

Opportunities for passenger and cruise development

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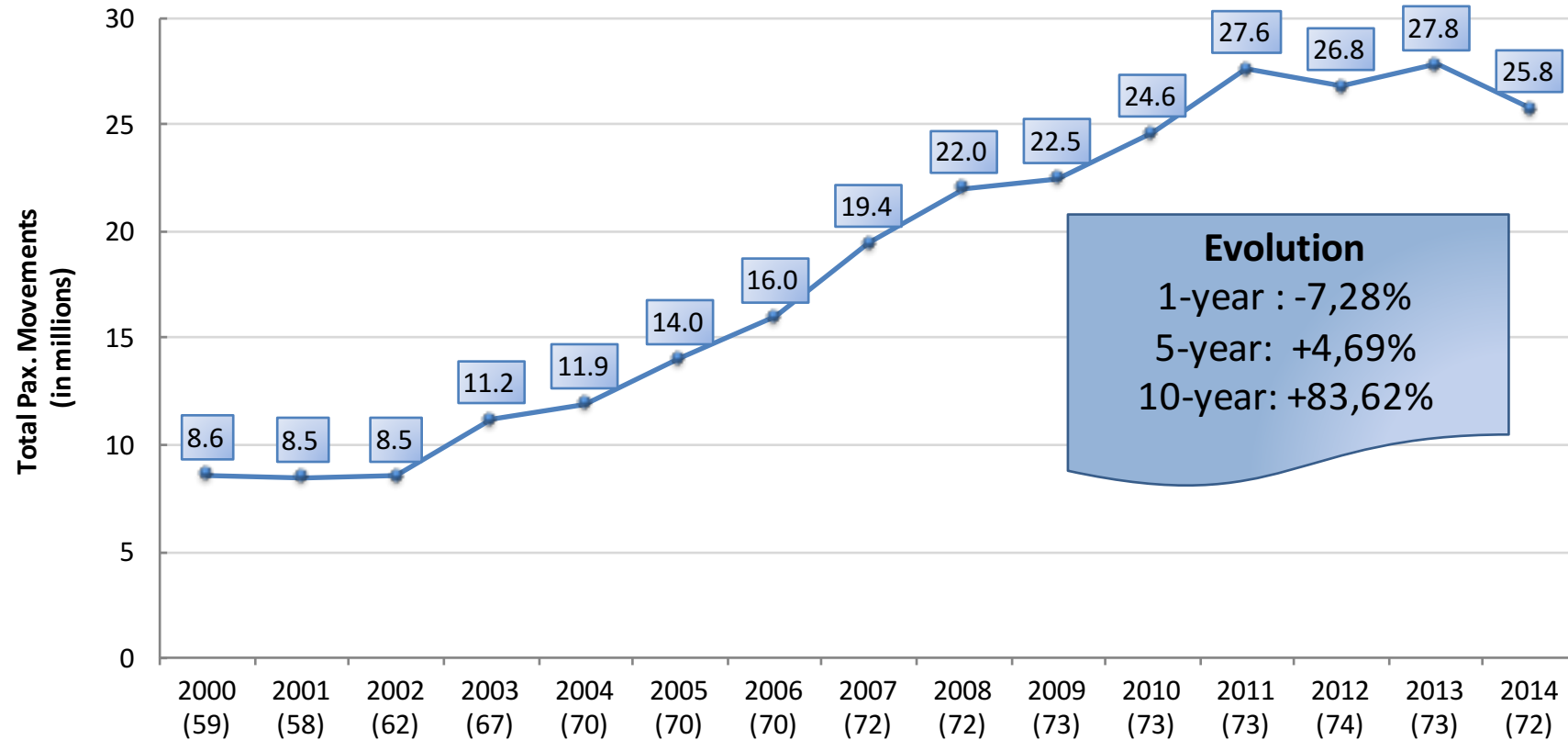


Economic Impacts of the Cruise Industry on Coastal, Insular
and River Destinations
Ancient Olympia, 23 May 2015

MedCruise in 2014



A long-term growth, that needs to sustain



Where should a Med cruise port focus?

I. Maturing vs emerging markets

- Is Med maturing?
- Is Asia really emerging?



I. Source markets

- Potential new ones
- Limitations of present ones



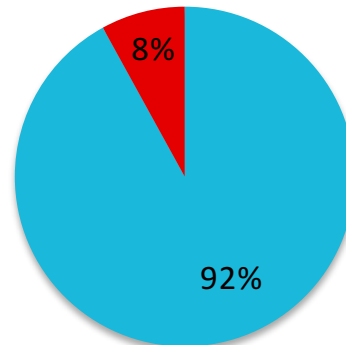
III. Capacity Issues (**blue-side**)

Ports in the Med and its adjoining seas that allow berth alongside a quay

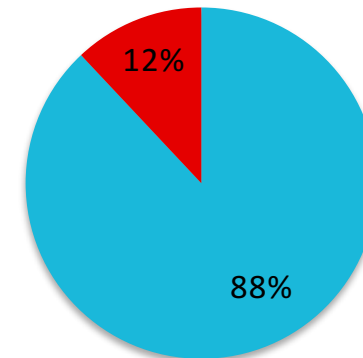
Percentage of ports that allows the option to berth alongside a quay for a transit call

blue = allowed,
red = not allowed

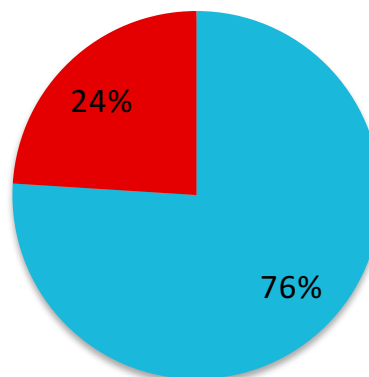
Small ship (N=51)



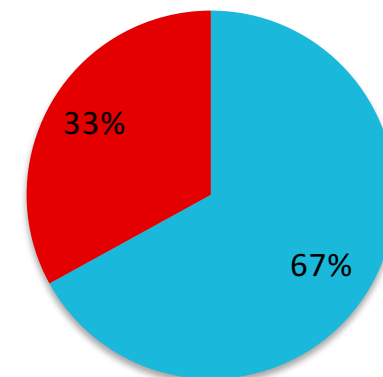
Medium ship (N=51)



Large ship (N=45)

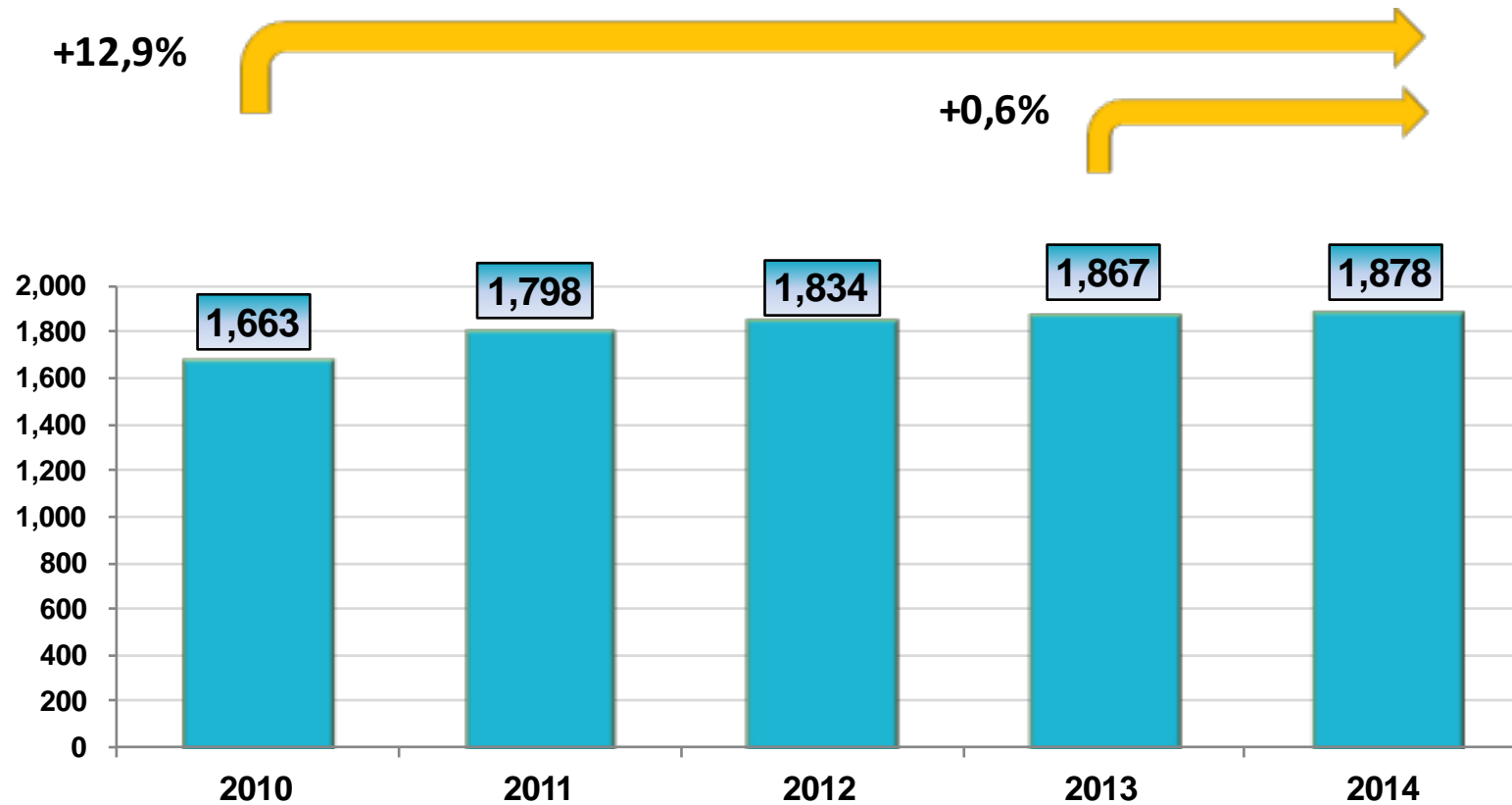


Mega ship (N=42)



IV. Capacity Issues (landside)

Average Cruise Passengers per Call



V. Image does matter

- 2,300 tons of water in its swimming pools
- 12,000 plants on board including hundreds of palm trees

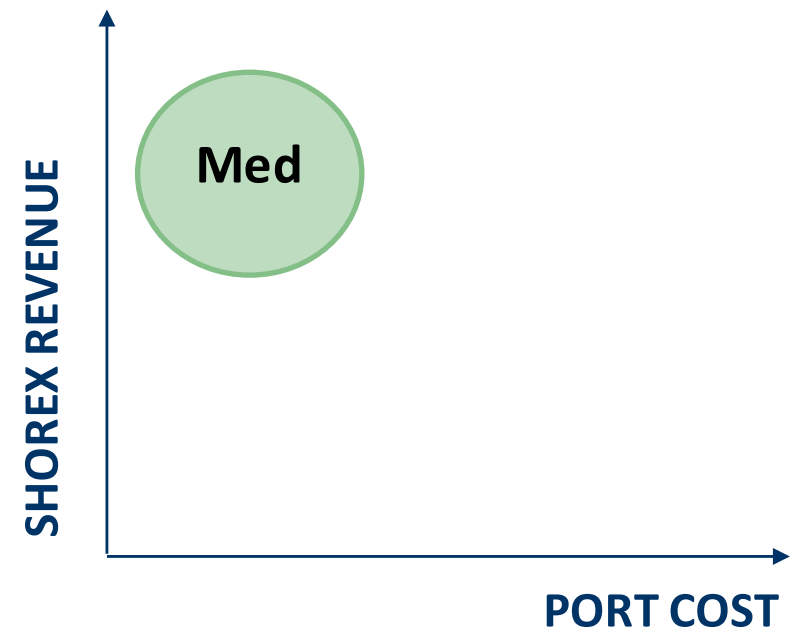


VI. Operational Issues

- Shorex activities
- Interporting
- Schengen (rules & implementation)
- Visa issues

VII. Vertical integration of cruise lines:

- Revenues of CL are already high
- Port dues are already low

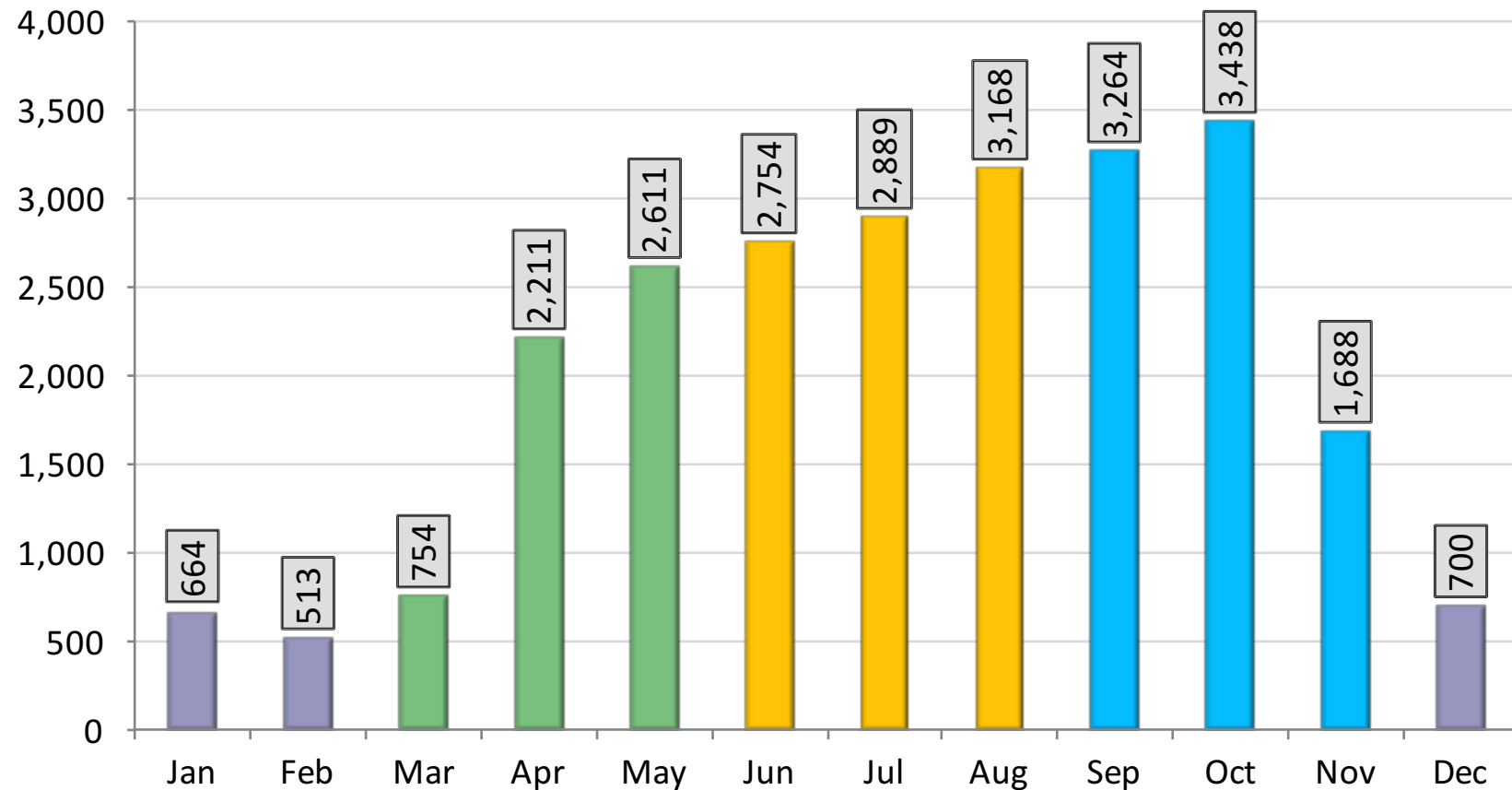


VIII. Building Successful Experiences

- Do you believe that cities & touristic destinations in the region are aware of the importance of cooperation?
- Do ports cooperate effectively with cities?
- **What needs to happen (destination level) to build successful program(s)?**

VII. Cruise activities in winter time

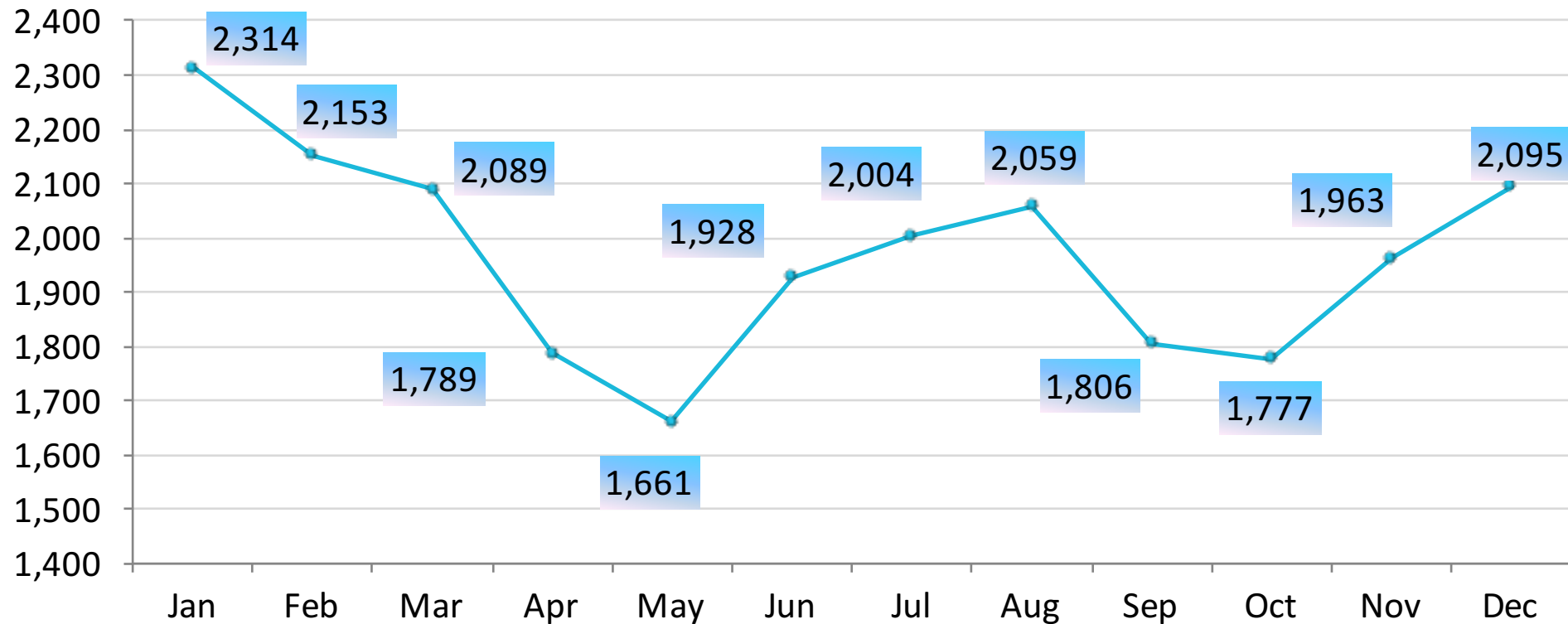
Total Cruise Passengers per month
(in .000 / 2014)



Source: MedCruise Statistics 2014

Winter Cruising: A different kind of operation

Average Pax/Call per month (2014)



Source: MedCruise Statistics 2014

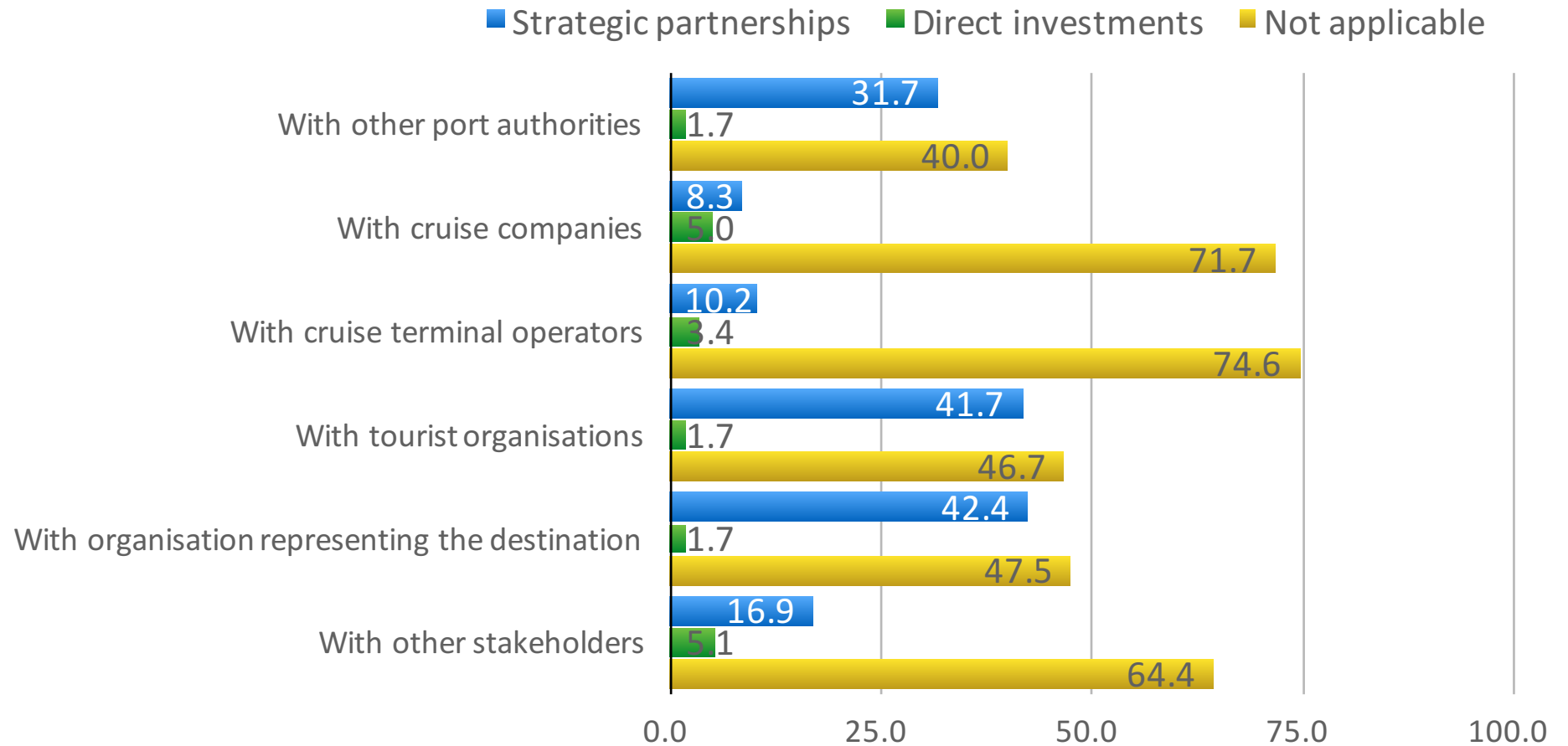
Major challenges for cruise ports

(top of list)

(0=Not a challenge, 1= Lowest importance, 5=Highest importance)

Port Challenges	Nota an issue (%)	Of highest importance (%)	Mean
Relationship with the cruise lines	11.9	54.2	3.83
Exploiting the potential of winter cruising	6.7	30	3.35
Relationship with people and businesses around the ports	5.1	22	3.32
The relationship with the city of arrival and local authorities	11.7	31.7	3.25
Bigger cruise ships (in size)	13.6	32.2	3.2
Security	16.7	40	3.17
Infrastructure (other than transport) in the port	11.9	37.3	3.15
Becoming a homeport	15	30	3.12
Transport infrastructure to and from the port	10.2	27.1	3.12
Connectivity of the destination with source markets	5.1	15.3	3.1
The competition with other (neighbouring) cruise ports	5	18.3	3.08
People with reduced mobility	16.7	28.3	3.03
The relationship with the travel agents	13.3	25	3.0
The development of other regions as new cruise destinations	10.7	19.6	3.0
The mobility to and from the port	15	18.3	2.85

Strategic partnerships and Direct Investments (%)

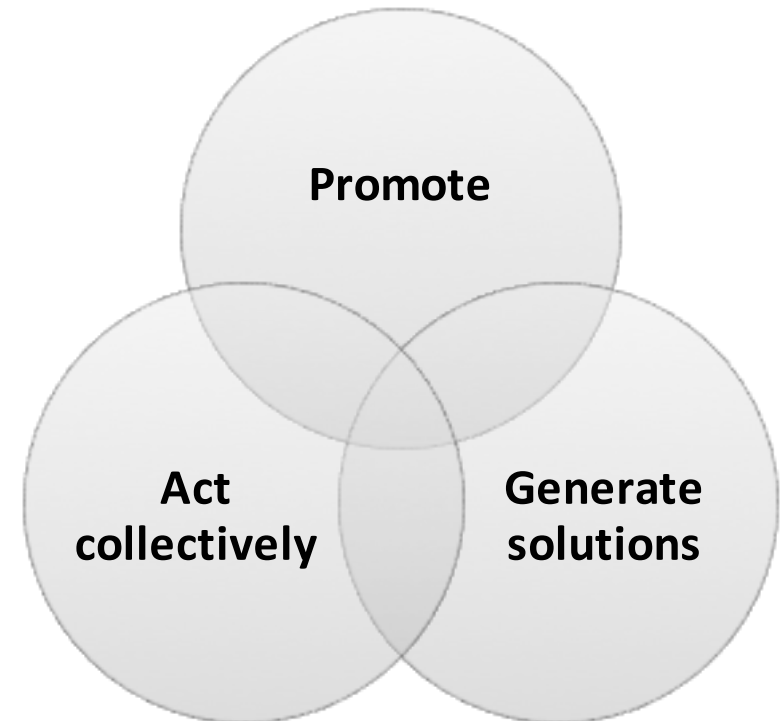


The X-Factor: 'Working together'

The dynamics of cooperation

Why:

- Resources available to some but not all;
- Cruise lines deploy ships to a **'region' *not to a 'port'***
 - They choose itineraries, including several ports
 - 'Classic deployment': 4 ports - 4/7 days cruise



The MedCruise way: Logic of “Collective Action”

- Provide marketing, networking and professional development tools & forums
- Develop & foster good relations and collaboration among cruise ports of the region (and beyond !!!) & liaison with cruise lines!
- Reflect on policy developments
- Reaching the entire port community: cities, cruise-lines, travel agents, passengers, etc...

The MedCruise way: Creating Solutions

- **Collaborate on solutions:**
 - Operational issues
 - Port Finances
 - Environment
 - Training
- **Information sharing**
 - Newsletter - a key publication
 - Directories – (hard copies /on line,
 - Press relations
 - Economic studies (statistics reports, benchmarking etc..)



MedCruise 2015/16 Yearbook

A Directory of Cruise Ports
& Professionals in the
Mediterranean &
Adjoining Seas



Click to view

MedCruise tools

- **Reaching together source markets**
 - Classic markets (i.e. Europe, US)
 - New markets (i.e. China; rest of Asia)
- **Professional development courses**
- **Dissemination of good practices**
- **Development of common practices**
 - MedCruise guidelines on berth booking process



Policy matters of importance to MedCruise

- Emissions
- Global – Climate Change, CO₂
- Local – Health issues SO_x, NO_x
- Shore-side Electricity
- Sulphur Directive
- **Waste management**



Define a plan for the recovery or re-use of **30%**

Act a plan for the re-use of **90%**

Define a plan for the recovery or re-use of **40%**

MedCruise is

- A well-balanced Association serving ports of different sizes, and from diverse regions, countries and cultures

Scope

- To balance the 'maritime' and the 'tourism' dimensions that are part of cruising



Thank you

We are social!



in

www.medcruise.com