GENERAL INFORMATION

It is a great pleasure to announce that the Cruise Shipping Conference "Opportunities and Challenges: markets, technologies and local development" will be hosted by Parthenope University and will take place from 4th to 6th October - 2007 in Naples (Italy), a city with a long maritime tradition on cruise shipping.

The Conference will provide a forum to discuss current issues, recent trends, developments and future challenges of the cruise shipping industry.

Key themes

1. Ship and shipbuilding technology
2. Ports and terminals
3. Strategies and operations
4. Economics, Financing and Marketing
5. Safety and environment
6. Tourism and cultural heritage
7. Local development
8. Passenger Intermodality
9. Policy

The official language of the conference is English.

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PROGRAMME | PARALLEL SESSIONS

Session 9: Friday 14.30 | 16.30
Safety and Environment

Chair: Vincenzo Saggiomo

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Cosimo Chiffi, Enrico Pastori, Liesbeth Schrooten, Ina De Vlieger,
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Issues.

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Branišlav Dragović and Dong-Keun Ryoo
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Steve Butts
Living and Working: Finding the Onboard Balance
Characteristics of Turkish Cruise Ports and Environmental Sustainability Issues

Abstract:

Due to the huge economy it involves, the employment facilities it creates, the socio-economic effects it brings about, tourism has become one of the most important industries in the world. Of all the industries available, transport industry stands closest to the tourism industry, and these two industries have noticeable effects on each other. In fact, it wouldn't be overestimating to state that the basic modes of transportation, i.e. air, land, rail and sea, have been woven so closely together with the tourism industry that each can be considered to be the part of a whole. Therefore, transport infrastructures are of great significance not only for passenger and cargo transportation but also for tourism.

The remarkable improvements and rapid increases in the world cruise tourism have positively affected the tourism industry in Turkey, particularly recently, and Turkey has enjoyed in the recent years hosting the increasing number of tourists coming on the cruise ships. Despite such an obvious rise in the number of tourists and cruise ships calling the Turkish ports, however, there has been no particular movement increasing the number of ports providing services for cruise ships, nor have the ship hosting capacities been improved to a considerable extend.

The nations who want to enjoy certain appreciable shares in cruise tourism apparently have got invest in well-equipped parts to provide cruise ships with the best quality services.

This study has a two-fold aim. The primary focus is placed on a thorough review over the present situation of the cruise ports in Turkey. Another emphasis is on the basic function to be carried out by new generation cruise parts.

Topic Area: Cruise Shipping and Port Policy

Key Words: Cruise ports, cruise passengers, Mediterranean.
1. Introduction

A cruise port could shortly be defined as a port where the ship carrying passengers whose aim is to travel through certain organized tours could be berthed. Some of the basic functions to be carried out by cruise ports could be highlighted as follows: providing the passenger ship (cruise ships) with such basic port facilities as electricity, generator, water, telephone, internet and relevant link lines and points; custom related services; accommodation units and services as restaurants, shopping centers; business-related facilities as banking services office buildings, communication and transport services; and decent superstructures easing ship berthing and passenger disembarking (www.denizcilik.gov.tr).

Marine tourism is one of the most important revenue and employment source for the coastal states. One of the important branches of the marine tourism is cruise shipping as well. Cruise shipping which has a customer profile that has upper high and upper middle income distribution is the key factor in regional development. One of the most important destinations of recently developing cruise shipping facilities is the Mediterranean region. Turkey which has the longest coast line of the Mediterranean Sea also has a bigger advantage in the cruise tourism. Anatolian peninsula which has a history over ten thousand years with over sixty thousands natural and historic sites is an indispensable destination for cruise shipping. Turkey has many undiscovered ventures for cruise shipping. Shores of Anatolian peninsula are an important opportunity for cruise ships that are looking for new destinations.

Because of the customers’ high expectations for comfort in these ships, the same quality of service is demanded at wharves as well. Shortly the docks for cruise ships must be as luxurious as the ships themselves. Apart from the minor Asia, many ports all over the world are not at the quality deserved by cruise ships passengers.

2. Cruise Ports in the Mediterranean

The Mediterranean Sea is divided geographically in the western and eastern parts and Italian peninsula as border. The Mediterranean Sea stretches more than 2,200 miles from the straits of Gibraltar to the Black Sea and Suez Canal. This "cradle of civilization" offers a seductive mix of cultures, geography and history all in a beautiful climate (www.unison-holiday-club.co.uk). It is climatically favorable region and offers diversity and superabundance of
historical and modern references. This region, which accommodates 13% all cruises taken worldwide, is the second world cruising pole following the Caribbean (Dragovic and Radmilovic, 2005).

The demand size in the Mediterranean cruise presents the constant development. Should the development trend in the cruise go on as expected, more opportunities will arise in terms of port offer, for both cruise home port and transit port? Ports located in the Mediterranean region need to develop a strategy that would allow them to become patterns determining the choice services providers in planning the itineraries to offer: along type of the vessels, the length and the potential itinerary are also affected by the state and the potential of the ports of call. The management of the Mediterranean cruise ports are trying to exploit the development and income producing opportunities related to cruise, placing investment in highly specialized terminal for the reception of cruisers and supplying services for the stay of passengers within the port (Dragovic and Radmilovic, 2005).

Cruise tourism has become significant for a number of ports because cruise tourists are higher yield tourists, spending on average higher amounts per day than other categories of international tourists (Hall, 2001). Conventional ports, however, are not able to gain any considerable shares from the overall cruise tourism revenue except that from ship services. Therefore if such ports are to increase their gaining in this particular tourism, they have got focus on passenger-oriented services.

The basic infrastructure of cruise tourism is cruise ports. Turkey, Italy and Greece are the leading countries in the East Mediterranean Region whose ports are called by cruise ships. The port at the East Mediterranean and around the region providing services can be seen in Table 1.

It wouldn’t be oversimplifying to argue that the line foremost aspects recalled when cruise tourism is in question are the “cruise ships” and the cities’ called by these ships. Cruise tourists spend some of their time on board the cruise ships and all the rest of their time is spent in the cities called. The basic marketing feature in this particular tourism comprises “ship, sea and cities to be called. Any cruise ship typically calls a new port each day and spends an important part of the time at that port. During such a stay, certain tours are arranged to visit certain basic naturally and historically worth seeing and renown places e.g. museums,
monuments, churches, mosques, parks etc., as well as certain points of attraction as bazaars and shopping centers. Besides the tours arranged, some of the tourist might chose to visit such places individually and through various means they themselves create while some of them might prefer to stay on board the ship.

Table 1. The Ports at the Mediterranean and Around This Region Called by Cruise Ships.

<table>
<thead>
<tr>
<th>Country</th>
<th>Ports</th>
<th>Country</th>
<th>Ports</th>
</tr>
</thead>
<tbody>
<tr>
<td>Turkey</td>
<td>İstanbul (Salıpazarı)</td>
<td>Greece</td>
<td>Mykonos</td>
</tr>
<tr>
<td></td>
<td>Kusadasi</td>
<td></td>
<td>Corfu</td>
</tr>
<tr>
<td></td>
<td>İzmir</td>
<td></td>
<td>Piraeus</td>
</tr>
<tr>
<td></td>
<td>Marmaris</td>
<td></td>
<td>Patmos</td>
</tr>
<tr>
<td></td>
<td>Messina Sicily</td>
<td></td>
<td>Rhodes</td>
</tr>
<tr>
<td></td>
<td>Milan</td>
<td></td>
<td>Katakolon</td>
</tr>
<tr>
<td></td>
<td>Naples, Capri</td>
<td></td>
<td>Thessalonica</td>
</tr>
<tr>
<td></td>
<td>Cagliari Sardinia</td>
<td></td>
<td>Santorini</td>
</tr>
<tr>
<td></td>
<td>Palermo (Sicily)</td>
<td>Egypt</td>
<td>Alexandria</td>
</tr>
<tr>
<td></td>
<td>Portofino</td>
<td></td>
<td>Safaga</td>
</tr>
<tr>
<td></td>
<td>Venice</td>
<td></td>
<td>Port said</td>
</tr>
<tr>
<td></td>
<td>Bari</td>
<td>Croatia</td>
<td>Dubrovnik</td>
</tr>
<tr>
<td></td>
<td>Ancona</td>
<td></td>
<td>Split</td>
</tr>
<tr>
<td></td>
<td>Corigliano, Calabro</td>
<td>Crete</td>
<td>Iraklion (Heraklion)</td>
</tr>
<tr>
<td></td>
<td>Catania</td>
<td>Malta</td>
<td>Valletta</td>
</tr>
<tr>
<td></td>
<td>Venice</td>
<td>Cyprus</td>
<td>Limassol</td>
</tr>
<tr>
<td></td>
<td>Trieste</td>
<td>Ukraine</td>
<td>Odessa</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Yalta</td>
</tr>
</tbody>
</table>

Cruise ships approach either the wharfs or piers at trade ports dedicated for passenger or cruise ports. In neither of those cases, however, it wouldn’t be to oversimplify to say that, are the expectations of the tourists met profoundly.

There is a common expressions used in tourism running as “the foremost striking thinks a tourist who visits a place for the first time keeps in mind is the very first and the very last think he or she has seen and / or experienced”. And very first and very last think a cruise tourist sees when having called a city is the port itself. Even this particular point itself should be good enough to underline the importance of cruise ports in this industry. The fact, however, does not reflect such an expected significance. An overall view reveals that the ports have not coped up with the rapid developments management in cruise tourism. The rapid modernization enjoyed by cruise ships has not been reflected to the ports at the similar rate. In many countries today, including Turkey, cruise ships berth at the piers at merchant ports dedicated for passenger ships. It wouldn’t be to overstate to point out a fact that in such cases,
cruise tourist wouldn’t be pleased to be exposed to an area crowded with cranes, containers and trucks.

Those berths that have not been planned particularly for cruise ships bring about various difficulties in the maneuvering of ships during approaching and departing on the one hand, and certain slight and steep ladders for the passengers to climb up and long distance to walk, on the other hand. At the overall planning stages for some merchant ports, passenger piers and passenger halls have been included in project. However, in the merchant ports operation, the revenue gained from cargoes and ship is considerably higher than the revenue received from passengers. This great difference in gaining has resulted in that merchant port operators do not favor passenger ships that usually occupy their piers for long periods, yield rather less revenue, and the number of the calls of which greatly chance depending upon seasons. Besides, almost all the ports suffer from the storage in the land port areas. Hence, merchant ports do not want to use such scare areas that are very important for cargo handling operations, for large passenger halls or dedicate them for buses to park at. Briefly standing, thus separate ports design exclusively for cruise ships are desperately.

3. Characteristics of Turkish Cruise Ports

The two basic components of cruise tourism are cruise ships and the cruise ports from which these ships receive services. Attracting more tourists to visit Turkey and promoting them to spend more is somehow a mutual aim of tourism sector and to achieve these goals Turkey is trying to manage product definition. However, cruise tourism is neglected in plans despite its well adjusting with this policy. Even thought it does not exist in plans and policies, some region in Turkey still serve as transit harbors for cruise ships (Kocak and Pirnar, 2005).

The total number of calls to Kusadasi, Istanbul, Marmaris, Izmir, Alanya, Antalaya, Dikili and Trabzon in 2004 was 756 voyages and the total number of tourist received through these calls was 750,000. these numbers rose in 2005 up to 1,004 voyages and 863,000 respectively.

Port of Alsancak, the biggest container port in Turkey, has recently displayed a considerable advancement in cruise tourism. While the total number of cruise ships that called Alsancak in 2003 was only 8 cruise ships and, it rose up to 32 cruise ships in 2004 and 51 in 2005 with
around 64,120 tourists. These numbers rose up 112 cruise ships and 184,610 tourists in 2006. The overall figures expected in 2007 are 107 with 301,000 cruise tourists.

The total number of cruise ships that called Kusadasi in 2006 was 499 with a total number of 425,000 passengers. These figures for 2007 are expected to be 650 ships with 650,000 passengers.

Marmaris, located in the southwest of Turkey, received 400 cruise ships with 388,000 passengers. Istanbul, another port included in the ports hosting cruise ships, received 132 ships in 2004 with 182,000 passengers. These numbers were replaced in 2005 with 227 and 229,847 respectively. Total number of cruise ships that called Alanya in 2004 was 101 with 54,488 tourists. These figures increased in 2005 up to 102 and 70,190 respectively.

Antalya hosted 56 cruise ships in 2004 with 56,704 passengers. These figures in 2005 were 41 and 30,677 respectively. The number of cruise ships that called Dikili in 2004 was 17 with 9,000 passengers. These figures were noted in 2005 as 23 and 7,000 respectively. Trabzon received 13 ship calls in 2004 with 3,832 tourists, replacing these figures in 2005 with 12 and 6,000 respectively.

The data collected for 2005 reveal that the nationalities of the cruise tourists were as follows: Italian 60%, French 10%, Spanish 10%, English, Japanese, German and American all together cover 20% (Hatipoglu, 2007).

Figure 1. Number of cruise passengers and vessels arrivals in Turkey (Hatipoglu, 2007)
Turkey has got eight ports that are included in the tour schedules prepared for the East Mediterranean. Only one of these ports, Kusadasi (Ephesus), has designed and built to serve exclusively cruise ships and operated in compliance with this particular mission.

**Table 2. Basic Turkish Ports Called by Cruise Ships.**

<table>
<thead>
<tr>
<th>Ports</th>
<th>Location</th>
<th>Berth Length (m)</th>
<th>Max. Berth Depth (m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salipazari TDI</td>
<td>Istanbul</td>
<td>600 m.</td>
<td>10.0 m.</td>
</tr>
<tr>
<td>Karakoy TDI</td>
<td></td>
<td>520 m.</td>
<td>6.0 m.</td>
</tr>
<tr>
<td>Alsancak İzmir Limani</td>
<td>İzmir</td>
<td>330 m.</td>
<td>10.5 m.</td>
</tr>
<tr>
<td>Çeşme Ulusoy Liman İşl.</td>
<td>İzmir</td>
<td>480 m.</td>
<td>10.0 m.</td>
</tr>
<tr>
<td>Dikili Liman ve Turizm İşl.</td>
<td>Aydın</td>
<td>124 m.</td>
<td>8.0 m.</td>
</tr>
<tr>
<td>Kuşadası Ege Liman İşl.</td>
<td>Aydın</td>
<td>920 m.</td>
<td>10.0 m.</td>
</tr>
<tr>
<td>Alidas Alanya Liman İşl.</td>
<td>Alanya</td>
<td>560 m.</td>
<td>10.0 m.</td>
</tr>
<tr>
<td>Bodrum Belediyesi Tic. Tur. A.Ş.</td>
<td>Muğla</td>
<td>90 m.</td>
<td>5.5 m.</td>
</tr>
<tr>
<td>Marmaris Turizm Yanaşma Yeri</td>
<td></td>
<td>60 m.</td>
<td>5.0 m.</td>
</tr>
<tr>
<td>Trabzon Limanı</td>
<td>Trabzon</td>
<td>400 m.</td>
<td>11.0 m.</td>
</tr>
</tbody>
</table>

A rapid increase in cruise tourism could not be foreseen in Turkey whereas the number of tourist received marked a dramatic rise (203%) in 2002 through 2006. Such an unexpected increase, however, was not reflected in overall revenue gained from this particular industry. This lack of reflection could be attributed to the considerably low levels of investments made in these years in cruise tourism. Due to the negligence in such investments, the services offered to the passenger at the cruise ports in Turkey have been rather limited. Besides, the lengths and the depths of these ports are inadequate.

It is quite obvious that demands for cruise ports at almost all the region are high. Despite this fact, the existing ports are rather short in terms of many points. This clearly means that there are huge opportunities for the prospective port investors. Providing sufficient lengths and depths for ship approaches along with a modern terminal, the new investments could easily attract the ship traffic of the existing port.

The figure 2 of allocation reveals that during the first half of 2007, Kusadasi takes the first row with share of 37%, next comes with share of 23% Alsancak (Izmir) with sudden attacks it has recently managed, and Istanbul with a share of 20% takes the third row. The total share of the others seems to be 20%.
Recently two new ports have been planned to serve cruise tourism exclusively. The construction of one of them has already started in Bodrum, which is expected to be put into service in 2005, with 200 m. long pier and a depth of -15 m. The second one, planned to be in Izmir, is still at the project phase. This second port planned to have a length of 1,200 m and a depth of -14 m. is projected to receive four ships at the same time.

4. New Generation Cruise Ports

From the point of ship operations, the two basic components are “cruise lines” and “tourism agents”. There are 3 categories of cruise lines to choose from: Luxury Cruise Lines, Premium Cruise Lines & Mainstream Cruise Lines. All of which have offer different types of ships to consider. Within the 3 categories of cruise lines are the following types of cruise ships: mega cruise ships, large cruise ships, small cruise ships, sailing ships, adventure cruise ships, river cruise boats and yachts (Soner, 2005). The ports and terminals to provide the ships with such diverse categories and specifications are thus to have diversities.

The major elements of a cruise product component purchased by a customer consist of transportation, accommodation, dining, ship-board entertainment, recreational activities, domestic and foreign ports of call, and shore excursions. The quality of each of the product
areas and the manner in which they are delivered contribute to the guest’s perception, enjoyment, and satisfaction with the overall vocation experience. Final, a poor performance in one area may negative a high performance in other areas (Soner 2005).

The rapid development in marine tourism seems to have affected the cruise tourism, bringing about certain increases in the number of ships in operation, the lengths as well as the passenger capacities of the ships. Statistics present that the size of the cruise vessels has been doubled in the last decade. In the future the trend probably looks similar, and we can estimate that the gross tonnage of the largest vessels will close to 300,000 than 200,000 at the end of this decade (Sirvio et al, 2003). The advancement in ships and the increase in their tonnages (Figure 3) have led to a need for deeper and longer berths for safe berthing operations.

![Cruise ship development](image)

*Figure 3. Cruise ship development (Modifying form Dragovic and Radmilovic, 2005)*

Equipped with various such facilities as movie, theaters, gambling saloons, fitness and sportive complex, and restaurants with a great variety of tastes and dishes, cruise ships today are like floating towns enabling the passenger to enjoy good times on board the ship during the whole voyages. Such comfortable, luxury and high quality services cruise tourist enjoy on board cruise ships should be provided for them at the cruise ports as well, the first piece of land they step on. In the other words cruise ports should be more than the places where passengers are provided with certain simple and limited services. Instead, they should be planned to act as a tourism complex rather than ordinary passenger ports.
The new cruise ports, planned to act as tourism complexes, are not doubt to be located on larger areas. Besides, they should not be kept a way from certain particular places e.g. historical, natural values, museums, monuments etc. that are the main goals cruise tourist pursue. Such renowned places which tourist would like to visit and thus which are subject to tourism marketing should not be more than one hour distant to the newly planned cruise ports. Considering that cruise ships stay at a port for limited periods, tourist would spend more of their time at such places if these points of primary visits are close to the cruise ports.

The future growth in ship size has resulted in needs for longer and deeper piers. Cruise ships have large volumes, but they are relatively light. Having more free on board cause’s such ships to be affected more winds. That’s why even with the aid of tug boats, approaching and departing maneuvers of the ship are difficult particularly in extreme meteorological and oceanographical conditions. Therefore, while selecting location sites for cruise ports, compared with cargo ports, more convenient oceanographical and meteorological conditions should be considered. Besides while projecting pier and berth infrastructure, the specification of the new generation cruise ships should be taken into consideration.

Terrorist attacks have been even more threatening and of more concern since the attacks at the Twin Towers on September 11, which has made it clear that such attacks are likely to target civilians. Considering this threat and its likely targets, it should be kept in mind that cruise ships and cruise ports could be a part of this targets as such attacks would attract world wide attention. Thus, strict and well planned security measures should be taken into account while projecting new generation cruise ports.

The links between the ship and the port area as well as from the port area to the land transport vehicles should be considered, and access form one point to the other should be easy. When a cruise ship arrives at a cruise port, around to or three thousand people will get involved in tours on land transport vehicles. Access to these vehicles should not involve along distance of walk. In the cruise market, there is a trend towards larger cruise vessels, meaning that more passengers need to be moved between the vessels and shore destination. These transfers should be fast but still comfortable and safe for both passenger and crew (Dragovic and Radmilovic, 2005). Besides, the new generation cruise ports should have adequate facilities for tour buses to carry out maneuvers, embarking and disembarking passengers smoothly as
well as parking safely. Furthermore, entries and exits as well as links with outer highways should be efficient and effective. Moreover, the new cruise ports should be planned in a manner that they will not be negatively affected by the city traffic congestions.

The initial infrastructures and the operation of ports require huge investments. Gaining capital investment back and then harvesting yields would not be so easy through the services provided for ships and passengers only. Thus, parts are to get involved in certain profit creating activities. Some of such activities could be providing the port with certain facilities where the tourists who don’t want to get involved in tours instead prefer to stay in port could have a good time, spending money which would increase the profits of the port. Therefore, in addition to structures of the customs, harbor master, port management services, certain other facilities like any renowned trade mark sales points, shops where regional culture is display and marketed, hobby centers, complexes for social and cultural activities should be planned. Cruise tourism typically involving middle or high income tourist has a potential for customers whose spending habits have quite largely developed. This could help cruise ports enjoy a wealth of means which would add considerable amounts to its profits.

The number of both cruise ships as well as cruise passengers has recently been in a considerable increase. Like wise the periods of cruise tours have been lengthened more. In parallel with such increases, the periods during which cruise ships stay at ports could also be lengthened once the ship receiving capacities of ports are increase and ports are turned in to modern tourism complexes. The operation costs of ships at voyagers are higher when compared with the cost incurred at ports. Through staying at ports longer, ships might be able to compensate the high costs sourced from the more lengthened voyages. Besides, in addition to such compensating advantaged through providing ports with certain greater numbers of alternatives that could be enjoyed by the cruise passengers, cruise tourism could be a point of higher attraction. Providing a large diversity of entertainment and satisfaction yielding services at ports would result in longer stays of ships at ports, which would also enable tourists to visit even more places.

To sum up, on the one hand, the new generation cruise ports will, and should, be places where cruise ships will be provided with safe berthing and departing services with the properly deep and long berths as well as the suitable geographical location; and on the other hand, they will, and should, be places where cruise tourist can find all the comfort, taste, and quality they want.
In other words, the new generation cruise ports will, and should, be planned in a manner that they will be operated as modern tourism complexes.

Sustainable tourism is a concept of tourism management that anticipates and prevents problems that occur when carrying capacity exceeded. This depends on an environmental impact assessment (EIA). An EIA typically follows these steps:

1. Inventory the social, political and economical environment
2. Project trends
3. Set goals
4. Examine alternatives to reach goals
5. Select preferred alternatives
6. Develop implementation strategy
7. Implement
8. Evaluate (Kotler, et all. 203)

Prevention on the environmental impacts of the cruise ships will be taken into account while projecting new generation cruise ports.

5. Conclusions

Having recently managed considerable advancements in tourism, Turkey has become a considerable destination for the cruise tourism as well. On the other hand, however, despite having received relatively high number of cruise ships and passengers, and managing a greater increase in ratios-even higher than the average increase in the word over, Turkey has unfortunately been rather late to invest in cruise tourism. Despite the great demands for this particular tourism in Turkey, Turkey suffers from the critical shortages of ports well convenient for cruise tourism. The existing ports in Turkey serving this tourism, unfortunately, suffer certain shortages in infrastructure and superstructure.

Despite the above mentioned problems Turkey has been in trouble with, it still could be considered as a wealth of opportunities for the prospective investors in cruise tourism industry. Admirably rich with natural, historical, and cultural heredities along with a 8,000 km coasts, it is one of the most suitable places for investors to establish the modern ports they have ever dreamed of.
At the new generation cruise ports, one of the important actors will be, for sure line operators. In order to reduce the costs of tours, meet the customer’s satisfaction thoroughly, and maximize the profits, the lines will have to either build their own ports or be partners to the existing ports. Turkey is one of the most suitable places fore those cruise lines who consider having their own ports. Due to the incentives granted to the foreign investors, Turkey will be better market its tourism and support the regional development on the one hand; the foreign investors will get the chance of enjoying profits over the investments and providing the quality services they have envisaged.

References


