



# The role of a travel agency on the marine industry

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Delivering what really matters™

## The role of the travel agent

### Dream



## The role of a marine travel agent

### Reality

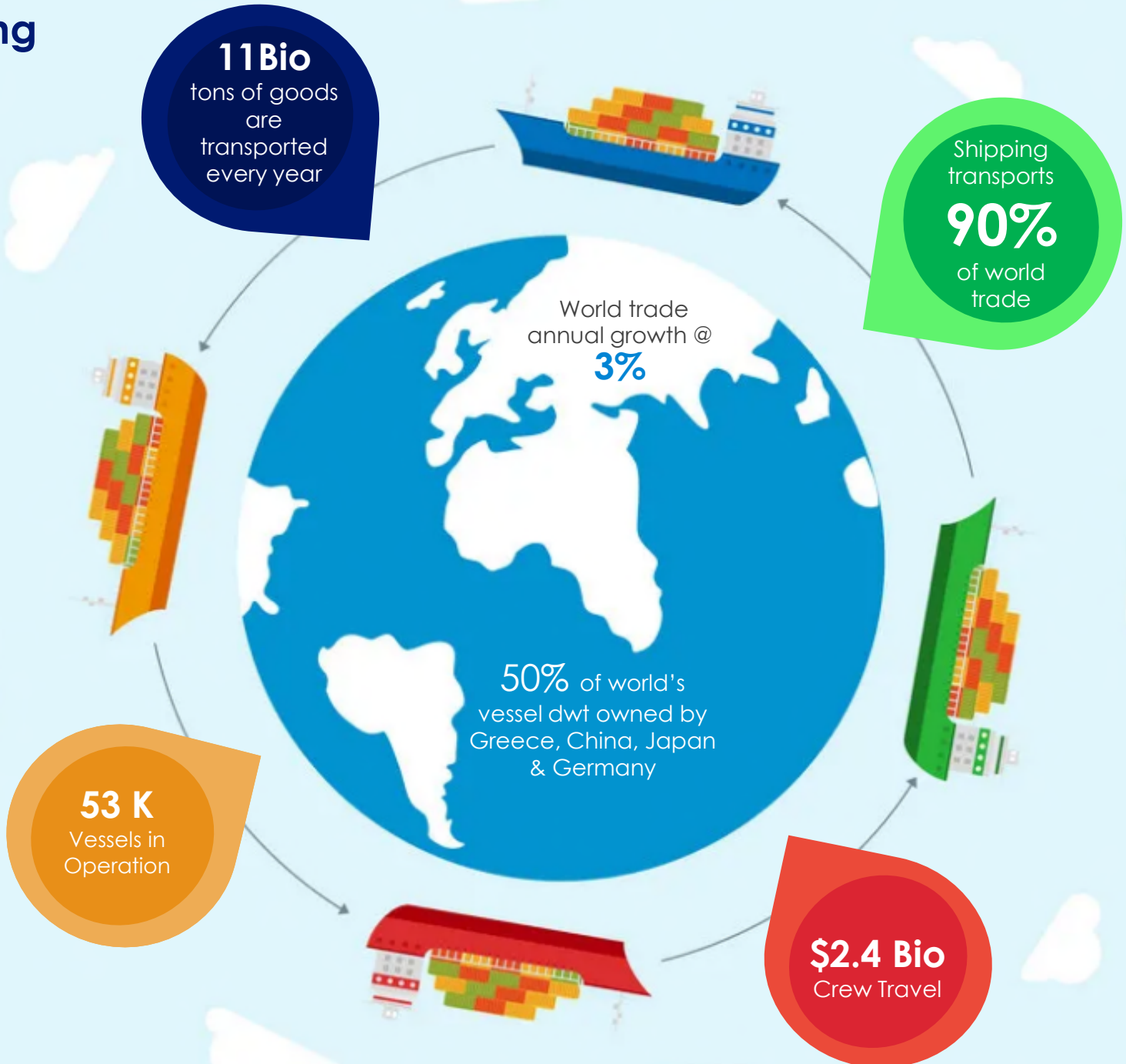


# The shipping industry at a glance

1. Mercantile
2. Cruise & Mega Yachts



# Mercantile Shipping Market Size



# 1.65 M Seafarers



**775K officers**  
**6-8 per vessel**

China  
Philippines  
India  
Indonesia  
Russia



**875K ratings**  
**12-14 per vessel**

Philippines  
China  
Indonesia  
Russia  
Ukraine

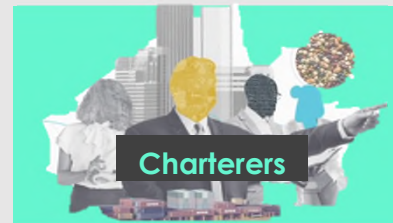


Depending on ship-owner & rank:  
Rotation 4-6 months  
May chose airline/flight  
Arrival 1 day prior – need of hotel stay

Depending on ship-owner, rank & nationality:  
Rotation 6-12 months  
No choice on airline/flight  
Arrival day of embarkation

# Mercantile Travel Segmentation

## Shipping



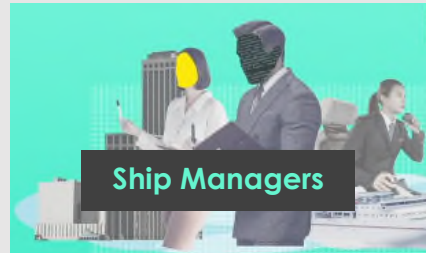
**Charterers**

Corporate travel



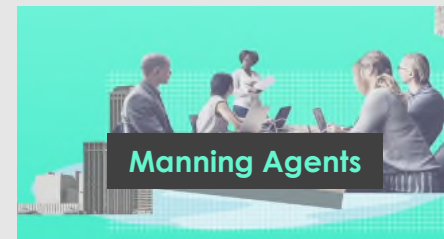
**Ship Brokers**

Corporate travel



**Ship Managers**

Crew Travel  
Superintendent Travel  
Shore-based Personnel  
Travel



**Manning Agents**

Crew Travel  
Shore-based Personnel  
Travel



**Bunker Operators**

Crew Travel  
Corporate travel

## Shipping Periphery

### Technical Suppliers

- Technical management (MFE)
- Maintenance & Repairs (MFE)
- Auditing and control (C)
- Spare Parts (C & MFE)
- Other suppliers (i.e. catering) (C & MFE)

### Travel characteristics:

Corporate (C) travel  
Marine fare eligible (MFE) travel

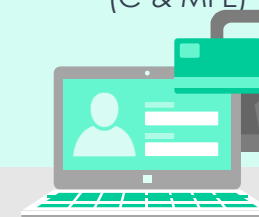


### Onshore Services

- Port Agents (C)
- Shipyards (C)
- Legal & Insurance Firms (C)
- Technology Suppliers & Support (C & MFE)
- Training providers (C & MFE)

### Travel characteristics:

Corporate (C) travel  
Marine fare eligible (MFE) travel



### Institutions & Associations

- Shipping Chambers (C)
- Shipping Associations (C)

### Travel characteristics:

Corporate (C) travel  
Marine fare eligible (MFE) travel



# Durability & agility of the shipping industry





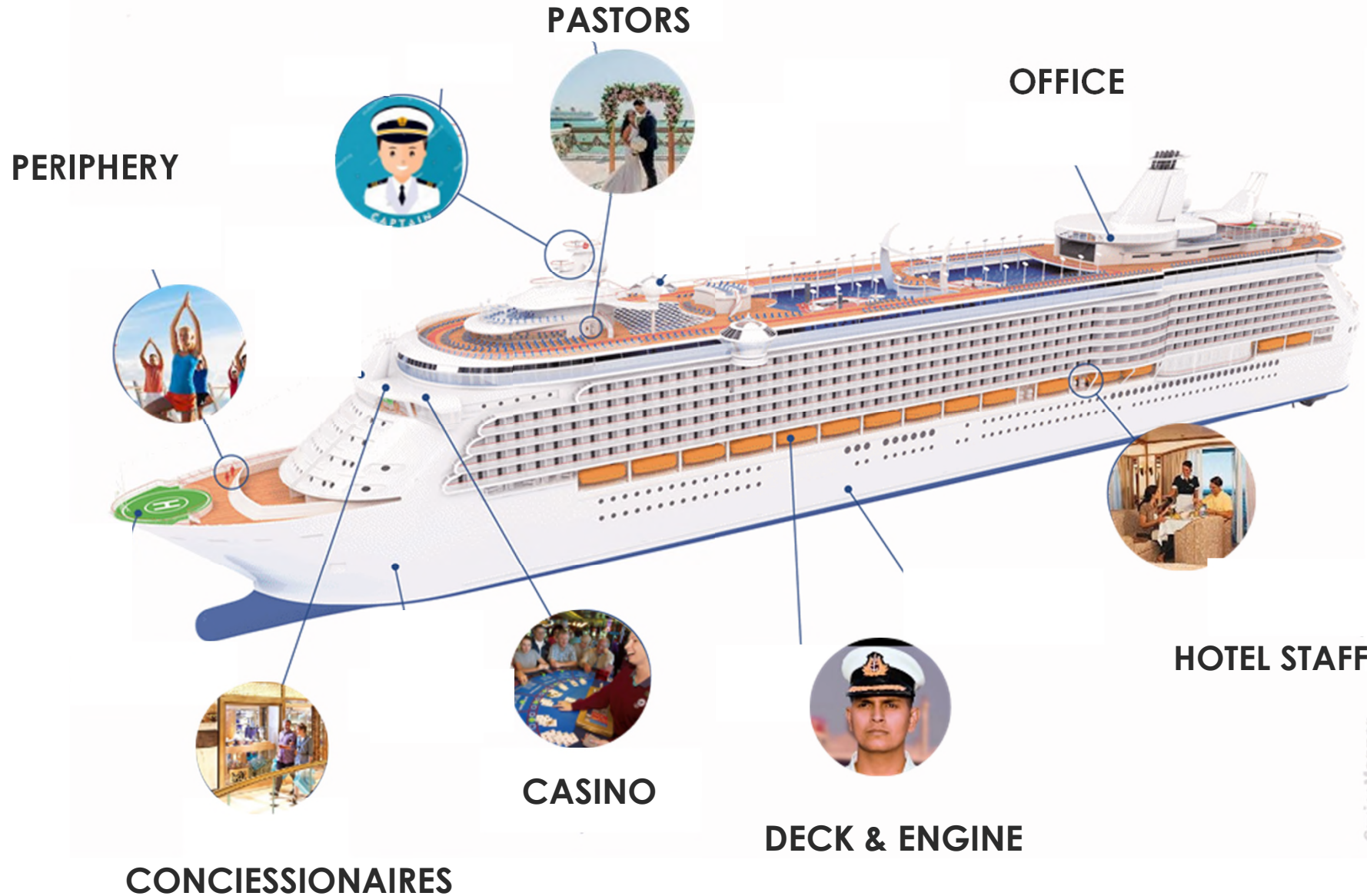
# Cruise & Mega Yachts Market Size

**\$600M**

**290K  
Crew**



# CREW TYPE SEGMENTATION



- 1 MAIN CREW CATEGORIES**
  - HOTEL STAFF
  - DECK & ENGINE
  - CONCESSIONAIRES
  - OFFICE
  - PERIPHERY
- 2 CONCESSIONAIRES TYPES**
  - PASTORS
  - ENTERTAINERS
  - SPA
  - CASINO
  - RETAIL

An aerial photograph showing the wing and tail of a large commercial airplane in the upper left quadrant. The tail is painted a bright red. Below the wing, the ocean is a deep blue-green, populated by dozens of ships of various sizes, including cargo vessels and smaller boats. The sky is filled with soft, white clouds. The text "Marine travel characteristics & needs" is overlaid in white on the left side of the image.

# Marine travel characteristics & needs

# Key Characteristics of Crew Travel

## Customer Relationship

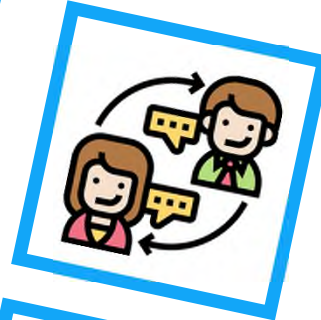
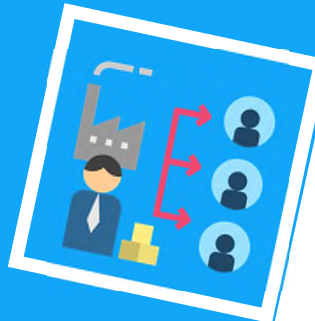
Executional



Re-active



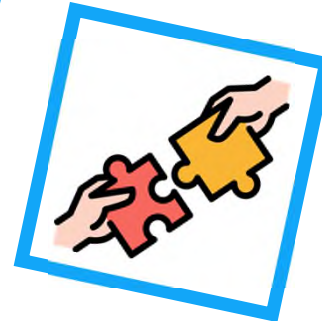
Multi-vendor/low-level



Engaging



Proactive



Partnership

# Key Characteristics of Crew Travel

## Cooperation type

Tickets



Partnership



Solutions



KPIs



Common goals



Consultative approach

# Key Characteristics of Crew Travel

## Service - Product Mix

Cheapest Tickets



Savings/Efficiencies

Emergency Service



24/7 Service

Avoid IATA banned airlines



"Check-in" at every leg

# Key Characteristics of Crew Travel

Market

Highly Fragmented



Consolidation



Survival



Growth



Global Reach



Economies of scale

# Key Characteristics of Crew Travel

Low-tech



Limited information/reporting



No need/lack of transparency



Manual process



Travel consultant: King



Evolution



Digitalisation



Big data



Transparency



System Integration



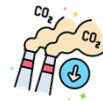
AI

# Key Characteristics of Crew Travel

What future brings



Climate change initiatives



2030: Sulphur cap



2050: Carbon neutral



Lesser use of fossil fuel



End-product closer to production



# Shipping industry needs



## Cooperation Model

- Executional
- Multi-vendor
- Re-active



## Savings

- Cheap Tickets

# Shipping industry needs



## Cooperation Model

- Engaging
- Proactive



## Savings & efficiencies

- Grip & control
- Transparency
- Process optimisation



## Digitalisation

- Big Data
- AI
- System Integration

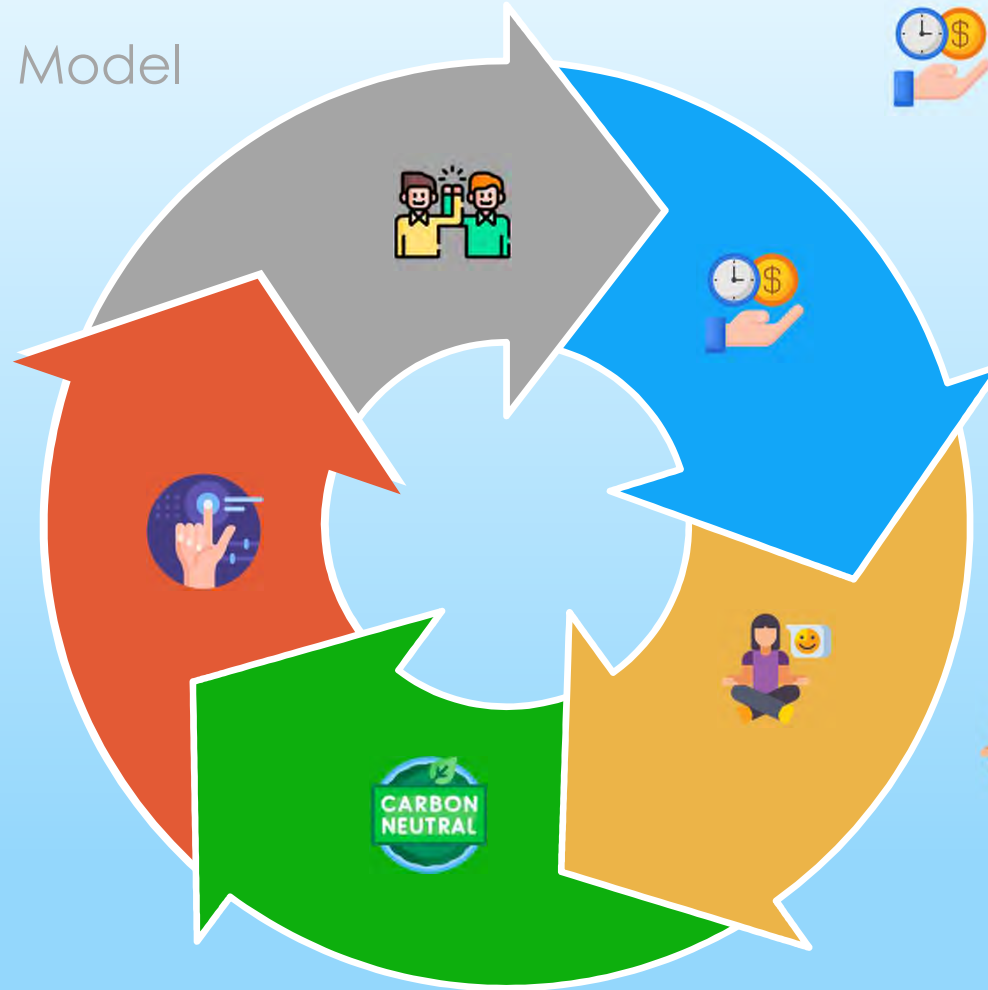


## De-carbonisation



## Duty of Care

- Seafarer Well-being
- "Check-in" at every leg
- 24/7 Service



# 5 +1 facts about marine travel

1. Up to 4% of airlines' business
  2. Definitely not low yield
  3. 12-month business
  4. Last-minute seat filler
  5. "Last man standing" during the pandemic
- 5+1. Crisis buster



A wide-angle photograph of a sunset over the ocean. The sun is a bright, glowing orb positioned slightly above the horizon line, casting a shimmering path of light across the water's surface. The sky is filled with soft, wispy clouds in shades of blue, grey, and orange, with the sun's light filtering through them. The water in the foreground is a deep blue with gentle ripples. The overall mood is peaceful and serene.

**Thank you!**