

## MEDCRUISE

## **NEWS**

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## MedCruise Board of Director's meeting Villefranche-sur-Mer, January 2005

# BoD meet in France

The most recent Board of Directors meeting was held in Villefranche-sur-Mer in January 2005. Here is a summary of the main points discussed:

- 1) The provisional statement of accounts for the year 2004 were approved and the proposal from KPMG to carry out the audit was accepted. The definitive accounts and audit will be presented to the General Assembly in Ceuta in May.
- **2)** Seatrade Med evaluation. Mario Flores presented the results of the survey conducted amongst members who attended last November's event in Genoa.
- **3)** Seatrade Miami 2005. Mario Flores presented the design of the MedCruise stand for Seatrade Miami 2005 which was approved. It is the same booth as last year, number 1261.
- **4)** Albert Poggio presented a specific marketing campaign with Tourist Boards.
- **5)** A discussion took place on the draft terms of the study about the impact of cruises on local economies being undertaken by Yiannakis Kokkinos (see box item for details).
- **6)** Charles Axisa, director responsible for the website presented an update on the www.medcruise.com site (see backpage).



**7)** The 26th General Assembly of MedCruise takes place in Ceuta, Spain between May 5th and 6th, 2005.

■ Ceuta – next General Assembly

## Board View - Yiannakis Kokkinos, Director Economic Studies

conomic impact studies are one of the most valuable tools that exist in evaluating the importance and the contribution of the cruise industry to our economies. Only through such studies, we will be able to add value to our product, to be able to differentiate and properly and strongly position ourselves in this growing market.

Within this context, MedCruise Board of Directors, have decided to commission a study: "The Impact of Cruise Shipping on Economic Activity in the Mediterranean". The Terms of Reference of the study have been approved by the Board of Directors and calls for selective tenders are due.

This study is expected to evaluate the direct and indirect socioeconomic impact of an increase in the volume of cruise ships, passengers and crews based on the latter's patterns and propensity to spend.



Obviously, spending by passengers and crew occurs on board and in port and its hinterland, although emphasis will be given to those pertaining to ports and their surroundings. Factors that have a general influence on spending patterns rather than being port of destination specific, are among others, the following: Nationality, level of affluence, sophistication of passenger, i.e. first time or repeat cruiser, length and type of cruise, crew or passengers and home port or port of call.

In as far as type of expenditure and impact on employment is concerned, it could be said that spending typically falls into one of the following: Clothing, souvenirs, eating, sightseeing tours, gambling, goods, cosmetics, cigarettes, alcoholic drinks etc. The impact on employment which is a multiplier effect will very much depend, among others, on the ship's carrying capacity the frequency of call, the per capita expenditure and the level of earnings in a certain country or location.

The duration of the study is 20 Mondays and draft final and final reports will have to be submitted by the selected tenderer.

Ancona

## €1m terminal investment



ncona is currently constructing a new cruise terminal situated along one of the largest piers and close to the historic centre of the town, just 200mtr away from the main street. The berth area is a trapezoidal shape covering approximately 30,000sq mtr.

The whole area, once properly re-paved and cleared of all obstacles, will be dedicated to cruise traffic and will include three different sections:

- passenger transit and ship docking areas facing quay No. 15, which is 220mtr long and between -9 to -10.5mtr deep. This area will be equipped with an escalator, adjustable in height as well as length, for embarking/disembarking passengers;
- a 2,000sq mtr covered service area with every comfort for the check-in process (climate control, bar and catering service, 200 seats, luggage scanners, shipping company offices, toilets, left-luggage offices, etc;
- and thirdly a monitored parking area for vehicles in the remaining 10,000sq mtr of designated area;

The new terminal represents around a €1m investment and will be completed in early 2005, ready in time for the end May call of Costa Crociere's Costa Classica – a first time visitor to Ancona. The ship can accommodate 1,500 passengers, many of whom will join the ship in Ancona.

Costa Classica will offer weekly cruises throughout the summer in Greek and Croatian waters until end October.

In 2004, Ancona had 11 cruise calls bringing 4,949 passengers. With Costa using it as a base port this summer that figure is set to rise sharply for 2005.

Alanya



n 2004, 101 cruiseships and 82 fast ferries called at Alanya bringing a total of 76,100 passengers, 73% of these arrived by cruiseship. This year the Turkish port is expecting to receive the same number of visitors.

Currently the port is investing in extending the jetty by an additional 200mtr to accommodate the largest cruise vessels. This is a \$3.5m project which is being completed over three successive winter seasons.

Popular tours undertaken from the port include Alanya castle, the archaeological museum, Damlatas cave, Dim cave, Dim river, Manavgat waterfall and the ancient cities of Side, Apendos & Perge.

For the more adventurous there are opportunities to partake in jeep safaris, rafting and diving. Each year the following events attract many visitors to the city: swimming marathon, Triathlon Championship, Mountain–Bike Competition, Beach–Volleyball, Beach–Football, Street Handball, Street Basketball and Sky–Ball Cup Tournaments along with the Carricature Exhibition and Tourism & Arts Festival.

## **Balearic Islands**

## Busy year ahead

ast year 596 ships called at the Balearic Islands bringing 886,474 passengers. This figure is set to increase to 608 calls and 955,300 passengers in 2005. 422 calls are scheduled at Palma, the busiest port followed by Ibiza, Mahon and La Savina.

What's new this year at the Balearic ports? In Palma de Mallorca Aida Cruises will have a ship in port year– round: Aidacara from January to April and then again in October and December, whilst Aidavita arrives in April and sails weekly itineraries until October.

Carousel which was acquired by Louis Cruises from MyTravel last year will sail under the Sun Cruises banner until May, after which she will be renamed Aquamarine and starts offering 8 day West ad ...

Med itineraries from Genoa. Passengers will embark and disembark at Palma, a regular stop each week.

Thomson will operate two cruiseships a week this summer: Thomson Spirit and Thomson Destiny (former Sunbird), whilst Costa Cruises will call twice a week with Costa Magica and Costa Fortuna, making a total of 63 calls. Costa Tropicale will also call 15 times.

MSC Cruises has two ships (MSC Lirica and MSC Sinfonia) calling Palma this summer with 59 visits. Both Ocean Village (25 calls) and Island Cruises will repeat their 2004 programme this summer but the latter will add a second ship (the former Horizon), based in Palma, in 2006, Ibiza port will have 20 calls.

The board of directors have approved the 2004–08 investment plan which includes over €50m for cruise–related work. In January work began on extending the commercial quays which will provide a new berth for medium sized cruiseships close to the cathedral.

**Barcelona** 

he Med's top cruise port is expecting 731 calls and over 1.2m passengers this year compared to 629 calls and just over 1m visitors in 2004. New visitors in 2005 include Aguamarine, Athena, Artemis, Carnival Liberty, Iberostar Mistral, MSC Armonia , MSC Sinfonia, Saga Ruby and Thomson Destiny.

Cruise terminal investment continues unabated to cater to the ever growing list of ships and



[] Impression of Adossat pier in 2006

customers. Terminal A refurbishment will be ready in 2006, Terminal B, a newbuilding costing over €10m, will be ready in time for this summer as will the refurbishment work on Terminal C.

In January Barcelona's Port Committee officially granted a 25-year concession to Costa Crociere for an area extending over nearly 5,500sq mtr (Terminal D) on the Adossat pier, where the company will build and manage its new cruise terminal. Work on the €8m cruise facility is scheduled to start this spring.

The terminal should become operational at the beginning of the 2006 summer cruise season. In 2004. Costa made 96 calls to Barcelona, bringing a total of 215,000 passengers (+33% compared to last year and 21% of the port cruise traffic).

Costa calls will rise significantly in 2005 to 128 calls and 335,000 passengers with the positioning of both Costa Fortuna and Costa Magica, which will visit the Catalan port every Friday and Tuesday, respectively throughout the summer. This year Barcelona is promoting the year of food, cuisine and gastronomy 2005/06, so hurry along and sample some tasty delights!

## New facility ready by 2007

uring 2005 Cyprus Ports Authority is expecting to receive a similar number of cruise calls as 2004 when 177 vessels brought 130,034 cruise passengers. An Architectural Competition for the construction of a new passenger Terminal at Limassol port was



organized and completed in July 2004. According to the architects' plans, the proposed terminal is to be constructed and operated by the end of 2007 and covers an area of around 8,500sq mtr. It includes arrivals and departures, lounges, administration offices, shops, restaurants and all the facilities that a modern passenger terminal offers. The entire project is expected to cost around £8m and will be financed by Cyprus Ports Authority and the EU.

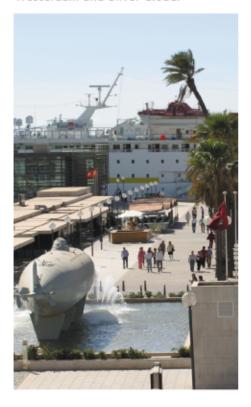
A new tourist attraction this year is the Evagoras Lanitis Centre, a contemporary conference and exhibition centre in the old Lanitis Carob Mill Warehouse of Limassol. Fully equipped, this dedicated conference venue will host a variety of national and international business, cultural and social events, plus exhibitions.

The Carob Mill complex also includes restaurants where guests can enjoy the taste of traditional Cypriot dishes and as an alternative, the delicate Mediterranean cuisine. Also on the premises there is a high-tech theatre. The 'Time Elevator' integrates quality entertainment with a well-researched educational story line using the '4D formula'. Through the Time Elevator, one can see, hear and feel the history of the Island of Cyprus!

## Cartagena

## 40 calls scheduled

ruise calls are expected to rise this year with 40 ships visiting which is up on the 27 cruise calls bringing 18,401 passengers last year. In 2005 the port has two new calls and in April P&O Cruises' Arcadia, on her maiden voyage, will be the largest ship to call at Cartagena. Other visitors this year include Artemis, Braemar, Century, Hebridean Spirit, Ocean Village, Paloma I, Paul Gauguin, Rotterdam, Westerdam and Silver Cloud.



Cartagena is currently studying a possible new passenger terminal and cruise berth. During 2004 there were a number of tourist attractions opened by the Association 'Cartagena Port of Culture' which include: La Concepcion Castle, Punic Rampart, Roman remains (Decumano, house of La Fortuna). panoramic lift, Civil War shelters, tourist bus and tourist boat.

Among tourist attractions being offered this summer are the Spa resort at Balneario de Archena and the Fortress-Castle at Lorca Taller del Tiempo.

For more active passengers, golf, tennis, horse riding and cycling are popular at La Manga Club, whilst scuba divers can head for Cabo de Palos.

Kusadasi

# Passengers set to double

ast year 347 calls were recorded at Kusadasi bringing 215,092 passengers. This year Ege Ports, private operator of the port is expecting to receive 412 calls (+19% increase) and 327,343, more than double the passenger traffic of last year.

In addition vessels have started visiting the port during the winter months of January and are scheduled to continue through to this December for the first time since the bankruptcy of Renaissance Cruises in 2001.

Companies returning to Kusadasi this year include Oceania Cruises (6 calls with Insigna), seven calls from Royal Caribbean Cruises' Brilliance of the Seas & six calls from Celebrity Cruises' Galaxy.

The Port of Kusadasi started the construction of a new passenger terminal facility in December 2004 which should be ready in April 2005.

New Terminal Building - Parking Lot - Commercial Center



In cooperation with the City of Kusadasi, Ege Ports will be undertaking extensive changes to the existing Port and its surrounds, including the construction of a modern passenger terminal building; improvements to existing piers and fendering systems; the construction of shops to enhance services to cruise passengers; and the enhancement and beautification of the shoreline and city board walks around the Port of Kusadasi.

The Port of Kusadasi was the first port in Turkey certified compliant with ISPS Code in May 2004, and Ege Ports believe that the Port of Kusadasi is among the safest ports in the Mediterranean. Safety enhancements include the acquisition in April 2004 of a newbuild 40 bollard tugboat.

## French Riviera

## Year-round success

he three French Riviera ports of Cannes, Nice and Villefranche welcomed 515 ships last year with cruise ships calling in every month of the year, including five calls in January compared to no calls



that month in the previous year. December calls in 2004 were also up from the previous year rising from 14 to 21. Total passengers reached 450,471 a small decline from the previous year but passenger numbers recorded at Nice and Villefranche together were up 10% compared to 2004. At these two ports the number of transiting passengers numbered 388,452, comprising 37% North Americans, 26% UK, 25% Spanish, 5% apiece from France and Germany.

Looking ahead to 2005, Cannes callers this summer will include Queen Mary 2 (twice) and QE2 three times, Wind Star, Carnival Liberty (9 calls), NCL's newbuild Norwegian Jewel, P&O Cruises' newbuild Arcadia, Princess Cruises' Grand Princess (twice) and Sea Princess (three) plus 24 visits by start-up line easyCruise. As a result Cannes is expecting around 115,000 passengers this year, compared to 70,361 in 2004.

Cannes' new cruise pier can accommodate ships up to 150mtr in length whilst Nice can take ships up to 250mtr long. Vessels calling Villefrance anchor in the bay and tender passengers to the quayside cruise terminal. All facilities at the ports of Nice; Villefranche-Santé and Cannes, are compliant with the requirements of the ISPS Code.

The French Riviera Cruise Association is always looking to improve the destination's value and service to cruise lines and part of the French Riveira ports' development strategy is to ensure cruise activities fit alongside environmental protection of the local area.

#### Gibraltar



■ Van Gogh and QE2 docked at the Cruise Terminal

78 calls have been booked so far for this year and the Port Authority is anticipating 180,000 passengers to call at the Rock in 2005. This compares with 168 cruise calls and 164,883 passengers last year.

Maiden calls in 2005 are being made by Arcadia, Voyager, Insignia, Athena, Saga Ruby, R Five (Blue Dream), Thomson Destiny, Thomson Celebration, Albatros, Le Diamant, Aquamarine (every Wednesday ex Carousel), Artemis, newbuild Norwegian Jewel (delivering August) and Ocean Monarch.

The Port Authority reports no expansion or refurbishment works are currently being undertaken, as considerable expenditure has been spent on making Gibraltar ISPS compliant, which it was officially recognised as being on June 30, 2004.

## **Naples**



hree of the world's leading cruise companies: MSC Cruises, Royal Caribbean and Costa Crociere have each taken a 20% share in the new company set up to manage the Molo Angioino passenger terminal at the Italian port. Other shareholders include Marinvest, also a 20% stake, plus Intership srl and the Port Authority, with 5%, to guarantee the control function provided for in law 84/94.

In 2004, Naples received 541 calls bringing 773,223 passengers. 580 calls are expected for this year with about 850,000 passengers, including the maiden call of the 100,000gt Carnival Liberty which will be the biggest ship to ever call at Naples. The Italian port has reached a peak of cruise traffic never seen before and is in the process of reforming the whole of the waterfront area, headed by Nausica SpA, the public holding company set up by the Port Authority and regional and local governments.

## Valencia

alencia is looking at a record 2005 with 118 calls booked so

far with around 125,000 passengers expected. This compares with 98 calls last year and 68 in 2003.

For 2005, Iberojet's Grand Latino will use Valencia as a home port every Monday from March 14 to December 26,



offering an itinerary to Villefranche, Livorno, Civitavecchia, Naples, Tunisia and back to Valencia.

Travelplan's Ocean Countess will also homeport at Valencia and will depart every Monday from June 6 to October 3 on cruises to Tunisia (Bizerte), Messina, Civitavecchia, Livorno, Ajaccio (Corsica) and back to Valencia. 2005 will also see new visits from Radison Seven Seas' Seven Seas Voyager and Paul Gaugin, Celebrity's Century and Fred. Olsen's Braemar. Orient Lines' Marco Polo will also make her maiden call.

Looking ahead to 2007, the XXXII America's Cup will take place in Valencia. This means not only the final races but also some of the preliminary races (known as Acts) leading up to 2007 will also be held in Valencia. For example from June 16 to 27, 2005, the Luis Vuiton race will be held in Valencia which will be a spectacle for any passengers on cruiseships calling in Valencia during that week.

Venice

## **Expansion all** round



enice is anticipating a 26% growth in cruise passengers in 2005 with 465 cruise calls scheduled bringing 854,120 passengers. Some existing cruise line customers are set to increase the number of ships using the Adriatic port: Pullmantur is homeporting R. Seven (Blue Dream) and R Six (Blue Star) in 2005 whilst MSC Cruises will call 59 times with MSC Opera, Armonia and Rhapsody. Costa's Costa Marina made its first Venice call of 2005 in mid January. Venice will also receive visits from Costa Classica, Costa Mediterranea and Costa Victoria this summer.

In 2004, a 150mtr long walkway was added to the original one, in order to ease passage between the ship and terminals 107/108, as well as the ship and shuttle boats. Work will soon commence on the building of a new elevated walkway connecting another berthing area to Terminal 103 (the newest cruise terminal). The port is also planning to build a new covered parking area for cruise passengers.

This year sees the opening of three interesting exhibitions in Venice. In particular 'Leonardo da Vinci: Leonardo's machines' at the Church of San Stae (from 28/02/2005 to 01/05/2005), 'Paolo Veronese: myths, portraits and allegories' at the Museo Correr (from 13/02/2005 to 29/05/2005) and the '51st International Art Exhibition' at the Giardini della Biennale and at the Arsenale (from 12/06/2005 to 06/11/2005). Passengers onboard ships calling September 4 will be able to witness the Historical Regatta 2005 starting from the Canal Grande. The regattas have been said to be held on the lagoon waters since the XIII century and the spectacle attracts crowds of tourists.

Monaco

## Monaco targets 247,500 passengers

ess than three years after inaugurating a new 352mtr long floating breakwater-cum-pier on the outer edge of the harbour, the Principality of Monaco succeeded in its challenge to grow cruise traffic. Figures announced for 2004 show a 39% rise in calls to 178, compared with 128 in 2003. Of these 45 were turnarounds. Passenger numbers are also up this year at 115,500, compared to 80,000 in 2003, an increase of 44%. Cruise tourist spend generated d19m.



New callers included Oceania Cruises' Insignia, P&O's Adonia, HAL's Prinsendam, Rotterdam and Westerdam, Silversea's Silver Whisper, Orient Lines' Marco Polo and Crystal Cruises' Crystal Symphony.

Forecasts for 2005 are even better, with 311 calls scheduled, a dramatic increase of 75% compared to 2004. Of these 66 are turnarounds. 247,500 passengers will call, around half will be from North America.

Bari

## New terminal management

ari Port
Authority is
expecting up to
10% growth in cruise
passengers in 2005
following a record 2004
of more than 260,000
passengers. This year's
figure represents a
21.6% rise on 2003.

From January, Bari cruise terminal will be managed by a new company, Bari Porto Mediterraneo. The Port



Authority holds a 30% stake in the company while the other 70% is shared amongst a number of partners, including Venezia Terminal Passeggeri (managers of Venice's passenger terminal), a number of shipping agencies, a local bank and the local Chamber of Commerce.

#### **Tunis**



unis La Goulette, Tunisia's main cruise port, is planning to build an additional berth and new cruise terminal. La Goulette, located on the outskirts of Tunis, accounts for about 90% of the country's total cruise passenger arrivals. In 2004 the port accommodated almost 320 cruise vessels totalling more than 400,000 passengers. By passenger volume Tunis ranks seventh among the West Mediterranean cruise ports.

The Ministry of Communication Technology and Transport and the Office of Shipping and Ports (OMMP) is seeking to identify potential private terminal operators interested in a BOT development project for the new terminal. HPC Hamburg Port Consulting GmbH has been appointed as consultant for the structuring and implementation of the BOT.

## Costa Crociere

# Costa launches first branded showroom

dream, the first lounge and bar branded by Costa Crociere opened last December in Genoa's city centre. Located in the same building as the company's headquarters, the showroom allows people to sample ashore the same atmosphere they can find on board.

Visitors have the chance to sample a selection of various types of tea, hot chocolate, wine and spirits plus complete information about the world of Costa Crociere and all the latest news. Comfortable Baxter armchairs allow visitors to browse through publications on historical ships that set sail from Genoa, tourist magazines and destination books. There's also a corner dedicated to Costa Crociere's own history.

The Hi Tech zone is furnished with chaises longues and armchairs fitted with Pcs allowing access to virtual reality tours of Costa ships and the cruise product. It is likely that in the near future a number of similar showrooms will be opened in other European cities.

Costa is building a second Concordia class ship due for delivery in spring 2007. It will join 3,000 lower berth Costa Concordia operating year-round in the Med starting next spring.



## **Island Cruises**

## Island doubles up

sland Cruises is adding a second ship to the brand. Horizon, currently part of the Celebrity Cruises fleet, joins Island from November 2005.

The 1,354 lower bed Horizon will start Med cruising on her return from Brazil in spring 2006 with an as yet unconfirmed programme.

Island Cruises will be substantially refitting the ship to reflect its relaxed and informal product delivery. Patrick Ryan, new md of Island Cruises, said: 'It's a great time for me to be joining Island Cruises as the business enters a period of rapid expansion. The addition of the Horizon brings with it a host of exciting opportunities for Island Cruises and our trade partners going forward.'

Meanwhile Palma-based Island Escape will sail three 7-night Mediterranean cruise itineraries this summer including a new Iberian itinerary, 'Mediterranean Charm,' designed to appeal to repeaters. Ports of call are Ibiza Town, Alicante, Malaga (for Granada), Cadiz (for Seville) and Gibraltar.



## easyCruise

## Weekends on the French Riviera

asyCruise has announced its 2005 summer Med itinerary for easyCruiseOne and its focus is the French and Italian rivieras with Cannes and St Tropez the ports of call for the weekend. With no homeport as such the seven day rotating itinerary will call Genoa (Tuesday), Portofino (Wed), Imperia (Thurs), Monaco (Friday), Cannes (Sat), St Tropez (Sun), Nice (Mon) before returning back to Genoa. The easyCruise website went live for bookings last month.



# New owners New names, new operators

■ Mistral off to Iberojet

ed ports will be welcoming some regular visitors this summer under new guises. Louis Cruise Lines' latest acquisition Seawing, purchased from MyTravel last December, is renamed Perla and will operate out of Piraeus alongside Calypso and Ithaca (ex Ausonia). The three Louis owned ships will be conducting 3, 4 and 7-day cruises to the Greek Islands and Turkey starting spring 2005. Meanwhile Iberojet has chartered Mistral, the former Festival ship. Renamed Ibero Star Mistral the 1999-built vessel joins Iberojet's owned Grand Latino and chartered Grand Voyager (ex Olympia Voyager), giving the Spanish operator almost 3,000 lower berths.

#### Livorno

## Etruscan delights

Livorno can experience a new tour this year in the Etruscan region with a visit to the archeological park of Populonia and Bolgheri wine yards. For those looking for more adventure there is golf in Tirrenia and bicycle tours along the Etruscan Coast Wine Road.

Livorno is expecting



432 calls this year bringing 475,000 passengers an increase of 23%. Newcomer will be Carnival Liberty which is scheduled for eight calls, plus two calls from Queen Mary 2 which will be the largest ship accommodated this summer. Livorno is investing in a new cruise pier, Molo Italia, which will be ready for the start of the 2006 season.

## Website update

n February 2004, MedCruise launched a newly revamped image for its website. The site underwent a total makeover in content, layout and structure whilst the site's usability was enhanced further.

Typically, the majority of the visitors come from the business community (most of the visits are during working days and working hours). About 30% of visitors are repeat visitors and, on average, 10 pages are viewed during each visit. Most of the viewers access the site through a bookmark or through entering the URL, thus knowing

medcruise.com and confirming the fact that many are regular visitors.

The site has about 65,000 hits per month.

Despite these good results, Medcruise is currently working to freshen up its website. A proposal to undertake some design changes in the website was unanimously accepted at the last BoD meeting. This would be implemented by the new website committee set-up recently.

by Charles Axisa, Director Website

## Membership expansion

## Call for Associate and Cruise Line members

In addition to port members MedCruise has two other kinds of membership: Associate members and Cruise Line members. Associate membership is open to any entity, public or private, whose activities involve tourism boards, port agents etc. The Associate member must be linked to a regular member. A Cruise Line member can be the line itself or a cruise ship tour operator. Anyone interested in becoming an Associate or Cruise Line member please e-mail Carla Salvado, Secretary General, on secretariat@medcruise.com

## **MedCruise Members**

- Alanya
- Monaco
- Alicante
- Naples
- Almeria
- Palamos
- Ancona
- Palermo
- Balearic Islands
- Piraeus
- Barcelona
- Portoferraio
- Bari
- Portuguese ports
- Cagliari
- Ravenna
- Cartagena Catania
- Sete
- Ceuta
- Sevastapol Sochi
- Cyprus ports
- Split
- Dubrovnik, Korcula
- Tarragona
- French Riviera ports
- Toulon, St Tropez
- Genoa
- Trieste
- Gibraltar
- Tunis
- Israeli ports
- Valencia
- Kusadasi
- Valletta
- La Spezia Livorno
- Venice Volos
- Malaga
- Zadar
- Messina

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