Research & Monitoring Centre for Coastal & Maritime Tourism in the Eastern Mediterranean

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COASTAL & MARITIME TOURISM · EASTERN MEDITERRANEAN

Executive Summary

CRUISE: WORLD, EUROPE, MEDITERRANEAN, GREECE

SECONDARY & PRIMARY RESEARCH (CORFU)

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Independent, evidence-based research and monitoring to advance sustainable coastal and maritime tourism in the Eastern Mediterranean.

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Executive Summary

Cruise: World and Europe, Mediterranean, Greece and Corfu

Introduction

This executive summary exhibits the findings on the cruise industry, of both the secondary study (P1.4) and the primary survey (P2.3 & P2.6) carried out in the pilot destination of Corfu. The analysis covers the international, European, Mediterranean and national level, while the primary research in Corfu allows for empirical documentation of the economic, social, environmental and intergovernmental dimensions of cruise tourism at the destination level.

Cruising is one of the fastest-growing forms of international tourism, with global passenger traffic amounting to 34.6 million passengers in 2024 and projected to exceed 37.7 million in 2025. Despite the severe disruption of the COVID-19 pandemic, the sector demonstrated remarkable resilience, exceeding pre-pandemic levels in many markets. This dynamic recovery confirms the maintained attractiveness of the touristic "product", while at the same time highlighting the challenges related to sustainability, governance and social acceptance at the host destinations.

A: International and European Framework

A.1. Market Structure

Global cruise activity is characterized by a high degree of spatial concentration. The Caribbean, along with the Bahamas and Bermuda, absorbs about 40–43% of total passenger traffic, operating almost year-round through a robust network of homeports in Florida and Texas. The Mediterranean ranks second globally, with a share ranging between 21% and 25%, followed by Northern Europe and the Baltic (~10–12%), Alaska (~4–5%) and the fast-growing Asia-Pacific market (~10% and growing).

However, this geographical hierarchy conceals fundamental structural differences. The Caribbean serves as a mature, high-standard destination, based on circular routes that start and end at the same major homeports. This model allows for continuous operation, high predictability of flows and increased control over the experience by companies. In contrast, the Mediterranean is characterized by linear or semi-linear routes that interconnect multiple countries, cultures, and port systems within the same journey, making it less homogeneous but richer in empirical and cultural content.

The industry is characterized by a high degree of concentration, with three major groups – Carnival Corporation & plc, Royal Caribbean Group and Norwegian Cruise Line Holdings – controlling more than 90% of global capacity. This oligopolistic structure gives companies significant bargaining power vis-à-vis ports and destinations, allowing them to set routes, select destinations, and push for low port charges and high operational requirements.

A.2. Seasonality and Distribution

Seasonality is one of the most important structural features of the cruise, with significant implications for profitability, employment and investment. Globally, the variation in the number of ships operating ranges from 187 in January to 226 in June, with a relatively limited range of 6.7%. This variation is explained by the climatic conditions, the school and work schedules of the main source markets, as well as the maintenance needs of the ships. Seasonality calculated on total passengers is even lower (4.9%), suggesting that companies are looking to keep their largest ships operational throughout the year.

In contrast, seasonality in the Mediterranean is particularly pronounced. The high season spans from April to October, with the number of ships ranging from just 5 in January to 68 in October, showing a variation of 60.8%. This intense seasonality leads to an unequal distribution of income and employment, while at the same time it burdens the environment and intensifies overtourism phenomena at certain times of the year.

The ability for companies to relocate their ships between different regions of the world reduces seasonality at group level, but ports and destinations remain exposed to strong fluctuations in demand.

A.3. Demand Profile and Market Segmentation

Global demand for cruising is characterised by stability in the average age of passengers (around 46–47 years), but at the same time by a broadening of the age range. The entry of Millennials and Gen Z into the cruise clientele is transforming the product, with a focus on experience, authenticity, flexibility, and digital connectivity. Younger travelers are looking for themed, adventurous, and personalized experiences, as well as wellness, gastronomy, and technological innovation services.

The segmentation of the market is reflected in the product structure: the Contemporary segment (55%) caters to families and mass audiences with large ships and entertainment, the Luxury segment (20%) seeks personalized experiences on smaller vessels, while the Expedition segment (5%) caters to remote destinations. The trend towards premium and luxury products is more pronounced in the Mediterranean, which affects the structure of demand and the demands on port infrastructure and services.

Europe is one of the world's most important passenger origin markets. In 2023, 8.2 million European passengers made a cruise trip, with Germany (31%) and the United Kingdom (28%) gathering most of the demand. European passengers have an average age of around 48 years and an average cruise duration of 8.8 days, reflecting a mature and demanding audience.

A.4. Economic Dimension

The economic contribution of the cruise is significant both globally and at the European level. In 2023, according to CLIA[1], the industry's global economic impact was estimated at $168.6 billion total production, contributing $85.6 billion to global GDP and supporting approximately 1.6 million jobs.

In Europe, the total economic impact for 2023 amounted to €55.3 billion, supporting around 440,000 jobs. The contribution of cruise ship construction is particularly important, as the vast majority of highly complex ships are built in European shipyards. Around 97% of the world's fleet is built in Europe, with investments in new ships for the period 2024–2036 amounting to around €57 billion.

The direct financial contribution of the cruise results from three main categories of expenses: the costs of passengers and crews to the destinations, the operating costs of the cruise companies (supplies, fuel, port fees) and the investments in shipbuilding. In Europe, passenger and crew costs amounted to €5.5 billion, operating costs to €11.3 billion and shipbuilding to €8.2 billion in 2023.

A.5. Environmental Dimension

The environmental sustainability of cruising is a critical field of assessment, as the industry's impacts span from air emissions and fuel use to wastewater and waste management and pressure on marine and coastal ecosystems.

Greenhouse gas emissions from cruise ships have attracted strong criticism. Carnival Corporation, the world's largest group, recorded total emissions of around 9.5 million tons of CO_2 in 2023, which exceeds the annual emissions of a major European city. The intensity of emissions varies significantly by geographical area: the Caribbean has around 280 gCO_2 per passenger-kilometre, the Mediterranean 320 gCO_2, while Alaska reaches 450 gCO_2 due to longer distances and more unfavorable climatic conditions.

Air quality in port cities is significantly affected by ship emissions during docking. In Barcelona, cruise ships are responsible for about 32% of NOx emissions in the port area, while in Miami emissions from ships are equivalent to about 350,000 additional cars circulating in the city during the tourist season.

The industry has made significant investments to reduce environmental impact. The use of liquefied natural gas (LNG) increased from 2 ships in 2018 to 19 in 2025 (12.6% of capacity), with 25 newbuildings committed to LNG use. Shore Side Electricity (SSE) capacity more than doubled, covering 65.4% of capacity in 2025

[1] Cruise Lines International Association

compared to 27.9% in 2018. At the same time, advanced wastewater treatment systems increased from 62.2% to 85.4% of capacity.
However, the transition towards cleaner fuels faces significant challenges. The phenomenon of "methane slip" in LNG engines may negate some of the climate benefits, as methane has about 80 times greater warming potential than CO_2 over a 20-year time horizon. In addition, the use of open-circuit scrubbers effectively transports pollutants from the atmosphere to the marine environment, which has led to bans in ports in Portugal, Spain and Belgium.

A.6. Social and Cultural Dimension

The social dimension of the cruise incorporates multiple aspects related to the rights and operating conditions of both maritime personnel and communities in destinations.
The crew of cruise ships — including cleaners, catering and technical support workers — live and work for consecutive periods of eight to ten months, with a daily work of ten to twelve hours, seven days a week. The composition of the crew is characterised by a strong geographical diversification, with most of the staff coming from countries of the South (Indonesia, the Philippines, India, Eastern Europe), while the senior executives and passengers come from richer countries.
In destinations, cruising can act as a significant driver of local growth, creating jobs and enhancing awareness. However, the mass and short-term arrival of passengers creates intense pressures: congestion in public spaces, rising cost of living, pressure on infrastructure and alteration of local identity. In destinations such as Venice, Dubrovnik and Barcelona, the phenomena of overtourism have led to social reactions and the adoption of restrictive measures.

A.7. Governance and Regulatory Framework

The regulatory framework of the cruise is multi-layered, with international, European and national provisions. At international level, the MARPOL Convention (73/78) is the most important regulation for the prevention of pollution from ships, covering gas emissions, sewage, garbage and air pollution. The IMO's Greenhouse Gas Emissions Reduction Strategy sets ambitious targets for net-zero emissions "around 2050". At European level, the European Green Deal and the "Fit for 55" package foresee a reduction in emissions of at least 55% below 1990 levels by 2030. The FuelEU Maritime Regulation requires cruise ships to be connected to shore-side electricity, while the AFIR makes it mandatory to install OPS infrastructure in key ports by 2030.
The labor dimension is regulated by the International Labour Organisation's Maritime Labour Convention (MLC, 2006), which sets minimum requirements for seafarers, terms of employment, living conditions and health protection. The European Union has incorporated the provisions of the MLC into a series of directives, strengthening the protection of seafarers and establishing obligations for flag and port states.

B: Mediterranean

B.1. Structure and Peculiarities of the Mediterranean Cruise

The Mediterranean is the second most important global cruise destination, with approximately 26–30 million passenger movements in 2024 and a +9.8% increase in transit passengers compared to 2023. The main routes are divided into three main axes: the Western Mediterranean (Spain–France–Italy), the Eastern Mediterranean (Greece–Turkey–Cyprus) and the Adriatic (Italy–Croatia–Montenegro–Greece), with Barcelona, Civitavecchia (Rome) and Piraeus being the main homeports.
The Mediterranean has significant structural differences compared to the Caribbean. Its linear or semi-linear routes interconnect multiple countries, cultures, and port systems within the same journey, making it more complex to manage but richer in empirical and cultural content. The multinational nature of the Mediterranean creates increased needs for coordination and governance, as the quality of the experience does not depend only on a port or a country, but on the sequence of destinations.

Intense seasonality is a hallmark of Mediterranean cruising. The May-October semester covers approximately 82.6% of total activity, compared to 74.3% in the Mediterranean as a whole. This concentration intensifies the pressures on infrastructure and societies during the summer months, while leading to underutilization of available resources during the low season.

B.2. Economic Dimension in the Mediterranean

The economic contribution of the Mediterranean cruise is particularly important for coastal and island economies. Italy, as the largest Mediterranean destination, recorded around 12.3 million passenger movements in 2019, accounting for almost 23% of total passenger traffic in the Mediterranean. The direct costs associated with cruising in Italy exceeded €2.5 billion per year.

The economic impact is highly spatially concentrated: the 50 largest ports in Europe and the Mediterranean account for around 79% of total passenger traffic. Italy has many ports in this category (Civitavecchia, Genoa, Naples, Palermo, Livorno), with the top three gathering more than 44% of passengers.

Homeporting is a strategic asset for Mediterranean countries. Home-porting passengers spend 2–3 times more than transit passengers, due to pre/post-cruise accommodation, air travel, dining, and local transportation. Italy, with a strong home-porting presence, is strengthening the interconnection of cruise with the broader tourism and transportation sector, increasing local economic multipliers.

B.3. Environmental and Social Challenges

The Mediterranean, as a semi-enclosed sea with a high density of navigation, faces intense environmental pressures. Emissions from cruise ships affect air quality in port cities, while water pollution, waste management and pressure on sensitive ecosystems (e.g. Posidonia meadows, marine protected areas) are significant challenges.

In the social field, the high concentration of visitors in historic city centers such as Venice, Dubrovnik, Barcelona and Santorini has led to phenomena of overtourism. Local communities face increased pressures in everyday life, an increase in the cost of living, an alteration of the local identity and conflicts between residents and tourist activity.

B.4. Cross-border coordination

The specificities of the Mediterranean – multinational routes, semi-closed sea, port density and overtourism phenomena – make cross-border coordination necessary. The Mediterranean Cruise Ports Association (MedCruise), founded in 1996, is the central coordinating body, with 78 member ports in 22 countries and three continents. In 2024, MedCruise's member-ports recorded 35.98 million passengers and 15,823 calls.

MedCruise promotes the Mediterranean region as a cruise destination, provides statistics and best practices, formulates common positions on policy issues, and develops partnerships with CLIA, ESPO and UNWTO. European initiatives such as the Sustainable Cruise Charter (French Mediterranean, 2022) and the LOCATIONS project (Interreg) help promote sustainable practices and finance low-emission infrastructure.

C: Greece

C.1. Historical Evolution and Contemporary Dynamics

Greece has a long-standing maritime tradition, with the cruise developing in an organized way since the mid-20th century. Greek companies such as Epirotiki Lines (Potamianos family) and Greek Line contributed decisively to shaping the cruise in the Eastern Mediterranean. Today, the Greek presence is mainly represented by Celestyal Cruises and Variety Cruises, which focus on thematic and experiential smaller-scale cruises.

The modern course of cruising in Greece is characterized by intense dynamics. In 2024, 5,490 cruise ship calls and nearly 7.9 million passengers were recorded, an increase of 13.2% compared to 2023. This development confirms the transition to a new level of operation, with performance significantly higher than in 2019 (5.55 million passengers).

C.2. Geographical Distribution

Activity remains strongly concentrated in a limited number of destinations. The South Aegean gathers 42% of passengers (3.36 million), Attica 24% (1.89 million), the Ionian Islands 14% (1.10 million) and Crete 11% (0.85 million), with these four Regions absorbing 91% of the total traffic.
At the port level, Piraeus (21.5%), Santorini (17.1%) and Mykonos (16.4%) dominate, confirming the intense spatial concentration. However, there is a gradual strengthening of secondary ports: Lavrio (+227% compared to 2015), Milos (+186%) and Kos (+145%) record impressive increases, indicating trends of geographical diversification.

C.3. Economic Dimension

The economic contribution of cruising in Greece is significant and rapidly increasing. In 2024, total cruise receipts amounted to €1.11 billion, showing an increase of 22.4% compared to 2023. The number of cruise passengers increased from 3.48 million in 2023 to 5.01 million in 2024 (+43.8%), while total overnight stays outside cruise ships increased by 31.5%, reaching 12.39 million.
According to CLIA, the total economic impact of cruising in Greece in 2023 was estimated at around €2 billion, contributing €973 million to GDP and supporting around 22,600 jobs. Passenger costs were the main driver of value creation, accounting for around 55% of the total contribution (€540 million).
The distribution of receipts by port shows a strong concentration: Piraeus collects about 48.5% of total receipts, Corfu 11.8%, Heraklion 8%, Santorini and Mykonos 7% each. The difference between visitor volume and cost-effectiveness is characteristic: high-traffic destinations like Santorini exhibit a lower collection ratio, indicating limited utilization of expenditure due to short stays.

C.4. Environmental Dimension

The environmental impact of cruising in Greece is particularly pronounced in the main ports. A study on air pollutant emissions in Greek ports showed that Piraeus has the largest total amount of emissions, due to the high number of approaches and the long length of stay. Ports such as Santorini, Mykonos and Corfu follow.
Most of the emissions are produced during the ships' stay in port, due to the operation of auxiliary engines to meet energy needs. The seasonal distribution of emissions is highly concentrated during the summer season, which is linked to increased tourism activity.
Waste management is also a major challenge. In Corfu, cruise ships produce an average of 30–50 cubic meters of solid waste per visit, while liquid waste management falls short of needs. The lack of permanent shore-side electricity infrastructure (cold ironing) keeps emissions at high levels at berth.

C.5. Social and Cultural Dimension

Cruising in Greece creates a complex social footprint. On the one hand, it contributes to employment and local development, especially in island regions with limited alternative economic activities. On the other hand, the massive and time-condensed presence of passengers creates intense pressures.
Santorini is a prime example, with daily peaks reaching 11,000–17,000 passengers in 2024, a figure that significantly exceeds the island's carrying capacity. The implementation of limits (8,000 passengers per day from 2025) aims to reduce the pressure on infrastructure and public spaces. Similarly, in Mykonos extreme concentrations of visitors are recorded (up to 20,000 per day), while in Piraeus the high passenger traffic burdens traffic and the main tourist poles.
Strong tourist demand, combined with the growth of short-term rentals, is leading to an increase in house prices and basic goods, limiting residents' access to affordable housing and exacerbating social inequalities. At the same time, the adaptation of the local economy to the needs of tourists changes the structure of the market, often to the detriment of local needs.

C.6. Governance and Institutional Framework

The Greek regulatory framework for the cruise incorporate international regulations (IMO) and European directives, supplemented by national legislation. The gradual lifting of cabotage restrictions, which until 2012 limited the possibility of cruising within Greek territory to ships flying the Greek flag, was an important reform.

In 2024, under Law 5162/2024, a cruise fee per disembarked passenger was introduced, imposing different charges per destination and period. In the peak season (June 1 – September 30), the fee is 20 euros for disembarkation in Santorini and Mykonos, and 5 euros for all other Greek ports. The fee is paid to the municipalities and the Ministries of Finance & Maritime, with the aim of financing infrastructure projects.

Despite the reforms, Greek cruise governance remains fragmented. Responsibilities are shared between the Ministry of Shipping, the Ministry of Tourism, the Coast Guard, Port Authorities, Regions and Municipalities, without a coordination mechanism. The need for an institutionalized destination management body (DMMO) emerges as a critical priority.

D: Methodological Framework for Cruise Value Chain Valuation

Valuing the cruise value chain in a destination is a complex undertaking that goes beyond simply recording arrivals. Its goal is to quantify the economic flows generated by the activity and identify the points where this value "leaks" outside the local ecosystem. In the context of the pilot research in Corfu, a comprehensive methodological model of such an analysis was developed.

The primary purpose of value chain analysis is to **comprehensively capture the immediate economic impact** of cruising on the destination. Unlike traditional economic impact studies that often focus on a general multiplier, this approach attempts to **analyze the individual components of the expense**, revealing the structure and functioning of the local economy that serves the industry.

The scope of the analysis covers all the direct costs associated with the presence of a cruise ship, distinguishing the expenses incurred **on board the ship** (which mostly does not benefit the destination) from those incurred **within the destination**. The focus is on recording the cash flows that generate direct income for local businesses and institutions.

D.1. Data Sources

The reliability of the analysis depends on the combination of multiple, complementary data sources, thus filling the gaps that usually exist at the level of local statistics. The main sources include:

- **Port Authorities:** They provide the basic traffic statistics (number of ships, passengers, crew, hours of stay). They are the basis on which all cost estimates are displayed.
- **Primary Field Surveys (Questionnaires):** Carried out on passengers and crew upon their departure from the port. They capture the **actual** expenditure (as opposed to the projected one), the categories of expenditure, the demographic characteristics and the patterns of behaviour. The survey in Corfu was based on a statistically significant sample (2,840 questionnaires, 99% confidence level).
- **Administrative and Accounting Data:** They concern the revenues of the Port Authority (from berth, passenger fees, ISPS, etc.), the tariffs of shipping services (towing, agency) and data from the General Business Registry and the Independent Authority for Public Revenue (AADE) on the turnover of the relevant businesses.
- **Key Interviews:** Executives from ports, travel agencies, travel agencies, and local businesses provide valuable insights into market practices, prices, and revenue allocation that are not available from other sources.

D.2. Categorization and Calculation of Expenses

The crucial step of the methodology is to analyze the total costs into individual categories, in order to capture the value chain accurately. The practice followed in Corfu categorizes the expenses as follows:

D.2.1. Passenger Expenses at the Destination

This is the most common and easily measurable category. The average expenditure per passenger for each activity (e.g. souvenirs, food, transport) is extracted from the field surveys. It is then multiplied by the total number of passengers disembarked. The calculation is straightforward: **Average Expenditure by Category × Number of Disembarked Passengers**.

D.2.2. Home-Porting Costs

Home-porting passengers, i.e. those who start or end their journey at the destination, have a much higher expense. This expense is calculated based on their accommodation (average accommodation expense for an estimated number of days) and the associated expenses (transport, catering). The calculation is made: **(Average Accommodation Expenditure + Other Expenses) × Number of Home-Porting Passengers**.

D.2.3. Excursion Expenses

This is the most complex category, where the biggest leaks are revealed. The analysis distinguishes:

- **Excursions Purchased on Board:** The total cost is calculated from the sale price of the excursion and the number of participants. The crucial point is that, according to the methodology, only a small percentage (in the case of Corfu, 37%) of this price remains in the local economy. The remaining 63% is the commission withheld by the cruise company. The **local expense** is calculated as: **Total Expenditure × (1 - Ship Procurement Percentage).**

- **Tours Purchased Independently (at the Destination):** The total expense is calculated from the (smallest) selling price of the excursion. In this case, the entire expense (100%) remains in the local economy, allocated to carriers, tour guides, caterers and local agencies.

D.2.4. Crew Expenditure

The calculation is like that of passengers. The average expenditure per crew member (from field surveys) is used and multiplied by the estimated percentage of the crew disembarked. **Average crew expenditure × (total crew × disembarkation rate).**

D.2.5. Port & Shipping Services Revenue

These are revenues from infrastructure and services that are not directly related to the consumer behavior of passengers. The revenues of the Port Authority (from fees) and local shipping service providers (e.g., towing, agency, waste management) are derived from accounting records and invoices.

D.3. Key Conclusions from the Application of the Methodology

The implementation of this framework in Corfu yielded critical diagnoses:

- **Total Value:** The cruise generates a huge direct economic footprint, exceeding **€92 million per year**.

- **The Value Distribution:** Passenger spending in the city (29.6%) and excursions (22.1%) are the biggest pillars. Homeporting, while making up only 10.8% of passengers, contributes nearly 12% of the total value, underscoring its importance.

- **The Leakages:** The most critical finding is the massive drain of value from the excursions sold on board. This 63% "hidden" commission deprives the local economy of over €6 million a year. Similarly, the almost zero local ships supply indicates a huge, untapped opportunity.

In conclusion, the value chain valuation methodological framework offers much more than just a numerical calculation; it provides a **functional map of economic flows**, enabling decision-makers to accurately identify where value is lost and devise targeted policies to increase local added value, transforming the cruise from a mere transit of tourists into an essential driver of growth.

E: Primary Cruise Research (Corfu)

E.1. Corfu Cruise Profile

Corfu is one of the most important cruise ports in Greece, with a strategic location at the entrance of the Adriatic. In 2025, the port recorded 474 cruise ship calls, which carried a total of 908,762 passengers and 324,507 crew members. The disembarkation rate stood at 87.6%, with home-porting passengers accounting for 10.8% of the total.

Activity is highly seasonal, with the peak season stretching from April to October, peaking in October (72 calls, 141,119 passengers). The daily distribution is extremely uneven: Wednesday, Thursday and Friday gather 55% of passengers, while Sunday only 8.4%. This concentration creates intense pressure on infrastructure and urban life on certain days.

The fleet approaching Corfu is diverse. Medium-sized ships with a capacity of 2,000–3,000 passengers predominate, while there are a significant number of small luxury yachts and sailboats. Overnight stays are extremely rare (only 98 in total), which limits spending on accommodation and evening entertainment.

E.2. Economic Dimension: Value Chain

The analysis of the cruise value chain in Corfu captures the overall economic contribution of the activity and the distribution of revenues. The total direct economic footprint amounts to €92.2 million per year, broken down as follows:

Passenger expenditure in the city (€27.3 million, 29.6%): Mainly in souvenirs (€4.96 million), local products (€6.01 million), food and drink (€4.08 million) and transport (€5.09 million). The average expenditure per passenger is €36.48, with 57.1% of passengers spending less than €50.

Homeporting (€10.75 million, 11.7%): Home-porting passengers (195,758 people) contribute significantly through accommodation (€8.8 million) and other expenses (€1.96 million). The average expenditure per home-porting passenger is €449 for a 3-day stay.

Local excursion costs (€20.35 million, 22.1%): Tours purchased independently at the destination generate €10.26 million, while excursions purchased on board generate €10.09 million (with 63% remaining with the cruise line).

Crew costs (€9.61 million, 10.4%): 20% of the crew (64,901 people) disembark, with an average expenditure of €148 per person.

Port Authority revenue (€8.23 million, 8.9%): Derived from berthing fees (€4.33 million), passenger fees (€1.09 million), ISPS security (€2.05 million) and others.

Shipping revenues (€9.43 million, 10.2%): Includes towing (€3.79 million), waste management (€2.84 million), agency (€0.71 million) and other services.

The largest leakage for the local tourist industry is found in the excursions sold on board, with 63% of the price remaining with the cruise company (€6.4 million per year). Ship catering is extremely limited (only €20,000 per year), even though the total supply value for 900,000 passengers is estimated at tens of millions of euros.

E.3. Social and Cultural Dimension

Qualitative research (focus groups, interviews) highlighted strong concern about overtourism in tourist attractions (old town, Liston Square, Spianada). On days with many cruise ships, the city "explodes", creating suffocation, noise and difficulty in moving. On a peak day, up to 200 buses and more than 30,000 rental cars move, while 90% of passengers end up in the Old Town.
The sense of safety remains high (score 3.94/5), but the cleanliness of public spaces (3.90/5) and the quality of the road network (3.71/5) are rated moderate. Residents of the old town report a loss of public space due to table seats and the commercialization of traditions ("Disneyland effect"). The shift of housing to Airbnb, combined with cruising, is exacerbating the housing problem.
The profile of passengers visiting Corfu is characterized by a predominance of mature age groups (71.8% over 55 years old), a strong European origin (84.5%) and travel mainly as couples (77.5%). The majority (82.7%) have made 1–5 cruises, while more than half (52.8%) have visited Corfu again, which demonstrates a positive previous experience.

E.4. Environmental Dimension

The environmental impact of cruising in Corfu is multidimensional. Cruise ships generate 30–50 cubic meters of solid waste per visit, while wastewater management falls short of needs (the Waste Reception Agreement was signed only recently). The uncontrolled anchoring of boats in Garitsa Bay destroys Posidonia meadows and pollutes the marine environment.
Air pollution in the port remains significant due to lack of electricity from land (cold ironing). Ships keep their engines running while docking, increasing NOx, SO_2 and particulate matter emissions. There is no permanent real-time pollution measurement infrastructure, with existing measurements being ad hoc.
Coastal erosion is also a major challenge: on the west side of Corfu, the coastline has receded by up to 10 metres in the last 25–30 years. The occupation of the seashore by platforms and sunbeds on municipal beaches has reduced free space, while water scarcity in the summer is exacerbated by increased demand.

E.5. Governance and Prospects

The main obstacle that emerged from all the consultations is fragmented governance. Responsibilities are shared between OLKE, the Municipality, the Region of Ionian Islands, the Port Authority, the Chamber of Commerce and the Central Government, without a coordinating body. The Municipality is responsible for urban mobility, but the urban operation regulation (removal of heavy vehicles from the historic center) has remained unenforceable for 8 years.
The need to establish a Local Destination Management Organization (DMMO) with the participation of the market, local government, and professional associations emerges as a critical priority. Such a body could undertake the coordination of stakeholders, data collection, consultation and management of a Local Cruise Fund.
The participants in the consultation called for the establishment of a maximum limit on cruise ship calls per day/hour, the mandatory and digital collection of anonymous data from AADE, Port Authority, Ergani and OLKE, as well as the installation of sensors to measure the carrying capacity per hour. The return on revenue (percentage of cruise revenue returned to the local economy) is a key issue.

F: Conclusions and Strategic Proposals

The contemporary debate about the future of cruising has shifted from the question of "how to increase the number of passengers" to the crucial question of "how to maximize local value and minimize negative impacts." This new imperative requires a holistic strategy that permeates all four dimensions of sustainability.

F.1. Economic Dimension: From Volume to Value

The economic imperative is to **maximize local added value** and **drastically reduce leakages**. The pilot research in Corfu showed that 63% of the expenditure on excursions purchased on board flows outside the local economy, while the supply of ships from local suppliers is almost non-existent.

- **Restructuring the Tour Market:** Instead of the dominance of large international tour operators, the creation of local cooperative schemes or the establishment of a "Local Tour Coordinating Office" is proposed. This would enhance the bargaining power of local businesses, allowing for the immediate design of high-quality experiences and the negotiation of lower commissions (from 63% to ≤40%), with a potential benefit of millions of euros.

- **Creating a Local Catering Ecosystem (Provisioning):** The development of a certified "Catering Cluster" can connect local producers with the needs of cruise lines. This requires investment in logistics and certifications but can turn an almost non-existent activity into a thriving multi-million-euro market.

- **Product Diversification and Extension of the Season:** The shift to premium, thematic experiences (e.g. gastronomy, culture) can attract passengers with a greater willingness to spend. At the same time, the development of special packages for the off-peak season, combined with incentives for companies (e.g. discounts on port fees), can contribute to the extension of the tourist season and the smoothing of seasonality.

- **Enhancing Homeporting:** Creating integrated "accommodation + cruise" packages and activating a "Local Home Porting Fund" can increase the percentage of passengers starting or ending their journey at the destination, multiplying local spending through accommodation and consumption of services before and after the trip.

F.2. Environmental Dimension: The Green Transition

The environmental imperative is to **accelerate decarbonization** and implement **circular economy principles**. The cruise is in the crosshairs for its gas emissions and waste management.

- **Investments in Shore-Side Electricity Infrastructure (OPS/Cold Ironing):** The mandatory installation of OPS in key ports by 2030 (based on European legislation) is a one-way street. Accelerating these investments, combined with the use of "green" electricity, can reduce emissions at berth, drastically improving air quality in port cities.

- **Adoption of Alternative Fuels and Technologies:** In addition to LNG, which is considered a transitional solution due to the phenomenon of methane slippage, investing in ships compatible with methanol, ammonia and hydrogen is the long-term goal. At the same time, the implementation of advanced wastewater treatment systems (AWTS) and the reduction of the use of open circuit scrubbers are critical to the protection of the marine environment.

- **Implementing the Circular Economy in Waste Management:** Reduction, segregation, and recycling of waste at source, combined with the development of infrastructure to convert organic waste into energy, can significantly reduce the environmental footprint of cruising shipping.

- **Protection of Sensitive Ecosystems:** The implementation of no-mooring zones in areas with Posidonia grasslands, combined with the mandatory use of ecological moorings, is essential for the protection of marine biodiversity.

F.3. Social & Cultural Dimension: The Management of Overtourism

The social imperative is to **restore the balance between residents and visitors** and to **protect the local identity**.

- **Establishment of Carrying Capacity:** The introduction of daily arrival ceilings, as applied to destinations such as Santorini and Dubrovnik, is the most direct tool for reducing pressure. The time dispersion of arrivals (different "disembarkation windows") can smooth out congestion peaks.
- **Spatial Redistribution of Flows:** Instead of concentrating all passengers in the historic center, the promotion of alternative routes, the development of thematic experiences outside the center and the improvement of transport can distribute the tourist load.
- **Reinvestment of Revenues in Local Communities:** The creation of a transparent reciprocity mechanism, where part of the revenues from cruise fees returns to municipalities for infrastructure, cleaning, cultural actions and housing policies, can enhance social acceptance.
- **Enhancing Authenticity:** Promoting intangible cultural heritage and supporting local producers and artists can address the phenomenon of "Disneyfication", offering a more authentic experience for both visitors and residents.

F.4. Governance Dimension: Coordinated Action

The governance project is to **replace fragmented management with an integrated model of cooperation**.

- **Establishment of Destination Management Organizations (DMMOs):** The creation of a single, institutionalized body that will bring together all stakeholders (Municipality, Port, Region, Chamber, local bodies) is the most crucial step. This body will be responsible for strategic planning, coordination, monitoring and resource allocation.
- **Institutionalization of Data Collection:** The mandatory and digitized collection of anonymous data by all bodies (AADE, Port Authority, OLKE, Ergani) through a central system (single window) is necessary for informed decision-making.
- **Enhancing Inclusivity:** Ensuring the active participation of local communities and civil society in decision-making processes, through open consultations, is a guarantee for the long-term sustainability of policies.

F.5. Destination-level suggestions

Cruise is an important economic factor at global, European and national level, with Greece holding a strong position in the Mediterranean. The country has significant comparative advantages: geographical location, island reserve, cultural heritage and maritime tradition. However, intense seasonality, spatial concentration and pressure on infrastructure and natural resources necessitate the implementation of integrated management policies.

The economic contribution of the cruise is significant but unevenly distributed. Value leakages in excursions, catering and supplies limit local added value. Enhancing the participation of local businesses in the value chain is a critical priority.

Environmental impacts require immediate address through investments in shore-side electrification, alternative fuels, and improved waste management infrastructure. The social acceptance of cruising depends on the ability to manage tourist flows, the protection of cultural heritage and the fair distribution of benefits.

Governance is emerging as the most critical issue. The fragmented division of responsibilities undermines any effort at sustainable management. The creation of a functional coordination model, involving all stakeholders, is a prerequisite for the effective implementation of policies and the fair distribution of revenues.

A set of 6 proposals is proposed at destination level:

1. **Expansion of homeporting:** Creation of "Corfu Stay & Cruise" packages and activation of the Local Home Porting Fund, with the goal of increasing the home-porting rate from 10.8% to 15%.
2. **Improvement of the experience in the city:** Creation of a digital card (Corfu Cruise Pass) with discounts in museums and shops, upgrade of transport services and strengthening of cleanliness, goal of increasing the average expenditure from 36.48 to 50 euros per person.
3. **Recovery of leaks from excursions:** Creation of a coordinating office for local excursions, with the aim of reducing the supply of the ship from 63% to ≤40%, with an estimated benefit of +3.8 million euros per year.
4. **Development of local ship catering:** Establishment of a Catering Cluster with certification of local products, target increase from 20,000 euros to 2 million euros per year.
5. **Establishment of an Observatory:** Systematic monitoring of key indicators (economic impact, employment, social pressure, environmental footprint) through a permanent data collection mechanism, with an annual report and comparative analysis with other destinations.
6. **Creation of a DMMO:** Establishment of a Local Destination Management Organization with the participation of the Municipality, the Region, the OLKE, the Chamber and professional associations, for the coordination of policies, the management of flows and the transparent distribution of revenues.

The implementation of these proposals can reduce value leakage, increase local expenditure and upgrade the visitor experience, without additional environmental burden. The sustainable development of cruising in Greece requires a shift from quantitative growth to qualitative value, with an emphasis on governance, innovation and social acceptance.