

US & Canadian Ports of Call

(Overview & Segmentation)

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Strategic Business Solutions, Inc. is a full service market research and consulting firm that works with a wide variety of companies to answer their most frequent and important management questions. While on a Strategic Planning project near a US Port, we were asked some broad questions about the perceived rapid development and expansion in many port markets. So, we thought it might be interesting add Ports to our portfolio of infrastructure datasets.

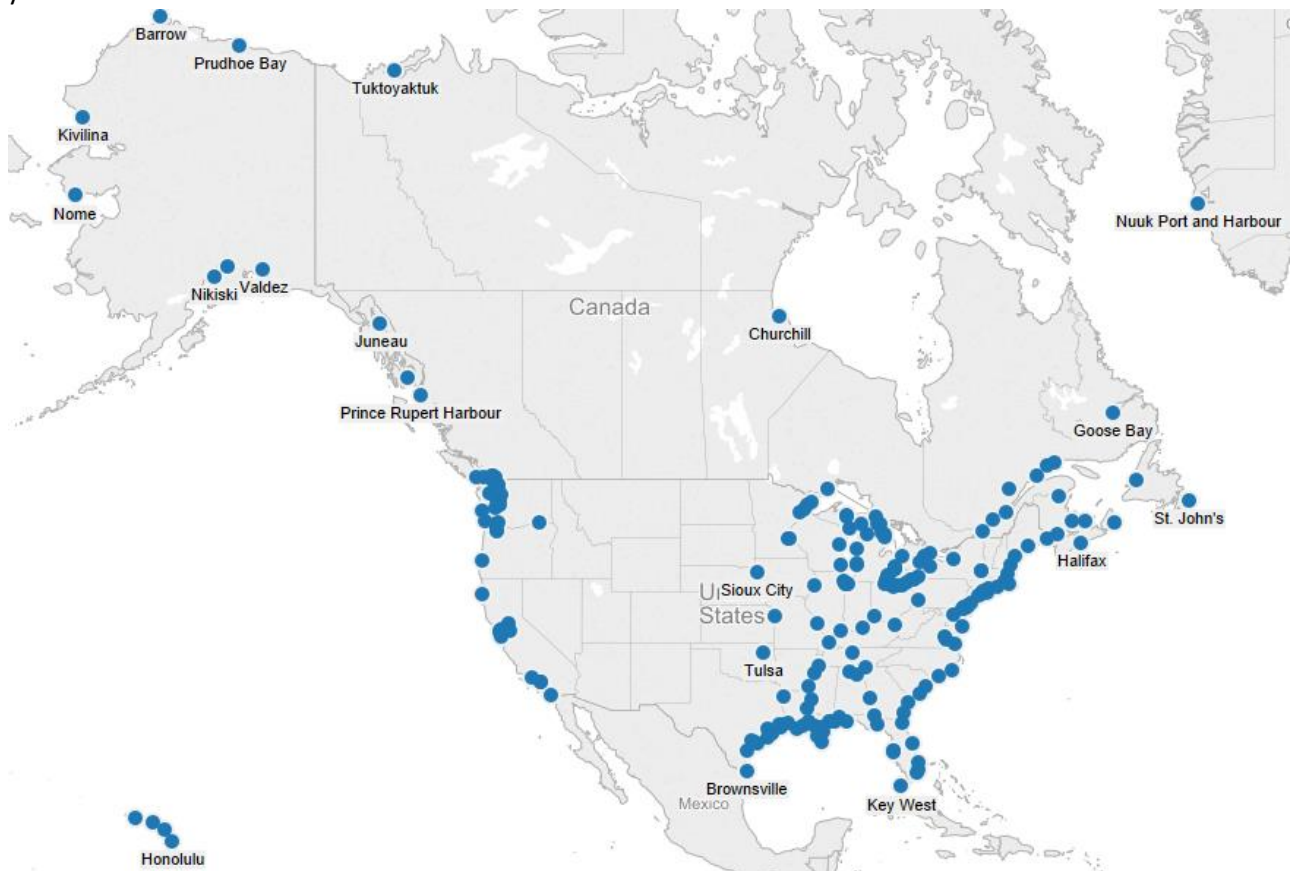
That sounds interesting Brian, so where are the ports?

I. Ports Database – US & Canada (217)

We started with a listing of ports in the US and Canada as starting point and after filling in some missing latitudes and longitudes – felt we had a sound base to work with. The core dataset includes 184 US ports and 36 ports in Canada. We added a few other segments (Arctic, Arctic Inland, Inland Lake, Inland River, Ocean) to add flexibility to our analysis capabilities.

Country-Type	Count of Type
Canada	35
Arctic	3
Arctic Inland	8
Inland Lake	8
Inland River	6
Ocean	10
United States	182
Arctic	9
Inland Lake	41
Inland River	31
Ocean	101
Grand Total	217

The map below shows the location and spacing of the overall port system. It was interesting that the United States has a very diverse port system with over 70 listed ports along Inland Lakes and Rivers – concentrated in the Eastern half of the country.



II. Segment 1 – Ocean Coast Ports - 126

Next we decided to isolate US and Canadian ports that are located along the ocean coasts. While an exploration of Inland ports might be of interest and is available, our conversations were mostly about Ocean Ports and where there was likely more economic activity.

Ocean Coastal Ports



Ocean Ports by Country & State

United States			Canada		
TX		12	NB		3
WA		12	NL		3
FL		11	NS		2
CA		10	BC		1
AK		9	MB		1
LA		9	NT		1
ME		5	PE		1
CT		4	QC		1
HI		4	Sermersooq		1
NY		4			
PA		4			
MA		3			
MS		3			
NJ		3			
OR		3			
VA		3			
DE		2			
GA		2			
MD		2			
NC		2			
SC		2			
AL		1			
NH		1			
RI		1			
Total		112	Total		14

So Brian, for the Ocean Ports is there anything else you found of interest?

Sure there is! (We can always look deeper...)

III. US Coast Port Diversity & Cruise Departure Ports (27)

As we explored further there are ports of many sizes and function. Many ports are commercial with their activity biased towards serving as a regional point for shipping and receiving international goods and services. Other ports have more mixed functionality and include larger hospitality components – the most visible of which is Cruise Lines.

Multiple conversations were related to port economic development in markets where there was high cruise activity so, we decided to isolate these ports into their own segment. Next, we found an interesting historical dataset that tracked cruise activity at a high level of detail. Unfortunately, distribution was curtailed after 9-11, but we felt it still served as a proxy for cruise analysis.

Florida = Cruise Port Capitol

The Top 3 Cruise ports are all in Florida – with two additional ports also appearing in the overall ranking (Tampa, Jacksonville).

Cruises by Port of Call 2004-2011

Departure Port	
Miami	5,956
Fort Lauderdale	4,974
Port Canaveral	3,884
Los Angeles	1,679
New York	1,677
★ Tampa	1,610
Galveston	1,519
Seattle	1,438
Long Beach	1,269
San Diego	1,140
New Orleans	910
Honolulu	807
★ Jacksonville	595
Mobile	504
Baltimore	462
Cape Liberty	462
Seward	392
Whittier	339
Boston	330
San Francisco	317
Charleston	294
Houston	150
Norfolk	145
Philadelphia	129
Gloucester (MA)	2
West Palm Beach	2
Gulfport	1
	30,987

IV. Business Profiling – Cruise Port Markets

While the Cruise industry is big business while on the ocean – cruise port land markets also have unique business profiles for on-shore investment. Port Authorities, Economic Development Directors as well as private investors may benefit greatly from our research.

For each Cruise Port we created a port proximate business database.

Why?

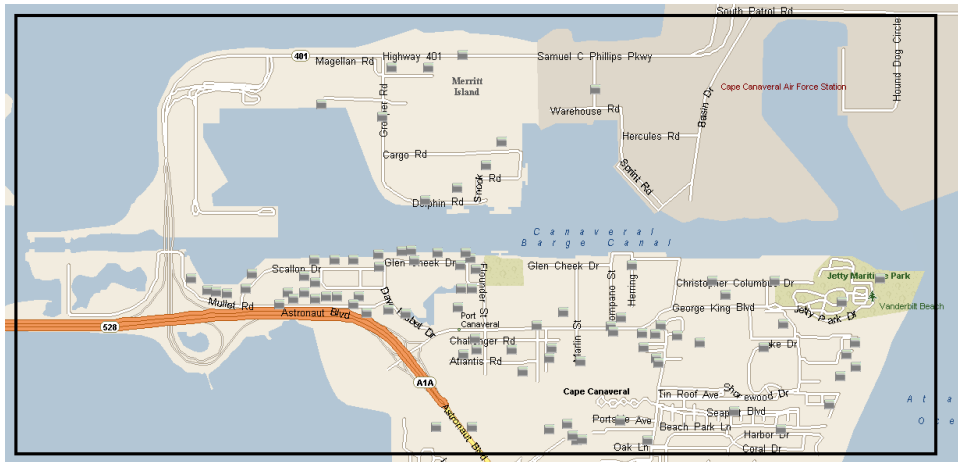
So we can help our clients:

- Identify Successful Port Based Companies
- Find Growth Opportunities & Acquisition Targets
- Compare Line of Business Mix & Identify Best Practices

V. Quick Example – Port Canaveral & Fort Lauderdale Business Profiles

An example of how Strategic Business Solutions, Inc. fact-based planning approach looks at markets is shown below. By assembling market specific data we can rank, compare and model at a higher level of detail than most others.

Port Canaveral Businesses (178)



Fort Lauderdale Businesses (514)



A few Quick Facts...

1. Top 5 LOB's

Restaurants, Yacht Brokers Real Estate, Business Management Consultants and Insurance were the most prolific Lines of Business when combining data from these two ports.

Line of Business Comparison – (2 Ports)

#	Port	Cape Canaveral	Fort Lauderdale	Grand Total
1	Restaurants	11	24	35
2	Yacht Brokers	4	17	21
3	Real Estate	3	15	18
4	Business Management Consultants	5	7	12
5	Insurance		12	12

2. Restaurant Segmentation

A. Branded vs. Unbranded

Of the 35 restaurants in our designated "Port Proximate" areas only 22.9% represent a National Brand while over three quarters (77.1%) of the restaurants appear to be unbranded.

Segment	Total	%
Branded	8	22.9%
Unbranded	27	77.1%
Grand Total	35	100.0%

B. Sales Segments

Finally, there is only one port-proximate restaurant reported to have sales greater than \$5 million.

Unbranded	27	77.1%
1 - More than \$5 Million	1	2.9%
2 - \$2 Million to \$5 Million	4	11.4%
3 - \$1 Million to \$2 Million	4	11.4%
4 - Less than \$1 Million	18	51.4%

To find out which restaurant, give me a call.
(262)-442-8725

We hope you enjoyed this newsletter illustrating how analysis by **Strategic Business Solutions, Inc.** can help with multiple business decisions at Global, National Regional and Local levels.

If you have management questions that might benefit from this type of analysis – contact us today!



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