

The Mediterranean Sea Region – the leader in the cruise ship tourism in Europe

Joanna Kizielewicz

Gdynia Maritime University, Faculty Entrepreneurship and Quality Science
81-225 Gdynia, ul. Morska 81–87, e-mail: poczta@edustar.pl

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Abstract

The main objective of the research is to assess the state of development of cruise ship tourism in the Mediterranean. The article also presents main homeports and ports of call and shows the most important cruise ship-owners in the Mediterranean. Moreover, there are analyzed available statistical data regarding cruise passengers in the Mediterranean and discussed a few examples of properly prepared port infrastructure for handling cruise ships on the example of ports in: Barcelona, Dubrovnik and Valleta (Malta). The research was realized using a method of desk research, a critical and comparative analysis of available statistical reports and publications and also other scientific materials.

Introduction

“The total worldwide cruise industry is estimated at \$36.2 billion (a 4.5% increase over 2012) with 20.9 million annualized passengers carried (a 3.3% increase over 2012)” [1]. According to the European Cruise Council (ECC) the industry related to cruise ship tourism generated in 2011 in Europe €36.7 billion in total output¹ [2] and created 315,500 jobs (49% direct, 36% indirect and 15% induced) [2]. Moreover CLIA Travel Agent Survey includes the Mediterranean to the Top Destinations, just after Alaska and Caribbean” [3]. Cruise passengers accounted for around 3% of all maritime passengers in the EU-27 but the Mediterranean Sea basin has a share approximately two thirds (66.5%) of all cruise passengers in the EU [4].

“The Mediterranean Sea is an inland sea surrounded by Asia, Europe and Africa. In the west, the sea is connected with the Atlantic Ocean by the Strait of Gibraltar. In the east, it is linked to the Red Sea and the Indian Ocean by Suez Canal, and the Black sea at the Dardanelles and the sea of Marmara” [5].

The Mediterranean is a very valuable area for tourists, attracting hundreds of thousands of visitors from all over the world, i.e. the USA, Japan, China, Germany, France and the Great Britain and the others. The tourist attractiveness of the Mediterranean is determined, first of all, by excellent weather conditions, because tourist season lasts on average from March to October, it means that it is longer about 2 or 3 months than in other regions of Europe. In the Mediterranean, there are a number of historical cities with a rich cultural heritage from the ancient times as: Minoan civilization² and Mycenaean civilization³ or Ancient Rome. For this reason, the Mediterranean has a competitive advantage over other tourist destinations of Europe.

“Cruise tourism can have particularly positive and immediate impacts on parts of Southern Europe which are particularly suffering from the economic downturn” [6]. In the Mediterranean, the port cities are well adapted for handling cruise ships, and some of them, such as e.g. Barcelona, support more than 2 million passengers annually. Local authorities of port cities and all relevant organizations in

¹ By definition, total output includes all intermediate inputs, taxes net of subsidies, net surplus (profits, net interest, dividends and other items) and employee compensation.

² one of the oldest civilization of the bronze age in the Mediterranean.

³ the oldest culture in Continental Greece on the Peloponnesos.

the Mediterranean appreciate the value of appropriate reception of cruise ships. It's a huge source of revenues for ports, tour-operators, catering industry and shopping services.

The article gives the results of the analysis of the cruise tourism market in the Mediterranean. The article consists of three parts and a summary. In the first part of the article, the main marine destinations in the Mediterranean are described. In the second part, the major homeports and ports of call in the Mediterranean are presented and there are characterized a few examples of organizational and technical preparation of ports for handling of cruise ships. In the last part of the work, a brief analysis of the offers proposed by leading shipowners operating in the Mediterranean, are included. The article ends with a summary where it is indicated the reasons why the Mediterranean has a competitive advantage among other sea regions in Europe as far as cruise ship tourism is concerned.

The Mediterranean Sea Region on the cruise ship market

According to G.P. Wild (International) Limited and Business Research and Economic Advisors, who were engaged by the European Cruise Council (ECC) “nearly 6.2 million European residents booked cruises (...), representing around 30% of all cruise passengers worldwide. An estimated 5.6 million passengers embarked on their cruises from a European port (...). Of these around 4.8 million were European nationals and about 0.8 million came from outside Europe. The vast majority of these cruises visited ports in the Mediterranean, the Baltic and other European regions, generating 28.1 million passenger visits at a total of around 250 European port cities” [2].

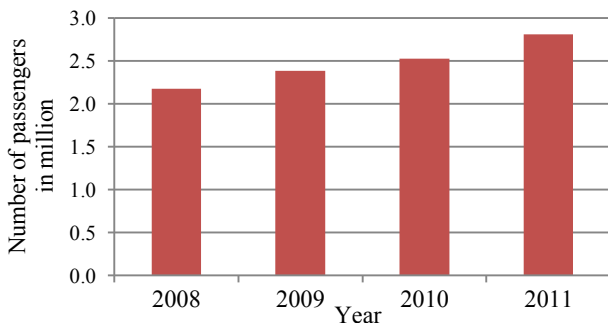


Fig. 1. Cruise visitors to Europe from 2008 to 2011 (own study on the base of [8])

It is worth noting, that the increase in the number of cruise passengers travelling in Europe from 2008 to 2011 amounted to 29.5%. In 2008, 21.7 million cruise passengers registered, and in 2011 – until 28.1 million cruise passengers (Fig. 1). “Since

1980, the industry has experienced an average annual passenger growth rate of approximately 7.2% per annum” [7].

In Europe, “the dominance of the Mediterranean Sea basin, which was apparent for all maritime passenger transport, (...) accounting for approximately two thirds (66.5%) of all cruise passengers in the EU” [4]. “The Mediterranean Sea basin is considered to be one of the most famous cruise destinations in Europe thanks to numerous historical monuments, long sailing traditions, and first of all, excellent weather conditions, that cause that a tourist season for cruise travels lasts up to eight months” [9].

In Europe, Italy is the most famous cruise tourist destination in Europe, because its share is at the level of 23%. However, Spain is on the second place with a share at 18.7%, and Greece is on the third place – 17%. Only these three countries in the Mediterranean have the total share at the level of 58.7% in the cruise tourism market in Europe (Table 1).

Table 1. European Cruise Passengers by Country of Destination, 2011 (own study on the base of [8])

Country	Passengers	Share of Total
Italy	6,471,000	23.0%
Spain	5,255,000	18.7%
Greece	4,780,000	17.0%
France	2,167,000	7.7%
Norway	1,947,000	6.9%
Portugal	1,069,000	3.8%
United Kingdom	648,000	2.3%
Sweden	517,000	1.8%
Denmark	483,000	1.7%
Malta	445,000	1.6%
Estonia	443,000	1.6%
Finland	356,000	1.3%
Gibraltar	329,000	1.2%
Germany	315,000	1.1%
Benelux	311,000	1.1%
Cyprus	259,000	0.9%
Ireland	160,000	0.6%
Iceland	137,000	0.5%
Poland	83,000	0.3%
Other EU	+ 3 229,000	0.8%
EU+3	26,404,000	93.9%
Other Europe	1,707,000	6.1%
Total	28,111,000	100.0%

Cruise ship destinations in the Mediterranean Sea Region

The sea ports handling cruise ships are generally divided into three main kinds so called: homeports, ports of call (transit ports) and hybrid ports. The homeports are the units where cruise ships start and end cruises and for these reasons, there are prepared to deliver a full range of reception services for hundreds of thousands of tourists such as: accom-

modation, catering, shopping, tourist amenities and also a rich offer of supporting services. These ports have perfect communication accessibility by: air, rail and road. On the other side, the ports of call deliver mainly shopping and tourist services for cruise ship passengers. While the hybrid ports combine both of these features.

According to O. Bagis and M. Dooms “homeports should be strategically located in a geographic area in which attractive inland destinations and port cities are abundant and at close proximity; thus cruise lines need to design competitive and flexible itineraries. Sufficient airline connectivity of the homeport city is another vital element in terms of passenger satisfaction and schedule reliability of the itineraries, given the global market within which costumers are recruited” [10]. Some authors home ports call a base port and e.g. according to F.M. Collison “a base port is the point that a cruise ship uses as its home port of call. This is typically where passenger initial embarkation and final debarkation take place. The base port often is used for the provisioning of the ship, including fuel, food and beverages, and other consumable and non-consumable stores” [11].

Generally speaking homeports are usually located in the areas with a concentration of a tourist demand, with unique tourist attractions, high standard of tourist amenities and with suitable communication accessibility. Among the most important homeports in the Mediterranean must be mentioned as follows: in Spain – Barcelona, in Italy – Rome and Venice, in Greece – Athens, in Portugal – Lisbon, and also Grand Harbor in Maltese [12].

The port of Barcelona has the largest market share among the major European homeports, because it supports more than 2.5 million passengers per year (Fig. 2), what gives the share more than 23% among the major European homeports in the Mediterranean. In the second place, there is a port of Civitavecchia with the share of almost 21% and in third place – the port of Venice with the share of nearly 16%.

Analysis of the number of passengers handled in the major homeports in the Mediterranean in 2011 in relation to 2009 indicates that all ports registered the increases. The largest percentage increase in the number of passengers carried from 2009 to 2011 was reported in the port of Palma Majorca that was up 34%. A good result was also noted in the port of Civitavecchia and it was at the level of 33%, and in the port of Barcelona – 24% (Table 2 and Fig. 3).

The port of Barcelona is the European market leader in terms of the number of passengers handled and cruise ships calls. This homeport is

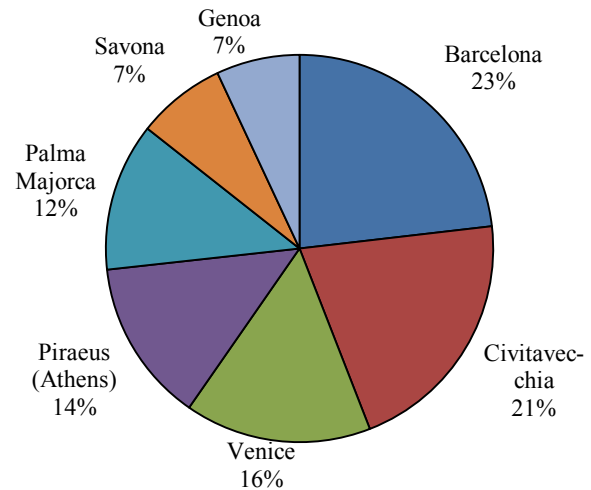


Fig. 2. Passengers in the major European home ports in the Mediterranean Sea Region (own study on the base of [8])

Table 2. Passengers in the major European home ports in the Mediterranean Sea Region (own study on the base of [8])

Home port	Country	2009	2010	2011
Barcelona	Spain	2,151,465	2,350,283	2,657,244
Civitavecchia	Italy	1,802,938	2,458,000	2,400,000
Venice	Italy	1,420,980	1,617,011	1,786,416
Piraeus (Athens)	Greece	1,500,000	1,210,000	1,560,000
Palma Majorca	Spain	1,056,215	1,347,009	1,419,502
Savona	Italy	712,681	931,000	850,000
Genoa	Italy	671,468	860,290	798,521

a perfect example of the cruise tourist destination i.e. a place with “a high level of port infrastructure to support visitation from large cruise ships, a high level of destination awareness among the cruise industry, a high degree of industry capacity and port infrastructure to support around visits, a high level of tourism destination infrastructure to support cruise ship visitation as: attractions, accommodation, activities, access and amenities” [13]. The port of Barcelona is located in the heart of the historical city, what is a great tourist advantage for cruise tourists. There are nine terminals in total but seven of them are dedicated to handle cruise ships [14] with the draught up to 8.5 m, length up to 215 m, breadth up to 35 m, and the capacity up to 50,000 t of deadweight [14]. The port of Barcelona offers a range of facilities for cruise passengers, i.e. air conditioned room, public telephones, foreign exchange office, duty free shops, souvenir shops, and also restaurants, the World Trade Center Barcelona, the five-star luxury hotel and the port cable car (Fig. 4).

In the homeports, it is also necessary to ensure adequate communication accessibility to the seaport, both by air, rail and road, in order to be able to handle tens of thousands of tourists benefiting from

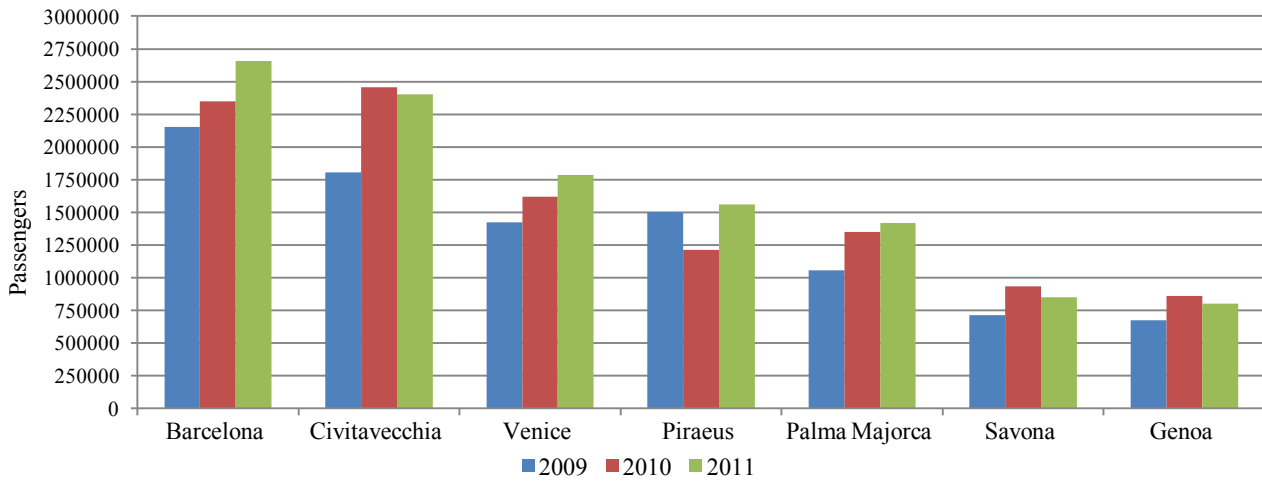


Fig. 3. Passengers in the major European Home Ports in the Mediterranean Sea Region (own study on the base of [8])



Fig. 4. Barcelona wharf in the Port of Barcelona [14]

cruises on cruise ships [12]. The port of Barcelona is perfectly connected to the city. Tourists can choose from a variety of forms of transportation i.e.: metro, bus transportation, Barcelona Tours Bus, taxi and car rentals. It also has a good clean connection with the Barcelona Airport what allows tourists using “flight and cruise” offers.

Next to the homeports in the Mediterranean, there are numerous ports of call where cruise ships stay for several hours in order to allow tourists visiting attractive tourist destinations, and for the reason of catering and water delivery and also energy supplies.

Among the top 15 ports of call in the Mediterranean, the cruise port in Naples in Italy has the largest share in the number of passengers handled at the level of 11.23% among the ports of call (Fig. 5). This port handles over a million passengers a year. The port of Dubrovnik, involving almost 9.58% and supporting about one million passengers a year is the second key port of call in the Mediterranean. The port of Livorno, with the share of 9.56% and almost one million of passengers annually, is on the third place of all ports of call in the Mediterranean (Table 3).

Table 3. Passengers in the major European ports-of-call (own study on the base of [8])

Port-of-call	Country	2009	2010	2011
Naples	Italy	1,265,000	1,139,919	1,154,000
Dubrovnik	Croatia	845,603	970,000	985,000
Livorno	Italy	795,313	822,514	982,928
Santorini	Greece	816,000	700,000	962,000
Marseille	France	622,300	699,892	826,000
Mykonos	Greece	868,000	594,000	684,000
Côte d’Azur	France	744,909	667,847	666,082
Malaga	Spain	487,955	659,123	638,845
Bari	Italy	567,885	507,712	586,848
Palermo	Italy	478,900	394,885	567,049
Valletta	Malta	441,913	493,748	566,042
Rhodes	Greece	727,000	536,000	526,000
Messina	Italy	253,200	371,180	500,636
Gibraltar	UK	dep 348,199	305,161	328,636
Limassol / Larnaca	Cyprus	322,034	380,278	303,135

The port of Dubrovnik is the second important port of call which is worth analysing. It has a long tradition and is famous for its unique cultural heritage all over the world. For years it is included in nearly all cruise schedules organised in the Mediterranean (Figs 6 and 7).

The port of Dubrovnik is one of the leading off-shore destinations in the Mediterranean. The port is located close to the picturesque ancient Old Town which is the tourist goal of all visitors coming on aboard of cruise ships. In addition, the port is perfectly organized as far as the communication accessibility is concerned. The visitors can get to the city center on foot, by bus or a taxi. Moreover, the international airport is just 20 km from the cruise port and it does not make any communicational problem. The port of Dubrovnik has a length of quays from 50 m to 605 meters and the draught of 2 m to 11.5 meters. The port is able to handle

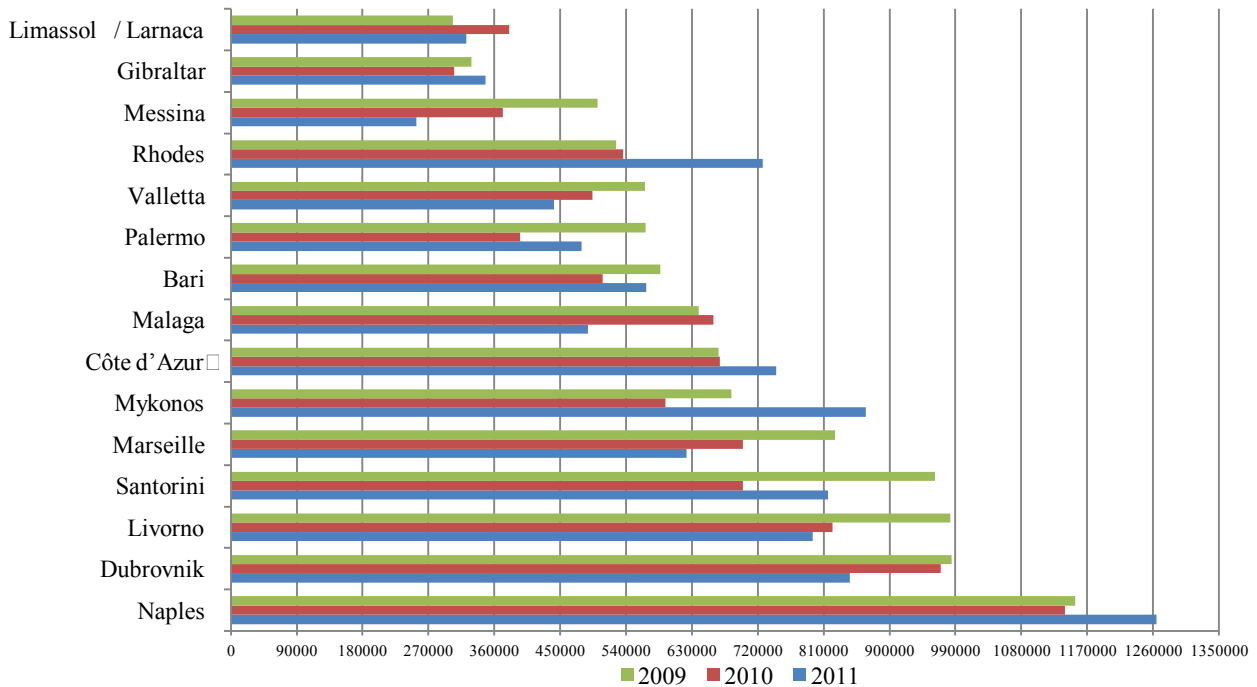


Fig. 5. Passengers in the major European ports-of-call in the Mediterranean Sea Region (own study on the base of [8])



Fig. 6. Cruise ship terminal in Dubrovnik [photo: K. Rudnicki, 2013]



Fig. 7. Cruise ship terminal in the Mediterranean [photo: K. Rudnicki, 2013]

cruise ships of all sizes. Annually, the port of Dubrovnik registers on average of more than 650 calls and more than 1 million passengers (Table 4).

Table 4. The seasonality of cruise ship calls in the port of Dubrovnik from 2010 to 2012 [15]

The month of a year	2010	2011	2012
January	5	9	2
February	5	9	2
March	11	8	4
April	53	41	49
May	99	76	87
June	89	86	98
July	97	99	89
August	94	97	96
September	105	117	97
October	106	94	97
November	33	38	26
December	8	7	7
Total	705	681	654

Tourist season on cruises in the Mediterranean lasts longer than in other parts of Europe e.g. in Dubrovnik – up to 243 days. However, analysis of the statistics of cruise ships calls in the port of Dubrovnik indicates that even in January, February and November and December the port is visited by cruise ships (Fig. 8). The peak of the tourist season in Dubrovnik is from July to October each year, when approximately 100 cruises ships call at the harbor of Dubrovnik monthly. Analysis showed that September is the month in which there are registered the highest number of calls for many years.

It happened in history of the port that more than a dozen units, with a number of 25,000 visitors, call at the port of Dubrovnik at the same time. It seems that such situation should be excellent for the tourist industry and local authorities. Unfortunately, the increasing dissatisfaction of the inhabitants caused by overcrowding and polluting of the city by visitors, are the serious problems for the port and local authorities.

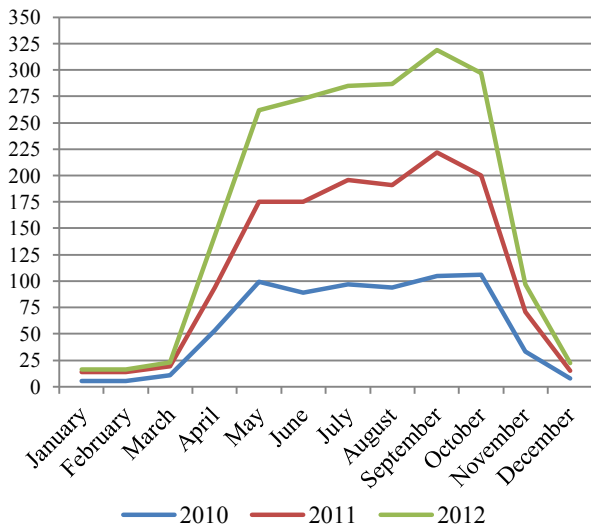


Fig. 8. The seasonality of cruise ship calls in the port of Dubrovnik from 2010 to 2012 (own study on the base of [15])

“Thanks to growth in tourism flows and in the average size of the ships, the cruise industry has been sparking numerous urban and architectural infrastructure projects based on the construction of new cruise ship terminals” [16]. The investment in the cruise passenger terminal, made in the port of Valletta (Malta), is an interesting example of cooperation (Figs 9 and 10). In 1996, Valletta Cruise Port plc. was made up of ten following shareholding companies: Applied Investments Ltd., Aggregate Investments Ltd., Checkout Developments Ltd., Perquisite Holdings, M. Demajo Ltd., Bank of Valletta plc., Malta International Airport plc., FSG Limited, Devoport Inc, Infrastructure World International Ltd. Honk Kong [17] who prepared the project to build a cruise ships terminal in Valletta. “Valletta Cruise Port plc. was awarded the project and the formal agreement was signed on the 23rd of November 2001. As a part of the package the Government offer included the lease of all 48,000 square meters of land and buildings on the land side of the quays for 65 years” [17]. The investment budget amounted to 35 million Euro. The cruise passenger terminal was designed to handle six cruise ships at the same time (Figs 11 and 12). On the quayside, there are numerous restaurants, cafes, bars, pubs, movies, shops with

souvenires and handicrafts etc. The modern passenger terminal is equipped with the border clearance office, dutie free shops and currency exchange office, and also toilettes for visitors. Adaptation of the quayside was carried out in the period from 1996 to 2001 [18].



Fig. 9. Cruise ship terminal in Valletta (Malta) [author’s photo]



Fig. 10. Cruise ship terminal in Valletta (Malta) [author’s photo]



Fig. 11. Cruise ship terminal in Valletta (Malta) [author’s photo]



Fig. 12. Cruise ship terminal in Valletta (Malta) [author's photo]

Nowadays, the cruise terminal in Valletta supports more than half a million passengers annually and it is the meeting and recreation place both for visitors and residents. Moreover, thanks to this investment, hundreds of jobs were created. This is a good example of a public-private partnership. Of course, it should be noted that climatic conditions in the Mediterranean are more beneficial and seasonality of tourism is not so noticeable, as it is in other regions in Europe. However, solutions used in such regions should motivate the port authorities and various organizations in other regions of the world to cooperate.

It is worth mentioning, that almost all cruise ports in the Mediterranean, both homeports and ports of call, are in the MedCruise association. The association has a long tradition and was established in Rome on the 11th of June 1996.

“MedCruise has grown to 72 members representing more than 100 ports around the Mediterranean region, including the Black Sea, the Red Sea and the Near Atlantic, plus 30 associate members, representing other associations, tourist boards and ship / port agents. The Association assists its members in benefiting from the growth of the cruise

industry by providing networking, promotional, and professional development opportunities” [19] (Fig. 13).

Cruise shipowners in the Mediterranean

Thanks to excellent climate conditions and unique tourist and cultural attractions, the Mediterranean Sea Region is the center of concentration of the cruise ship tourism in Europe. All leading cruise corporations are present in the Mediterranean and offer a wide range of tourist packages. Now, the cruise ship market in the world is divided among three main corporations i.e. Carnival Corporation & plc. – 48.4% share in the global market [20], Royal Caribbean Cruises Ltd. – 23.3% and Star Cruises – 1.4%. They form together 73.1% of the berths. The all key players in the cruise tourism market are present in the Mediterranean. The Carnival Corporation & plc. (CCP) is the largest cruise lines in the world and has 24 cruise ships. The statistics show that about 4.5 million passengers are clients of the CCP annually. CCP employ approximately 4000 employees on seacoast and 39,000 on the shipboards in various regions of the world. In the Mediterranean only Venice and Barcelona are CCP homeports during the summer seasons. Mostly, cruises in the Mediterranean last from seven to twelve days (Table 5).

The Royal Caribbean Cruises Ltd. [22] is the second most important cruise corporation in the world. “Royal Caribbean Cruises Ltd. is the world's second largest cruise company, operating the Royal Caribbean International, Celebrity Cruises, Pullmantur, Azamara Club Cruises and CDF Croisieres de France brands, with 40 ships and a passenger capacity of approximately 92,300, and TUI Cruises through a 50% joint venture” [23]. There are employed approximately 5,200 full-time and 850 part-time employees worldwide in shoreside operations and approximately 52,000 shipboard employees



Fig. 13. The members of the MedCruise Association in the Mediterranean Sea Region [19]

Table 5. The cruise lines and their offers in the Mediterranean Sea Region [own study on the base of [20, 21, 22])

The owner of the vessel	The name of the vessel	The duration of a cruise	Chosen cruise routes in the Mediterranean Sea Region
Carnival Corporation & plc.	Legend Sunshine	From 9 to 12 days	From Barcelona to Venice, with stops at Palma de Mallorca, Marseilles, Olbia, Livorno, Rome, Naples, Sicily, and Dubrovnik
Royal Caribbean Cruises Ltd.	Navigator of the Seas; Serenade of the Seas; Splendour of the Seas; Liberty of the Seas; Legend of the seas	From 5 to 15 days	From Barcelona, Cannes (Monte Carlo), Livorno (Florence), Civitavecchia (Rome), Piraeus (Athens), Kusadasi (Ephesus), Santorini, Naples (Capri), Barcelona or e.g. from Venice, Kotor, Montenegro; Messina (Sicily), Naples (Capri), Civitavecchia (Rome), Livorno (Florence), Provence (Marseilles), Barcelona
Celebrity Cruises	Equinox, Eclipse, Reflection, Silhouette	From 7 to 14 days	From Barcelona, Spain to Valletta, Malta; Athens, Greece; Mykonos, Greece; Ephesus, Venice (Italy) Turkey; Santorini, Greece; Naples, Italy; and Rome, Italy Dubrovnik, Croatia
Costa Mediterranean Cruises	Costa Serena, Pacifica, Concordia, Fortuna or others	From 7 to 13 days	From from Savona to Katakolon, Mykonos, Izmir, Istanbul, Costanza, Odessa, Yalta, Piraeus, and Civitavecchia or e.g. Spain, Morocco & Portugal cruises on the Costa Deliziosa. Round-trip from Civitavecchia (Rome) to Barcelona, Casablanca, St Cruz de Tenerife, Funchal and Malaga
Holland America	ms Ryndam; ms Noordam; ms Nieuw Amsterdam	From 10 to 28 days	From Rome to Athens, with stops at Kerkira, Corfu; Dubrovnik, Croatia; Split, Croatia; Venice, Italy; Katakolon, Greece; and Thira, Greece an e.g. from Istanbul to Barcelona. Stops at Kusadasi, Turkey; Marmaris, Turkey; Antalya, Turkey; Port Said, Egypt; Alexandria, Egypt; Katakolon, Greece; Corfu, Greece; Messina, Italy; and Naples, Italy
MSC Cruises	MSC Splendida; MSC Divina; MSC Fantasia; MSC Preziosa; MSC Orchestra	From 7 to 11 days	From Rome to Genoa, Marseille, Barcelona, La Goulette and Palermo or e.g. from Barcelona to Marseille, Genoa, Naples, Messina and La Goulette
Norwegian Cruise Lines	Norwegian Jade; Norwegian Spirit; Norwegian Epic	From 7 to 12 days	From Barcelona (Spain) to Casablanca (Morocco), Funchal (Madeira), Arrecife (Canary Islands), and Granada (Spain or e.g. from Venice (Italy) to Dubrovnik (Croatia), Athens (Greece), Ephesus (Turkey), and Split (Croatia)
Princess Cruises	Crown Princess; Ruby Princess; Pacific Princess; Royal Princess	From 12 to 14 days	From Venice to Athens, with stops at Ravenna, Dubrovnik, Patmos, Haifa, Ashdod, Port Said, Alexandria, and Kusadasi or e.g. from Barcelona to Venice, with stops at Florence, Rome, Naples, Mykonos, Istanbul, Kusadasi, and Athens.
Windstar Cruises	Wind Surf; Wind Star; Wind Spirit	From 7 to 11 days	From Barcelona to Rome, with stops at Marseille, France; Monte Carlo, Monaco; Cannes, France; and Portofino, Italy or e.g. from Athens to Venice. Venetian passageways, with stops at Hydra, Corinth Canal, Delphi, Zakynthos, Butrint, Kotor, Dubrovnik, and Hvar
Crystal Cruise Line	Crystal Serenity; Crystal Symphony	From 7 to 12 days	From Barcelona to Venice, with stops at Monte Carlo, Monaco; Florence, Italy; Rome, Italy; Sorrento, Italy; Sicily, Italy; and Torgir, Croatia or e.g. from Athens to Istanbul, with stops at Mykonos, Greece; Navplion, Greece; Patmos, Greece; Izmir, Turkey; and Canakkale, Turkey
Cunard	Queen Elizabeth; Queen Victoria	From 7 to 17 days	From Southampton, England to Seville, Spain; Valletta, Malta; Venice, Italy; Dubrovnik, Croatia; Corfu, Greece; Messina, Italy; and Gibraltar or e.g. from Southampton, England to Seville, Spain; Malaga, Spain; Valencia, Spain; Barcelona, Spain; Gibraltar; and La Coruna, Spain
Regent Seven seas	Seven Seas Mariner; Seven Seas Voyager	From 7 to 10 days	From Florence, Italy; Rome, Italy; Sorrento, Italy; Sicily, Italy; Argostoli, Greece; Durres, Albania; Split, Croatia; and Koper, Slovenia or e.g. Santorini, Greece; Ephesus, Turkey; Taormina, Italy; Positano, Italy; Rome, Italy; Florence, Italy; Monte Carlo, Monaco; and Marseille, France
Seaborn Cruise Line	Seabourn Spirit; Seabourn Odyssey; Seabourn Quest; Seabourn Sojourn	From 7 to 24 days	From Barcelona, Spain, with stops at Valencia, Spain; Livorno, Italy; Civitavecchia, Italy; Naples, Italy; Messina, Italy; Iraklion, Greece; Rhodes, Greece; Bodrum, Turkey; Ermoupolis, Greece; Piraeus, Greece; Kusadasi, Turkey; Cesme, Turkey; Mykonos, Greece; Rethymnon, Greece; Valletta, Malta; Trapani, Italy; Propriano, France; Monte Carlo, Monaco; and Marseille, France or. e.g. from Monte Carlo. Stops at Kusadasi, Turkey; Symi, Greece; Thira, Greece; Catania, Italy; Lipari, Italy; Ponza, Italy; Livorno, Italy; and Portovenere, Italy
Silverssea Mediterranean Cruises	Silver Spirit; Silver Cloud; Silver Wind	From 7 to 14 days	From Athens to Rome, with stops at Alexandria, Egypt; Ashdod, Isreal; Haifa, Israel; Limassol, Cyprus; Antalya, Turkey; Rhodes, Greece; Crete, Greece; Catania, Sicily; and Sorrento, Italy or e.g. from Monte Carlo to Barcelona on the Silver Wind. Visit St Tropez, France; Marseille, France; Sete, France; Soller de Majorca, Spain; and Valencia, Spain

[23]. The major home ports are located in: Barcelona, Venice and Civitavecchia (Table 5).

In the Mediterranean, there are also other cruise shipowners and they offer a wide range of cruises for tourists of different interests. There are short term offers lasting only 5 days. e.g. the cruise with Royal Caribbean Cruise Lines, but also cruises lasting until 28 days proposed by the Holland America. A detailed analysis of the tenders proposed by all the shipowners operating in the Mediterranean market indicates that visitors buy mostly cruises lasting for seven days. This is in accordance with the generally known trends on the cruise tourism market. Most of the cruises in the Mediterranean begins in two major destinations, i.e. in Barcelona and Venice, but among the most visiting ports of call, there mentioned such tourist destinations as: Naples, Dubrovnik, Livorno, Santorini, Marseille and Mykonos. In 2011, only these six destinations were visited by nearly 5.6 million passengers, what constitutes the share at the level of 54.4% [24].

Conclusions

The analysis of the cruise ship tourism in the Mediterranean shows that, it is the area of great potential providing strong competition for other marine areas in Europe, and even the world. It is the result of favorable climate conditions, rich tourist attractions, and unique cultural heritage and also convenient geographical location. Moreover, the Mediterranean is the area of concentration of activities of all major cruise shipowners that skillfully use these attributes. Other sea regions in Europe look with a great attention at the solutions applied by the ports in the Mediterranean and tourist packages offered by cruise shipowners and they try to adapt as much as possible to their needs and possibilities. However, a strong position of the Mediterranean Sea region causes that for a long time the region will be the market leader in the cruise ship tourism in Europe and important cruise destination in the world.

However, it is interesting to note, that “nowadays tourists look for offers that are innovative, unique, interesting and fascinating, and most importantly cater to their needs, expectations, interests and dreams. Tourists are not satisfied with a standard sightseeing in a famous destination on the cruise route. They want something more, what will give to them chances for personal development or vocational trainings, allow them to develop their skills, broaden knowledge, exchange of experience, and will provide them with new and an unforgettable experience” [25]. Therefore, marine regions which do not have convenient weather conditions

and have shorter tourist seasons, should try to attract tourists through interesting and innovative offers such as for example theme cruises for groups of special interests.

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