



2nd UNWTO Conference on Destination Management in the Mediterranean "QUALITY: THE KEY DRIVER FOR SUCCESS IN THE MEDITERRANEAN DESTINATIONS"

Budva, Montenegro, 22-24 June 2015

SESSION 3 Cruise and Maritime Tourism: Challenges and Opportunities

Cruise and maritime tourism in the Med:
there is still space to improve the benefits
for the involved destinations

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RISPOSTE



TURISMO

ADRIATIC
SEA
FORUM

CRUISE
FERRY
SAIL &
YACHT



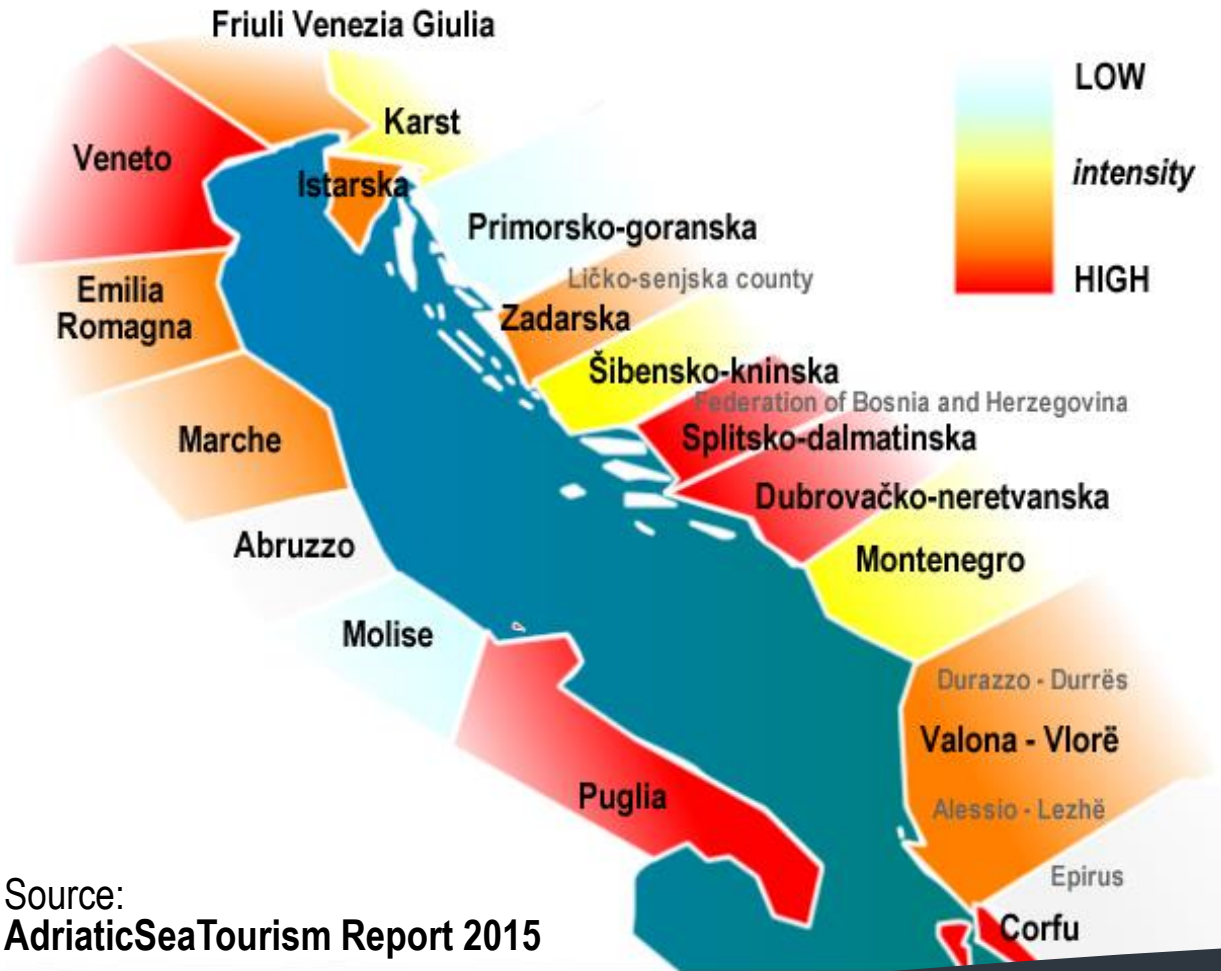
ITALIAN CRUISE DAY

**Are we facing maritime tourism
as a whole phenomenon and not
as just a sum of many factors?**

**Each maritime tourism component
(cruise, ferry, nautic, ...)
has different peculiarities
but also common elements**

MARITIME TOURISM: THE ADRIATIC SEA CASE

Maritime tourism intensity in the Adriatic regions (combination of cruise, ferry, sail & yacht tourism)



Source:
AdriaticSeaTourism Report 2015

ADRIATIC AT A GLANCE

more than 20 cruise ports
+4.6 million passenger movements

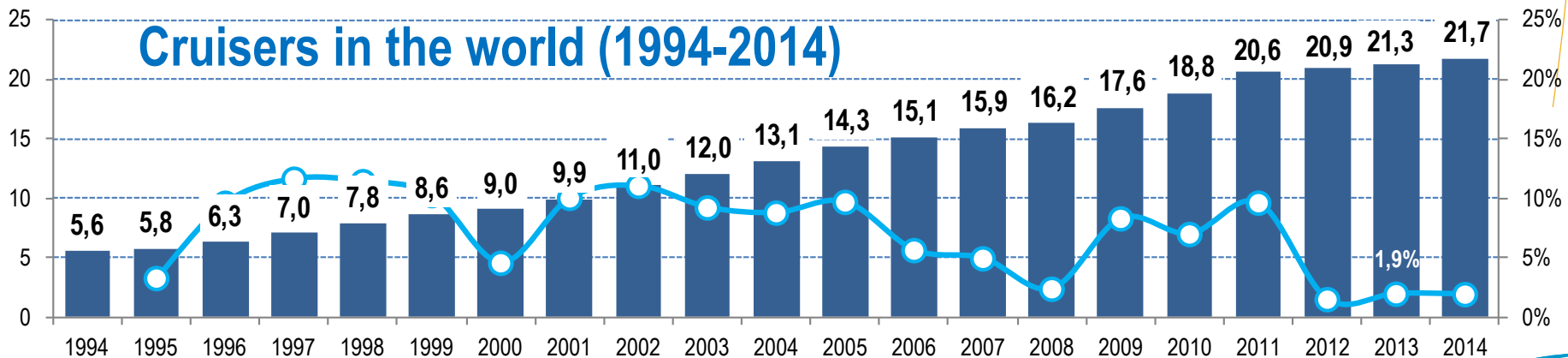
more than 40 ferry ports
over 17 million passengers

more than 320 structures
for boat tourism
around 80,000 moorings

MARITIME TOURISM SECTORS OVERVIEW (1/3)

CRUISE

- strong industry which sees many players working together in associations (as CLIA and Medcruise)
- After decades of growth in the Med in terms of passenger movements it experienced a drop in 2014 due to redeployment. Now it is back to rise.
- Around 30mln movements in Med ports (+100 cruise ports).



Source: Italian Cruise Watch, 2014

MARITIME TOURISM SECTORS OVERVIEW (2/3)

FERRY

Maritime Transport, passengers

	2001	2011
EU-27	210,574	192,702
Other Med	3,378	3,677
Total	213,951*	196,379*

Source: Eurostat. *Pocketbook on Euro-Mediterranean statistics*, 2013

Med traffic volumes (2013)

228mIn* passengers
*counting only embarks

Source: Shippax, 2013

- **Difficulties for national-owned companies (with some monopolistic situations to their end) facing intense activity of private ones.**
- **More than 450 ferry operators in the world (Europe and Japan as the most ferry intense areas)**
- **Hi dependance on bunker costs (decreased during this season)**
- **Strong low cost airlines competition.**

MARITIME TOURISM SECTORS OVERVIEW (3/3)

- 4.500 marinas (+500.000 berths) estimated in Europe with 217 super yacht marinas in the Mediterranean (the most attractive region in the world).
- the Mediterranean Sea attracts 70% of the world charter activity.
- A sector that suffered a strong fiscal crunch in some European countries and which is still suffering a crisis in internal demand with more foreigner purchasers of boats.

NAUTIC

***could we refer to growth
just in terms of traffic movements?***

MANY INDEXES OF GROWTH TO BE CONSIDERED

+ JOBS

+
SUPPLIERS
ENGAGEMENT

LOCAL
SOCIO-ECONOMIC
CONDITIONS

BOATS & YACHTS
BERTHING

+ TRAFFIC
SHIPS, FERRIES, BOATS
& PAX MOVEMENTS

+ PASSENGER
MOVEMENTS
IN PORTS &
MARINAS

SHIP CALLS
IN PORTS

+ SHORE
INVESTMENTS
(w/
sustainability)

+ SHORE
INVOLVEMENT
(pre-post &
excursions)

benefits' distribution vs. concentration

MARITIME TOURISM AS GVA ACTIVATOR

MARITIME COASTAL TOURISM IN EUROPE GROSS ADDED VALUE (2011)

Cruise tourism
(direct/indirect and induced)
14.5 bln€
303.000jobs

183 bln€

Yachting and Marinas
(direct/indirect)
38.7 bln€
372.000jobs

Coastal tourism
(only direct)
130 bln€
2,5mln jobs

MARINA INDUSTRY IN EUROPE

60 bln€
total capital amount. Value in Europe
(taking everything into account, from the berths
to the supporting facilities)

Source: T. Luković, *Nautical tourism and Its Function
in the Economic Development of Europe*, 2012

CRUISE ADRIATIC CASE

Risposte Turismo estimated 0,5 bln of
direct expenses for cruises only in
Adriatic that could rise to
2,9 bln€ in the Med considering
Adriatic share of traffic (18%)

NAUTIC INDUSTRY IN EUROPE

Boating, marinas and water sports represent over **155,000 direct jobs**, generating **13 bln€** in revenues annua

Source: European Boating Industry, *Contribution to the EU Tourism Policy -Sustainable Coastal and Maritime Tourism*, 2013

The most involved ones

Shipping Companies

Passenger terminals

Port operators

National governments

Marinas

Tour operators & AdV

Destinations

Charter companies

THE MED HAS MANY FACTORS TO LEVERAGE ON IN THE MARITIME GLOBAL COMPETITION



**large variety of options
to skip kinds of instability
(geopolitical, airconnections, weather, ..)**

***a key element for each
maritime tourism component***

Eterogeneity of destinations/ports & shore experiences that works from tourists coming from the sea

A lot of attention on the maritime sector, industry investments, and a desire shared by many stakeholders to draw a development path

***THESE AND FURTHER COMPETITIVE
ADVANTAGES OF MED DESTINATIONS
ALLOW TO ATTRACT LOTS
OF MARITIME TOURISM TRAFFICS***

***TOURISM DESTINATIONS ARE
ALREADY GETTING SOME BENEFITS***

***BUT THEY COULD DO MORE
FOR ACQUIRE MORE***

DO MORE TO GET MORE (1/3)

Destinations must speak & discuss with maritime stakeholders

being active and pro-active, understanding the private needs while setting local public needs, and not just thinking to taxes to raise

Destinations must cooperate in order to get higher global results

In sectors in which itineraries are at the base of the tourist experience, a multi-destinations approach is needed not only for the demand but also for the offer

DO MORE TO GET MORE (2/3)

Understand the business and get ready
each sector has its rules and know how:
it's necessary to invest in education in order to have
operators with the right skills

More quality and creativity in the local offer

There is an higher potentiality to promote the destination
through maritime tourists: they can come back for a different
experience and/or activate a word of mouth.

To do that it's important to positively impress them with variety
and accuracy in what is offered

DO MORE TO GET MORE (3/3)

A proactive approach is needed

Destinations couldn't expect ships and boats to berth when shops and the whole city are open. Local operators have to adapt their working hours to the "rhythms" of the cruise and maritime demand. More time tourists spend on land, more money the destination gets

Higher benefits come with stronger commitment

Are destinations dedicating attention and priority to these sectors? It's not an inevitable choice but we must be aware that benefits don't come without tangible and intangible investments



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SESSION 3

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Risposte Turismo

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