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Indicators of passenger flows movements on the world and mediterranean cruise market

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ABSTRACT

Strengthening the global cruise market is in the upward trend as evidenced by the continued growth in the number of passengers on the cruising market. The source market, which is dominating by the demand for cruising, is North America, followed by the European market. In addition to the European market intensifying its increase in demand in the last few years, compared to other markets, passenger flows on cruises in Europe is constantly increasing its share in the global passenger flows on the world cruise market. Consequently, in this paper, the main features and trends in passengers flows on the world market and Mediterranean cruises are analyzed, within which a specific attention is given in analyzing passenger flows in the developing Mediterranean or Adriatic market. In accordance with the analyzed data, significant conclusions have been brought about the present state and future prospects of the global passenger flows on the Mediterranean area, as well as the prospects of development of the Adriatic market within the Mediterranean cruise market.

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1. Introduction

Each year, the increasing popularity of cruises produces a larger number of passengers. Analyzing cruise offers, the Caribbean, the Mediterranean and Northern Europe are pointing out as the main cruise destinations. One of the factors that affect the dispersion of the number of passengers on a particular area is the seasonality or climatic factor that has a crucial role in determining the schedule of itineraries.

Some areas are suitable for cruising throughout the year, while others have expressed seasonality which is still a strong limiting factor in the development of cruising in that area.

With the natural, historical and cultural tourism resources, to achieve the status of unavoidable cruise destinations, essential preconditions that must be met are developed port systems with multi-passenger capacity and good transport links. This is definitely a weak spot for cities on the Croatian part of the Adriatic, which reduces the possibility of otherwise high degree of valorization.

Consequently, the main problem of this research is: the analysis of the main indicators of passenger flow movements (intensity, structure and dynamics) on the world and European market cruises.

The purpose and objective of the research is to highlight the relevant influential factors and circumstances that currently form passenger flows on the cruise market, as well as those factors that could affect their further dynamics. At the same time, along with the world cruise market, separate analyzes were made regarding the Mediterranean area and its current status, as well as the prosperity and forecast of the development of the region in the global cruise market.

2. Relevant characteristics of forming passenger flows on the cruise market

Forming passenger flows on a world cruise market is very dynamic, considering they are influenced by constant changes in the supply and demand. A strong growth in the demand for cruises, which was recorded in the last few years, has confirmed that the maritime cruise market is still in the development stage, and that we can expect further expansion thereof. Although cruises make up less than 2% of the global tourism market, their presence in the world is getting more important. The demand for this specific form of tourism is growing almost twice as fast as the number of international arrivals and according to forecasts, in the following years, it will represent even a larger part of the world, the European and the Mediterranean tourism.

Consolidation of passenger flows on a cruise is conditioned by two functions: the maritime-transport function and the tourism function. The tourist function refers to a tourist destination with activities that contribute to the quality of services at the destination, while the maritime-transport function or traffic function on a cruise is performed by a shipping company which is specialized just for that specific shipping activity. In addition to the transport, an essential element of the transport function involves passenger ports which represent the "door" leading to a tourist destination. The tourist destination covers a wide variety of tourist contents that are creating a motive for the arrival of passengers – tourists. The organization and implementation of cruises is presented as a complex product of shipping, port activities, land and air transport, ship suppliers, cultural institutions, restaurants, shops, tourist and maritime agencies and other businesses. Consequently, the formation and consolidation of the passenger flows on the cruise ship market is influenced by all those phenomena and factors arising from the specific nature of maritime transport and tourism, as well as from their interdependence.

Passenger flows on a cruise imply traffic flows, that is, transport of people (passengers) according to a predetermined sailing list that is time and spatially adjusted to a variety of activities during the voyage.

Maritime transport services of passenger flows on cruises are characterized by the following processes:

- intense increase in demand,
- concentration of ship lines on a small number of ports,
- introduction of a variety of services for passengers,
- increase in quality of services for passengers
- reducing the number of shippers to several large ones,
- construction of modern passenger ports,
- expanding the content and organization of additional activities in the harbour and beyond [6].

The specificity of the formation of itineraries and cruise passenger flows are complex and are the result of many factors. Therefore, in terms of a geographical location and direction of voyage, passengers often choose a cruise by itinerary, and not by the ship or shipping company, although the offer of the shipping company for the transport phase also appears as a relevant factor in the selection. In addition to the geographical distribution of cruise destinations, the relevant factor is the climatic factor which has a decisive role in the itineraries schedule.

Thus, for example, seas between the northern and southern tropics of the equator (the Caribbean, Central and most of South America, Africa and Southeast Asia) are suitable for tourism cruises throughout the year, while other areas are those which are not suitable for cruising in the colder months (Alaska, eastern part of North America, south of South America, the Mediterranean, Northern Europe, the Baltic Sea, the Far East and Australia and the Pacific).

Analyzing the main directions of the passenger flows on the world cruises, it should be noted that during 2013 the most visited cruise destinations in the world were: the Caribbean, the Mediterranean, Northern Europe, Alaska, Australia – the Pacific, Asia and South America, which confirms the previously listed statements [4]. At the same time, 77% of the world capacities of cruise ships are located in warm and sunny areas, even though other areas are not any less important.

Taking into account the market shares of individual regions, according to the capacity of the ships they are in dispose of, the Caribbean are still in lead and the Mediterranean region ranks second.

As Table 1 shows, it is clear that the major world receptive regions when it comes to cruise passenger flows are the Caribbean, the Mediterranean and Northern Europe. While the Caribbean still convincingly occupy the first place as a major destination with a share of 37.3%, Europe is rapidly evolving in cruise market and is present not only as an important source market, but also as a receptive region for cruising.

Table 1 Main World Cruise Destinations in 2013 According to the Schedule of the World Cruise Fleet

Position	Destination	Share (%)
1	the Caribbean	37.3
2	the Mediterranean	19.9
3	Northern Europe	9.8
4	Alaska	5.4
5	Australia – the Pacific	4.1
6	Asia	3.6
7	South America	3.4
8	Other	16.5
	Total	**100**

Source: http://www.f-cca.com/downloads/2013-cruise-industry-overview.pdf (01/02/2014)

3. Analysis of the intensity and structure of passenger flows on the cruise market

The expansion and strengthening of cruises in the world is in an upward trend, and indicates the increasing number of passengers on cruises that constantly grows from year to year. In order to arrive at concrete conclusions on all relevant processes that characterize maritime transport services of passengers on cruises, it is necessary to conduct a detailed analysis of the market. Therefore, in this part of the paper a comparative analysis is conducted as well as an assessment of the market cruises in the world, Europe and the Adriatic Sea.

3.1. The passenger flows on the world cruise market

World cruising developed on the border line of tourism and maritime affairs, taking over their basic characteristics from them, as well as travel characteristics and skills of navigation and shipping. The dynamic development of cruising was associated with large capital investments as well as with the development of a fleet of cruisers in order to satisfy tourists- passengers and ensure high profit corporations [8].

During 2012, a record of 20,9 million passengers were cruising the seas [1]. Compared to the year 2000, when the figure stood at 10 million passengers, it is an increase of over 100%.

The data presented in the above table have shown that the intensity of the passenger flows on the world cruise market keeps increasing and no reason of future negative affects on further affirmation of that kind of traffic flows can be discerned, as well as on the positive dynamics of the growth of the same.

The cruise industry, in the last 30 years, has experienced a significant growth, initially encouraged by the demand from North America, and more recently by the demand from Europe and the rest of the world. Table 2 shows the trends in the number of passengers on cruises in the world between 2002 and 2012, indicating an almost doubled demand from 11,1 to 20,9 million passengers, which is an increase of 88%.

The source market that dominates by the demand for the cruises is the market of North America, which accounted for 56% of the global demand for cruise ships, as shown in Chart 1. The second source market, per share in the world, is the European market which, in the last decade, has more than doubled its share of world demand.

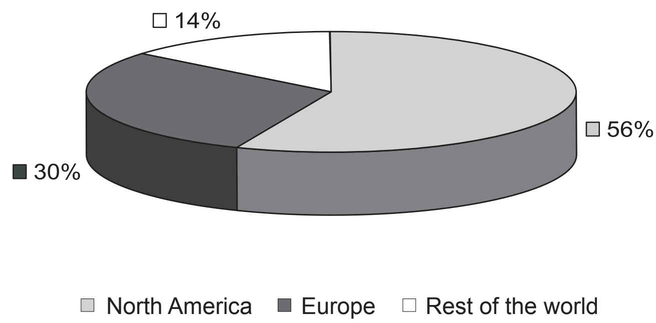

Chart 1 The structure of the demand for cruises based on source markets in 2012

Source: http://www.cruise-norway.no/viewfile.aspx?id=3824 (03/02/2014)

The rest of the world is positioning itself as a market of Southeast Asia and the Far East, the South Pacific and Hawaii with some smaller markets. Their participation in the current market distribution is relatively low, in 2012 amounted to only 14%. In accordance with the situation in the Middle and Far East, with their safety components and development, the interest and development of cruising in this part of the world will be determined.

The evaluation of the development of the world cruise market can show continuity in the growth of the American market by constant, though not excessive, growth rates, which trace the development of the offer of quality and of the construction of new cruise ships. Another reason for continuity of relatively stagnated development of the American cruise market is in the developing offers that are adapted to the new needs of passengers, followed by diversification of the supply. Such developments are also indicated by the cruise research conducted under the auspices of large cruise associations, CLIA (*Cruise Lines International Association*) and the ECC (*European Cruise Council*), and are a great support to the development of not only the American market but of other world markets as well. The development of world cruising is accompanied by the development of standardization and quality. Strong American market comes to the fore here, forming more developed and complex mega-strategies. In developing these strategies, American corporations are working more intensive on the collaboration with ports for large cruisers with regional and local authorities. Thus, for example, the development of a new Antarctic cruise industry which

Table 2 The intensity and dynamics of passenger flows on the world cruise market based on the main source markets (in millions of passengers)

Source Markets	2002	2007	2008	2009	2010	2011	2012
North America	7,7	10,45	10,39	10,49	11,01	11,4	11,6
Europe	2,4	4,05	4,48	5,06	5,71	6,18	6,26
Rest of the world	0,97	1,37	1,71	2,16	2,43	2,77	3,00
Total	**11,1**	**15,87**	**16,50**	**17,68**	**19,1**	**20,4**	**20,9**

Source: http://www.cruise-norway.no/viewfile.aspx?id=3824 (03/02/2014) connects large competent entities, and thus ultimately contributes to the generation of new motifs for passengers on cruises.

In this way, an intense communication model is created: passenger/tourist – cruise corporation – a natural resource. The subject of many studies are the American cruise markets, as the most advanced ones, and the world cruise markets in the Caribbean and the Bahamas, which developed between 1970 and 2003 at an average annual rate of 8%. Research is being conducted due to the planned changes and design of new development opportunities of this market, as it has become, with regard to its significance, a most insecure market, so this segment has been given a special attention to. The second group of activities is related to the upgrading of the transport system and linkages with the Caribbean destinations starting points, in which airlines are developing special arrangements together with the cruise corporations that not rarely become the owners. The third group of activities is focused on the consolidation of companies in this market, taking into account the bankruptcy of two major companies on the market after 11th September 2001, the Premier Cruises and the Commodore Cruises, followed by a process of consolidation in this market with the help of major corporations, so today the market is dominated by three large corporations, under whose auspices are smaller companies: Carnival Corp. with 45 cruisers, Royal Caribbean International with 25 cruisers and Star Cruises with six cruisers [8].

3.2. Passenger flows on the european cruise market

The fact that Europe ranks second among the most popular cruise destinations in the world (after North America) convincingly confirms the importance of the that market as well as the attractiveness of the European area as an essential factor of attracting passengers on cruises.

The general characteristic and the status of the European cruise market is the expansion of interest and demand for cruises as evidenced by the data on the number of 6,26 million European passengers who cruised the world in 2012 [1].

European cruise destinations, in regional terms, can be divided into:

– the Mediterranean (the Western Mediterranean and the Eastern Mediterranean) and
– Northern Europe (ports bordering on the Atlantic, Ireland, the United Kingdom, the North Sea, the Baltic Sea).

According to the data shown in Table 3, the Mediterranean together with the islands bordering on the Atlantic occupy 56% of the market share, and in 2012, 3,5 million European passengers had visited the area which certainly points to the fact that the Europeans prefer the Mediterranean as their cruise destination. Northern Europe and the Caribbean along with the rest of the world take equal shares of 22%.

The benefits of the Mediterranean as a cruise destination are reflected in the following:

– strategic position between Europe, Africa and Asia,
– Greek, Roman, Egyptian culture and history,
– archaeological sites, churches and museums,
– beautiful natural landscapes,
– contrast between modern and ancient art,
– a variety of products.

These benefits greatly affect the attendance of the Mediterranean by European passengers as evidenced by the data in Table 3.

Table 4 reports on a growing intensity, and positive dynamics of passenger flows on European cruises, given that 4,9 million European passengers cruised in 2009, and, only in 2012, that number went up to more than 6 million passengers that cruised the world.

Regarding the structure of passenger flows on cruises according to the source country (Table 4), the most numerous among the European passengers were the British, with a share of almost 30% (1,7 million passengers), and the Germans with a share of 25% (1,5 million passengers).

Seasonality as a factor in the formation and intensity change of passenger flows on cruises in the Mediterranean is getting less significant. In fact, global warming and improving weather extends season cruising in the Mediterranean during winter months which is a great advantage

Table 3 The European Cruise Market by Destination (000 passengers)

Passengers	2006	2007	2008	2009	2010	2011	2012	% change 2011–2012
The Mediterranean and Islands Bordering on the Atlantic	1981	2397	2649	2873	3303	3651	3456	-5
North Europe	595	651	737	866	1022	1216	1333	10
The Caribbean and the Rest of the World	832	957	1036	1206	1242	1201	1350	12
Total	**3409**	**4004**	**4422**	**4944**	**5567**	**6068**	**6139***	**1**

*Remark: An additional 120,000 passengers are estimated to have been sourced from other European countries (+3 countries outside the European Union) amounting to a total of 6,26 million passengers on the European cruise market

Source: http://www.irn-research.com/files/7813/6526/5158/CLIA%20Europe%20Stats%20and%20marts%2022012.pdf (15/02/2014)

Table 4 European cruise passengers by source country (000 passengers)

Passengers	2009	2010	2011	2012	% change 2011–2012
Great Britain	1,533	1,622	1,700	1,701	0
Germany	1,027	1,219	1,388	1,544	11
Italy	799	889	923	835	-9
Spain	587	645	703	576	-18
France	347	387	441	481	9
Scandinavia	173	283	306	324	6
Switzerland	76	91	121	131	8
The Netherlands	67	76	98	110	12
Austria	80	93	104	108	4
Belgium/Luxemburg	43	50	61	59	-3
Other from the EU +3	213	212	224	270	21
Total	**4,944**	**5,567**	**6,068**	**6,139***	**1**

*Remark: An additional 120,000 passengers are estimated to have been sourced from other European countries (+3 countries outside the European Union) amounting to a total of 6,26 million passengers on the European cruise market

Source: http://www.irn- -research.com/files/7813/6526/5158/CLIA%20Europe%20Stats%20and%20marts%202012.pdf (15/02/2014)

in this area, taking into account that it has always been the rule that the arrival of the winter season means crossing cruise ships to the Caribbean and the Southern Africa area.

Nevertheless, when we talk about the seasonality of the European cruise market, it should be taken into account that the European market is divided into the Mediterranean and Northern Europe market bearing in mind that the climate of the Mediterranean is far more suitable for cruising than the cold North Sea and the northwest Atlantic. The analysis of these two segments of a unique European market has shown that they should, because of their climatic specifics, be selectively analyzed.

The condition in the European cruise market is important to comment, given the tendency of total passenger movements on cruises in Europe that are definitely on the rise.

In the period between 2007 and 2012, the number of passenger movements on cruise ships in European ports increased by 53%, rising from 18,82 million passenger movements in 2007 up to 28,69 million recorded in 2012. One of the reasons for such an increase in the number of passenger movements is the length of the cruise route since the cruiser calls at more and more enroute ports on a single voyage.

The most significant ports of the Mediterranean are located in Spain and Italy, and the first on the list is the port of Barcelona, with the recorded 2,4 million passenger movements in 2012. It is also an example of a successful development of the port, which, with its five terminals, receives the greatest number of passengers in the Mediterranean and today is the fourth home port in the world.

In Northern Europe, a strong dominance is held by the port of Southampton with almost 50% market share of cruises in that part of Europe in the last few years. If we compare the traffic of the port of Southampton with the busiest Mediterranean port, we are talking about almost one million passenger movements less in the British port in 2012 alone. Therefore, the conclusion is that Northern Europe is very strongly seasonally limited, which certainly leads to less passenger flows in these destinations during winter.

However, the Mediterranean, as a major global cruise market, because of unevenly indented coastline, still remains insufficiently represented. Its 40,000 kilometers of coastline belonging to different developing countries – from the highly developed France, Spain and Italy, to the medium developed Croatia and Greece, together with many small medium developed countries that occupy a small part of the coast. Unevenly indented coastline of the Mediterranean is reflecting on the possibility of a further development of cruising. The coasts of Greece and Croatia are highly indented and unsuitable for large cruise ships and they take up half of the Mediterranean coast. It is this feature that encourages the development of the construc-

Table 5 Passenger movements on cruises in Europe (millions of passengers)

	2007	2008	2009	2010	2011	2012
Passenger movements	18,82	21,71	23,76	25,18	27,50	28,69
% change	19.80%	15.36%	9.44%	5.98%	9.21%	4.33%

Source: http://www.cruise-norway.no/viewfile.aspx?id=3824 (13/03/2014)

Table 6 Passenger movements on cruises according to the leading home ports in Europe (2010 – 2012)

Home Port	Country	2010	2011	2012
	The Mediterranean			
Barcelona	Spain	2,350,283	2,657,244	2,408,960
Civitavecchia	Italy	2,458,000	2,400,000	2,190,000
Venice	Italy	1,617,011	1,786,416	1,775,944
Piraeus	Greece	1,210,000	1,560,000	1,199,000
Palma de Majorca	Spain	1,347,009	1,419,502	984,785
Savona	Italy	780,672	948,459	810,097
Genoa	Italy	860,290	798,521	797,239
	Northern Europe			
Southampton	Great Britain	1,243,463	1,445,000	1,529,000
Copenhagen	Denmark	662,000	819,000	840,000
Kiel	Germany	341,000	377,205	348,180
Dover	Great Britain	307,223	223,825	246,000
Hamburg	Germany	245761	314,494	430,329
Amsterdam	The Netherlands	198,530	258,576	289,757

Source: http://www.cruise-norway.no/viewfile.aspx?id=3824 (28/02/2014)

Table 7 Passenger movements on cruises in the major European enroute ports (2010 – 2012)

Port of Call	Country	2010	2011	2012
	The Mediterranean			
Naples	Italy	1,139,919	1,154,000	1,190,000
Livorno	Italy	822,514	982,928	1,037,849
Dubrovnik	Croatia	970,000	985,398	950,791
Marseille	France	699,892	826,000	930,000
Santorini	Greece	700,000	962,000	838,899
	Northern Europe			
Lisboa	Portugal	448,497	502,644	522,604
Stockholm	Sweden	415,000	452,000	467,000
Bergen	Norway	291,877	350,248	446,906
Tallinn	Estonia	389,370	437,517	440,504
St. Petersburg	Russia	423,931	455,476	440,000

Source: http://www.cruise-norway.no/viewfile.aspx?id=3824 (28/02/2014)

tion of small well-equipped cruisers. Nautical tourism and cruising as a part of it, gradually gets recognized as the backbone of the development of medium developed countries in the Mediterranean, which will reflect on the development of cruising itself [8].

Regarding the ports of call in Europe, there is still a great difference in the number of passengers who have visited a particular port in the Mediterranean as compared to those who have visited the North European ports. Italian ports are still in lead, and the port of Dubrovnik is positioned as an enroute port on a high third place, with 950,791 passenger movements in 2012.

3.3. Passenger flows on the adriatic cruise market

It is possible to analyze the structure of passenger flows on cruises in the Mediterranean dividing it within the following regions:

– the Western Mediterranean,
– the Adriatic,
– the Eastern Mediterranean and
– the Black Sea area.

Accordingly, the structure of the *Mediterranean cruises in these regions* in 2012, which is shown in Chart 2, indicates that the Adriatic, with the Western Mediterranean on top, is placed second in the total number of passengers that visited its ports in 2012.

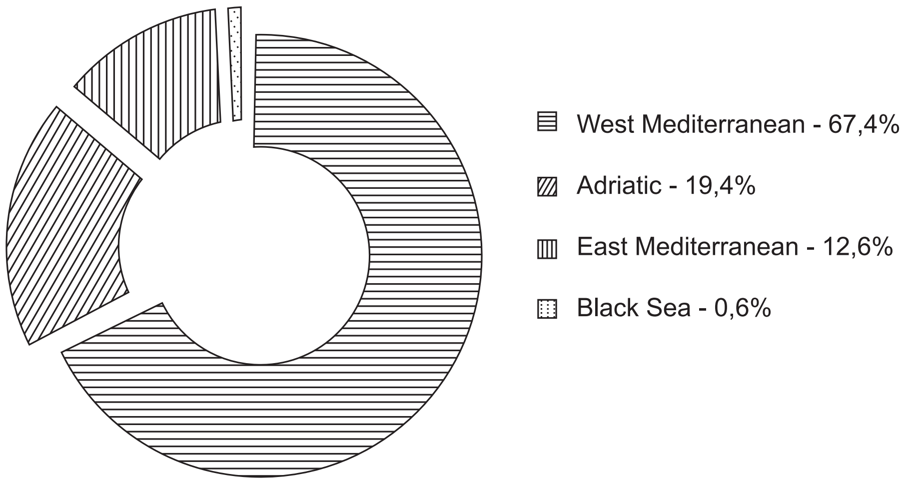

Chart 2 The Concentration of cruise passengers in the Mediterranean in 2012

Source: Adriatic Sea Tourism Report, 2013

Table 8 "Top Twenty" cruise ports in the Adriatic according to passenger movements in 2012

Port	Passengers	Share (%)
Venice	1,775,944	35.6
Dubrovnik	975,423	19.6
Corfu	655,764	13.1
Bari	618,882	12.4
Kotor	546,623	4.9
Split	245,451	4.9
Ancona	110,106	2.2
Ravenna	100,987	2.0
Trieste	70,807	1.4
Koper	64,456	1.3
Korčula	42,469	0.9
Zadar	20,640	0.4
Šibenik	15,355	0.3
Brindisi	13,507	0.3
Rijeka	9,539	0.2
Pula	8,322	0.2
Rovinj	7,956	0.2
Igoumenitsa	1,827	<0.1
Opatija	1,800	<0.1
Otranto	1,182	<0.1
Total	**4,988,200**	**100**

Source: Adriatic Sea Tourism Report, 2013

The Adriatic share in the number of passengers on cruises in the Mediterranean is 19.4% and in the last few years has continued to grow, taking into account that in 2003 it amounted to 16% [5]. It is still a great difference as compared to the dominant Western Mediterranean which was visited by 67.4% of all cruise passengers in the Mediterranean in 2012.

The Adriatic Sea is deeply indented into the European continent, and has two highly-ranked cities suitable for a great world cruising – Dubrovnik in the South and Venice in the North. Between these cities, on both sides of the Adriatic, there are many more interesting and rich in culture cities and ports. Unlike Italy, as the world cruising power, Croatia can be classified in the group of underdeveloped but, together with Greece, very attractive Mediterranean countries. Statistical data have shown that the development of cruising is not questionable, as much in the world as in the Mediterranean, as well as along the Croatian part of the Adriatic Sea [8].

The Adriatic area registered 4,988,200 passenger movements in 2012. The port of Venice occupies the first place as the main home port in the Adriatic and registered 1,775,944 passenger movements. The port of Dubrovnik, as the largest enroute port for cruises in Croatia, is placed second in the Adriatic with almost one million passenger movements in 2012. Thus, the data in Table 8 highlight the fact that the roles of the two largest competitors in the cruising market in the Adriatic are taken by Croatian and Italian ports, where the Italian port of Venice holds a leading position in the "Top Ten" leading ports for cruises in the Adriatic.

The Republic of Croatia is situated in an extremely convenient geographical position for offering cruise services, but this advantage is still underused. The port of Dubrovnik, as the most important passenger port for cruises in Croatia, does not play the role of a home port but just of an enroute port and all its traffic is related to passengers in transit, although even in this role it holds the third place in the entire Mediterranean and second in the Adriatic. These statistic data indicate that the capacity of the port of Dubrovnik is currently underused and that in case of being established as a port of departure for cruises this would have an important and impact not only on the number of passengers who will call at Croatian ports when on cruises but on the overall Croatian economy as well.

Joining the European Union has represented a great opportunity for the growth of cruises in the Adriatic. By opening the borders, which means free flows of passengers, goods and capital, Croatia has got an opportunity to affirm its own cruise market within the member states of the European Union.

The growth of cruising along the Adriatic coast is yet to be expected given the clearly expressed interest of potential investors and the level of growth that, with the exception of Dubrovnik, has not yet reached the first saturation point when it comes to the Croatian coast [8].

4. The forecast of passenger flows on a cruise market

The forecast of demand for cruises in the following years underscore the growing recognition of that attractive and cost effective form of maritime transport and tourism in the world.

According to these forecasts, the total demand for cruises in 2020 will amount to 29,7 million passengers and, as compared to 2012, represents an increase of 42%. Consequently, in 2025, an estimated 36,3 million cruise passengers will cruise around the world, and, as compared to 2012, when 20,9 million passengers cruised, it represents an increase of 74%.

This forecast model implies that the main tourist source market for cruises remains the North American market, although it is anticipated that the market share of the total demand will be reduced by 6% as compared to the year 2012 when it stood at 56%.

It is also anticipated that, in 2025, 12 million Europeans will cruise the world and, as compared to 2012, it represents an increase of as much as 91%, indicating a trend of a rapid growth of the European cruise market.

5. Conclusion

Cruise market is constantly increasing on the world markets. During 2012, 20,9 million passengers cruised the world. The main receptive region or destinations for attracting passenger flows on cruises are the Caribbean with a share of 37.3%, the Mediterranean with a share of 19.9% and Northern Europe with 9.8%. There is an expressed upward trend in demand for cruises in the Mediterranean, which is a leading European region for cruising, followed by the Caribbean as the second most visited region in the world.

The main source market of cruises is the North American market, which generated 11,6 million passengers in 2012, or 56% of the total demand in cruising, followed by Europe with 6,26 million passengers who have cruised the world.

The European market can be divided into two independently marked markets, The Mediterranean market and the North European one. They are very different, regarding the

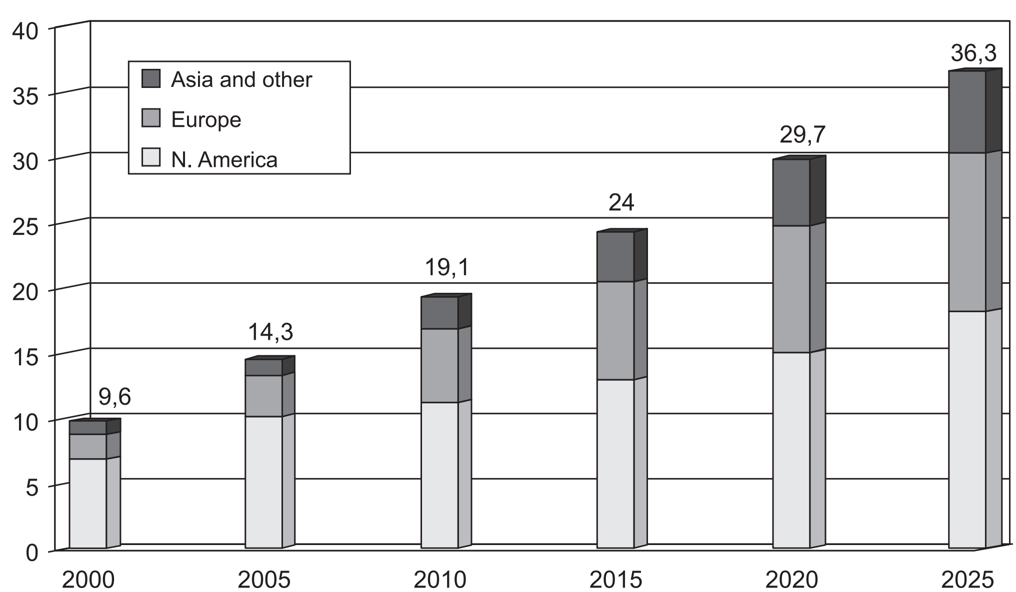

Chart 3 Passenger flows demand forecast on the world cruise market according to source markets (in millions of passengers)

Source: http://www.maritime-rh.com/maritime_docs/osc_press_releases/press-release2-world-cruise-ports-and-shipping-to-2025.pdf (13/03/2014) climate, but also in terms of culture. The most important ports of the Mediterranean are located in Spain and Italy. The leading port is Barcelona, which in 2012 recorded 2,4 million passenger movements, while in Northern Europe dominates the port of Southampton which, in the last few years, counted nearly 50% of the market share of cruises in that part of Europe. The future growth of these markets should definitely be based on market characteristics of the selectiveness of the Mediterranean and North Europe.

The Adriatic area is placed second in the Mediterranean as against the total number of passengers who visited its ports in 2012. This information indicates the significance of the future growth of cruises in that area as well as the fact that Dubrovnik, as the second Adriatic port with nearly a million passengers per year, will have substantial economic benefits from cruise ships and of the maritime passenger traffic in general.

The overall increase in the traffic of ships and passengers in the Mediterranean, as well as the attractiveness of the port of Dubrovnik as a destination, ideally located on the way to Venice, generates the realistic assumptions of a further continued growth in the number of passengers who call at that port on a cruise. Since the ships structure that sail the Mediterranean and visit Dubrovnik undergoes intensive changes, and the average size of the ships increases significantly, the port of Dubrovnik, as well as the whole tourist destination in its entirety, should be adapted to new trends and demands of a dynamic cruise market.

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