



# CRUISE SHIPS IN MEDITERRANEAN HARBOURS

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As we look at mega-trends in facilities and infrastructure, ports and cities need to think long-term and strategically

Cruise lines are thinking short-term and operationally



Capital investments have to last for the long-term  
Take years to execute

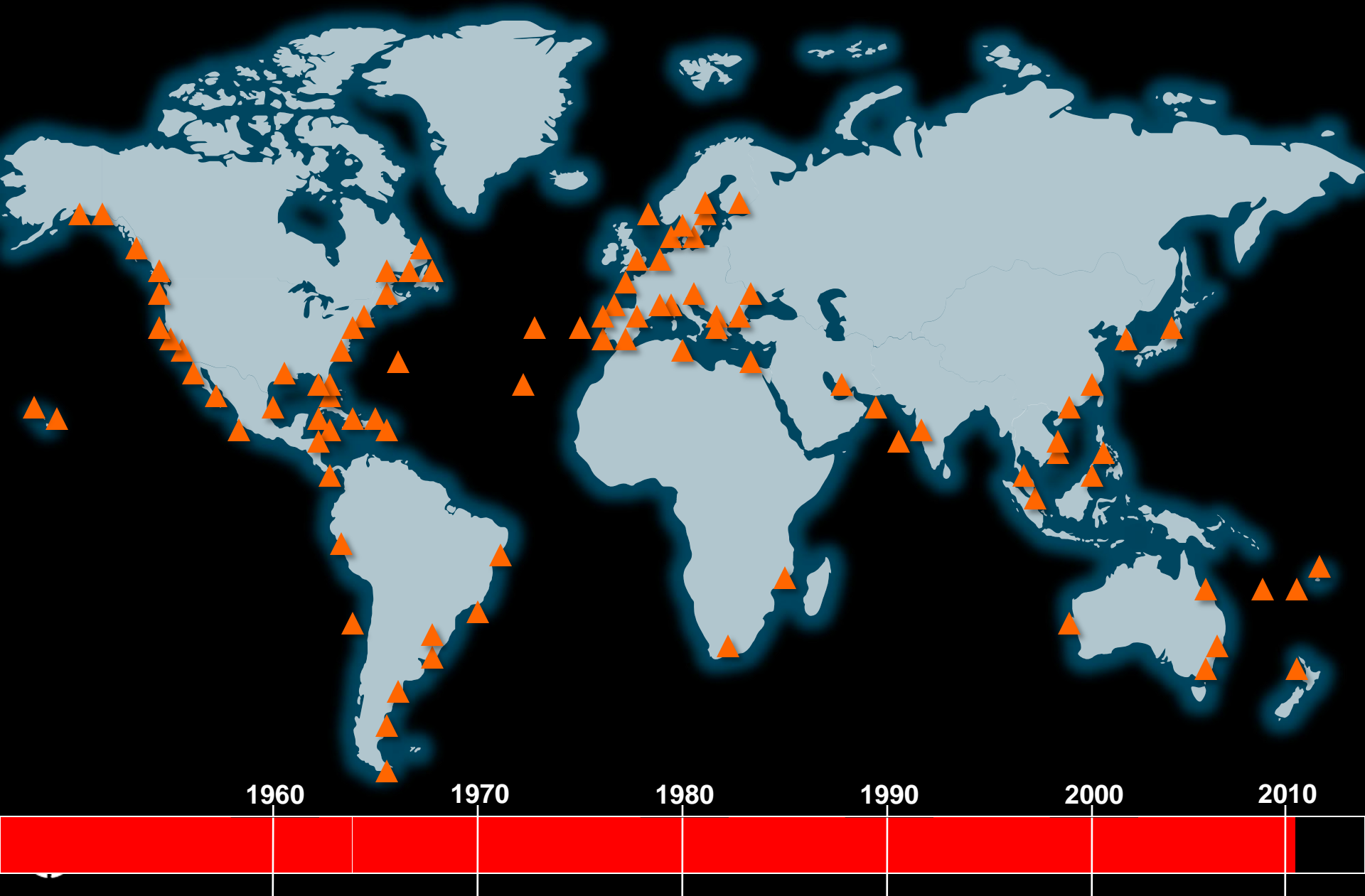
# LONG-TERM VISION



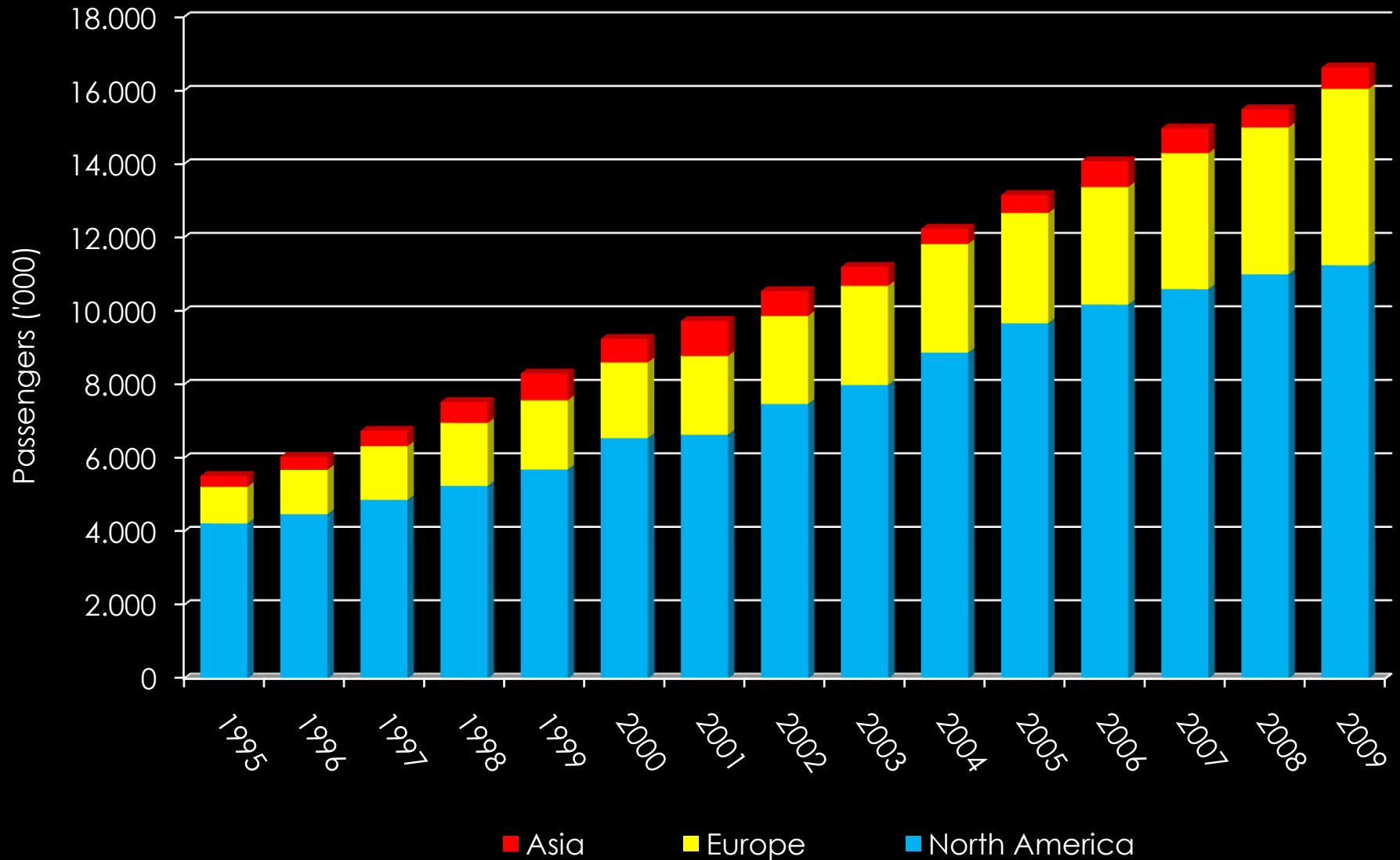
Market and growth



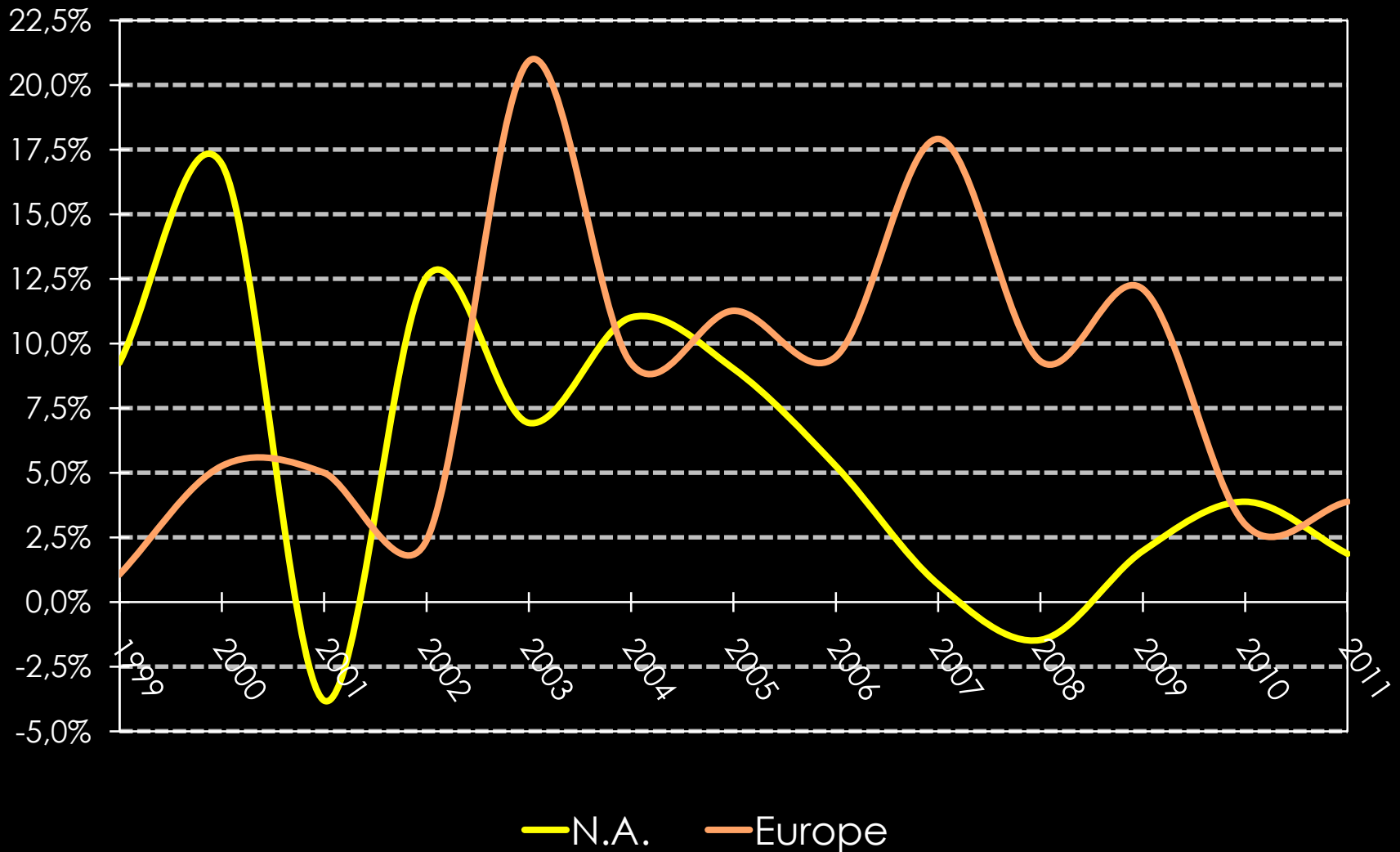
# Worldwide expansion



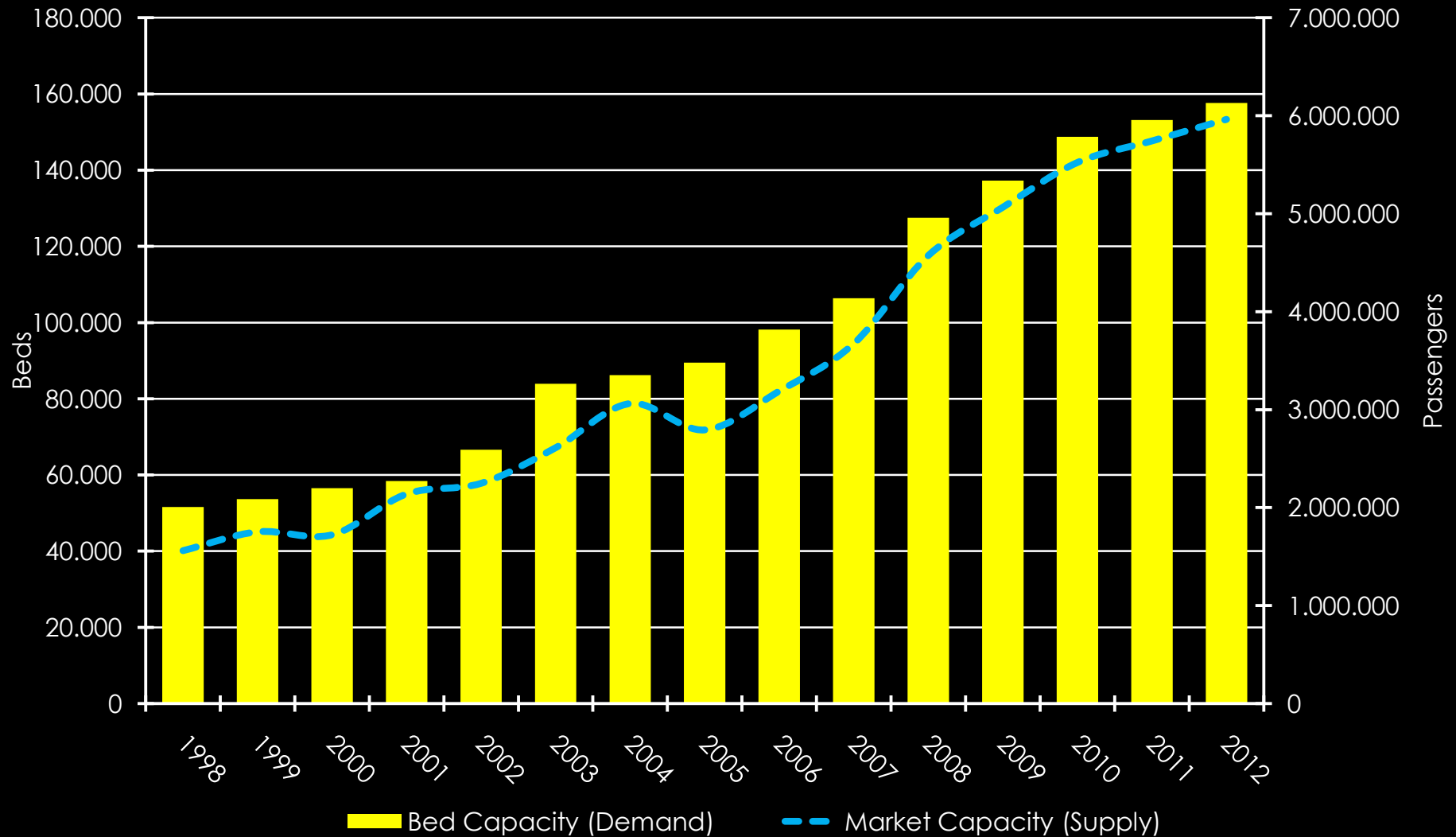
# Worldwide and regional expansion



# North American vs. European growth

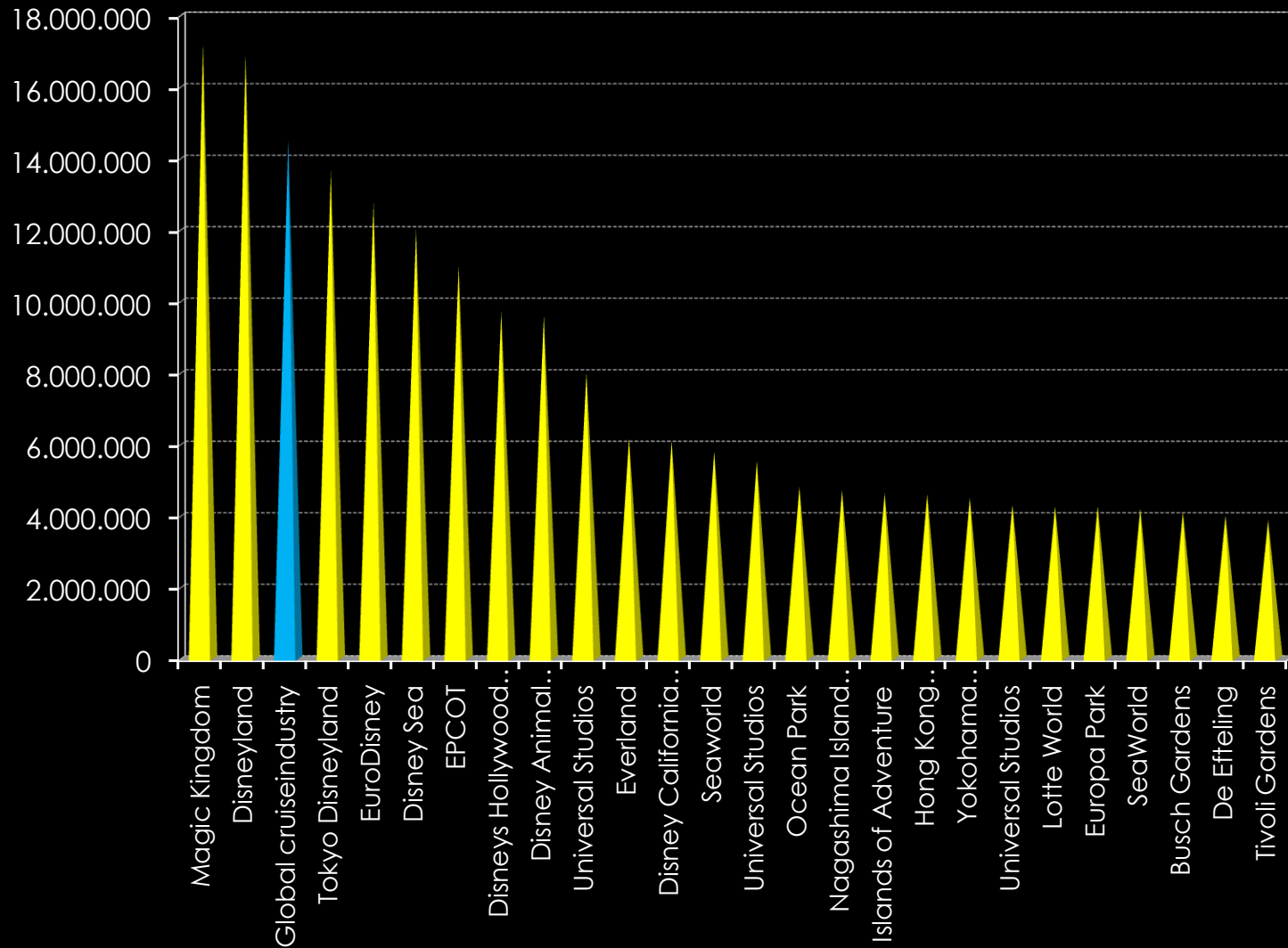


# European cruise market growth

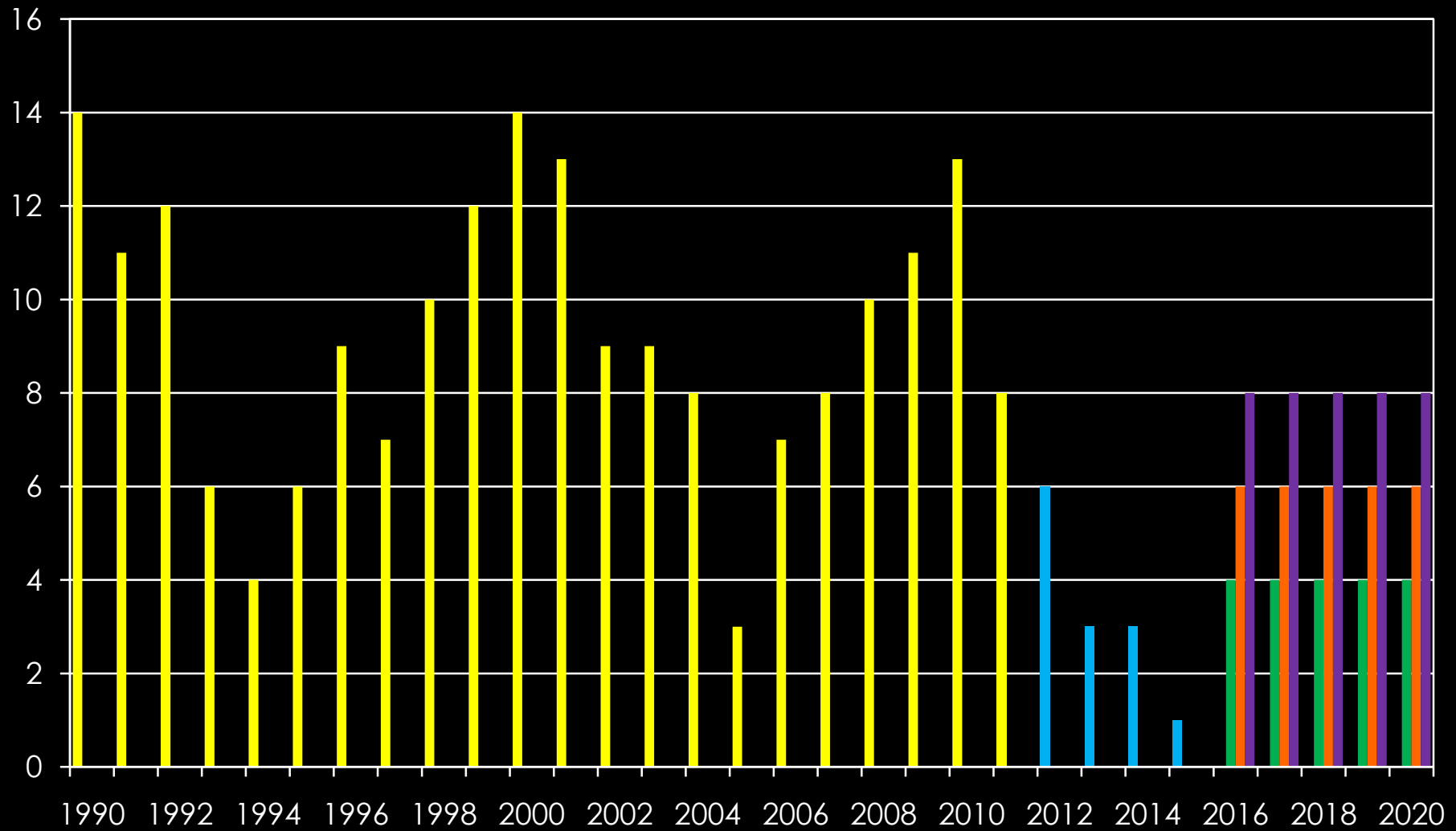




# Top 25 worldwide attractions



# Vessel deliveries



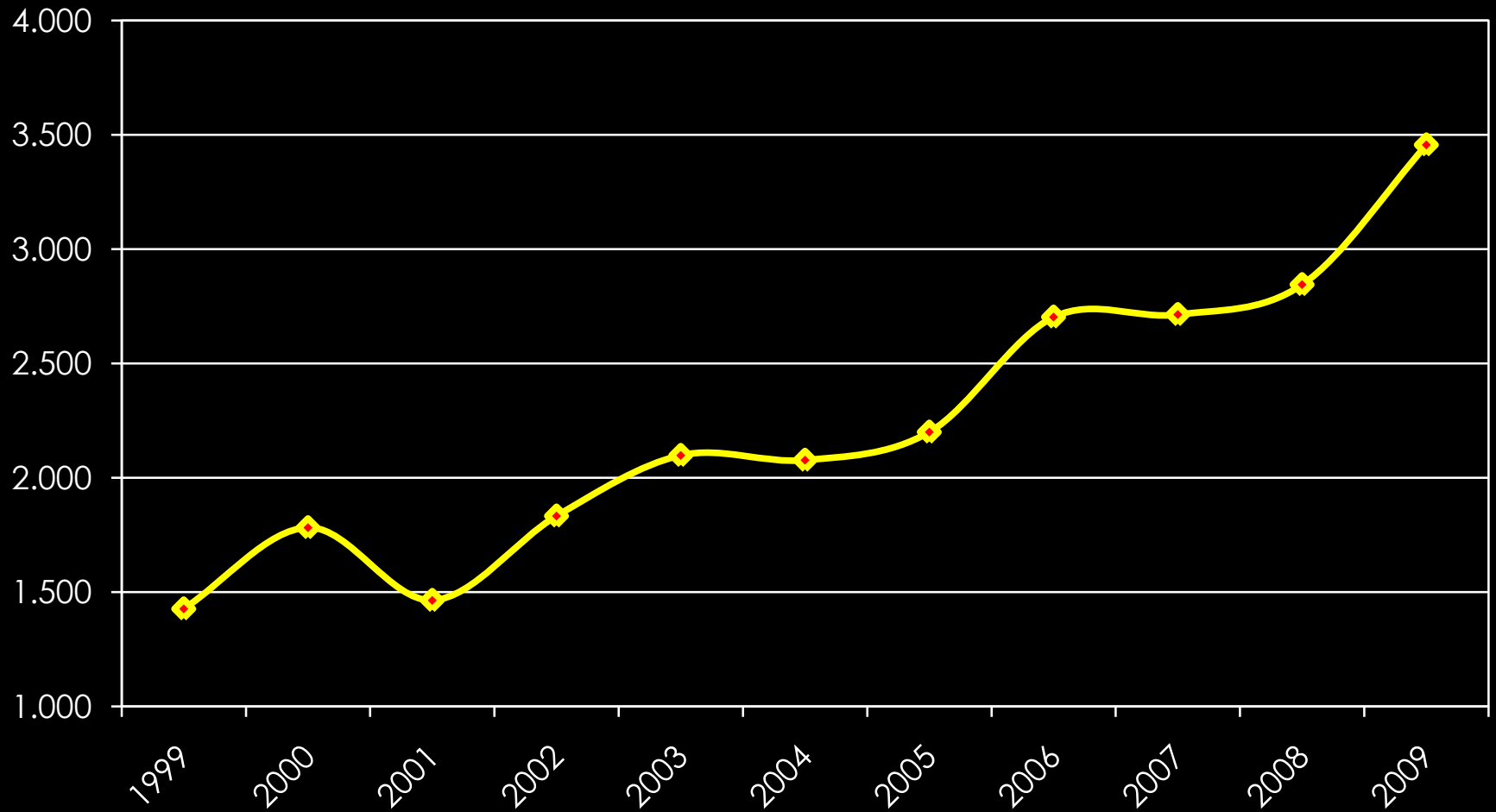
Ships



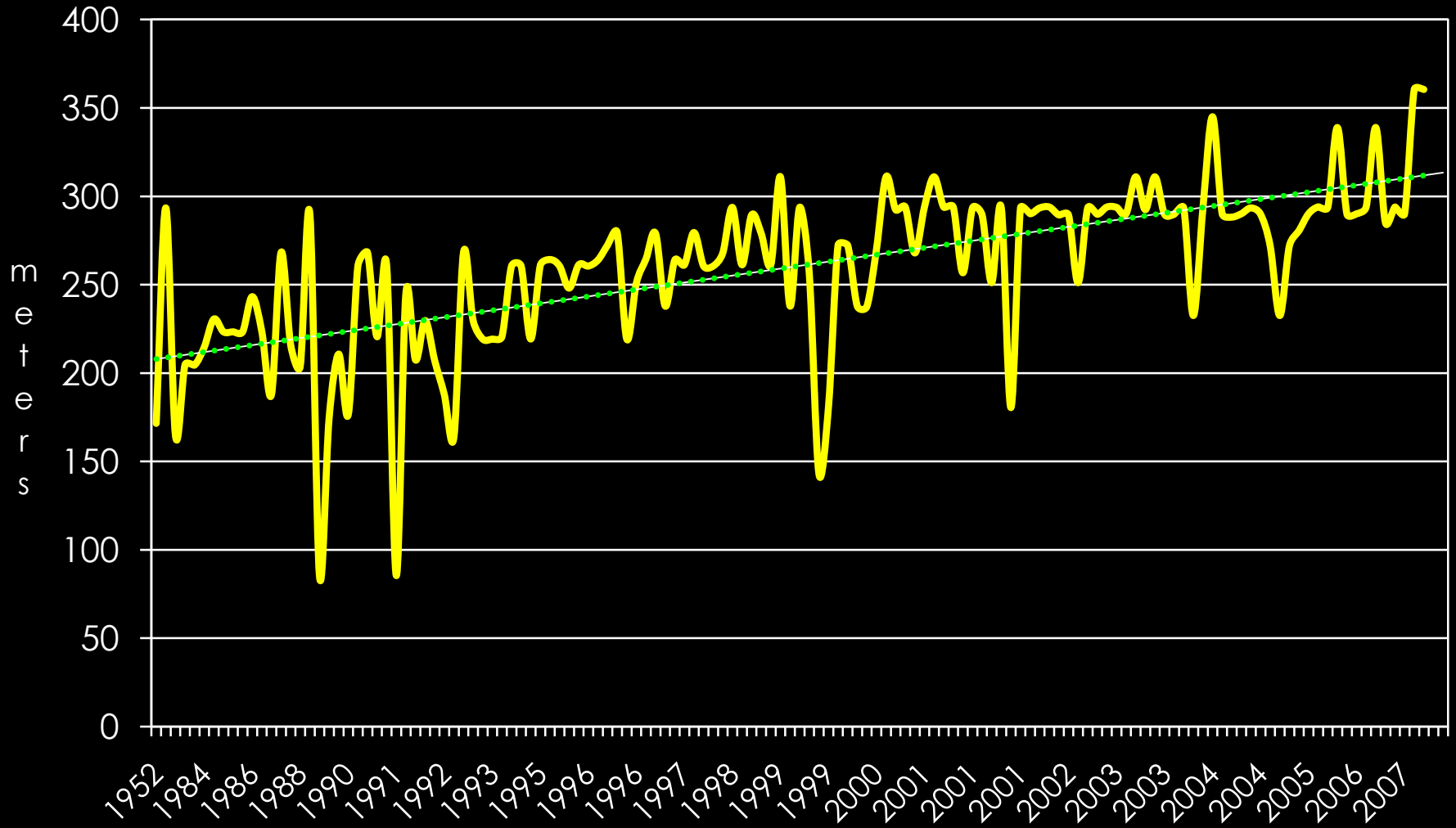
# Ever growing mega ships



# Average passengers per ship by year of construction



# Length of ship by year of construction



# Past ship drivers – physical

- The width of the Panama Canal
- The air-draft of the Verrazano Narrows and Golden Gate bridges
- The draft of smaller harbors (for non-transatlantic)



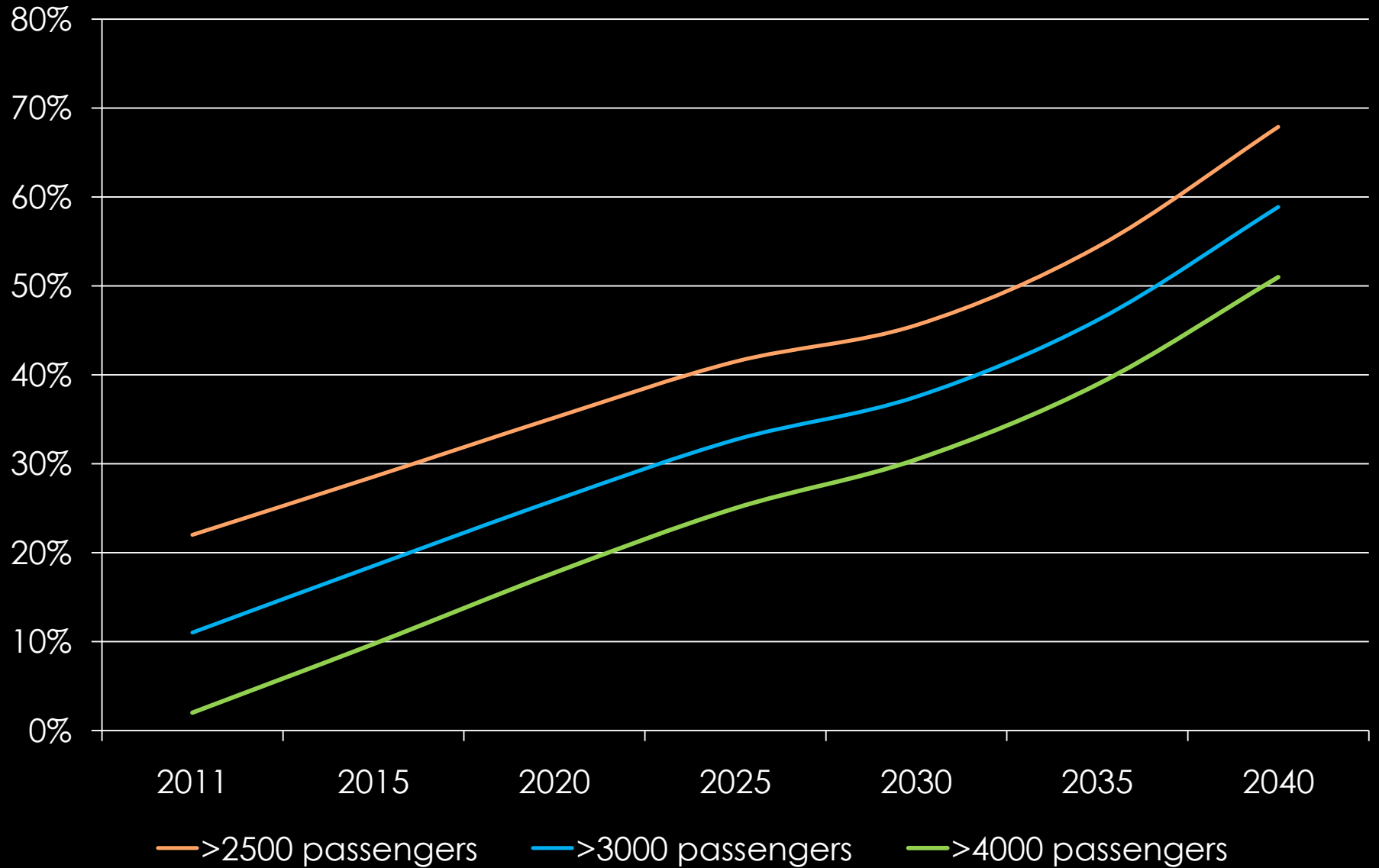
# Future drivers – market and economies

- More passenger amenities
- Better sales yields
  - Outside cabins – larger perimeter
  - Balconies
  - Grander atriums
- Logistics
  - Distribution of passengers
  - Boarding and disembarking
- Better economics
  - Crew to passenger ratios
  - Power / fuel consumption

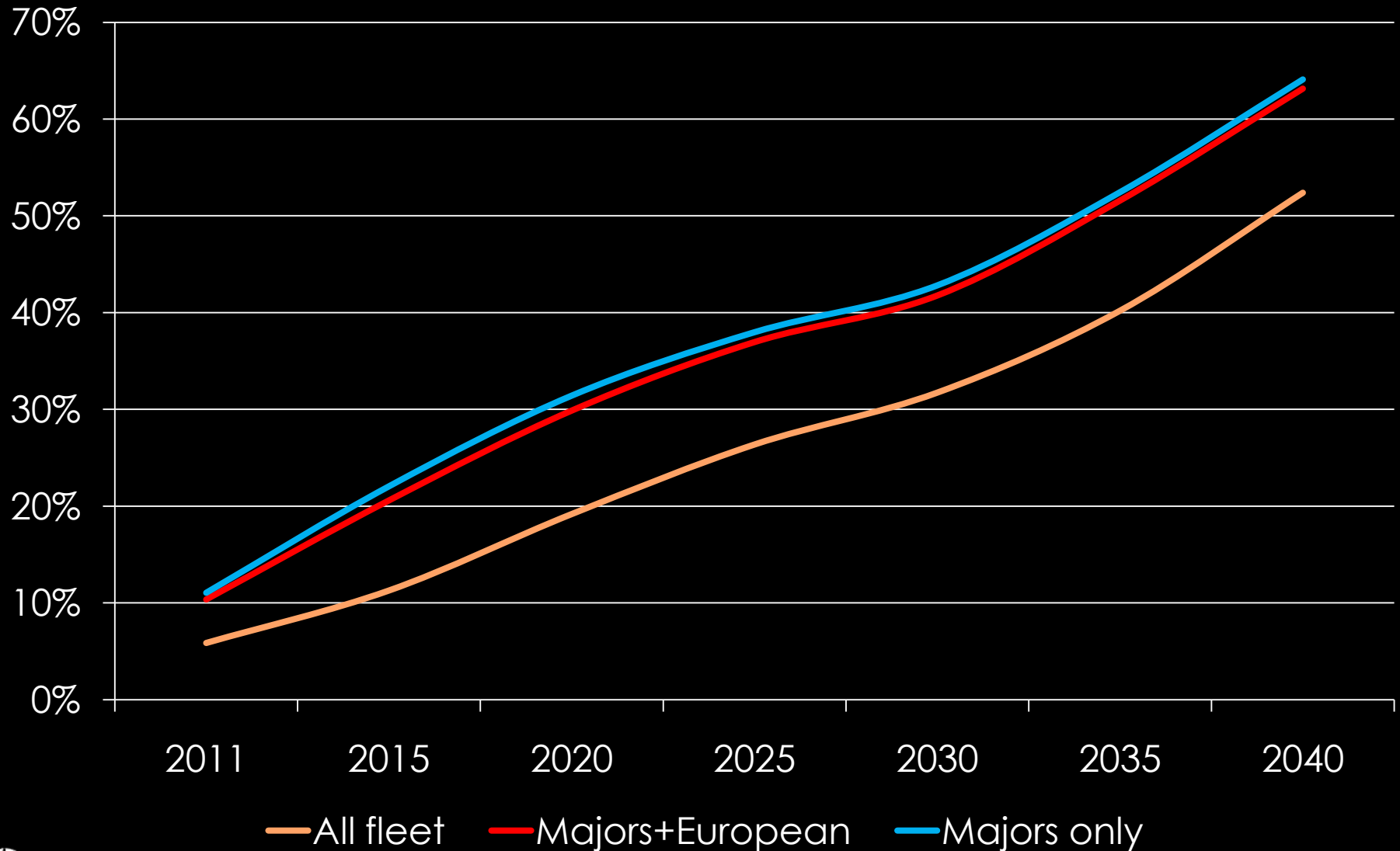




# Fleet size projections



# Percent of ships over 300 meters



# Operations

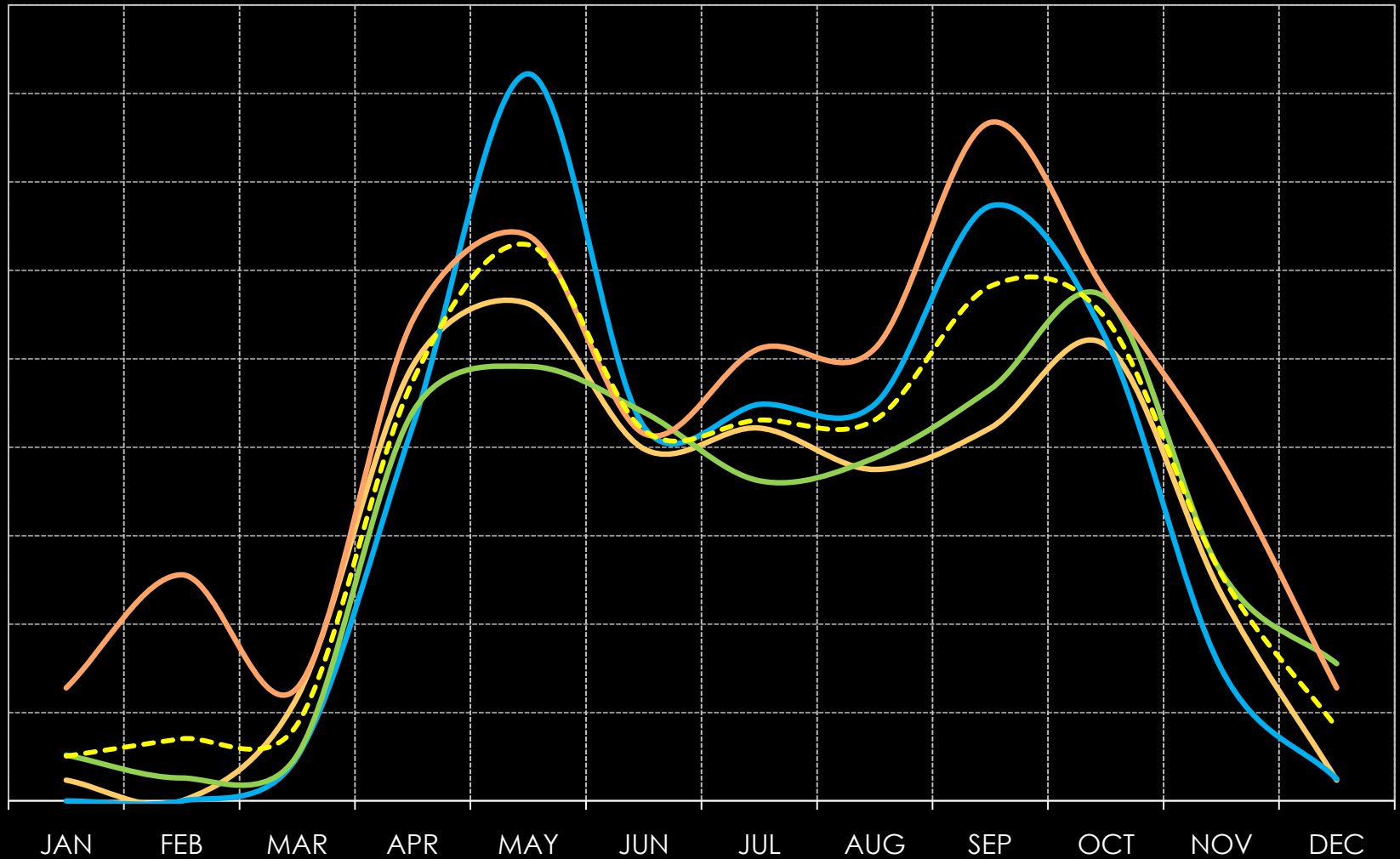


# Peaking

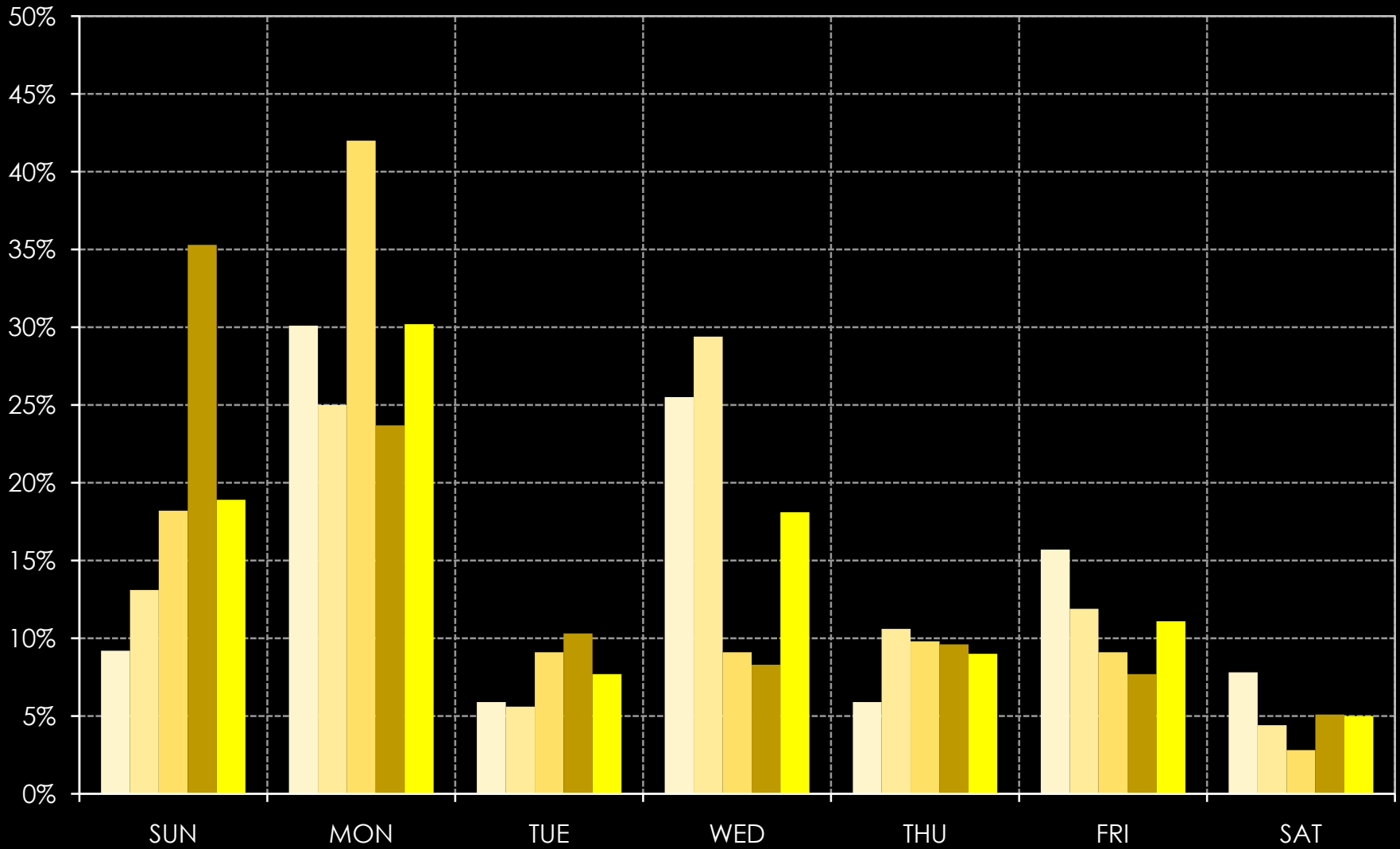
- Usually peaking occurs due to competition
- Repositioning timing
- Desire to use most desirable weekend days



# Typical Mediterranean monthly variations



# Daily distribution



Homeports



# The evolution of the cruise terminal





# Major components

**Ground transportation and access**

**Passenger and luggage (terminal)**

**Marine ops including apron**



# Critical design issues

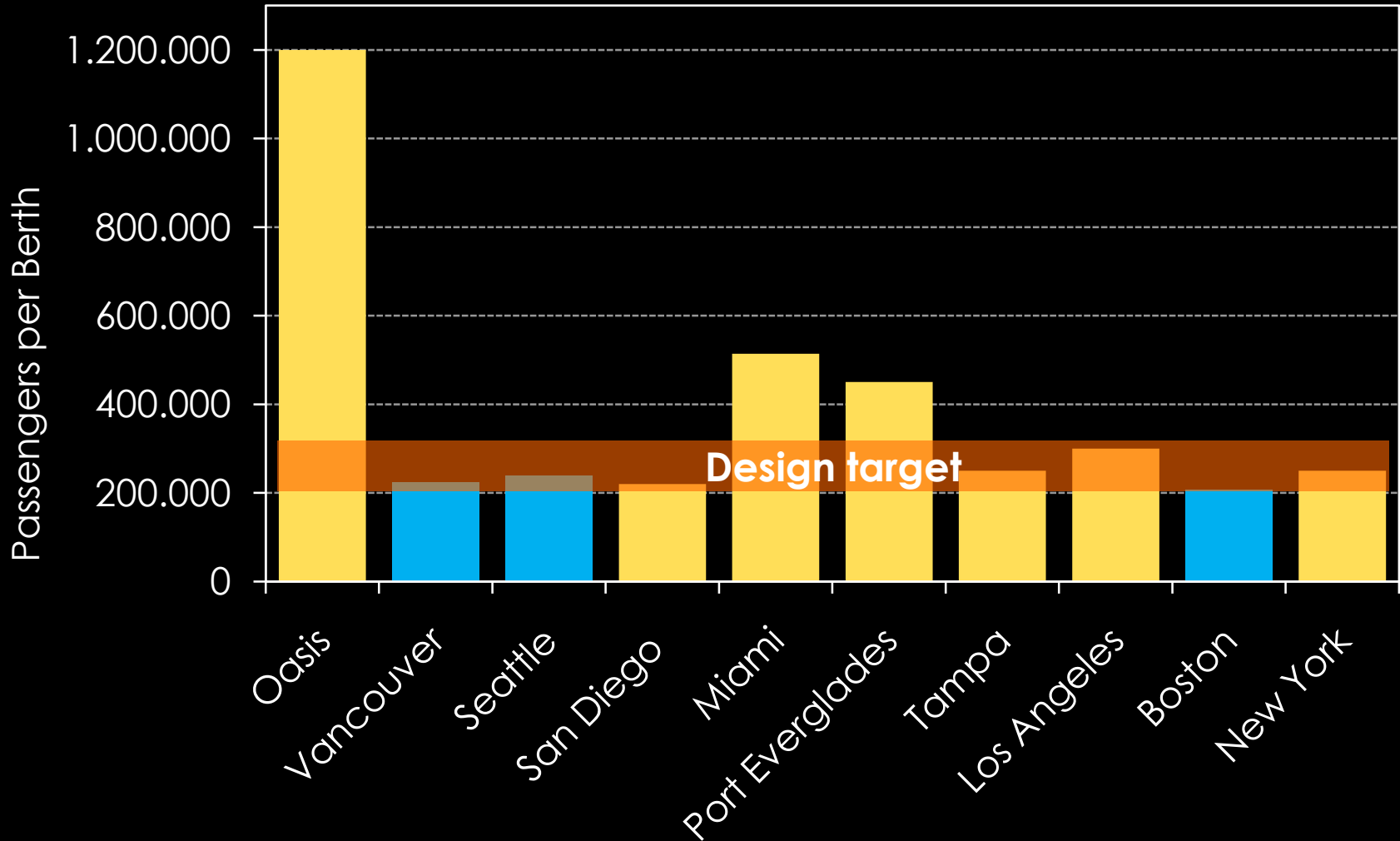
- ① Segregate embarkation from disembarkation
- ② Segregate modes of transportation
- ③ Provide the latest security
- ④ Improve functionality
- ⑤ Luggage handling
- ⑥ Integrate terminal into waterfront
- ⑦ Secondary uses



# Passenger experience



# Metric - berth use (passengers per year)



# The future terminal

- Focus on processing passengers at the least cost
- Lines expect better functioning terminals
  - Larger
  - More comfort
  - Two level operations
  - Multiple gangways
  - Elevators, escalators, etc





# Northern Europe

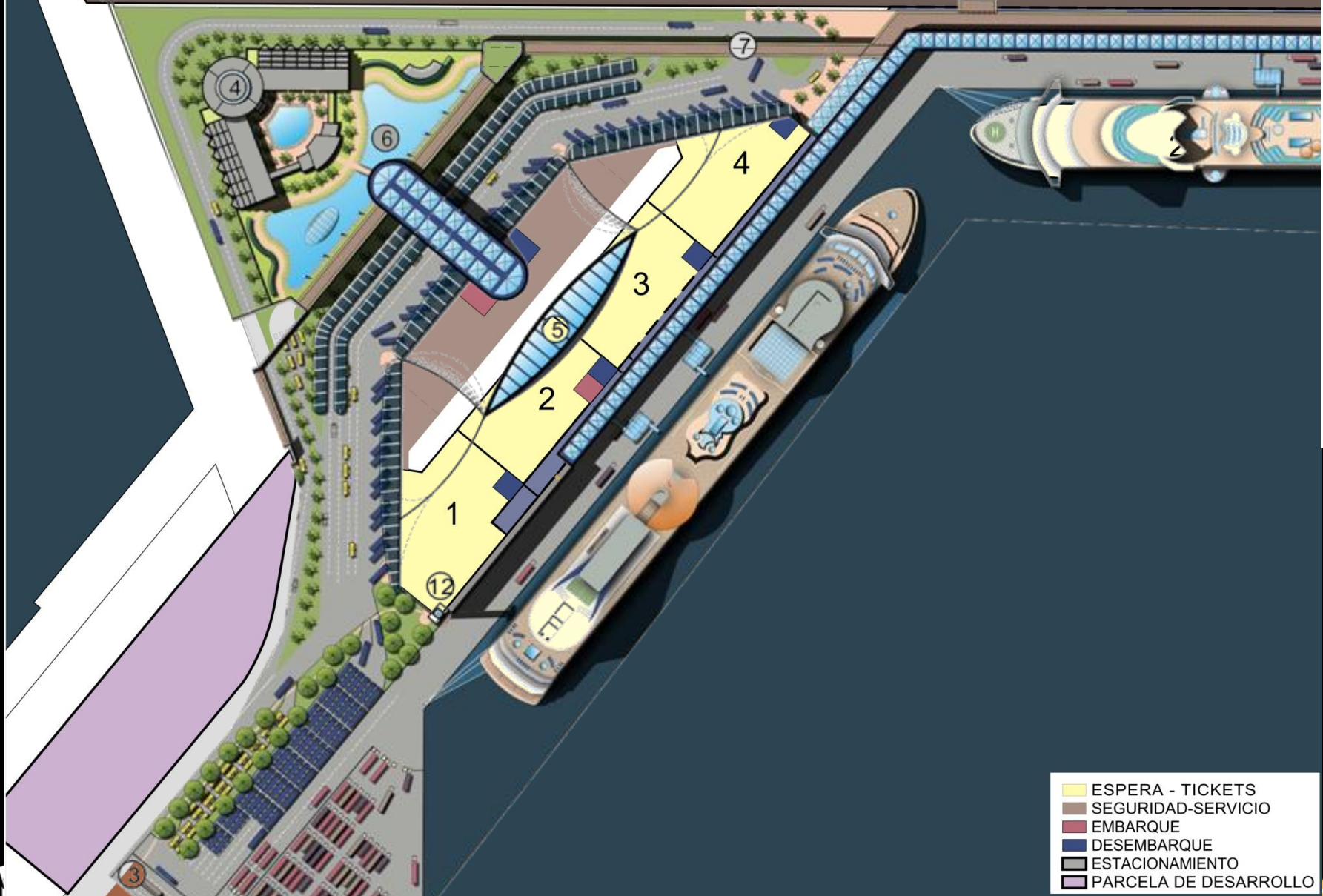




# St. Petersburg, Russia



# Mediterranean



- ESPERA - TICKETS
- SEGURIDAD-SERVICIO
- EMBARQUE
- DESEMBARQUE
- ESTACIONAMIENTO
- PARCELA DE DESARROLLO



# Asia





# Port Everglades 18 (Oasis terminal)



# Manhattan





# Performance standards

- **Passenger experience**

- Time
- Flow
- Queues
- Spaciousness
- Direction
- Friendliness

- **Cruise company**

- Cost
- Efficiency
- Labor
- Turn around time
- Passenger experience

- **Destination**

- Revenues and costs
- Volumes



City-port integration



# The paradox

*.....the more charming and attractive  
the destination the more desirable.....*



...among the uses of an urban waterfront,  
cruise activities previously relegated to a  
few harbors, are now commonplace  
worldwide.....



# City-port integration





# Poor integration



- Bad for the Port
- Bad for the City
- Bad for the passengers
- Bad for the cruise lines
- Exacerbated by:
  - No planning by ports
  - Mega liners
  - Interline Competition



# Opportunity

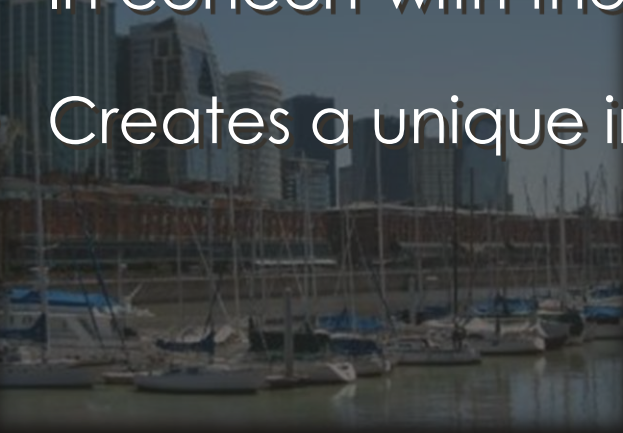
- Many cities are beginning to lose their identities and mimic each other, a trend fueled by worldwide consumerism, communications and retailing
- The waterfront is the last area where history and culture can and should be preserved and a window to the future anchored





# What makes a successful waterfront?

- Attracts people
- Enhances a city
- Financially successful
- Promotes growth and economic development
- In concert with the economy of the city
- Creates a unique image of the city



# What Makes a Successful Urban Waterfront?

- Size does not matter
- Some of the most enduring waterfront experiences are the small human scale harbors
- What matters is the uniqueness
- Based on:
  - Geography
  - History
  - Culture





# What Makes a Successful Urban Waterfront?

The City's waterfront should be considered an integral part of the City, not an isolated stretch or line. Open space and access should be emphasized.





# What Makes a Successful Urban Waterfront?

- Environmental sensitivity
- Provide a sustainable balance between development and the environment
- The water's edge will be a future battle ground due to global warming





# Strong linkages between city and waterfront





# Dramatic architecture





# Diversity of uses





# Marine activities





# Cruise facilities



# Conflicting needs?





# Canada Place



# Canada Place





# Park – cruise



# Critical

- Docking facilities
- Generous pedestrian areas
- Ground transportation area
- Security system
- Integration to the waterfront





# Conclusions



# Conclusions

- Think strategically
  - Community issues
  - Port's mission
  - Short – term solutions without a strategic plan will be short lived and more expensive
- Think financially
  - How to finance the project
  - Stay competitive with the industry
  - Not considering pricing in design will create problems
- Think functionally
  - Listen to your users and stakeholders
- Think globally –
  - Comparing yourself against your neighbor – this is a global business
- Focus on all parts of the business
  - Operations
  - Third party costs to the lines



# Conclusions

- Plan for the long-term
- Execute for the mid-term
- Plan for the large ships
- Improve the destination
- Create performance standards
- Improve the passenger experience
- New creative offerings





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