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АНАЛІЗ ТА ПЕРСПЕКТИВИ РОЗВИТКУ КРУЇЗНОГО РИНКУ В УМОВАХ ГЛОБАЛІЗАЦІЇ ТА РЕГІОНАЛЬНОЇ ІНТЕГРАЦІЇ

Стаття присвячена сучасним тенденціям розвитку міжнародного та українського ринків круїзних послуг. На основі аналітичних даних обґрунтовано сутність і значення круїзного туризму для економіки держави. Інтенсивність розвитку глобального круїзного ринку вимагає пошуку ефективного механізму

функціонування морського круїзного туризму в приморських регіонах України, розширення програм обслуговування туристів у морських портах України, сприяння в модернізації секторів економіки приморських регіонів держави. Сучасний розвиток ринку круїзних послуг полягає в поєднанні в ньому практично всіх форм міжнародного туризму і об'єднанні різних видів сервісу та організації дозвілля (готельне обслуговування, ресторанный бізнес, екскурсійна діяльність). Зроблено висновок про те, що процеси інтеграції українських морських портів в міжнародну круїзну індустрію, проблеми модернізації круїзної інфраструктури регіонів вимагають розробки цільових державних пріоритетів. Проаналізовано можливості розвитку круїзного туризму в країнах Причорномор'я. Дано рекомендації з напрямків розвитку круїзного бізнесу в приморських регіонах України.

Ключові слова: круїзна індустрія, глобалізація, регіональна інтеграція, європейський круїзний ринок, Чорноморський круїзний регіон.

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АНАЛИЗ И ПЕРСПЕКТИВЫ РАЗВИТИЯ КРУИЗНОГО РЫНКА В УСЛОВИЯХ ГЛОБАЛИЗАЦИИ И РЕГИОНАЛЬНОЙ ИНТЕГРАЦИИ

Статья посвящена современным тенденциям развития международного и украинского рынков круизных услуг. На основе аналитических данных обоснована сущность и значение круизного туризма для экономики государства. Интенсивность развития глобального круизного рынка требует поиска эффективного механизма функционирования морского круизного туризма в приморских регионах Украины, расширения программ обслуживания туристов в морских портах Украины, содействия в модернизации секторов экономики приморских регионов государства. Современное развитие рынка круизных услуг заключается в сочетании в нем практически всех форм международного туризма и объединении различных видов сервиса и организации досуга (гостиничное обслуживание, ресторанный бизнес, экскурсионная деятельность).

Сделан вывод о том, что процессы интеграции украинских морских портов в международную круизную индустрию, проблемы модернизации круизной инфраструктуры регионов требуют разработки целевых государственных приоритетов.

Проанализированы возможности развития круизного туризма в странах Причерноморья. Даны рекомендации по направлениям развития круизного бизнеса в приморских регионах Украины.

Ключевые слова: круизная индустрия, глобализация, региональная интеграция, европейский круизный рынок, Черноморский круизный регион.

Yatsyna Nadiia, Nezdoyminov Sergei

THE ANALYSIS AND DEVELOPMENT PROSPECTS OF THE CRUISE MARKET IN THE CONDITIONS OF GLOBALIZATION AND REGIONAL INTEGRATION

The article is devoted to the modern trends of development of international and Ukrainian markets of cruise services. The essence and meaning of cruise tourism to the economy of the state is based on the analitic data. The intensity of the global cruise market requires finding of an effective mechanism for the functioning of the sea cruise tourism in the coastal regions of Ukraine, the extended service of tourists in the seaports of Ukraine, assist in modernizing sectors of the economy of the coastal regions of the state. Modern development of cruise services market combies almost all forms of international tourism and merging of different types of services and leisure activities (hotel services, restaurants, sightseeing activities). The conclusion is that the processes of integration of Ukrainian sea ports in the international cruise industry, the problems of modernization of cruise infrastructure areas will require the development of targeted government priorities. The possibilities of the development of cruise tourism in the Black Sea region are analized. The recommendations concerning to the development of cruise business in the coastal regions of Ukraine are given.

Keywords: the cruise industry, the globalization, regional integration, the European cruise market, the Black Sea cruise region.

Statement of a problem. In recent years, sea and ocean cruises firmly take its place among the most perspective sectors of world tourism. Modern development of cruise services market is a combination of almost all forms of international tourism and combining different types of services and leisure (including hotel services, restaurants, sightseeing activities). Globalization of the cruise industry, the increasing number of cruise ships requires activation of all forms of economic activities in the area of cruise services in ports and their role in the reception and servicing of cruise tourists in the coastal regions of Ukraine.

Analysis of recent research and publications. Problems of modern development of cruise business in Ukraine, international marine tourism and the role of ports in servicing and reception of cruise tourists were investigated in the works of experts: Axel Schulz, Josef Auer, Andreeva N. N., Logunova N. A. and others [1-5]. Overall, their conclusions converged on the need to develop the cruise shipping, international integration of transport communications, upgrading of Ukrainian sea ports infrastructure.

Sorting out the unsolved aspects of the problem. Not reducing the value of works of scientists, it should be mentioned that problem of integration into the international cruise industry, activation of all forms of economic activities in the area of cruise services in ports and their role in the reception and servicing of cruise tourists in the coastal regions of Ukraine is studied not enough and it need further investigation.

The main goal of the article is to analyze the current trends in the development of the cruise industry in the whole international market and market of Black Sea countries, assessment of expediency and prospects of development of this sector, and identification of problems specific to the current cruise market in Ukraine.

The main material research. The modern cruise industry is a globally integrated industry, directly linked with almost all basic sectors of the world economy (from shipbuilding to the entertainment industry).

Experts believe that by 2020 every second tourist feel the unforgettable experience of cruise tourism. Globalization of the cruise industry, the increasing number of cruise ships reception requires activation of all forms of economic activities in the area of cruise services [1].

The cruise industry continues to grow, which benefits communities around the world. In 2013 worldwide economic impact was manifested in

nearly 900,000 jobs and economic income of \$117 billion. With more than 22 million people cruising worldwide each year, the cruise industry will invest \$25 billion to launch 55 new ships between 2015 and 2020. In 2015, the industry introduced six new oceangoing cruise ships and 16 new river cruise ships [7].

There are three reasons why Europe is a key market for the global cruise industry. First, with 6.39 million Europeans cruising in 2014, Europe represents the second biggest source market worldwide, after the USA. Second, Europe is also the number two cruise destination in the world, after the Caribbean, having received 5.85 million cruise passengers last year. Third, Europe's world-class shipyards continue to exercise near-total control over the global order book, being scheduled to build 29 oceangoing cruise ships to be delivered until 2018 [6].

Cruise Lines International Association (CLIA) has presented its a comprehensive analysis of the global cruise industry's operations in Europe and its contribution to the European economy in 2014.

Established in 1975, Cruise Lines International Association (CLIA) is the world's largest cruise industry trade association, providing a unified voice and leading authority of the global cruise community.

Some of the major highlights of cruise operations in Europe during 2014 were:

- During 2014 there were 42 cruise lines domiciled in Europe, operating 123 cruise ships with a capacity of around 146,000 lower berths. Another 60 vessels with a capacity of around 89,000 lower berths were deployed in Europe by 18 non-European lines;

- An estimated 6.4 million European residents booked cruises, a 0.5% increase over 2013, representing about 30% of all cruise passengers worldwide;

- An estimated 5.85 million passengers embarked on their cruises from a European port, a 3.6% decline from 2013;

- The vast majority of these cruises visited ports in the Mediterranean, the Baltic and other European regions, generating 29 million passenger visits at a total of around 250 European port cities, a decrease of 7.1% from 2013;

- In addition, an estimated 14.4 million crew also arrived at European ports.

As a result of the European cruise operations and the investment in

new cruise ships by the global cruise industry, this industry generated significant economic impacts throughout Europe. The total economic impacts of the cruise industry included the following:

- €40.2 billion in total output;
- €16.6 billion in direct spending by cruise lines and their passengers and crew;
- 348,930 jobs;
- €10.75 billion in employee compensation

These impacts are the sum of the direct, indirect and induced impacts of the cruise industry. In summary, each €1 million in direct cruise industry expenditures generated:

- €2.42 million in business output;
- 19 jobs paying an average annual wage of nearly €33,700.

At the same time new building and investment in cruising are planned for 2015–2018. Over the period from 2015 to 2018, 31 cruise vessels have been scheduled for delivery for worldwide trading with capacity for 93,300 passengers of which 29 will be constructed in Europe and two in Japan. In addition a further four ships are already on order for 2019–20, all in European yards. Thus, from the beginning of 2015 through 2021, Europe will account for 34 of the 36 new cruise ships to be constructed [7].

Out of the 2015–18 total, 10 ships with 30,375 berths (30.0%) will primarily serve the European source market, representing an investment of €5.2 billion. Many of the others will visit European destinations. This new investment underlines the cruise industry’s continuing commitment to the future of its business both in Europe and elsewhere in the world (Table 1) [6].

Table 1

Cruise Ship Orders 2015-2018 [6]

| Year Copmleted | Ships | Berths | Investment (Millions) |
|----------------|-------|--------|-----------------------|
| 2015 | 7 | 18,930 | € 3,335 |
| 2016 | 11 | 28,546 | € 5,475 |
| 2017 | 6 | 22,124 | € 3,936 |
| 2018 | 7 | 23,708 | € 4,211 |
| Total | 31 | 93,308 | € 16,957 |

The cruise industry has enjoyed dynamic growth over a period of 30 years, driven initially by demand from North America and more recently by growing demand from Europe and the rest of the world. Table 2 sets out international cruise sector growth between 2004 and 2014. Over the ten years from 2004 to 2014 demand for cruising worldwide has increased from 13.1 million passengers to 22.0 million (+68%) with 3.4% growth achieved in 2014.

Table 2

International Demand for Cruises 2004 to 2014 [6]

| Region | 2004 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|---------------|--------------------|-------|-------|-------|-------|-------|-------|
| | Million passengers | | | | | | |
| N.Am | 9,14 | 10,40 | 11,00 | 11,44 | 11,64 | 11,82 | 12,16 |
| Europe (1) | 2,80 | 5,04 | 5,67 | 6,15 | 6,23 | 6,39 | 6,39 |
| RoW (2) | 1,13 | 2,15 | 2,40 | 2,91 | 3,03 | 3,09 | 3,49 |
| Total | 13,07 | 17,59 | 19,07 | 20,49 | 20,90 | 21,30 | 22,04 |

We note that the: 1-Including Russia and Central and Eastern European countries outside the EU–7. 2-Rest of the world: Largely estimated and adjusted from 2009 to take account of dynamic growth in China and the southern hemisphere. Source: G. P. Wild (International) Limited from CLIA, IRN and other sources. In 2014 a total of 152 cruise ships were active in Mediterranean waters. The market in the Mediterranean is expected to recover slightly in 2015 as a result of increases in capacity both from European and more particularly American-domiciled operators. Source Markets. There were an estimated 22.04 million global cruise passengers in 2014 (Figure 1). The countries of Europe accounted for 29% of them in terms of a source market.

The European market has grown by 128% over the last ten years but with economic growth moderating over the past five years, European-sourced passengers have only increased by about 4% over the past three years (Table 3). Fifty-six percent of Europeans cruised in the Mediterranean and Atlantic Isles in 2014, 22% in Northern Europe and the remaining 22% cruised outside Europe, primarily in the Caribbean.

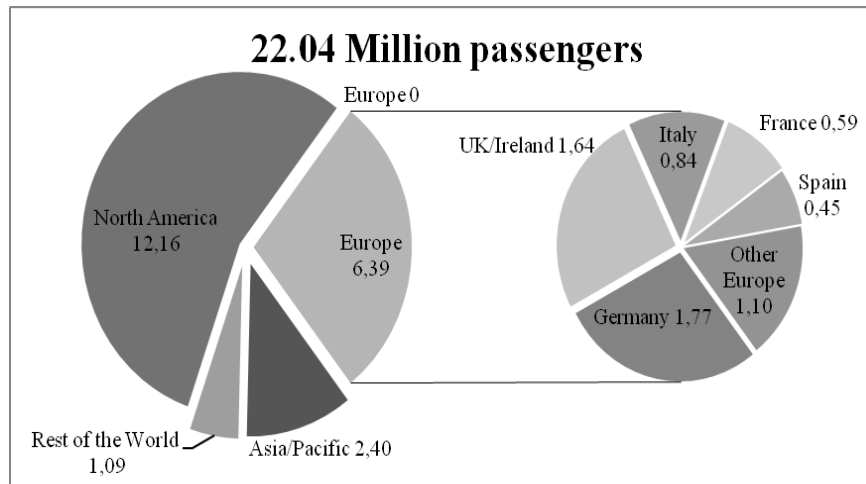


Figure 1. Global Source Markets by Cruise Passengers [6]

Table 3

European cruise passengers by source country, 2014 [6]

| Country | Passengers | Share of Total, % |
|--------------|------------|-------------------|
| Germany | 1 771 000 | 27,7 |
| UK/Ireland | 1 644 000 | 25,7 |
| Italy | 842 000 | 13,2 |
| France | 593 000 | 9,3 |
| Spain | 454 000 | 7,1 |
| Norway | 176 300 | 2,8 |
| Switzerland | 143 000 | 2,2 |
| Austria | 122 000 | 1,9 |
| Netherlands | 109 000 | 1,7 |
| Sweden | 78 800 | 1,2 |
| Belgium | 73 000 | 1,1 |
| Denmark | 37 700 | 0,6 |
| Finland | 12 200 | 0,2 |
| Other Europe | 331 000 | 5,3 |
| Total | 6 387 000 | 100 |

Athens, 26 May 2015 – CLIA Europe, the association representing the 40 billion euro cruise industry in Europe, and MedCruise, the association of cruise ports in the Mediterranean and its adjoining seas, have signed a strategic partnership agreement to collaborate, sponsor and support the advancement of a European travel agent training program [12]. Set up in Rome in 1996, MedCruise is the Association of Mediterranean Cruise Ports. MedCruise's mission is to promote the cruise industry in the Mediterranean and its adjoining seas. The Association assists its members in benefiting from the growth of the cruise industry by providing networking, promotional and professional development opportunities. Today, the association has grown to 74 members representing more than 100 ports around the Mediterranean region, including the Black Sea, the Red Sea and the Near Atlantic, plus 31 associate members, representing other associations, tourist boards and ship/port agents. Countries represented in MedCruise: Croatia, Cyprus, Egypt, France, Georgia, Gibraltar, Greece, Italy, Malta, Monaco, Montenegro, Portugal, Romania, Russia, Slovenia, Ukraine, Spain, Syria, Tunisia, Turkey. MedCruise members in Black sea are Batumi, Constantza, Odessa, Sevastopol, Trabzon, Sinop, Sochi. The total of cruise passenger visits at the 72 MedCruise port members for which data are available in 2014 reached 25,8 million. Comparing to the previous year, this number is 7,28% lower (Figure 2), as the cruise passenger movements that had taken place in 2013 were 27,8 million. 2013 stands as the year when all records were broken [7].

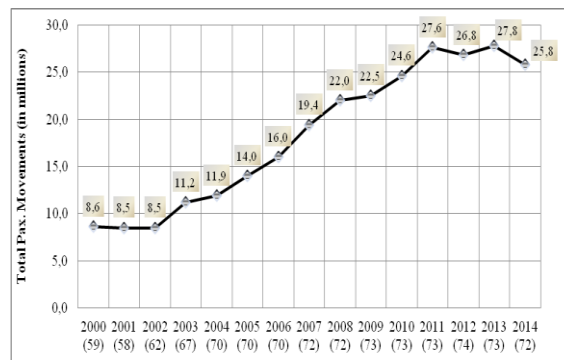


Figure 2. Cruise passengers growth on MedCruise ports (2000-2014) [7]

As for Ukraine, the ports of the Black Sea region have enough great potential for the development of cruise tourism. In the basins of the Caribbean and Mediterranean Seas cruise ship are crowded. The fight for customers makes the cruise companies to seek new markets for their services. Black Sea region is suitable for this like no other, because, in fact, is part of a Mediterranean cruise market.

Ukraine could initiate establishment of an international cruise cluster of ports of the Black Sea. Black Sea by its geographical location is not transit, therefore, in order to stand out in an independent direction for mass cruise tourism at least five ports should have infrastructure capable of handling vessels up more than 300 m. Today this infrastructure have two Black Sea ports – Odessa (Ukraine) and Constanta (Romania). Now the modernization of facilities for receiving passengers is going on in ports of Burgas (Bulgaria), Sochi (Russia) and Batumi (Georgia). After this the Black Sea region can declare itself as cruise ship direction for the mass segment [5].

The cruise market in Ukraine is in a state of decline. According to the operative data of the Department of Tourism Service and European integration of the Port Authority, the number of passenger ships' visits to Odessa this year was 13, which is 15 ship calls less than last year and 93 ship less than in 2013. Head of Department Elvira Leshchinskaya in a brief comment said that for the season 2016 the port administration has already received 33 requests for visits by cruise ships. However this number may vary in one and in the other direction, depending on many factors.

Among the negative factors the first place can be given to the transformation of the Crimea in "gray" area for cruise line operators - says E. Leschinskaya. – The historically formed ship courses Odessa-Yalta, Odessa-Yalta-Sevastopol were brands in the regional market. Odesa, by itself, remainis very hospitable and very attractive place for tourists, but it cannot recoup the costs of the charterer in the north-western part of the Black Sea [8].

However, positive things do occur. Thus the administration of the Odessa seaport successfully passed the audit of quality management system for compliance with ISO 9001-2008 (DSTU ISO 9001: 2009). A certified quality system improves the production activity of the company, strengthens its image, competitiveness and investment attractiveness of the

market, allows to expand the range of services [9]. Through membership in MEDCRUISE (since 2008), the port of Odessa failed to effectively implement several image projects, gave notable impulse to the development of the industry of sea travel in the Black Sea region. Among other things, it should be noted the success of the international conference Black Sea Cruises. But the main result of this partnership, of course, was an increase in the number of visits to Odessa cruise ships under foreign flag in 2013 (more than 100 calls) [11].

The administration of the Odessa sea port took part in the 47th General Assembly MedCruise, which was held in the Italian town Olbia (North Sardinia) from 14 to 17 October 2015. The administration of the Odessa seaport was represented by the Head of Tourism and European Integration Department - Member of the Board of Directors Association of the Black Sea region – Elvira Leshchinskaya.

E. Leshchinskaya reported that in near future the number of cruise ship calls is unlikely to increase because of the steadily formed image of Ukraine abroad, including Odessa as an unsafe area. In addition, cruise lines plan their routes in two or three years in advance, and Ukrainian ports are not included in the plans for 2016-2017 years. The reasons mentioned above. However, despite this, the General Assembly and the Board of Directors decided to hold the 48th anniversary of the General Assembly MedCruise in Odessa in June 2016 [8].

World experience in the formation and development of civilized economies confirms the universality of formulation and implementation rules of economic policy in terms of mutual respect, complementarily and coordination of national and regional interests and capabilities. In our opinion, among the priorities of social and economic development of coastal areas that form the strategy for economic growth in Ukraine, implementation of ecological and economic reforms, objectively and reasonably determined by the level of competitiveness of the tourism and recreation industry as a highly profitable industry that should meet the needs of domestic and international demand for travel and recreation services. Such event will actualize the interest of the leading cruise market operators to the Ukrainian direction voyages. The presence at the 48th General Assembly session MEDCRUISE of top managers of the cruise lines, representatives of shipping companies, known media journalists will strengthen the position of Odessa as an international tourist center, will carry information about the Europeans to South Palmyra, as a safe, economically

attractive city with a rich historical cultural heritage and natural and recreational potential, will present profitable opportunities of passenger terminal in Odessa port [10].

Conclusions of the above problems and prospects for further research. Positioning of Ukraine as a maritime state requires a consideration of global trends in world maritime trade and keeping those trends that occur in the Azov-Black Sea region. The necessity of the development of national marine economy and port infrastructure is dictated by the high profitability of market cruise services through a world-recognized competitive advantages of waterway transport (environmental friendliness, low cost, investment attractiveness, etc.).

Thus, government authorities, port and cruise business entrepreneurs need to make significant efforts to promote Black Sea tourist region in the European market of cruise tourism. The development of cruise shipping stimulates the development of related sectors of the regional economy (hospitality, catering, transport, shipbuilding, ship repair, etc.). It promotes investment, creates a multiplier effect for regional economic development, and therefore - helps to create new jobs.

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