Maritime transport of passengers as a factor of economic local development

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Abstract

The increasing request of competitiveness in the maritime transport, marked by highly capital- intensive activities, implies the necessity to reach greater levels of efficiency. In an extremely dynamic and changeable environment, it is very important to determine the crucial factors of port competitiveness, which make the port more "attractive" both for the distribution of goods and for passengers. In particular, as far as passenger transportation is concerned, the main elements that contribute to increase port "attractivity" and to implement local spillovers, are: adequate infrastructure endowment, strong inclination to change, flexible and market oriented decision-

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making strategies and availability of value-added services. Aim of this paper is to analyse the role of these factors in enhancing the development of the port of Bari in the cruise sector, which is, at the present, a market in strong growth, especially in Mediterranean area, and represent a source of revenue for the localeconomy.

1. Factors of port competitiveness

During the last few years, due to market incentives, international competition and following the new legislative orientations, the concept of "port" has developed into an actual service centre, where port operators try to meet the needs of ships, goods and passengers in the best economical and qualitative possible way. Ports include not only modern infrastructures for loading and unloading all typologies of see-transportable goods, but also passenger-traffic related maritime activities and a wide variety of accessory maritime services such as distribution, storage, ship repair, crew assistance and all else is needed by the ships calling at that port and by the operators working there. In particular, the access of private players to the port sector has brought about greater efficiency in calling ports, has increased economic revenues and generally contributed to develop the services offered by ports in terms of international competitiveness. At present, the factors influencing the choice of a port rather than another are not only exogenous or structural (geographic location, adequate infrastructure, local legislation,...), but also endogenous or service-related (quantity and quality of the services offered, efficiency and performance of the existing structures...)[1]. The most competitive ports are characterised by the professionalism of both public and private operators and by their being in the van with regards to functions based on medium and long term strategies, technological innovations in port infrastructure, supply of a wide, diversified port-produced portfolio, through innovative marketing and promotional techniques, integration and cooperation among all actors involved in port activities. Each port can objectively and professionally evaluate what its role may be in each sector, in order to place targeted investments and to make them more efficient, considering that the various typologies of service require different infrastructures and different investments. In order to keep their market share (or even to increase it), most Port Authorities chose to follow the road of new investments, enlargement of terminals and supply of more efficient services, not only in relation with goods, but also with passengers.

1 Huybrechts, M., Meersman, H., Van de Voorde, E., Van Hooydonk, E., Verbeke, A., Winkelmans, W., (2002), *Port competitiveness. An economic and legal analysis of the factors determining the competitiveness of seaports*, De Boek, Antwerp.

Actually, specialising in a niche market, linked to the presence on the territory within the port area of influence, may turn out to be a winning choice. A type of specialisation which has attracted more than one Port Authority is the one concerning the cruise market. As a matter of fact, this is an expanding sector whose economic fall-out on the port, as well as on the town and the adjoining territory must not be neglected.

2. The cruise market and industry at global scale

During the last thirty years, the cruise market recorded a growing development trend. In the year 2009, the number of passengers averaged about 17 millions (Figure 1). Drawing a balance of the past two years, it is important to note that the industry has managed to offset the problems associated with the global economic crisis without considerable damage. Despite the crisis the industry maintained the demand in the cruise market. Notwithstanding the adverse economic conditions the sector achieved a relatively good profit on fare yields, contrary to earlier gloomy forecasts. Since then the fare steadily increased and advance booking figures also improved significantly. With the supply of cheaper fares and value added the leading cruise operators could keep demand up and keep on realizing profits.

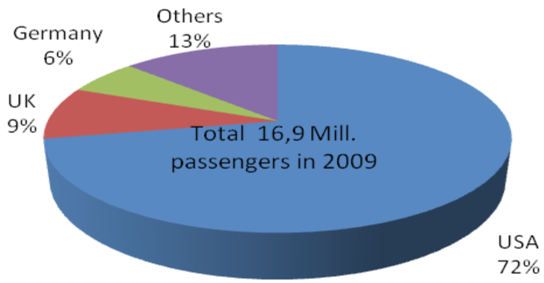


Figure 1. Global demand for cruise shipping, 2009 (per cent-share of total passengers). Source: ISL, 2010

According to the ISL – Institute of Shipping and Logistics[2] - statistics, the tonnage achieved in recent years increased the world cruise fleet by about 12.6%. By the end of 2009, the fleet accounted for 11.8 million tons gross tonnage and the number of presently operational cruise ships is 284 units. Fourteen new ships were delivered in the first six months of 2010, contributing another 919,264 gt to the fleet already this year, while four more ships are scheduled for delivery till end of the year. One of these expected additions is a further ship in

2 ISL Shipping Statistics and Market Review, (2010), vol. 54, No 8.

the category "world's largest cruise ship" with 225,000gt, which belongs to the cruise operator Royal Caribbean. The structure of the fleet reflects, in fact, the growing importance of mega ships (100,000gt and over) (Figure 2).

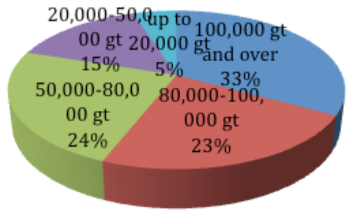


Figure 2. World active cruise fleet by gt-size class, 2010(gt-per cent). Source: ISL, 2010

A significantly portion of the entire cruise fleet is registered under the top five flags of convenience. Among them Bahamas is the most used flag, while other flags of convenience as Italy, the Netherlands and the UK showed a stronger growth due to these countries are the homes of the biggest cruise companies as Costa Crociere, P&O and Holland America Line. The cruise market is generally experiencing a strong process of concentration, generally guided by businesses and groups which mainly operate in the richest and most differentiated area in terms of type of offer, and the less subjected to seasonal factors, such as North America and the Caribbean (Figure 3). Looking at the market share of the major cruise shipping companies in 2010, the Carnival group controls the 47% of the world tonnage with 98 shpis and 7.5 million gt. The Carnival corporation is located all over the world and comprise a lot of international cruise line as the Italian Costa Crociere. The other four leading groups that control the market are Royal Caraibbian (23%) followed by the Malaysia-based Star Cruise (8.2%) and European Mediterranean Shipping Cruises (5.8%).

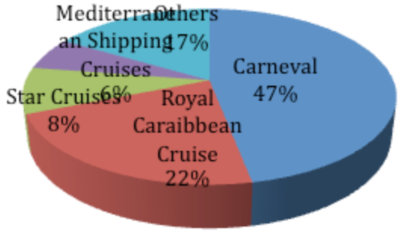


Figure 3. Market shares of the major cruise shipping companies, 2010. (berths per cent-share). Source: ISL, 2010

Following the market expectations processed by ISL, the new cruise ships will be prevailingly build in European shipyards (Table 1). Italy – with the leading role of the Fincantieri group – is the leading builder of such a typology of ships, with orders for 13 units. Meyer Werft, with orders for 756,000 gross tonnage, ranks second among the European building countries, followed by STX (formerly Chantiers de l'Atlantiques) and Marriotti, an Italian niche operator, with respectively 4 and 2 ships on order.

Table 1. Cruise ships on order by major yards, 2010

Yard	No of ships	1000 gt	% share of total
Fincantieri	13	1320	48.8
Meyer Werft	7	756	27.9
STX	4	563	20.8
Marriotti	2	64	2.4
ASENAV	1	3	0.1
TOTAL	27	2707	100.0

Source: ISL, 2010

With reference to the main offer markets, navigation companies are trying to detect new cruise routes where to use recently-built ships. If routes in the world main cruise regions are still dominant, such as in the Caribbean, the Mediterranean and Northern Europe, other lines still exist, that offer particular destinations, like for instance Alaska, the Mediterranean, the Atlantic and the Indian Ocean Isles. With regard to the main areas of destination, America plays the leading role, with 67% of the market, followed by the Mediterranean with 19% and Northern Europe with 4%, and other destinations 10%.

The remarkable offer increase, brought about by the expansion and differentiation strategies started by businesses, seems to be absorbed by the favourable variations of demands. In particular, offer tends to propose variously-shaped services, able to appropriately meet the needs expressed by users.

As a matter of fact, over the years a total and renewed conception of the cruise journey was observed[3]. From a product destined to a limited elite endowed with time and money, the passage occurred to a potentially limitless, extremely varied market, thus making cruises a widely accessible product.

3 Sancetta, G., Siano, A., (1995) "Il mercato crocieristico: aspetti evolutivi della domanda e strategie delle imprese", *Economia e diritto del terziario*, n.2.

At present, the main users of cruises are not only well-off elderly, but also young people on their honeymoon, business groups, families and singles. Moreover, the growing demand for shorter and shorter holidays caused cruise companies to offer not only longer journeys, but also shorter vacations, able to meet the needs of medium-low income young people.

A change in the market is therefore occurring, where the leading role is played by the need for socialisation, relax, tourist interests and tempting prices.

Such a result is mainly due to the evolution that, over the years, has characterised the market, following the various actions of the main actors of the sectors, that decided to remodulate their product and to present it as an alternative to the traditional tourist opportunities already present on the mass-market. Ships have wider medium size and greater receptive capacity; the average duration of a cruise is greatly concentrated in order to guarantee not too high tariffs and the range of the offer is wider, also from a qualitative point of view, hence the choice of on-board facilities, activities and services is made on the bases of a larger, more differentiated target of reference.

3. The new frontiers in the cruise sector: the Mediterranean area

In recent years, the cruise market in the Mediterranean has been characterised by a remarkable development. Even thought still far from the Caribbean performance, the Mediterranean has recently experienced such a growing dynamism, that it now ranks second in the world market, as measured by demand and deployed capacity. Majior companies are deploying more vessels in the area and many passengers and ports are undergoing infrastructural modernization. Specifically in 2009, 152 cruise ships were active in Mediterranean waters with a capacity of 176,019 lower berths (an average of 1,158 berths per ship). These ships carried a potential 3.33 million passengers on 2,779 cruises, offering a total capacity of 26.31 million pax-nights, giving an average cruise length of 7.9 nights. According to forecasts, these data are destined to grow, as a consequence of the implementation of market diversification and globalisation policies by the leading companies and of the research of a partial absorption of the new capacity in terms of beds. The first signs of development in the area under examination already occurred with the acquisition of Costa Crociere, a leading company on the Mediterranean market, by Carnival Corporation and with the increase by the competing Royal Caribbean company in the number of ships utilised in the Mediterranean Basin. The reasons of this growth can be brought back to the geographical localisation and to the favourable climate characterising this area, not only for the above-mentioned economic reasons, but also for other reasons, related to tourist interests. The strength of the Mediterranean market surely consists in the large variety of destinations and, as a consequence, of the excursions that shipping companies may offer. Landscapes, games, historical and climatic factors merge into a 360-degree offer, and these destinations are never more than 12-hour navigation from one another, which makes it possible to establish routes entailing navigation during the night and excursions during the day. Despite the great variety of themes, durations and destinations, the Mediterranean is still considered as a seasonal market. A less discontinuous flow of ships throughout the year, on the other hand, would be extremely important not only for ship owners, but also for the ports that can offer reduced tariffs because of a more efficient use of facilities and staff; moreover, tourist attractions may draw a larger benefit from a lesser congestion during high-season. Among the Mediterranean cruise ports, more than half approached the cruise market only in recent years. Should the development trend in the cruise sector go on as expected, more opportunities will arise in terms of port offer, for both home ports and transit ports (Table 2).

Table 2. Typologies of cruise ports

Home Port	Transit Port
- Links with the international airport - Tourist attractions and hotels - Cruise Terminal - Safety - Costs	- Tourist attractiveness - Distance vis-à-vis other ports - Ship access/Clearance facilities - Possibility to organise tourist tours - Costs

From the point of view of the possibilities this market offers ports, one thing is to try and became a transit port, for which some tourist characteristics are necessary in order to justify the interest in a port, as well as some adequate reception facilities to offer passengers; for this typology of port, port infrastructures are not major factors. A different thing is to aim at becoming a home port for a company or for a number of cruises. As a matter of fact, to aspire to such a position, it is fundamental to have top-quality links with international transport systems: an efficient airport, with flight towards the main world destinations, good road and railway links, as well as efficient port infrastructures (passenger terminal, parking, ship-supply facilities), both modern in terms of the market and convenient in economic terms. An adequate offer of such qualifications might no doubt facilitate the development of the market and the possibility for the more Mediterranean ports (Tables 3 and 4) to achieve the strategic aim of becoming the privileged destination of passengers from all over the world.

Table 3. Major Mediterranean home ports , 2007-2009
(revenue passengers)

Home Port	Country	2007	2008	2009
Barcelona	Spain	1,765,838	2,069,651	2,151,465
Civitavecchia	Italy	1,586,101	1,818,616	1,802,938
Piraeus	Greece	1,000,000	1,290,000	1,500,000
Venice	Italy	1,003,529	1,215,088	1,420,980
Palma Majorca	Spain	1,048,906	1,131,147	1,056,215
Savona	Italy	761,000	772,000	712,681
Genoa	Italy	520,197	547,905	671,468

Source: European Cruise Council, 2010

Table 4. Major Mediterranean transit ports, 2007-2009
(revenue passengers

Transit Port	Country	2007	2008	2009
Naples	Italy	1,151,345	1,237,078	1,265,000
Livorno	Italy	713,144	849,050	795,313
Nice/ Villefranche/ Cannes	France	559,411	708,785	742,668
Marseille	France	434,087	540,000	622,300
Bari	Italy	351,897	465,739	567.885
Malaga	Spain	290,558	352,875	487,955
Palermo	Italy	471,395	537,721	478,900
Valletta	Malta	487,817	556,861	441,913
Limassol	Cyprus	427,408	376,296	320,467
Messina	Italy	291,296	337,117	253,200
Monte Carlo	Monaco	184,117	231,639	235,904

Source: European Cruise Council, 2010

4. Factors influencing the choice of a cruise port and port development strategies

The interesting opportunities of development related to the changes in demand occurred on the world cruise market have brought about a strong dynamism in cruise companies, which often look for innovative, competitive services to better meet the demand of users.

Among the strategic choices made by cruise operators, a major role is played by the detection of embark/disembark ports and of the various transit ports making up an itinerary.

The factors influencing the choice of a cruise port are related on one hand – as previously stated – to the technical and infrastructure characteristics and ship- and passenger-devoted services, and on the other hand to the port-territory relations, from both a tourist and logistic offer point of view[4] (Table 5)

Table. 5 Cruise port selection factors

Port-related factors	Port non-related factors
• Physical features of the terminal • Features of the services offered to passengers and ships • Costs	• Geographic location • Attractiveness of the area • Road connections • Railway connections • Airplane connections

As far as port factors are concerned, it is clear that an adequate accessibility to the port, an efficient offer of embark/disembark services and of navigation-support services, as well as the implementation of competitive tariff policies, although fundamental in port selection processes, represent the operational conditions for a cruise port and acquire therefore a lesser importance in terms of port competitiveness. It is extra-port factors (geographical location, attractiveness of the adjoining territory, modal connections) that influence a port competitiveness, thus determining its true vocation (home port or transit port). It is also clear that geographical location, port connections with airports (which are indispensable characteristics in the choice of a transit port) and the presence of historical and/or natural factors may contribute to incisively determine the attractiveness and uniqueness of a given cruise itinerary. As a consequence, it is the value differential (vis-à-vis competitors) produced by the port thanks to its integration with the tourist offer

4 Penco, L., (2001), "Drivers di valore, criteri di port selection e strategie di sviluppo portuale nel settore crocieristico", *Economia e diritto del terziario*, n.3.

local system that determines the input in port selection processes by cruise companies. In order to maximise port performances in terms of a better synergy between port and territory, it is necessary to implement forms of cooperation among the different actors: port authorities, local organisations, private businesses operating in the tourist sector and in the organisation of events, in order to enhance local attractions and to better meet the consumers' needs.

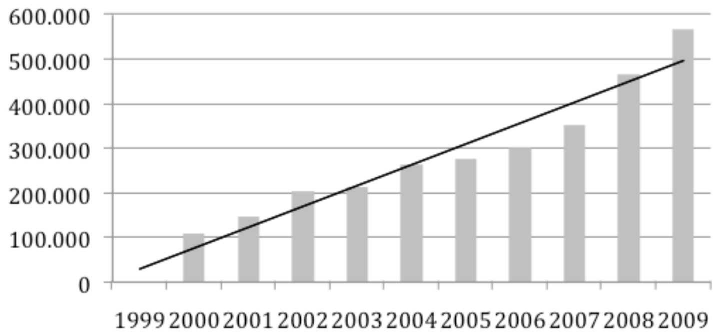
5. The development of the cruise sector in the port of Bari: restraints and opportunities

The maritime activities connected to passenger traffic have recently recorded a high growth trend, particularly due to the development of the cruise sector. The development plans defined by big companies suggest such a trend is destined to continue in the next few years, thus exceeding the best expectations of the sector operators. It is therefore indispensable that Italian ports, due to their strategic position in the Mediterranean basin, are prepared to adequately meet the needs induced by the new typologies of the cruise market. The quality of the services offered to passengers and the image of the port are fundamental factors for cruise port competitiveness, as depending on these characteristics, cruise passengers judge the places visited and the cruise product as a whole.

The overall product of a port is made up of factors that refer to the core of port services and to other factors related to the territory. Hence, if on one hand ports widen their offer by building specialised cruise terminals, able to supply commercial, reception and leisure services, on the other hand Port Authorities – being the promoters of the cruise activity development – aim at implementing strategies to enhance the value offered by the port-territory system, by means of cooperation relations with cruise companies and with all the actors constituting the local economy. In particular, the Port Authorities committed in enhancing this sector aim both at convincing economic operators and public organisations of the importance of the impact that cruise activities have on the local economy and on the image of the territory from a tourist point of view, and at promoting steady relationships among companies, customers and private operators, in order to supply unique, value-creating attractions.

In a highly dynamic and competitive scenario, the increase in the cruise traffic recorded at the port of Bari in Italy during the last few years demonstrates both the quality of passenger services and the appearance of an adequate tourist offer (Figure 4).

Figure 4. Cruise passenger traffic in the port of Bari, 1999-2009



Source: Bari Port Authority, 2010

Table 7. Port of Bari – Growth trend of the cruise traffic

	2007	2009	Changes %
Cruise landing	120	182	+ 51,67%
Passengers	351.897	567.885	+ 61,38%

Source: Bari Port Authority, 2010

A sudden, but steady increase, that has greatly changed the aspect and the destiny of the port. A commitment coupled with the change in the town image, rewarded by the adhesion of the largest cruise companies. As a matter of fact, nowadays Bari is a highly estimated port, where important cruise operators work (Table 6).

Table 6. Port of Bari - Cruise ship line, 2010

Cruise ship line
- Costa Crociere
- Royal Caribbean
- Mediterranean Shipping Companies
- Costelation Cruise
- Montenegro Lines
- Silversea Cruise Inc.
- Mano Matime
- Kristina Cruise
- P&O
- Sea Hawk
- Kd Bereederung Gmbh

Source: Bari Port Authority, 2010

Due to the availability of the new cruise terminal and to the possibility of visiting places of incommensurable artistic and cultural value, surrounded by beautiful landscapes, the port of Bari represents one of the most attractive cruise ports in the Mediterranean.

The Port Authority started an important revolution at the end of the Nineties, by implementing development plans that entailed interventions aimed at avoiding the void utilisation of the existing space, at avoiding congestions in the different types of traffic, shifting the commercial area far from the passenger area and endowing the whole port area with adequate passenger reception structures.

The operation of the new cruise Terminal sure represents a significant improvement for the port of Bari, in terms of quality of services and facilities devoted to passenger traffic. Ultramodern in design, this area aims at offering international reception standards to the growing number of passengers transiting or embarking in the town. The new structure, where beauty and functionality are mixed in a delicate balance, demonstrates the attention of the Port Authority towards the cruise market, that represents a major chance of development and promotion for the town of Bari and for its hinterland. The almost 3500 square meters of the new cruise terminal, distributed over three levels, include all the services for passengers and operators alike: from the functional boxes for check-in operations to a comfortable waiting room, from the nursery to the video-information system; the new baggage deposit close to the terminal, the shopping area and the restaurant on the second floor, moreover, will soon become operational. Particular attention was given to security: a video-watch system made up of 14 colour cameras will allow to constantly check the terminal indoors and will interface with a similar system for the outdoors; metal detectors will check passengers and their luggage, in compliance with the new regulations for security in ports.

The further aim of the Port Authority is to gradually open the port to the town, developing an urban space for the fruition of everyone. The aim is to favour the social and economic development of the port area and of the town adjoining area, through the requalification of the port waterfront.

Anyway, prospects for the port of Bari can be considered viable in the hypothesis that the present quota on the market is kept unaltered.

This hypothesis is based on the assumption that the port of Bari is able to face the market competitive pressure, resulting from both the evolution of present competitors and from the access of new subjects, attracted by the strong dynamism of demand.

With respect to such an approach, it is not easy to reliably define the future asset of the market and the consequent position of the port of Bari, although nowadays it has no doubt conquered a significant role on the market, also due to its infrastructures and to the quality of the services offered. Nonetheless, the enhancement of the town from a tourist point of view might guarantee the further development of the cruise activity, permitting to couple the transit function to the home port function, in order to induce a longer stay of cruise passengers in the town and its hinterland, also considering the closeness of the airport.

At present, as a transit port, the port of Bari does not receive all the benefits deriving from the tourist flow, because the duration of the passenger stay is limited to a few hours during the day and not all the passengers aboard the ship decide to make the mainland excursion. Moreover, if costs and gains of the individual businesses and shops are compared, the opening on festivities and the implementation of shopping-no-stop initiatives (aiming at the uninterrupted opening of shops according to the cruisers stay in the port) are at present very profitable. Playing on the elongation of the passenger stay would surely favour the commercial businesses and reception facilities of the territory.

Terminals specialised in cruise tourism, anyway, pose many problems to destination ports, particularly if these are emerging ports. Besides the need to deaden the costs of equipments by a minimum number of passengers, a particular difficulty lays in the fact that, if the cruise activity remains a seasonal activity, the amortisation of investments will necessarily have to be concentrated over a limited period of time, with consequent problems also for the territorial communities that would like to favour investments in cruise tourism supporting facilities.

As to specialised terminals, such as the one in the port of Bari, a solution to the problem might consist not only in elongating the cruise season as much as possible, but also in connecting such structures to others (shopping and leisure centres), capable of working also out of season.

Such solutions evidently require a very close cooperation between Port Authorities and territorial communities, as they must integrate within a global project of town development and promotion of the tourist attractiveness of the town itself and of its immediate vicinity.

As a matter of fact, the port should better take the opportunities given by its geographical location, in order to appear as a convenient and competitive transit port in terms of efficiency of services and space offered, that can bring about such cost reductions as to attract big navigation companies. The South of Italy and Apulia make up an exceptional area in terms of cultural, archaeological, natural and climatic assets, which can remove the barriers of cruise "seasonality". Significant evidence of this trend is given by the extraordinary tourist growth particularly experienced ("Salento" and "Terra di Bari").

Anyway, some critical details in the local tourist offer still remain, which are caused by the lack of organisation, tourist "culture", promotion and enhancement of the main resources of the territory. Moreover, the town of Bari has been considered as a chaotic place for years, congested with traffic, scarcely safe because of micro criminality, and with a less than efficient network of links with the hinterland.

If nowadays, the town is generally well evaluated in terms of perception of tourist attractions, due to a complete re-qualification of its historical centre and port waterfront, as a historically and culturally interesting place, the scanty knowledge and accessibility to the various attractions offered by the territory indicates the need for more efficiency enhancing and promotion strategies for the existing resources.

Considering the significant opportunities of development offered by the market, it is advisable for the port of Bari to create its own competitive advantage, by offering cruise operators an high value of attractiveness vis-à-vis other ports, not only through infrastructure enhancement, but mostly through the offer of services that favour the access (from both the tourist and the logistic point of views) to the cruise location, involving all the businesses operating in the sector of tourism, public operators and local public organisations, in order to fully meet customers needs.

6. Conclusions

The cruise market shows progressive changes, transformations and competitive remodulations, related to the changes in environmental trends.

The increased dynamism of demand calls for the implementation of interventions aimed at guaranteeing the offer of vastly differentiated products, to meet the needs of local markets.

In a strongly competitive scenario, businesses tend to implement size-increasing and diversification strategies, thus determining an increase in the level of concentration on tourist, high-growth potential markets.

The Mediterranean, which is characterised by a clearcut fragmentation of the tourist offer, is going to become one of the most important cruise tourism markets, representing the area with the highest growth trend and subtracting market even to the Caribbean. The Port Authorities of the Mediterranean countries are trying to exploit the development and income-producing opportunities related to the cruise sector, placing investments in highly specialised terminals for the reception of cruisers and supplying supporting services to the stay of passengers within the port.

This is, no doubt, an expanding sector whose economic fallout, though, has not been exactly determined, yet. Investing in this sector means to bet on the enhancement of the image of the town and of the tourist assets of the adjoining territory.

As a matter of fact, the competitiveness of a cruise port is mainly measured on the basis of its offer in terms of activities (hotel hospitality, restaurants, reception services, excursions, tourist activities, air and land connections) and in terms of attractive factors (related to the landscape, artistic and historical characteristics of the territory), that may add value and uniqueness to the cruise destination, in order to catch the interest of ship-owning companies. Such a strategy entails a very close cooperation among port authorities, local institutions and private businesses, aimed at activating tourist and commercial induced consumptions for the territory.

Within such a revolution of the world tourist market guiding principles, an unprecedented occasion is about to open up for the town of Bari: it is candidating to become a home port for cruise passengers.

The remarkable increase in the number of passengers transiting at the port of Bari during the last few years confirms the viability of the initiatives carried out by the Port Authority, aimed at improving the reception and welcoming facilities and at strengthening the image of Bari as a great Mediterranean melting pot, able to put up its visitors and to direct them along the evocative itineraries offered by the great cultural and artistic heritage of the territory.

A prolonged stay of ships and cruise passengers would surely bring about economic benefits to the reception, commercial and tourist facilities of the town and its hinterland. Nonetheless, in order for the port to become competitive over the time, both as a transit and a home port, many interventions are needed, in cooperation with local institutions and specialised businesses, aimed at enhancing and promoting the logistic and tourist offer of the neighbouring towns and territory, in order to catch the interest of companies and to enjoy the benefits of a growing tourist flow.

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