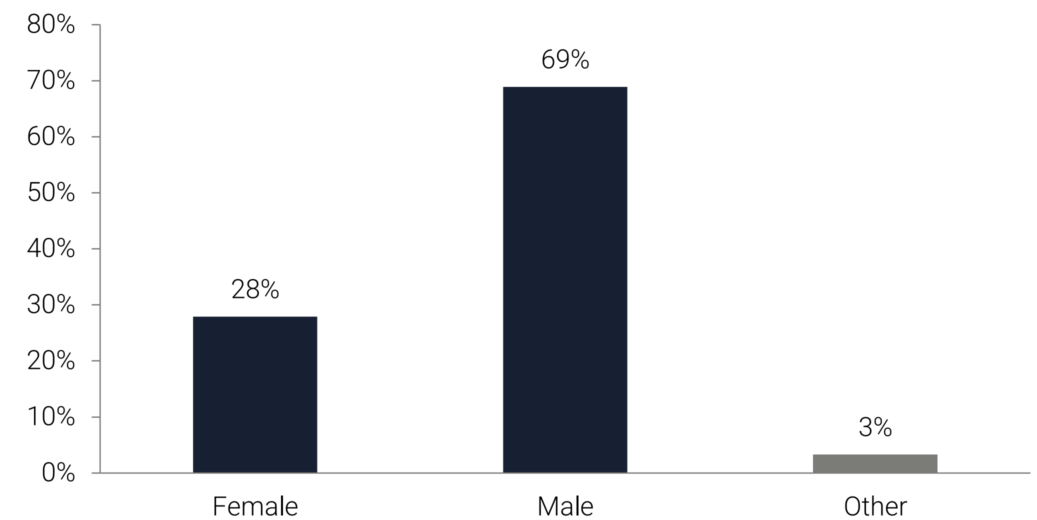


Source: Tourism Economics

Crew members were notably younger and predominantly male compared to passengers. Over 74% were aged between 18 and 34, more than twice the proportion among passengers, while nearly 70% were male, compared to a more balanced gender distribution among passengers.

Crew member gender

% of respondents



Source: Tourism Economics

1. Note: The sample size for the crew member survey is 61 respondents. As a result, the results should be considered as indicative, and caution is required when drawing inferences from these results.

Crew Member Destination Engagement

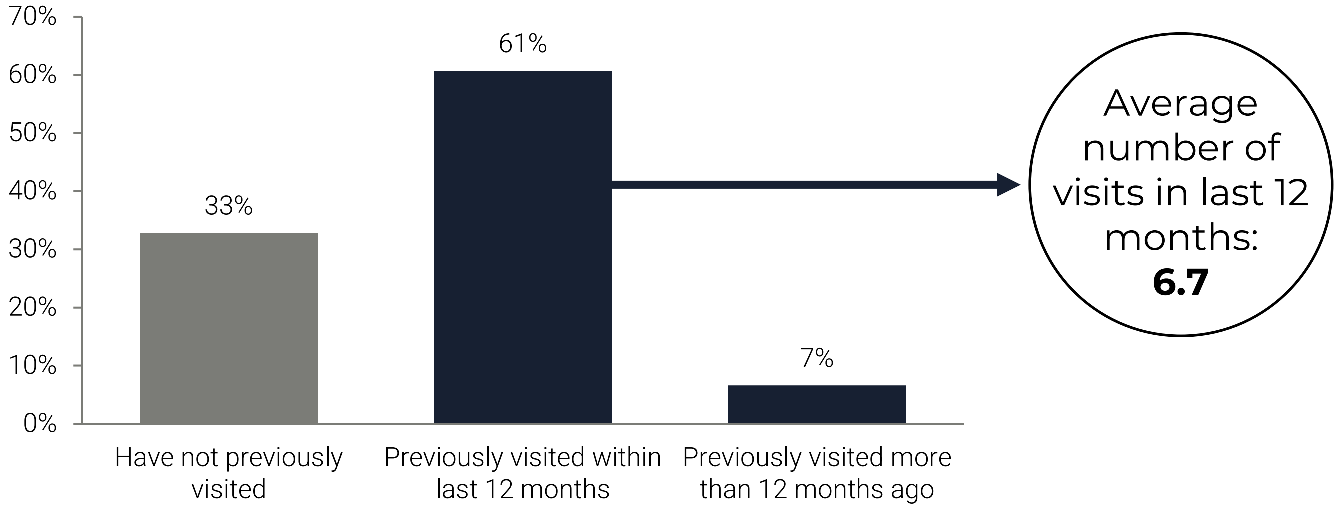
Crew members showed strong engagement with the city, often visiting multiple times per year and mostly leaving the terminal to explore. Their top activities were eating and drinking, walking, and shopping. They undertook a greater variety of activities during a shorter visit compared with passengers.

Crew members were asked about their frequency of visits to Marseille to better understand their visitation behavior. Over half (61%) reported having disembarked in Marseille within the last 12 months, indicating strong engagement and familiarity with the city. A smaller share (7%) had disembarked more than 12 months ago, while 33% had never disembarked in Marseille.

Among those who had visited within the last year, the average disembark frequency was 6.7, suggesting that a segment of the crew visits regularly, approximately every two months.

Crew member previous Marseille visitation (while working)

% of respondents

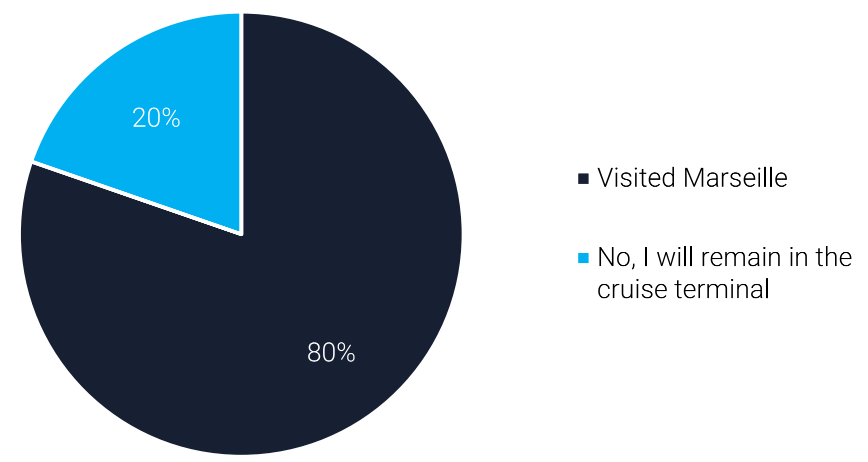


Source: Tourism Economics

Crew members were also asked if they intended to visit Marseille on their current cruise stop or remain in the terminal. Encouragingly, the vast majority (80%) stated that they intended to visit Marseille, with only 20% planning on staying at the cruise terminal.

Crew member visitation of Marseille city

% of respondents

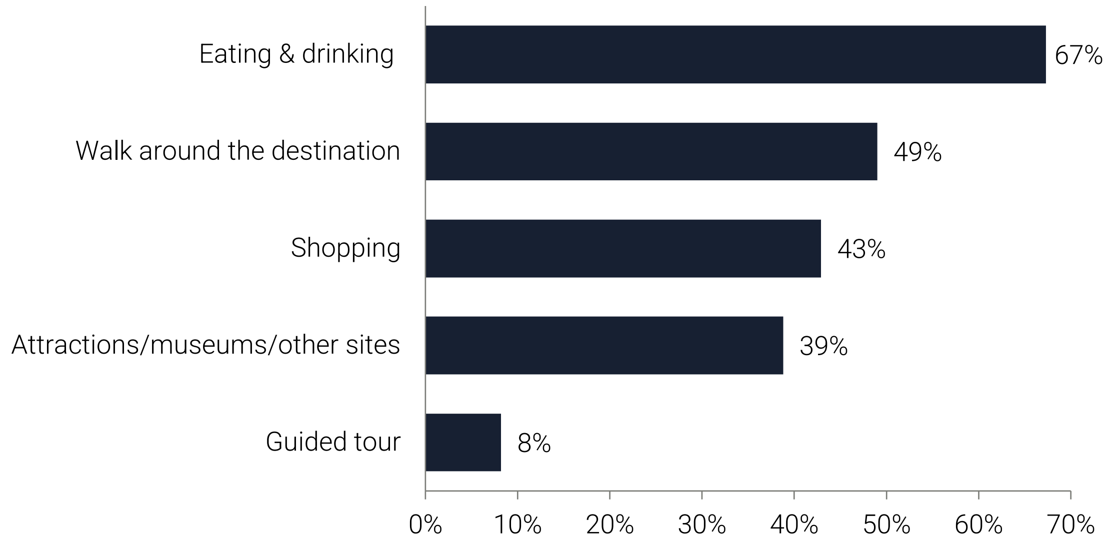


Source: Tourism Economics

Crew members who visited the city spent an average of 3.5 hours in Marseille, less than the dwell time of transit and turnaround passengers, reflecting their greater time constraints. Their most popular activity was eating and drinking (67%), followed by walking (49%), shopping (43%) and visiting attractions or museums (39%). Guided tours were least common (8%). Crew members tended to be more active during their time in the city compared to passengers. This is evident as they demonstrated high propensity to undertake activities, especially eating and drinking, during a shorter visit compared with transit and turnaround passengers.

Crew member activities undertaken

% of respondents



Source: Tourism Economics

Crew Member Spending

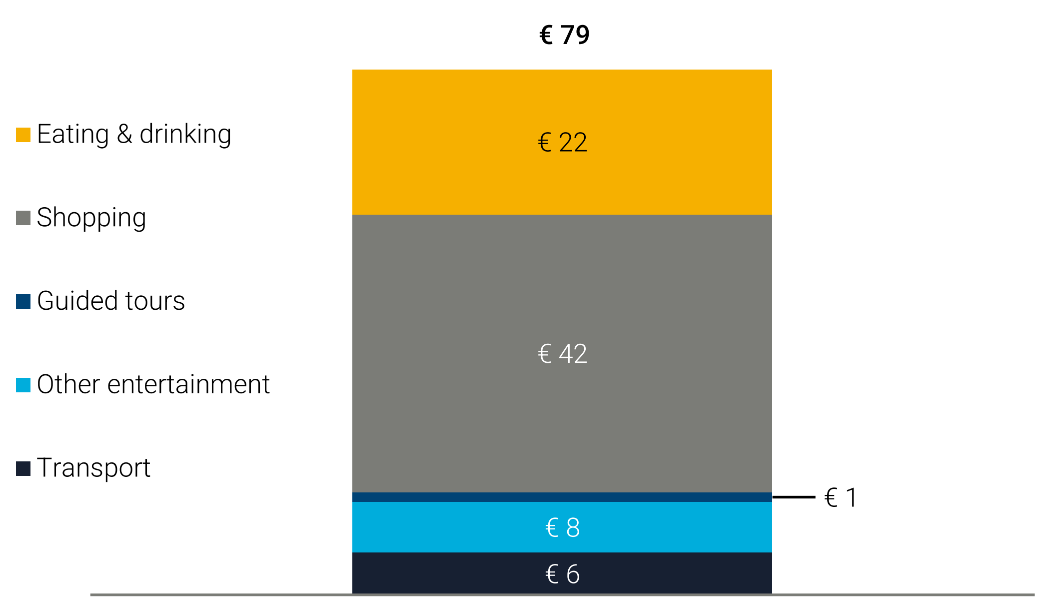
Crew members spent more on average than cruise passengers, with per-person expenditure reaching €79. Over half of this was spent on shopping, highlighting Marseille's role as a key stop for crew to restock with supplies.

Among the crew members surveyed, the average spend was €79 per person. The largest share of this was spent on shopping (€42), representing over half of crew member spend. Eating and drinking accounted for €22, other entertainment for €8, transport for €6, and guided tours accounted for €1 of total spending.

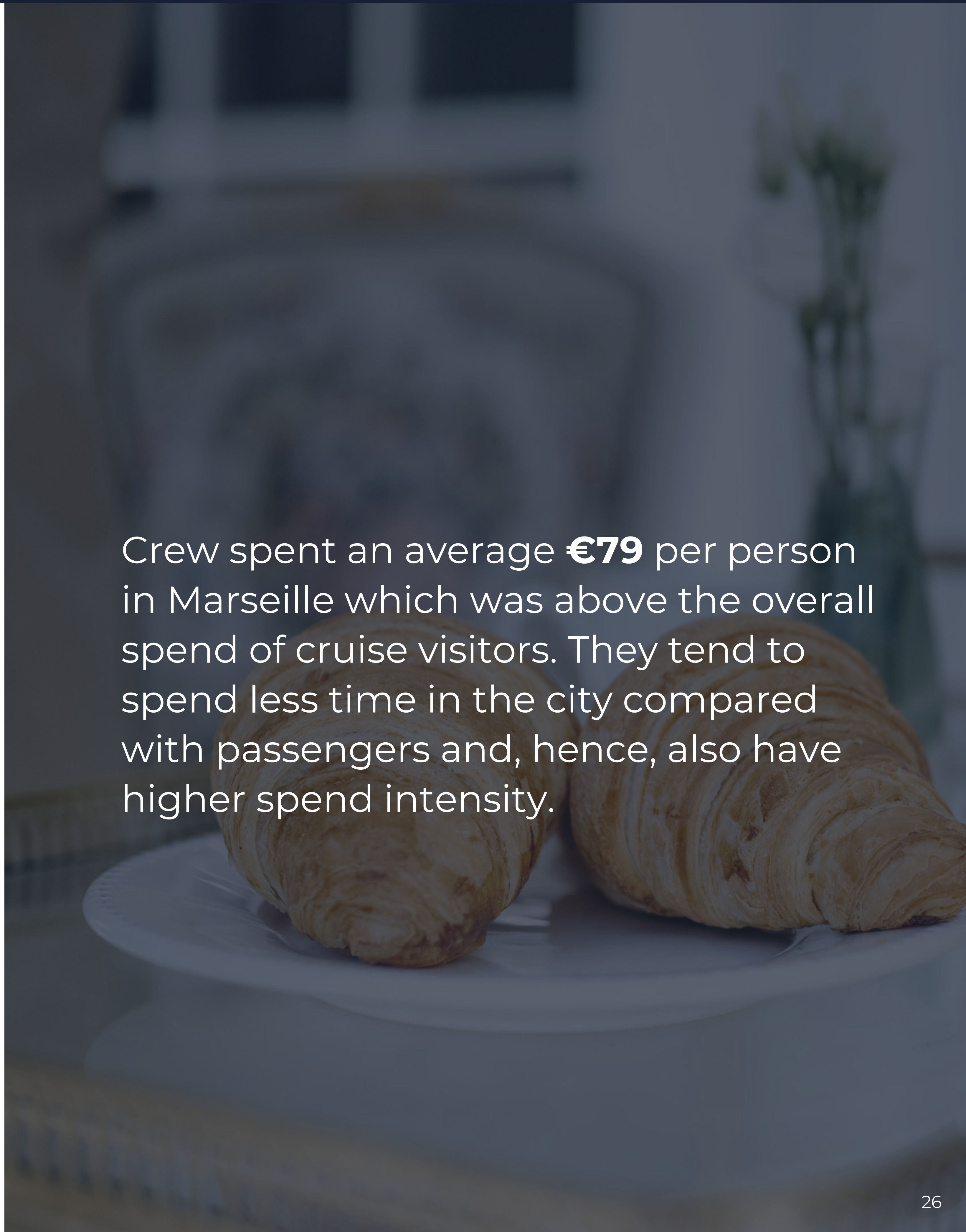
The results indicate that crew members tend to spend more per person than cruise visitors overall. This was driven by significantly higher spend on shopping compared with transit and turnaround passengers (€42 compared with €19 and €10, respectively). This suggests that crew view Marseille as a valuable opportunity to restock essential items such as clothing and medicine.

Crew member expenditure on goods and services

Euros



Source: Tourism Economics



Crew spent an average **€79** per person in Marseille which was above the overall spend of cruise visitors. They tend to spend less time in the city compared with passengers and, hence, also have higher spend intensity.

5

Economic Impact

5. Economic Impact

Introduction & Approach

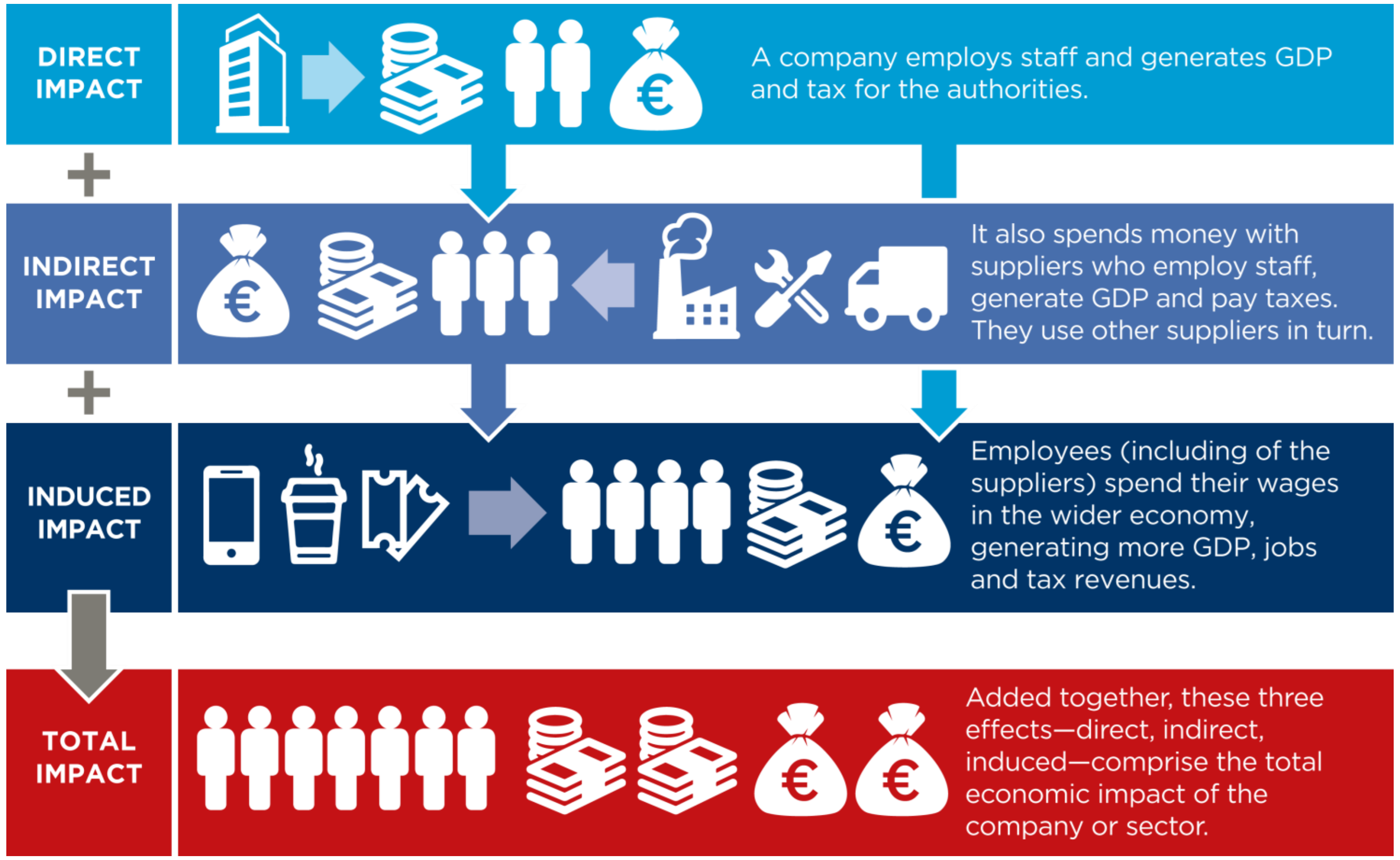
The economic impact of cruise tourism in Marseille has been assessed using a standard approach known as economic impact analysis which quantifies the impact of the cruise industry across three "core" channels:

- **Direct impact**—this relates to the economic activity supported by expenditure directly linked to the cruise industry. This includes visitor spending at ports and cruise line operational purchases.
- **Indirect impact**—captures the regional supply chain effects that follow on from direct impacts. For example, purchases by businesses of goods and services from other businesses.
- **Induced impact**—captures the income effect and flow on to household consumption. Direct and indirect impacts generate employment and wages among businesses, and these employees then spend part of their earnings elsewhere in the economy.

We present the economic impact of the cruise industry in Marseille across four key metrics:

- **Output**—this consists of those goods or services that are produced by a company or industry. To calculate output, we add together the value of the inputs used in the production process including labour, capital, and intermediate goods and services. Output is closely linked to revenue.
- **GDP**—the gross-value added contribution to GDP. This reflects the value (after accounting for costs) that a business or sector receives for producing goods and services. This value is distributed between wages and profits.
- **Employment**—the number of jobs supported.
- **Wages**—which includes the gross wages paid to workers but also includes benefits in-kind and employer social security contributions (including pensions)

Channels of Economic Impact



Direct Spending Summary

In 2024, we estimate that around 2.4 million cruise passengers visited Marseille—1.8 million transit visitors and over 650,000 turnaround visitors—as well as around 350,000 crew. This led to cruise-related total spending of €407 million.

The direct local impact of cruise activity in Marseille can be split into two categories:

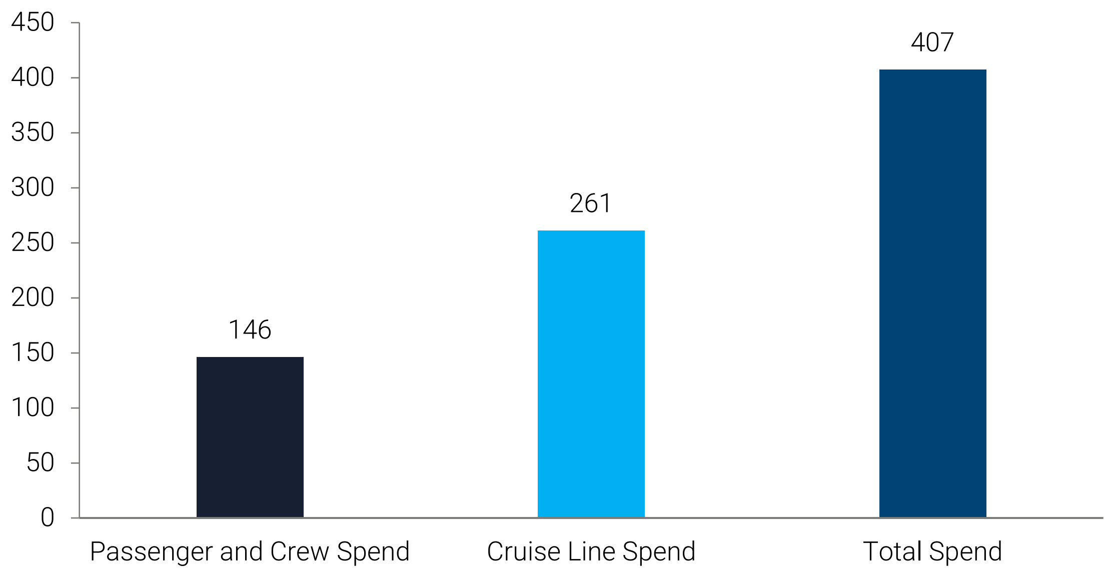
Passenger and crew spend occurs at various stages of the journey, including during embarkation and transit stops as passengers visit destinations on the ship's itinerary. Spending before or after embarkation often includes the cost of travel to and from Marseille, as well as accommodation for those that choose to stay in the area as part of their cruise trip.

Cruise line spend is limited to operational expenses. It is driven primarily by embarkation calls, when cruise vessels restock on their supplies and carry out any light maintenance. Cost of sales and other headquarter related expenses, as well as shipbuilding, are excluded from this study.

The total cruise-linked spend in Marseille was €407 million in 2024. Marseille is both a transit and turnaround port, meaning that it has a more even split of passenger and crew spending and cruise line spending—36% and 64%, respectively.

Total spending by category

€ millions



Source: Tourism Economics

Cruise line spending totalled €261 million in Marseille in 2024. We estimate that port charges and fees accounted for the highest proportion of this spending, at 35%, followed by other operating costs and vessel maintenance—26% and 22%, respectively. Turnaround ports tend to have much higher port charges and fees, covering the costs involved with embarking and debarking passengers, as well as vessel maintenance costs.

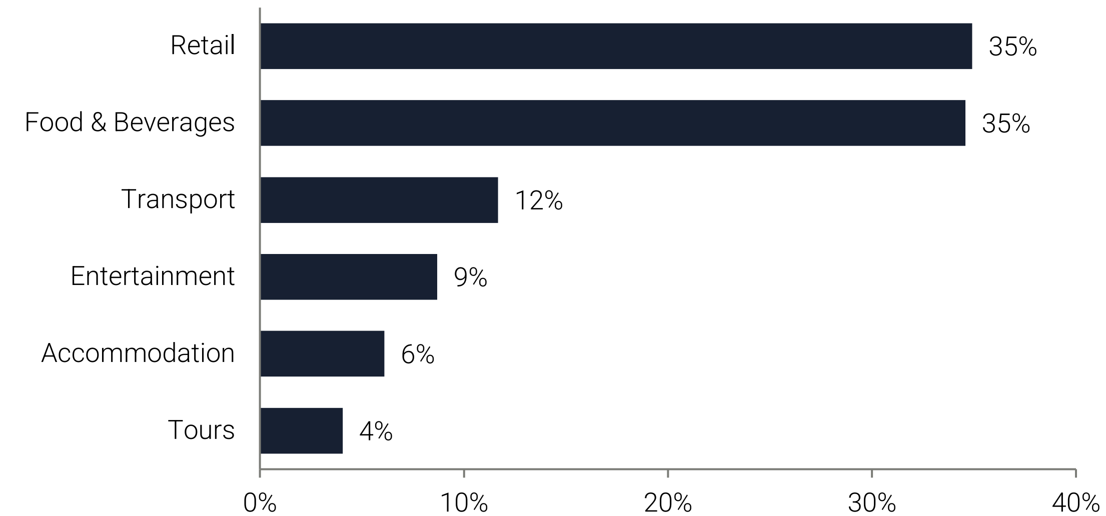
Passenger and crew spending reached €146 million in 2024. This was largely made up of spending on food and beverages and retail, with each accounting for 35% of total passenger and crew spending. This was followed by transport (12%), entertainment (9%), accommodation (6%), and tours (4%).

The high proportion of spending on retail and food and beverages in Marseille is driven by the availability of multiple popular retail areas near the port, including La Joliette and Canebière/Bourse, as well as the wide of variety of bars and restaurants in and around central areas of the city.

Tours make up the smallest share of total passenger and crew spending, which could partly be explained by the lower visibility of historical sites/tour options in Marseille as cruise passengers may have had limited awareness of places that were available to visit.

Passenger and crew spending by type

% of total



Source: Tourism Economics

Output Impact of Cruise Activity in Marseille

The economic contribution of the cruise industry in Marseille extends beyond the direct spending of passengers, crew, and cruise lines. Total output, including indirect and induced effects, is estimated at €610 million in 2024.

Direct spending generates a knock-on effect across multiple sectors, stimulating business activity, supporting employment, and driving economic growth. These effects are spread across the direct, indirect, and induced channels. Direct output represents the total value of goods and services directly purchased by crew, passengers, and cruise lines. This direct spending reflects the immediate financial contribution of the spending channels to the local economy of Provence.

Indirect output represents the economic activity that spreads through the supply chain as a result of this direct spending. This occurs when businesses that benefit from the direct spending such as hotels, tour operators, fuel suppliers, and shipyards make purchases from other industries to meet demand. It captures the value of goods and services generated within the supply chain due to direct spending, as well as the contributions from sectors such as wholesale and retail trade, transportations and logistics, hospitality services, and construction, which provide goods and services that support cruise industry operations and related expenditures. These indirect effects are quantified using country-specific input-output multipliers, accounting for regional specialisations.

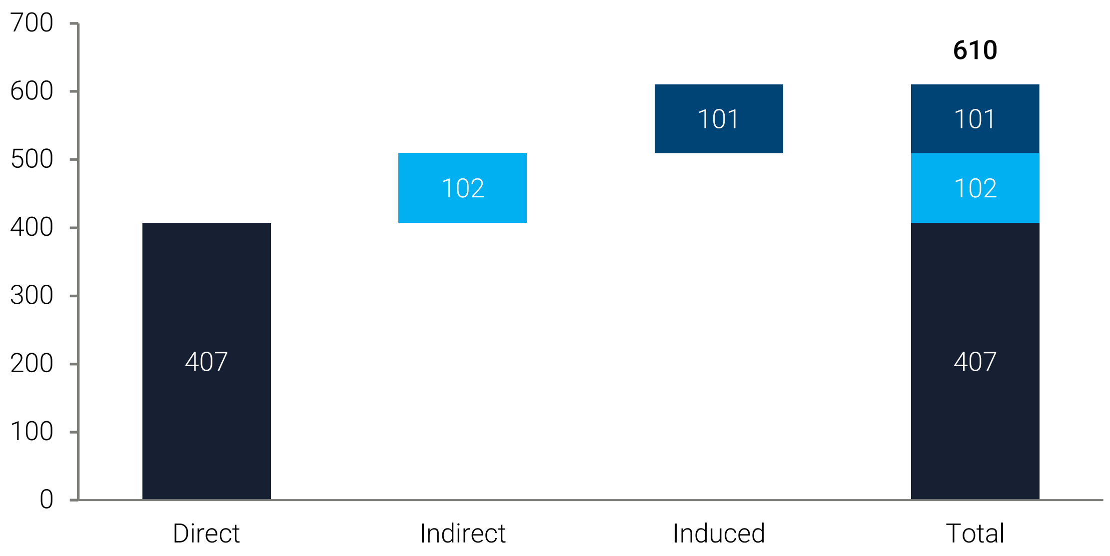
Induced output represents the economic activity generated when employees in the sectors impacted by cruise-related spending, directly or indirectly, spend their wages within the broader economy. It is estimated using country-specific and region-specific household expenditure data from national accounts, covering retail activity, utilities, recreation, and other purchases, which break down spending based on consumption patterns at a national and local level. This highlights the wider economic benefits resulting from wage-driven consumption.

Total output is the sum of direct, indirect, and induced output. This reflects the overall economic contribution of the spending channels to economic activity, generated across multiple sectors.

In 2024, cruise activity in Marseille supported €610 million in economic output in Provence. An initial injection of €407 million in direct output—or direct spending—by passengers, crew and cruise lines generated a further €102 million in sales output through the indirect channel, and €101 million through the induced channel, linked to cruise industry wages impacts.

Output by channel of impact

€ millions



Source: Tourism Economics

The cruise industry in Marseille contributed **€610** million in economic output to the Provence economy.

GDP Impact of Cruise Activity in Marseille

The GDP impact of cruise activity in Marseille in 2024 was significant at around €280 million for the local economy. The wholesale commerce & retail trade sector, which includes food and drink suppliers, makes up a sizeable share of the GDP impact.

An important indicator used to measure the impact of business and industry activity in the economy is Gross Domestic Product (GDP) contributions. While quantifying output (sales) enables measurement of overall economic activity, identifying GDP contributions provides important insights highlighting the value added by business activities, which includes profits and wages supported.

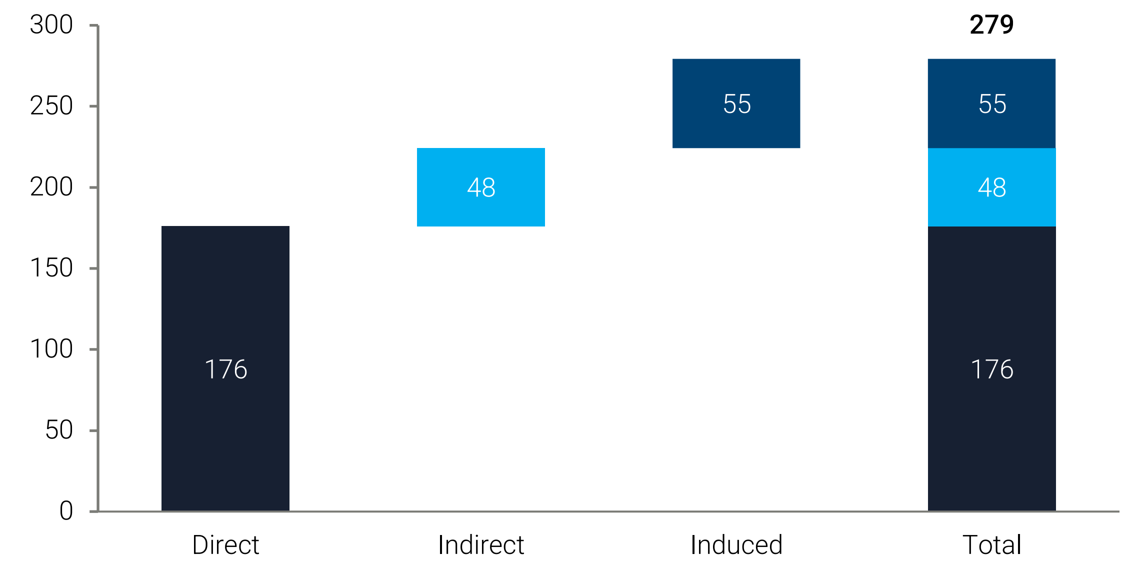
Cruise industry-linked spending in Marseille is estimated to have contributed €279 million in GDP to the Provence economy in 2024. Of this total, €176 million was delivered through direct effects, €48 through indirect effects (i.e. supply chain effects), and €55 million through induced (wage-linked) effects.

The induced impact was slightly higher than the indirect impact, likely due to the labour-intensive nature of the cruise industry. Port services, tour operators, retail, and hospitably are highly labour intensive, meaning a large share of direct spending will go towards wages and salaries, which will then be spent in the local economy, driving up the induced GDP impact.

The largest impact was across the wholesale commerce & retail trade sector (€70 million GDP impact) followed by the transport, logistics & storage sector (€57 million GDP impact). The sectors with the lowest GDP impact, each generating less than €5 million, were the information & communications, construction, and agriculture, mining & natural resources sectors.

GDP by channel of impact

€ millions



Source: Tourism Economics

GDP impact by sector

€ millions

Source: Tourism Economics

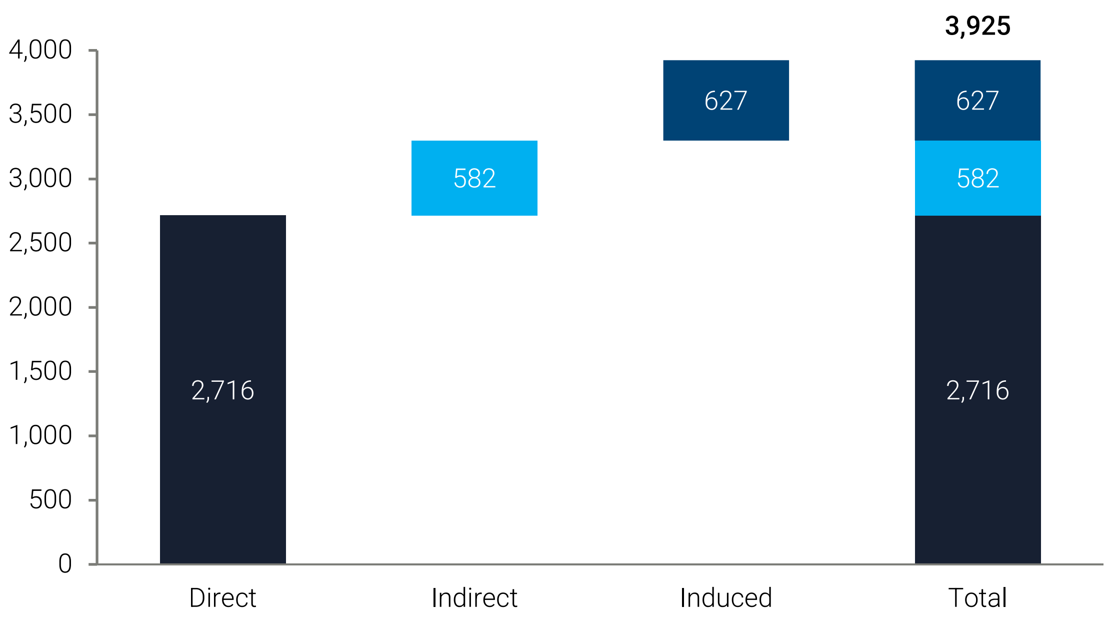
Employment Impact of Cruise Activity in Marseille

Cruise industry activity in Marseille supported nearly 4,000 jobs across the Provence region in 2024, with over 1,100 of these jobs in the wholesale commerce & retail sector.

In 2024, cruise industry activity in Marseille supported nearly 4,000 jobs in the Provence region. This was generated through 2,720 direct jobs, which refers to jobs that exist specifically due to spending by passengers, crew, and cruise lines. A further 580 jobs were supported through the indirect channel, representing jobs generated within the supply chain due to demand from direct purchases. Almost 630 jobs were supported through the induced channel, showing the broader effects of wage-driven spending. Workers in direct and indirect jobs earn wages and their spending supports additional employment in consumer services, housing, and retail industries.

Employment by channel of impact

Number of jobs



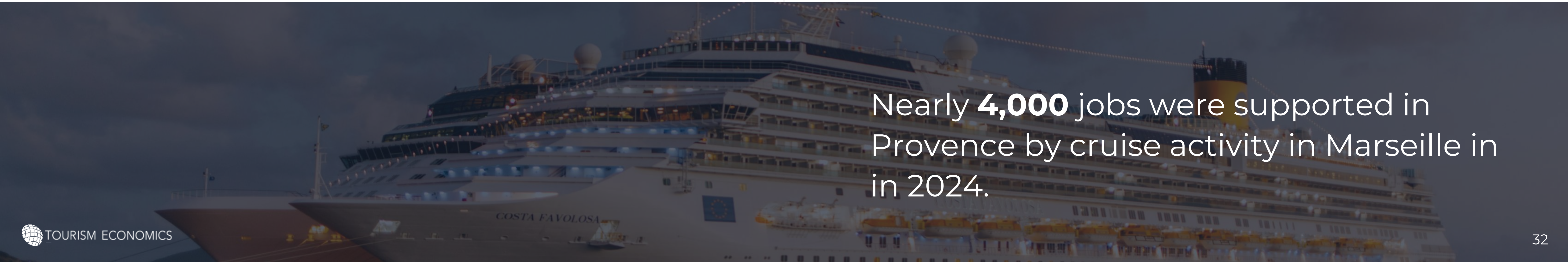
Source: Tourism Economics

The largest proportion of these jobs (30%) were in the wholesale commerce & retail trade sector, supporting over 1,160 jobs, followed by the transport, logistics & leisure (19%), and accommodation & food (17%) sectors. Meanwhile, the lowest impacts were for agriculture, mining & natural resources, construction, and information & communications sectors with each having an employment impact of fewer than 50 jobs.

Employment impact by sector

Number of jobs

Source: Tourism Economics



Wages Impact of Cruise Activity in Marseille

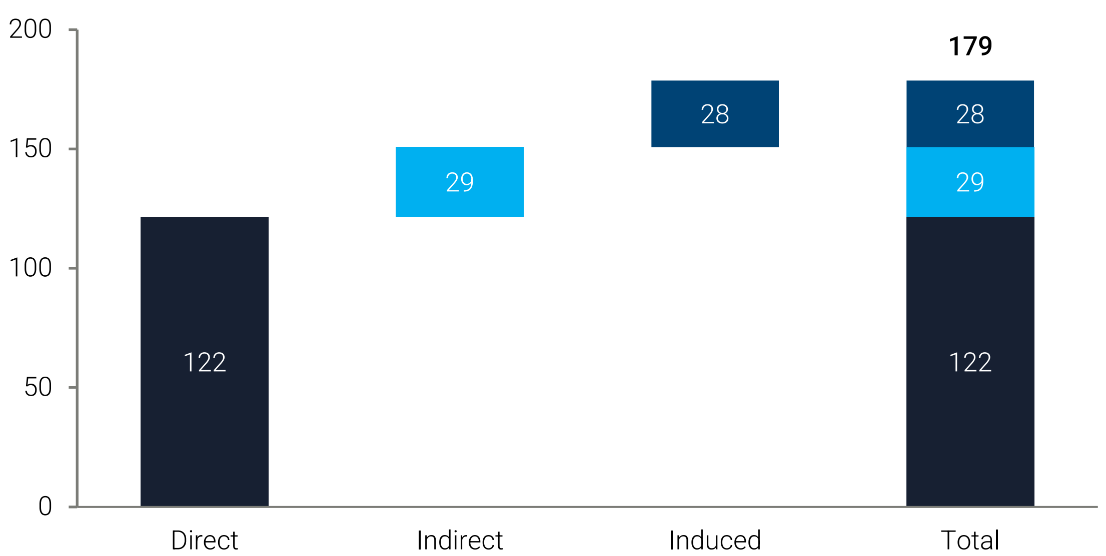
Cruise industry activity in Marseille generated total wages of nearly €180 million to the Provence economy in 2024.

In 2024, the jobs supported by cruise activity at the port of Marseille earned a total of €179 million in wages across the Provence economy. This represents the combined earnings of workers whose jobs were either directly or indirectly tied to cruise tourism.

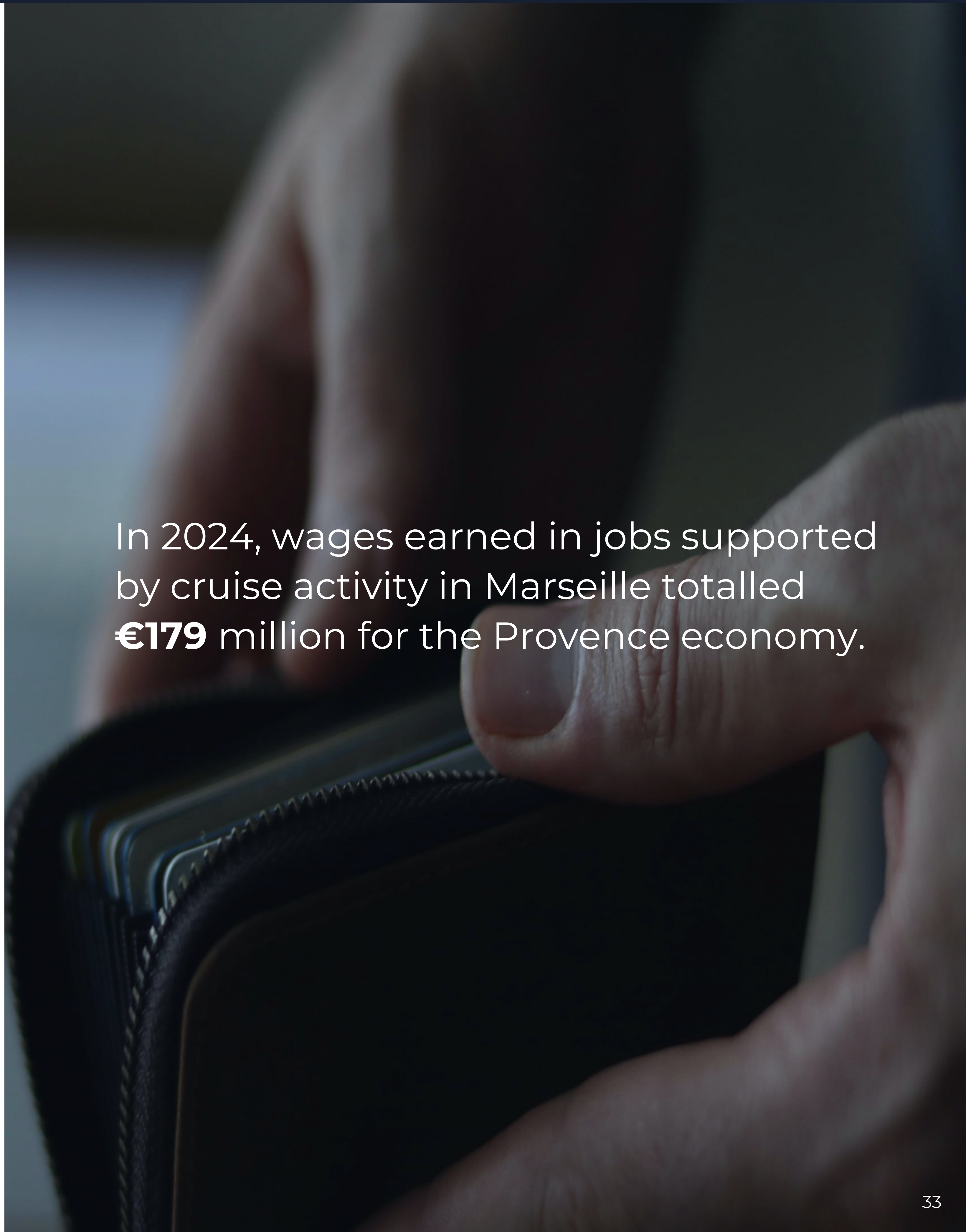
This was generated through €122 million in direct wages, which represent the salaries and benefits paid to workers directly involved in providing the services to cruise passengers and crew that go ashore, as well as servicing cruise line operational purchases. A further €29 million is generated through indirect effects, which includes salaries paid to workers in supplier industries that service businesses directly involved in cruise operations. Finally, €28 million is generated through the induced channel, reflecting the wages earned in industries benefitting from increased consumer spending and cruise line purchases due to employment growth.

Wages by channel of impact

€ millions



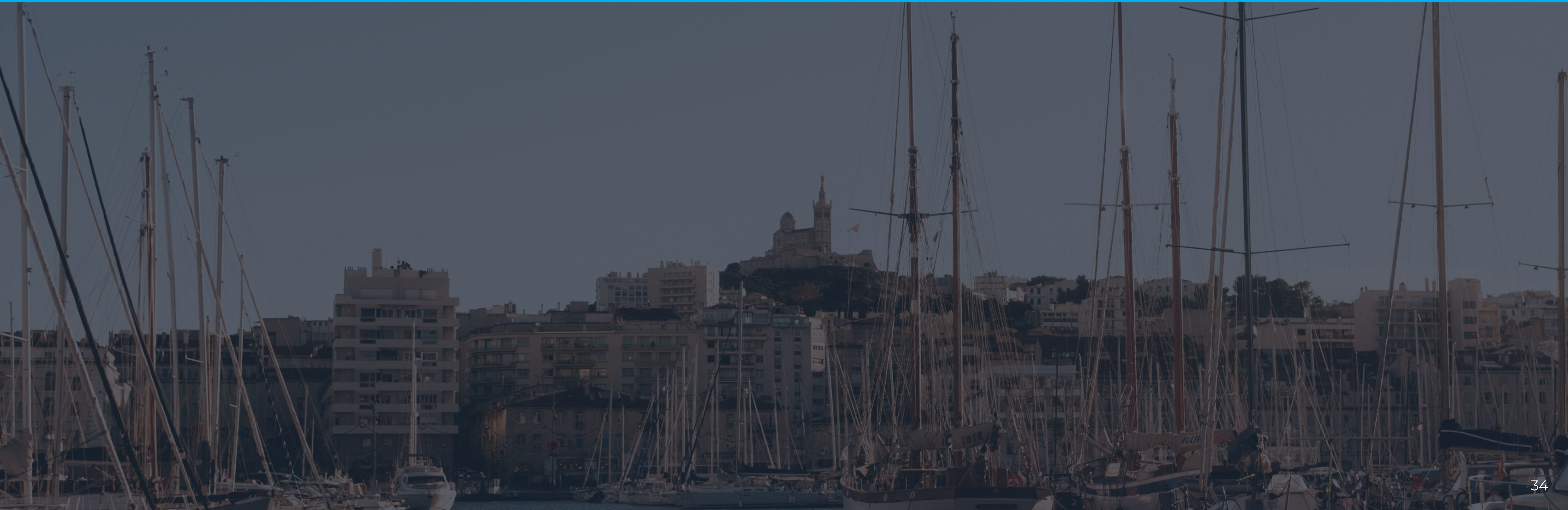
Source: Tourism Economics

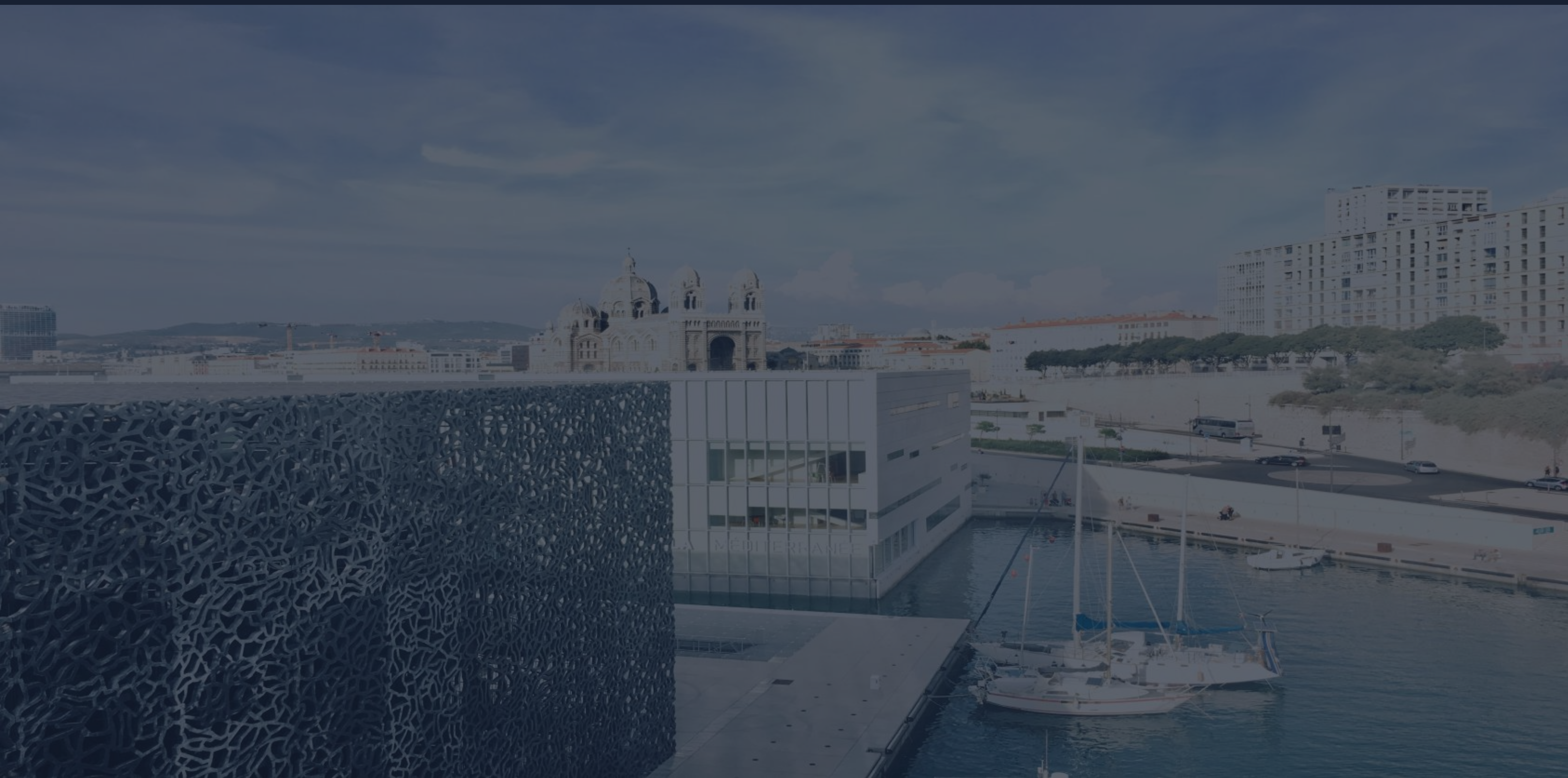


In 2024, wages earned in jobs supported by cruise activity in Marseille totalled **€179** million for the Provence economy.

6

Local Business Survey





6. Local Business Survey

Introduction

A survey among local businesses was undertaken to assess the impact of cruise visitors on the destination.

To supplement the cruise visitor research based on input from passengers and crew, a survey was conducted among local businesses. The objective of the survey was to gather insights into the cruise industry's impact on the business community in Marseille.

The questionnaire explored several topics, including the importance of cruise visitors to business operations and local perceptions of the impacts of both cruise visitors and cruise lines on the destination.

The findings from this research provide additional context for understanding the impact of cruise tourism for the visitor economy of Marseille.

Methodology

The survey was conducted by an online survey which was distributed to a database of local business contacts by Marseille Provence Cruise Terminal. The research took place between October and November 2024. In total, feedback was gathered from 66 respondents representing local businesses in and around Marseille.

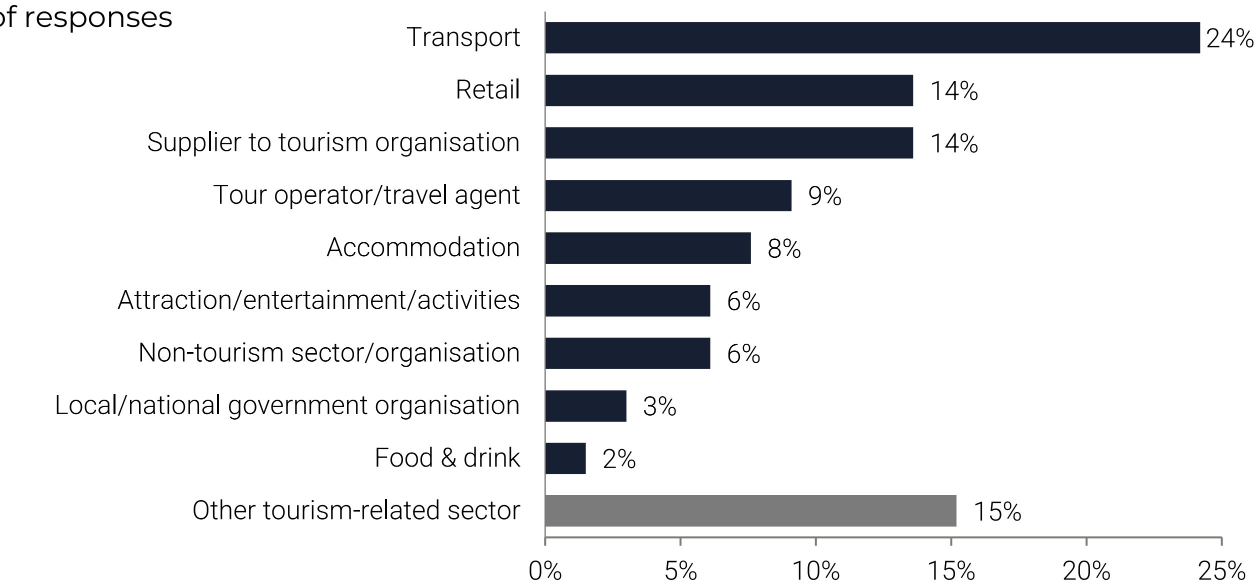
Local Business Survey Sample

The survey captured views from a good spread of businesses within Marseille. Businesses tended to be well-established, micro-sized entities based in the city centre or close to the port.

The largest proportion of responses were from businesses in the transport sector (24%), followed by retail (14%), and suppliers to tourism organisations (14%). The remaining responses were achieved among a broad range of businesses across varied sectors, including tour operators, accommodation providers, and attractions.

Business sector

% of responses



Source: Tourism Economics

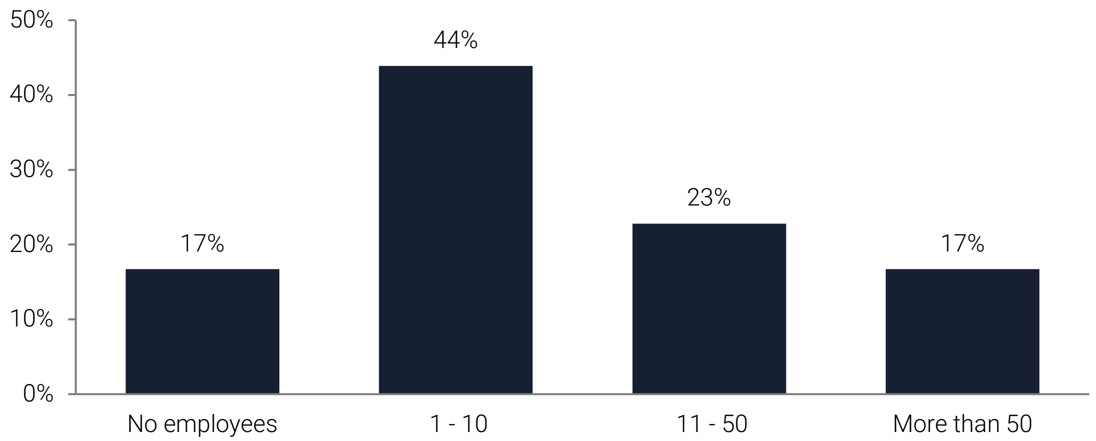
The responses were commonly from representatives of well-established businesses in the city as around three quarters (74%) had been trading for 10 years or more while under 10% had been trading for under five years. Furthermore, the vast majority were responding on behalf of businesses that are open all year round. Just 5% (3 out of 66 respondents) stated that their business was seasonal.

Local Business Survey Sample (cont.)

Reflecting the diversity of the sample, responses came from a broad mix of businesses with different headcounts. Micro businesses with between 1 and 10 full-time employees accounted for 44% of the sample, while 40% of respondents represented organisations with 11 or more staff.

Business headcount (full-time employees)

% of responses

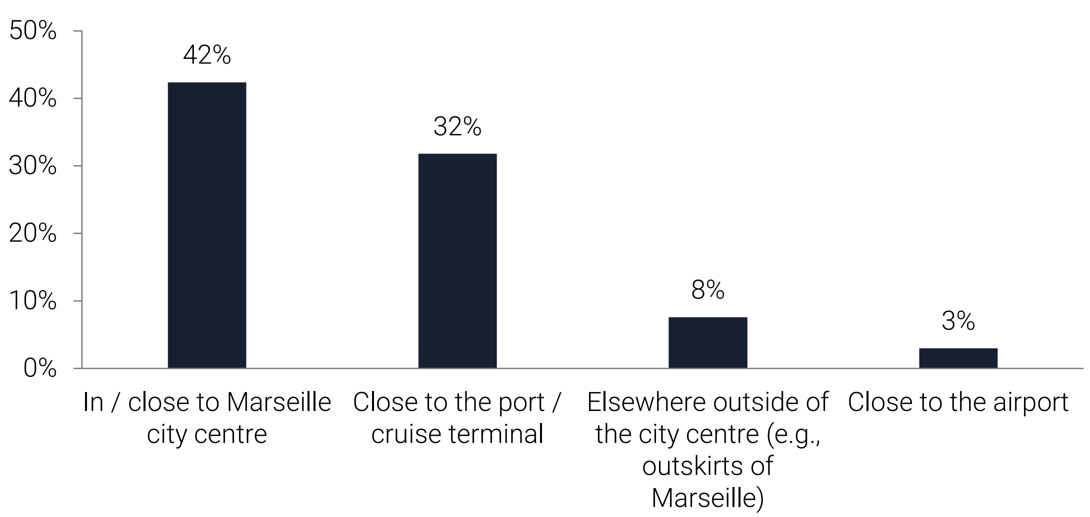


Source: Tourism Economics

Businesses were asked about their location in Marseille, with most indicating they were either centrally located or within the city centre (42%) or close to the port and cruise terminal (32%).

Business location

% of responses



Source: Tourism Economics

Cruise Industry Business Impacts

Among the businesses sampled, the cruise industry accounts for a sizeable share of their total revenues, underlining its importance to the local economy. Businesses were confident about growing their revenue linked to cruise activity over the next five years.

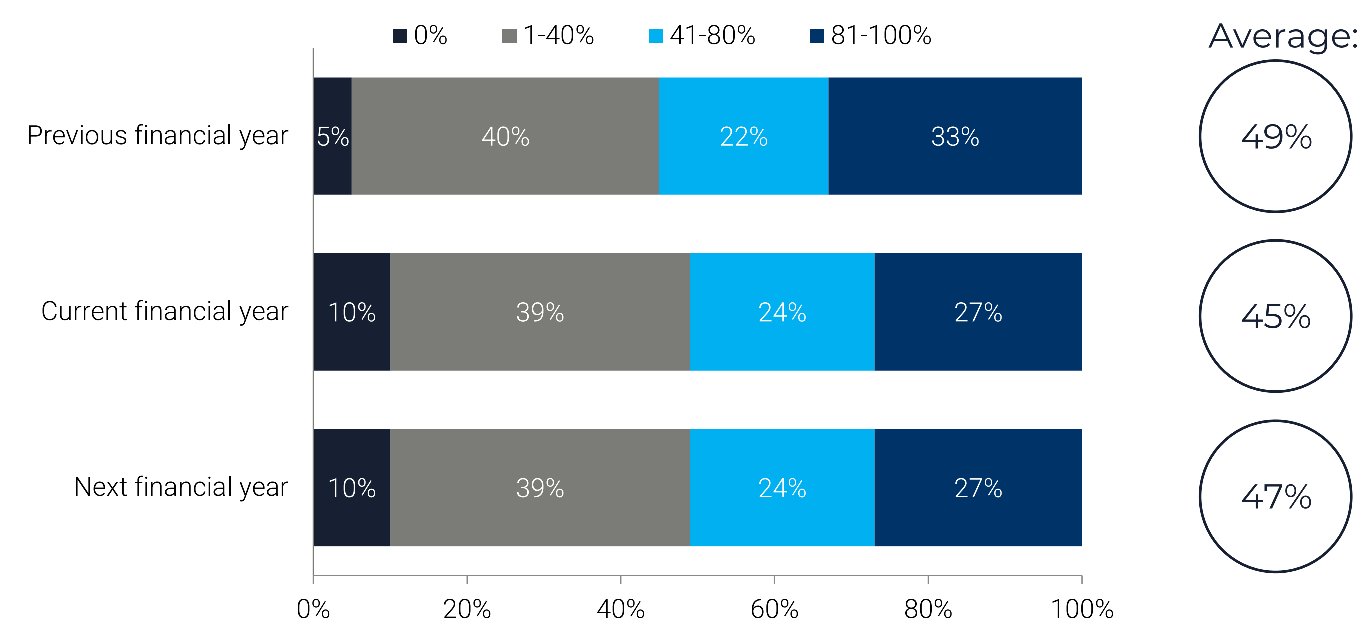
Businesses were asked to estimate the percentages of sales that were and are expected to be generated by cruise visitors in the previous financial year, current financial year, and next financial year.

The average percentage of sales generated by cruise visitors was relatively consistent across the three financial years. In the previous financial year, the average reported value was 49% of sales, which fell slightly to 45% in the current financial year. Meanwhile, for the next financial year the average percentage of sales generated by cruise visitors is expected to increase slightly to 47%.

Overall, the results highlight that the cruise industry plays an important role generating revenue among the businesses sampled. Indeed, our findings suggest that between 40% to 50% of the revenue achieved by these organisations is directly linked to cruise activity in the city.

Estimated sales generated by cruise visitors

% of responses



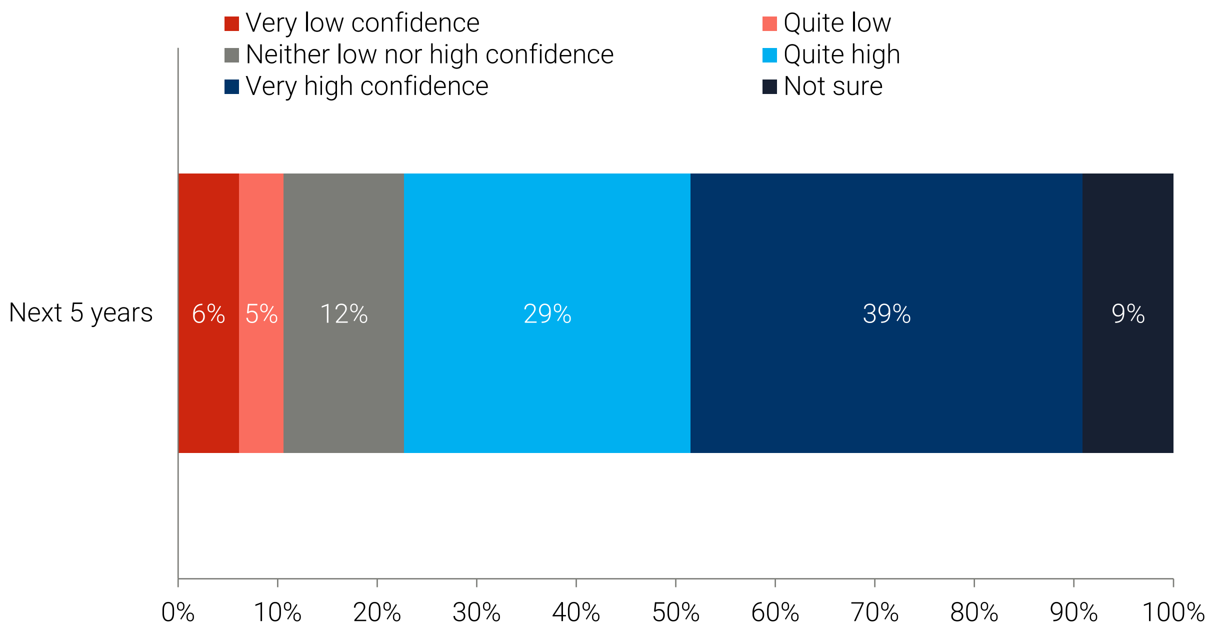
Source: Tourism Economics

Cruise Industry Business Impacts (cont.)

Signalling optimism for the future, businesses demonstrated strong confidence in growth for the sector over the next five years. Nearly seven in 10 (68% of businesses) stated they had quite high or very high confidence about growing their revenues from cruise visitors over the next five years. This compares to only 11% of respondents that stated they had low confidence in growing this part of their business.

Business confidence in growth in cruise visitor sales (next 5 years)

% of responses



Source: Tourism Economics

Impact of Cruise Visitors

There was widespread recognition of positive impacts linked to cruise visitors with most businesses agreeing they are important to the local economy. Meanwhile, respondents tended to disagree that cruise visitors caused disruption in the city.

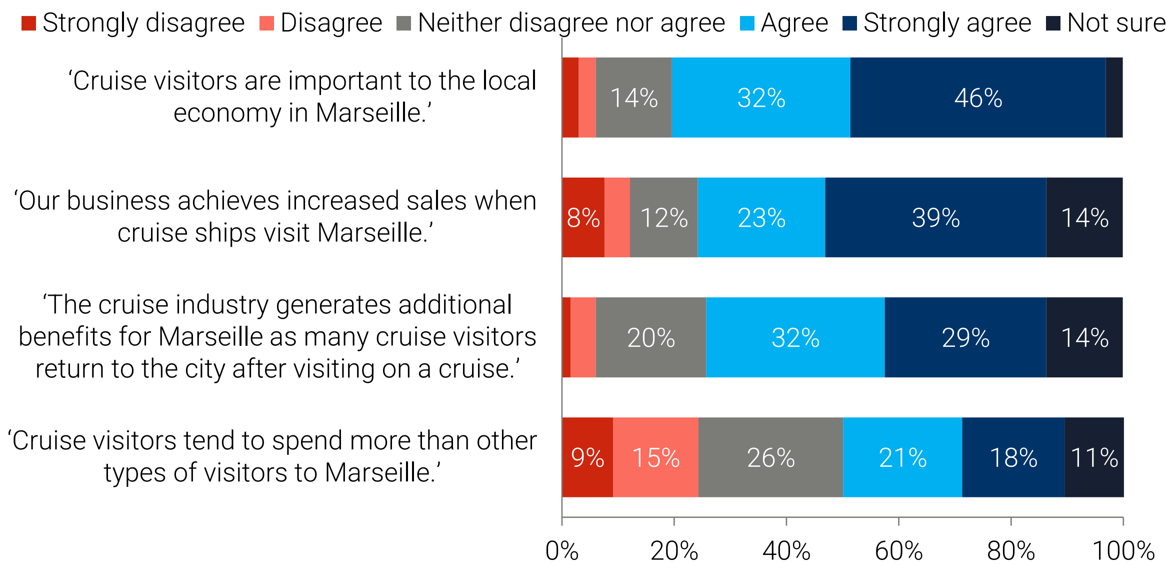
Businesses were provided with a list of statements regarding the impact of cruise visitors in Marseille and were asked the extent to which they agreed/disagreed with each statement.

Most businesses (77%) agreed that cruise visitors are important to the local economy in Marseille, while only 6% of respondents disagreed. Further, underlining the importance of cruise tourism, well over half (62%) agreed that their business achieves higher sales when cruise ships visit Marseille, compared to only 12% that disagreed. There was also recognition of additional, future impacts associated with cruising as 61% agreed that many cruise visitors return to the city and, in doing so, generate additional benefits after their cruise.

There were more varied opinions on the statement that cruise visitors tend to spend more than other types of visitors to Marseille as nearly 40% agreed with the statement, whereas the remainder had alternative views or were unsure.

Business views on cruise visitor impact: Statement agreement

% of responses



Source: Tourism Economics

68% of businesses are confident that their cruise visitor sales will grow over the next five years.

77% of businesses agreed that cruise visitors are important to the local economy.

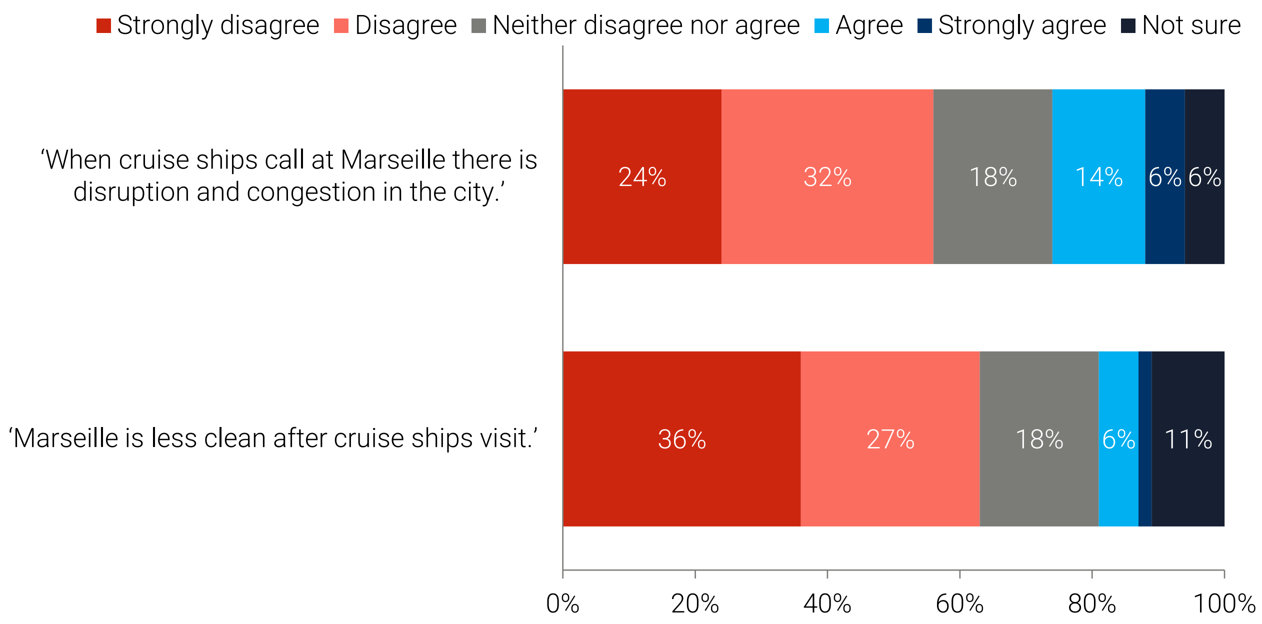
Impact of Cruise Visitors (cont.)

There was limited recognition of any negative impacts associated with cruise visitors as most businesses (56%) disagreed that cruise visitors cause disruption and congestion in the city. Furthermore, a similar proportion of respondents (64%) also disagreed that Marseille becomes less clean after a cruise ship visits.

According to the businesses samples, these results indicate overall that cruise visitors generate minimal disruption in the city which positively complements the important role the sector plays in generating revenue for local businesses.

Business views on cruise visitor impact: Statement agreement

% of responses



Source: Tourism Economics

64% of businesses disagreed that Marseille becomes less clean after a cruise ship visits.

Impact of Cruise Industry

Businesses believe the cruise industry could do more to enable greater economic impacts for destinations via more collaboration and initiatives which allow guests to interact and spend more in destinations.

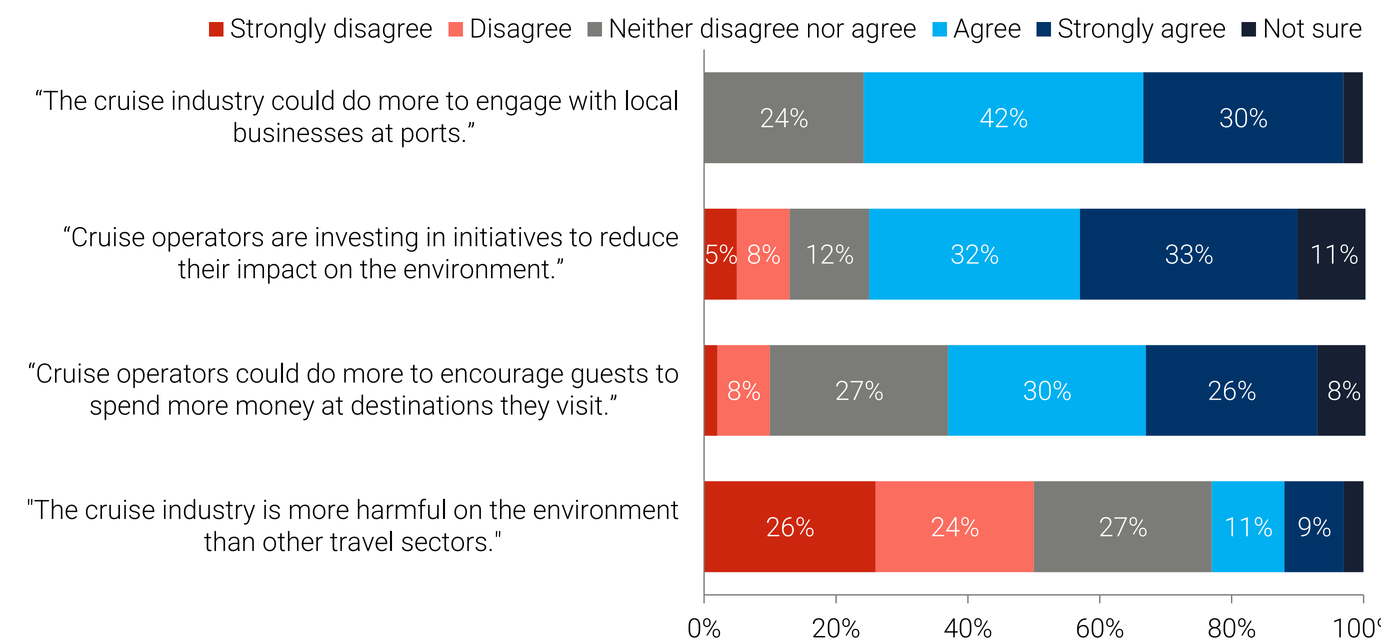
Respondents were asked about their views regarding the cruise industry overall.

With 73% in agreement, there was strong support that the cruise industry could do more to engage with local businesses at ports. Similarly, over half (56%) of respondents agreed that cruise operators could do more to encourage guests to spend more money at destinations they visit, with only 9% disagreeing. These findings suggest there are potentially unlocked additional economic benefits which could be generated through increased collaboration between local businesses and the cruise industry.

Meanwhile, there was recognition of the efforts of the cruise industry to decarbonise as most (65%) agreed that cruise operators are investing in initiatives to reduce their impact on the environment, compared to 12% that disagreed with this statement. There was more variation in the responses to the statement that the cruise industry is more harmful on the environment than other travel sectors compared with other statements. While half of businesses disagreed with this statement, 20% agreed with the statement and 27% neither disagreed nor agreed.

Business views on cruise operator impact: Statement agreement

% of responses



Source: Tourism Economics

Satisfaction & Recommendations to Improve Impact

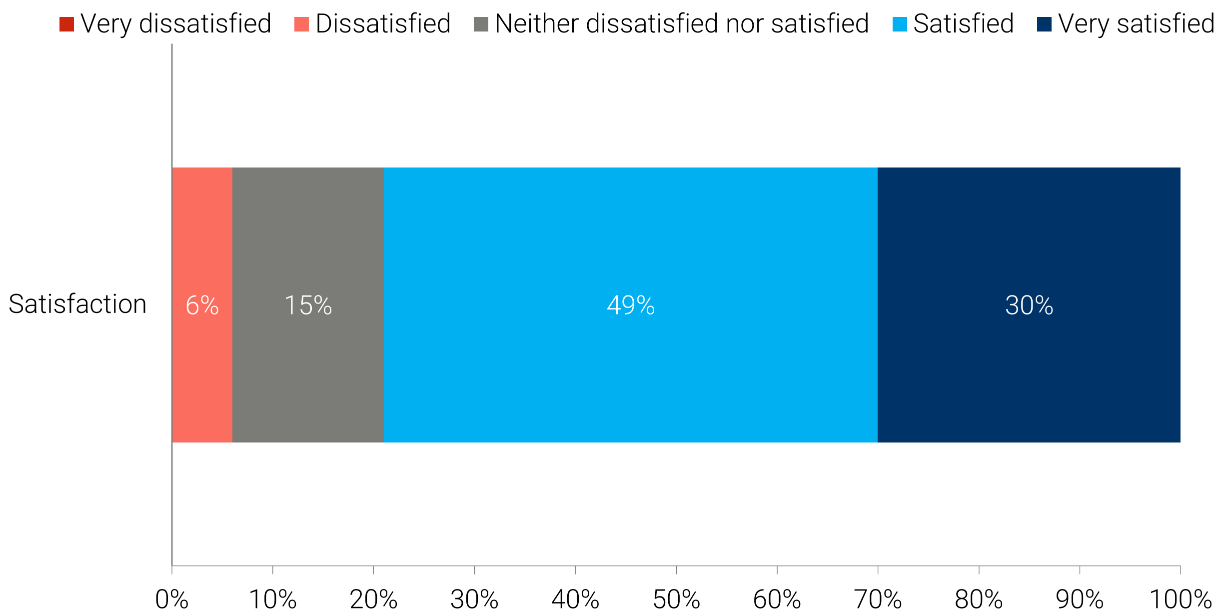
Businesses are generally satisfied with the impact of cruise visitors in Marseille currently. Stronger partnerships between local businesses and the cruise industry were considered important to grow and improve these impacts in the future.

Businesses were asked how they feel about the current situation in terms of the impact of cruise visitors in Marseille.

The vast majority (79% of organisations) stated that they are satisfied with the current situation and its associated impacts, with 30% stating they are 'Very Satisfied'. Meanwhile, only 6% said they were dissatisfied. These results align with previous findings which highlight that the businesses sampled are engaged with and appreciative of the impacts of the cruise industry in Marseille.

Business satisfaction with cruise visitor impact

% of responses



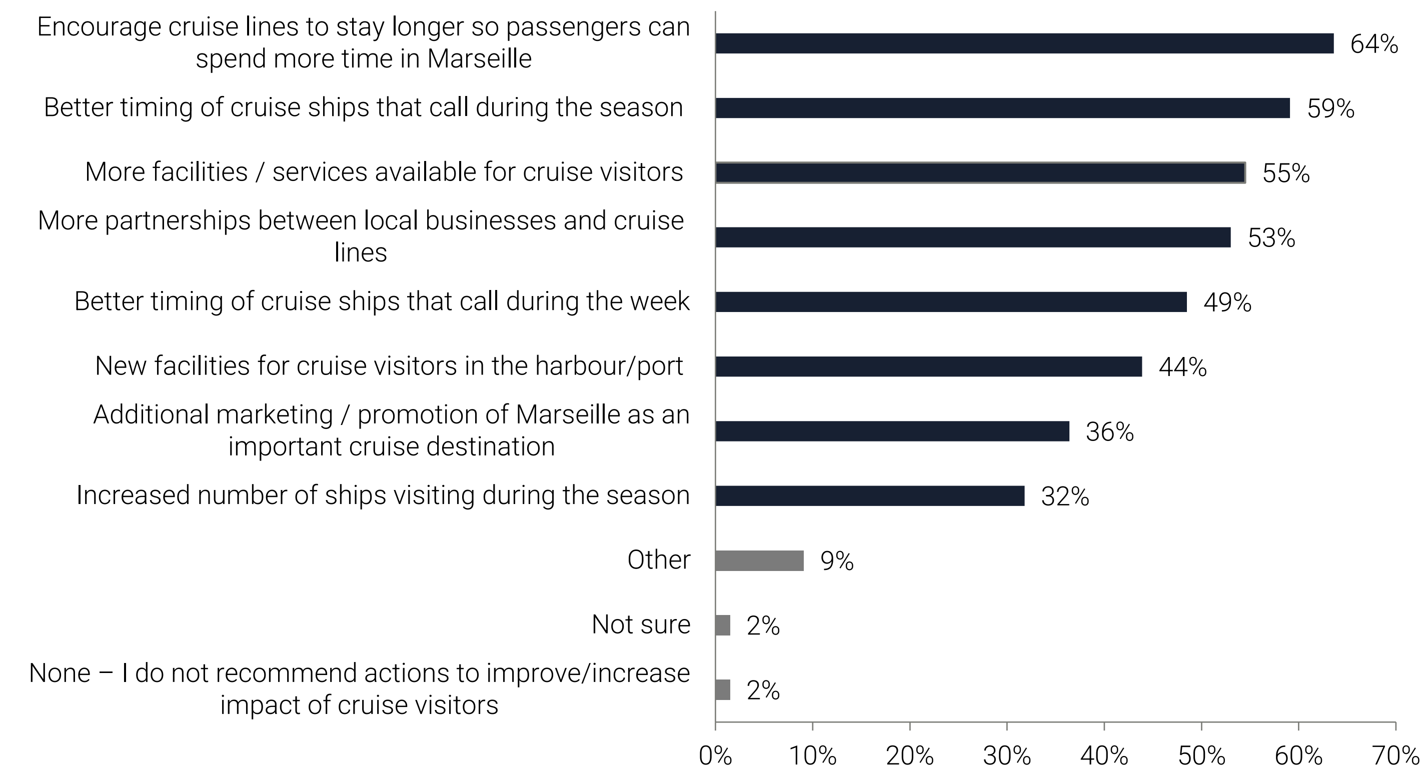
Source: Tourism Economics

When asked to consider potential changes which could generate improved or increased cruise visitor impacts for their business, the most supported suggestions, each chosen by over 50% of respondents, were encouraging cruise lines to stay longer, better timing of cruise ships, more facilities/services being made available for cruise visitors, and more partnerships between local businesses and cruise lines. Meanwhile, there was lowest support for initiatives aimed at increasing the number of ships visiting during the season which was mentioned by 32%.

Collectively, the results suggest that increased partnerships, including better communications, between local businesses and cruise lines and investment into visitor facilities and services will help to drive up the economic footprint of cruise tourism in Marseille.

Recommendations to improve/increase impact

% of responses



Source: Tourism Economics

79% of businesses are satisfied with impact of cruise visitors in Marseille.

64% of businesses stated longer cruise stays would generate greater impacts.

TECHNICAL APPENDIX

Glossary

MPCT: Marseille Provence Cruise Terminal, the primary terminal in Marseille where cruise ships start, stop, or finish their journeys. This location serves as the central hub for cruise activity examined in this report. The analysis specifically focuses on spending by both cruise passengers and cruise lines associated with operations at MPCT.

Marseille: The primary location where direct spending by cruise visitors takes place. While the majority of tourism-related expenditure occurs within the city—covering activities such as shopping, dining, and visiting attractions—a small portion may also take place in surrounding areas within the broader region. For the purposes of this report, spending is primarily attributed to Marseille as a simplified reference point.

Provence economy: The broader regional economy that serves as the focus area for assessing the economic impacts of cruise-related spending.

Cruise passengers:

- **Transit visitors/passengers:** Cruise passengers who disembark at a destination for a day visit without beginning or ending their cruise there. These visitors typically engage in tourism-related activities such as sightseeing, shopping, dining, and visiting local attractions during their limited time ashore.
- **Turnaround visitors/passengers:** Cruise passengers who begin (embark) or end (debark) their cruise itinerary in Marseille. In addition to engaging in tourism-related activities such as sightseeing, shopping, dining, and visiting local attractions, these visitors also typically incur transportation costs to reach the city and may spend on accommodation if staying overnight before or after their cruise.

Crew members: Individuals working on board cruise ships who may embark or disembark in Marseille. When granted shore leave, they engage in local activities similar to transit passengers, such as shopping, dining, and limited sightseeing, typically within the duration of their stay in port.

Passenger and crew spend: Includes expenditure by cruise passengers and crew members on eating and drinking, shopping, guided tours, other entertainment, and transport. Turnaround passengers may incur additional accommodation and transport costs. Combined with cruise line spending, it forms the total visitor-related spending in this analysis.

Cruise line spending: Operational expenditures incurred by cruise lines during port calls, primarily associated with embarkation stops. This includes spending on supplies, provisioning, port fees, and light maintenance. The analysis excludes broader corporate costs such as headquarters operations, cost of sales, and shipbuilding, focusing solely on local operational spending related to cruise activity in the region.

Total economic output (Output): total sales in an industry or the economy.

Total value added (GDP): total contribution (value added) to the GDP of an industry or GDP of the economy.

Jobs supported: number of jobs supported by cruise-related spending.

Wages supported: gross wages paid to workers but also includes benefits in-kind and employer social security contributions (including pensions).

F2F CAPI: Face-to-face computer-assisted personal interviews which was the methodology used to undertake the primary research among cruise visitors.

Appendix A: Cruise Visitor Research

A key part of this study was to undertake primary research among cruise passengers and crew during the 2024 season from May to October.

Sampling approach

This study used interviewers undertaken by professional interviewers to gather data from the following types of cruise visitors:

- **Cruise passengers**
  - **Turnaround visitors**—those embarking on or debarking from a cruise ship at the start/end of cruise their cruise trip.
  - **Transit visitors**—those visiting the destination/surrounding area for the day or undertaking a shore excursion as part of their cruise trip.
- **Crew**
  - **Crew members** visiting the destination/surrounding area for the day or undertaking a shore excursion.
  - **Crew members** only spending time ashore in the port/cruise terminal building.

The data was gathered by face-to-face computer-assisted personal interviews (F2F CAPI) with cruise passengers and crew at appropriate locations and times which aligned with the sampling schedule. The sampling schedule was developed to achieve a good spread of interviews reflective of the cruise ship calls in Marseille during the sampling period

Responses to the research were achieved using a simple random sampling approach whereby cruise passengers and crew (aged 18 and above) who pass by were randomly asked if they would like to participate in the research. Among groups, interviews were conducted using the nearest birthday rule. This helped to ensure a good spread of interviews among different profiles of visitors.

Sample size[1]

This following sample sizes were achieved for the target sample:

- **Cruise passengers**
  - Turnaround visitors: n=340, Transit visitors: n= 671
- **Crew members**
  - Crew members: n=61

1. Note: The sample sizes that formed the basis of the expenditure analysis were on average around 10% below these values as the data was cleaned to remove anomalous responses.

Appendix B: Local Business Survey

Another research component entailed gathering feedback from local businesses to better understand views and attitudes regarding the cruise industry impact. This survey was undertaken between October and November 2024.

Sampling approach

This study was undertaken using an online survey that was distributed by Marseille Provence Cruise Terminal (MPCT) among their network of local business contacts.

Sample size

The survey achieved 58 responses from business contacts, most of which were representing local businesses in and around the city centre and port of Marseille.

Appendix C: Cruise Line Spend Research

The estimates of local cruise line spending are based on detailed national-level data provided by various cruise lines to CLIA.

Estimation approach

We have used data on a range of countries with good data to estimate the relationship between the number of embarking passengers, the number of transit visitors, and the cruise line spend per visitor. The list of countries included are France, Italy, Germany, Greece, Norway, United Kingdom, and Canada. The formula below outlines the approach taken.

$$Cruise\ line\ spend = \beta_1 \times embarkations + \beta_2 \times transit\ visits$$

The estimates for β_1 provide a guidance on the cruise line spend per embarking (turnaround) passenger. Turnaround passengers are counted only once for this purpose, to be consistent with the formula above.

The estimates for β_2 provide a guidance on the cruise line spend per transit visit. This tends to be focused on payments for tours and port charges, with some spend on food & beverages.

Overall, we found that cruise line spending is concentrated in turnaround calls, where cruise lines have more time to re-stock their supplies. Fuel payments are more mobile and are driven by cost differences between countries.

Limitations

The cruise spend estimates are based on patterns observed at the national level. Therefore, it may be that large parts of the goods and services procured come from other parts of the country outside the study area of Provence.

Appendix D: Economic Impact Assessment

The total economic contribution of cruise tourism starts with the direct spend incurred by passengers, crew, and cruise lines. Their expenditure is then allocated across sectors of the economy based on port-specific survey data and historical patterns observed at the national level. The direct spending estimates are then run through a model of the regional economy to estimate the knock-on impacts from the supply-chain (indirect effects) and from wages (induced effects). The sum of direct, indirect and induced effects is the total regional economic impact linked to cruise activity out of the port of Marseille.

Direct Spending Estimates

Direct expenditure linked to cruise activity out of Marseille is split in four categories:

- **Turnaround** considers expenditure by embarking and debarking passengers before and/or after their cruise. Spending estimates are based on findings from the Cruise Visitor Research outlined in Appendix A and adjustments to reflect the true distribution of turnaround passengers in Marseille by brand segment using data from Tourism Economics' Cruise-IP.
- **Transit** considers expenditure by cruise guests visiting Marseille as part of their itinerary. Spending estimates are based on findings from the Cruise Visitor Research outlined in Appendix A and adjustments to reflect the true distribution of transit passengers in Marseille by brand segment using data from Tourism Economics' Cruise-IP.
- **Crew** considers expenditure by crew members visiting Marseille during a turnaround or transit port call. Spending estimates are based on findings from the Cruise Visitor Research outlined in Appendix A.
- **Cruise line** considers operational expenditure by cruise lines visiting Marseille during a turnaround or transit port call. Detail on the spending estimates is available in Appendix C.

For more detail on the forecasts of direct spending please refer to Appendix A and Appendix C above.

Spend by Category

The spending for each type of visitor is then distributed across various items and sectors according to the survey results. For more detail on the survey approach, please see Appendix A on Cruise Visitor Research.

Total Economic Output Impact

The direct spending estimates are then combined with supply-use tables published by the OECD. These tables are adjusted to reflect specialisations and the size of the regional (Provence) economy. The adjustment is done using data on regional employment by sector to construct the Flegg Location Quotient (FLQ). For more information on the approach taken please see "Julia Kowalewski (Feb 2013) *Regionalization of National Input–Output Tables: Empirical Evidence on the Use of the FLQ Formula".*

The total economic impact is estimated using this regional supply-use table as follows.

$$total\ impact\ by\ sector = direct\ spending \times (I - A)^{-1}$$

Where A is the direct requirements matrix and I the identity matrix. Direct spending is a vector with the final expenditure by sector.

This total impact can be split into direct, indirect (supply-chain), and induced (wage-linked). For more information on the approach taken to estimate the indirect and induced multipliers, please see "ONS (Apr 2022) *Input-output analytical tables: guidance for use".*

GDP, Employment, Wages

Tourism spending figures are combined with national statistics and forecasts for macroeconomic indicators to produce an estimate of the direct contribution of tourism to GDP, Employment, and Taxation.

- **GDP** contribution is calculated based on sector-specific GDP to output ratios sourced from Eurostat. Gross revenue (or output) is multiplied by the sector-specific GDP to output ratio to get an estimate of the associated GDP. GDP estimates are based on Gross Value Added (GVA) data from Eurostat. However, the terminology of GDP is used within the report for ease of communication
- **Employment** is calculated based on sector-specific labour productivity ratios sourced from Eurostat. GDP is divided by these ratios to get an estimate of the associated jobs.
- **Wages** are calculated based on sector-specific compensation of employees to GDP ratios sourced from Eurostat. GDP is multiplied by these ratios to get an estimate of the wages associated with the above employment.

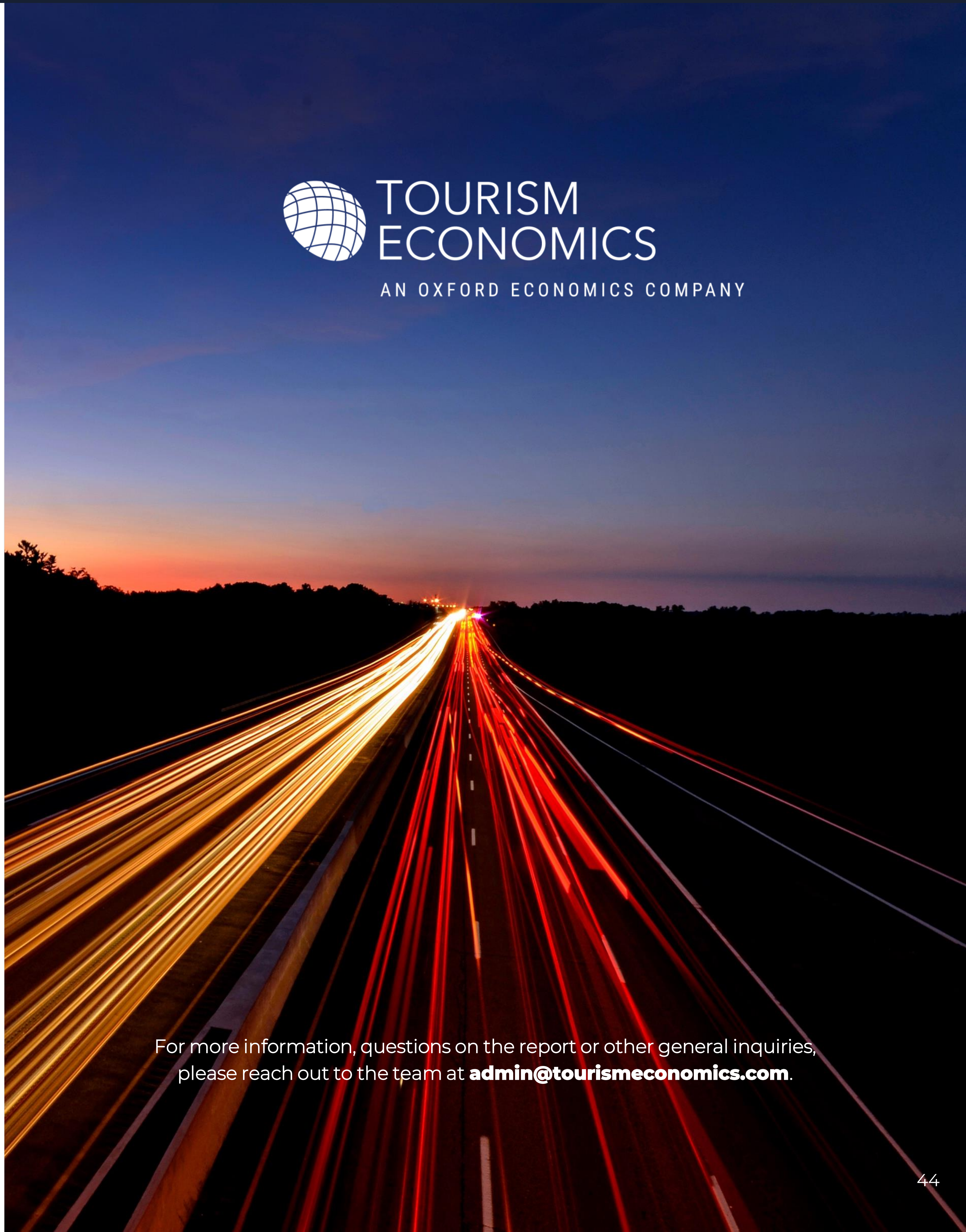
About the Research Team

Oxford Economics was founded in 1981 as a commercial venture with Oxford University's business college to provide economic forecasting and modelling to UK companies and financial institutions expanding abroad. Since then, we have become one of the world's foremost independent global advisory firms, providing reports, forecasts and analytical tools on 200 countries, 100 industrial sectors and over 3,000 cities. Our best-of-class global economic and industry models and analytical tools give us an unparalleled ability to forecast external market trends and assess their economic, social and business impact.

Oxford Economics is an adviser to corporate, financial and government decision-makers and thought leaders. Our worldwide client base comprises over 2,000 international organizations, including leading multinational companies and financial institutions; key government bodies and trade associations; and top universities, consultancies, and think tanks.

This study was conducted by the Tourism Economics group within Oxford Economics. Tourism Economics combines an understanding of traveler dynamics with rigorous economics in order to answer the most important questions facing destinations, investors, and strategic planners. By combining quantitative methods with industry knowledge, Tourism Economics designs custom market strategies, destination recovery plans, forecasting models, policy analysis, and economic impact studies.

Oxford Economics employs 700 full-time staff, including 300 professional economists and analysts. Headquartered in Oxford, England, with regional centers in London, New York, and Singapore, Oxford Economics has offices across the globe in Belfast, Chicago, Dubai, Miami, Milan, Paris, Philadelphia, San Francisco, and Washington DC.



For more information, questions on the report or other general inquiries, please reach out to the team at **admin@tourismeconomics.com**.