Indonesia Cruise Update

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Indonesia Cruise Summary 2016

- Cruise Lines : Approx. 20
- Ports & Islands :15 ports for vessels of max 2500
  :60 ports for vessels of max 450
  :75 Islands for expedition size vessels
- Port Visits :155+ calls (vessels of max 2500)
  : 30+ calls (vessels of max 450
  : 175+ calls (expedition vessels)
- Passenger volume by source market : 1.9% (Indonesia)
- 37% + growth since 2012 - 2016
- 2016 VS 2017 passenger numbers reduce 259,000 – 195,000

Strength

- Country of world's largest archipelago: 17,504 islands (34 islands > 2000 km and 17,470 islands <2000 km)
- Culture diversity
- Heritage sites and temples
- One of world's best underwater sites and beaches.
- Friendly

Opportunities

- Infrastructure development plan
- Cabotage Policy (5 main ports)
- Itinerary growth
- Home port (Benoa, Bali)
- Marquee ports
- Develop more destinations for Expedition vessels
- Indonesians as a source market

Weaknesses

- Channels to enter some ports is difficult due to narrow and shallow channel, such as Benoa, Semarang
- Large cruise ships require high safety of navigation, need accurate and updated marine charts and ENC (electronic navigational chart).
- Inappropriate infrastructure of cruise ship ports, no specific port and passenger facilities designated for large Cruise ships.
- Lack of flexibility of CIQP to accommodate visits to multiple cruise destinations, such as immigration on board, mobile port clearance
- Port fees are expensive when compared to other countries in SE Asia
- High Cost Economy (remote areas)

Threats

- Limited port facilities (remote areas)
- Lack of air transportation to access remote destinations
- Lack of infrastructure and facilities : roads, sea port, transportation quality, Language guides (remote area)

Government Supports

- Dredge of Benoa port channel to accommodate large cruise ships to enable operating safe navigation
- Provide reliable and updated ENC (Electronic Navigation Chart) data issued by Hydrographic office.
- Simplifying clearance process system between entry and exit ports, mobile and flexible port clearance
- Rationalize port fee
- Improve port infrastructure & facilities including passenger terminal (Benoa) become priority of National Development Program
- Establish a national task force to monitor and support development of cruise tourism
- Destination infrastructure

Terimakasih (Thank You)