

An aerial photograph of a large cruise ship, likely an AIDA ship, sailing on a deep blue ocean. The ship's white hull and blue accents are prominent. The ship is viewed from a high angle, showing its curved decks and multiple levels. The water is a deep, textured blue.

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Cruising 2030: Value Creation, Challenges & Opportunities for Mecklenburg- Western Pomerania and the Baltic Sea Region

(Keynote · MV CruiseNet Conference · on board AIDA, Warnemünde · 14 Sept. 2026)

Do you know what this animal is called?

It is a “tardigrade-ant”!



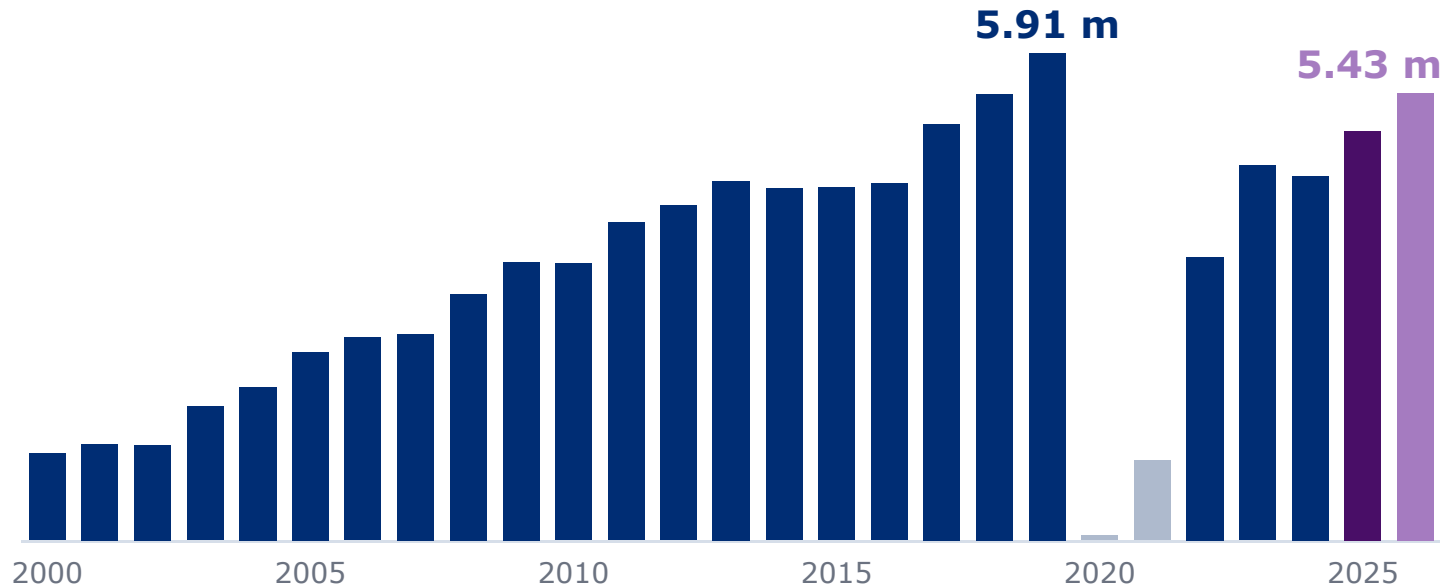
... And more importantly: what does a fictional species have to do with successful cruise regions?



Where does the Baltic stand?

25 years: from 1.05 m to 4.97 m cruise passengers

Cruise passengers in the Baltic Sea region, 2000–2026



2020/21: pandemic · 2022: loss of St Petersburg · 2026: port forecast

Survey of Cruise Baltic ports (31 members plus Kiel and Malmö). Passenger count per Cruise Europe definition: turnarounds counted twice, transit once.

6.4 %

average annual growth since 2000 – from 1.05 m to 4.97 m passengers.

– 16 %

below the record year 2019 (5.91 m). For 2026, the ports expect 5.43 m.

+ 33 %

Q4 calls 2025 vs. 2024 (184 to 245). The season is extending into the winter months.

The Baltic is growing again, and across more months. Pre-crisis levels have not yet been reached.



The demand is there! Does the risk lie in 'monocultures'?

Loss of St Petersburg and regional rebound

EU demand

45.7 % → Baltic route
Drive-to market Kiel/Warnemünde

Germany
2.8 m (+10 %)

Lever: US market
Fly-cruise, still untapped

Europe total
8.9 m (+5.3 %)

AI-generated image

+ 12.3 % passenger growth 2025



Strong source markets and regional diversification are the key...



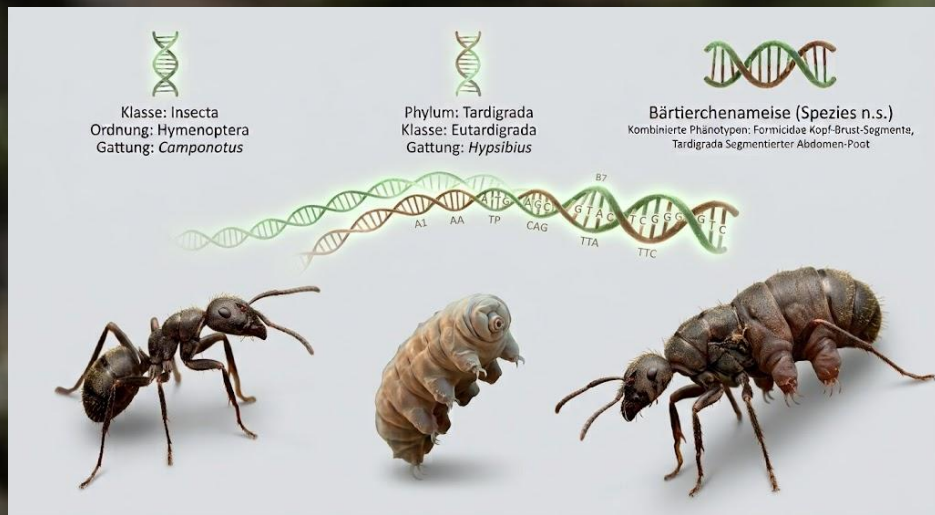
Cruise trends: 2030 and beyond

3 trend lines × 3 time horizons

	Demographic shift	Regulatory cost pressure	Overtourism and resistance
Short term 2026–27	Today's booking base 31 % first-time cruisers, ~90 % rebook (CLIA 2026). <i>→ Excursion quality > new customer acquisition.</i>	Shore power deadline FuelEU Art. 6: zero emissions at berth from 2030. <i>→ Shore power expansion is a priority – not a 'nice-to-have' or 'for later'</i>	Destination caps Amsterdam halves slots in 2026 (190→100); also Venice, Barcelona. <i>→ Displacement from the south as an opportunity for the Baltic.</i>
Medium term to 2030	Shifting demand Under-40s growing to 1/3; DE remains fastest-growing major market (+10 %). <i>→ "Drive-to-port" a key advantage for Kiel/Warnemünde.</i>	CO₂ costs ETS since 2024; FuelEU –2 % (2025) on the way to –80 % (2050). <i>→ Short, efficient calls become more economical.</i>	Caps are spreading Venice model likely to spread to other ports (assessment). <i>→ Baltic could score as a "managed tourism" role model.</i>
Long term Direction open	Generational change Today's under-40s become the core target group by 2035. <i>→ Customer retention and loyalty work today = investment in the future</i>	FuelEU target 2050 –80 % well-to-wake by 2050; third-country ports at an advantage. <i>→ Third-country port advantage possibly temporary.</i>	Full exit possible Amsterdam aims to exit ocean cruising by 2035. <i>→ Port infrastructure development = competitive factor.</i>

Worldwide 2025: 37.2 m passengers, 325 ships, ≈ 690,000 berths.



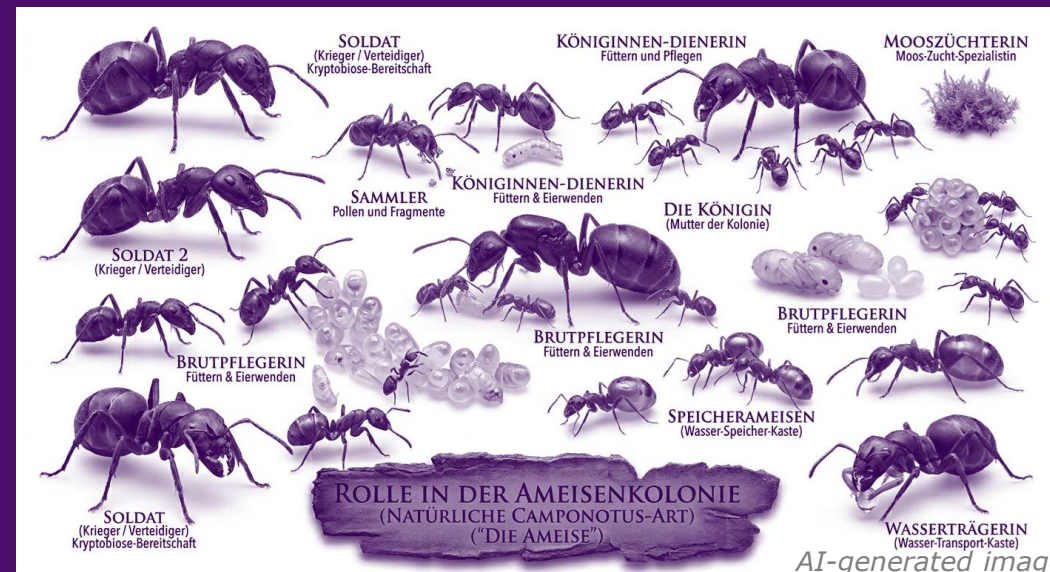


The future brings challenges... Mastering them requires a new 'species' of cruise destination.

Resilience comes from
regional diversity...
And diversity is no geographical
accident. It is a **collective**
and coordinated **strategic**
positioning!



AI-generated image



AI-generated image

Northern Europe – growth through diversity:

A region is more than the sum of its ports

low — Tourism development → high

EXCLUSIVE

Differentiation through unique places, limited capacity

e.g. Visby · Bornholm

15.8 % of passenger visits · avg. USD 87

ESTABLISHED

Reputation & brand – focus: sustainability and visitor management

e.g. Copenhagen · Stockholm · Tallinn

18.0 % of passenger visits · avg. USD 87

AUTHENTIC

Development potential, cost advantage, room for innovation

e.g. Wismar · Stralsund · Sassnitz

5.6 % of passenger visits · avg. USD 86

GATEWAY

Hub: turnaround, access, maximum value creation per call

e.g. Kiel · Rostock-Warnemünde

60.6 % of passenger visits · avg. USD 165

low — Infrastructure development → high

Destination factor

Importance

Destination mix: highlights + discoveries

● ● ●

Destination attractiveness

● ● ●

Destination accessibility

● ● ●

Port connectivity (hub quality)

● ● ●

Onshore experience quality

● ● ●

Safety and security

● ● ●

Connectivity/reliability

● ● ●

Local environmental management

● ● ●

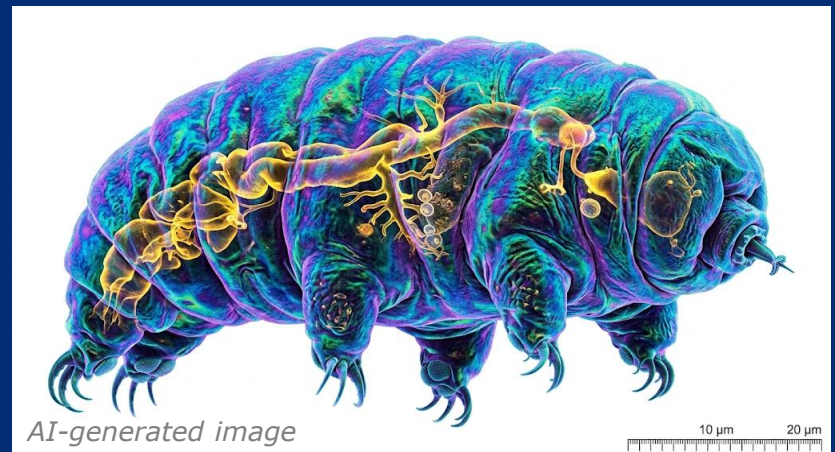
MV occupies two quadrants: Gateway (Rostock-Warnemünde) and Authentic (Wismar, Stralsund, Sassnitz)... with prospects towards “Established”!



Resilience becomes
success when it is linked to
a sustainable
business model!



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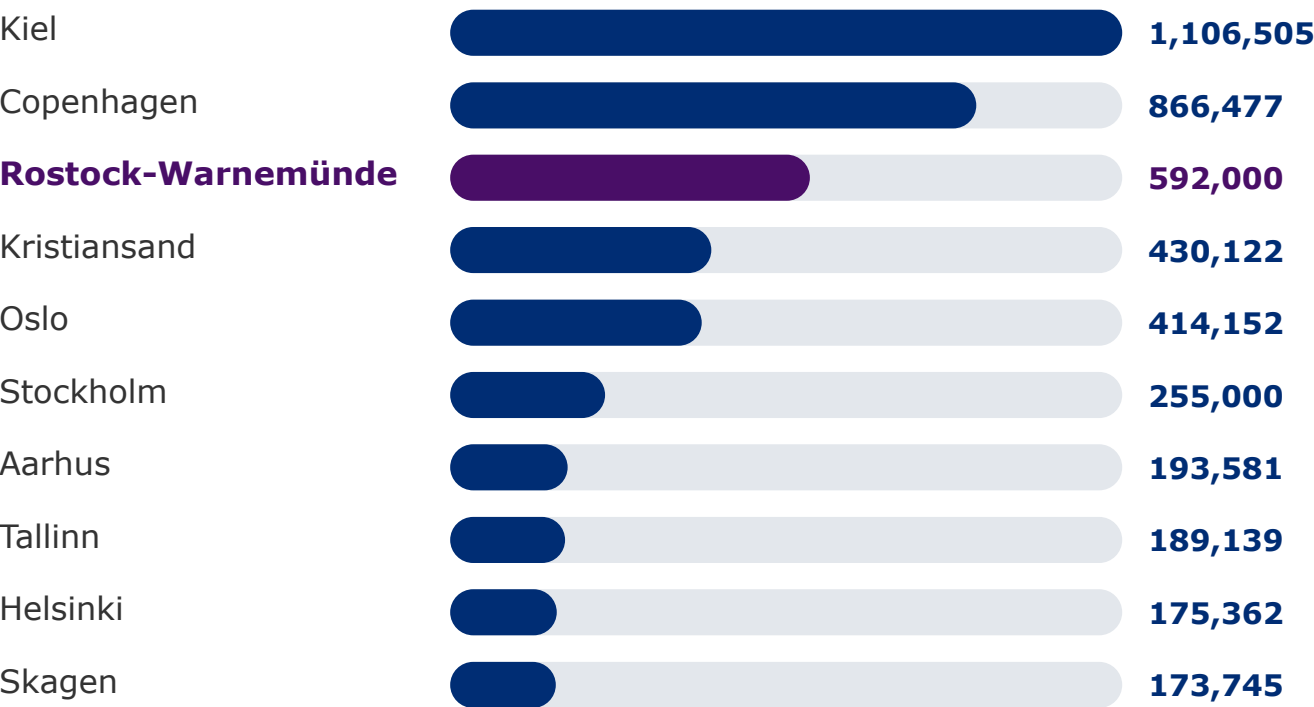


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Rostock in Baltic comparison

Cruise Baltic 2025: 4.97 m passengers, 2,032 calls, 455 turnarounds

Cruise passengers 2025 – ten largest ports in the Cruise Baltic network



Kiel leads despite 188 calls vs. 316 in Copenhagen: 89 % of its calls are turnarounds, which count twice.

Cruise Baltic ports (31 members plus Kiel and Malmö). Count per Cruise Europe definition: turnarounds counted twice, transit once.

Rostock-Warnemünde Rank 3

592,000 passengers in 2025 (+11 %). Only Kiel with 1.11 m and Copenhagen with 866,000 rank higher.

66 % of the 165 calls are turnarounds – compared with 35 % in Copenhagen and 14 % in Oslo.

109 turnarounds in 2025 (2024: 95). Almost a quarter of all 455 turnarounds in the Baltic.

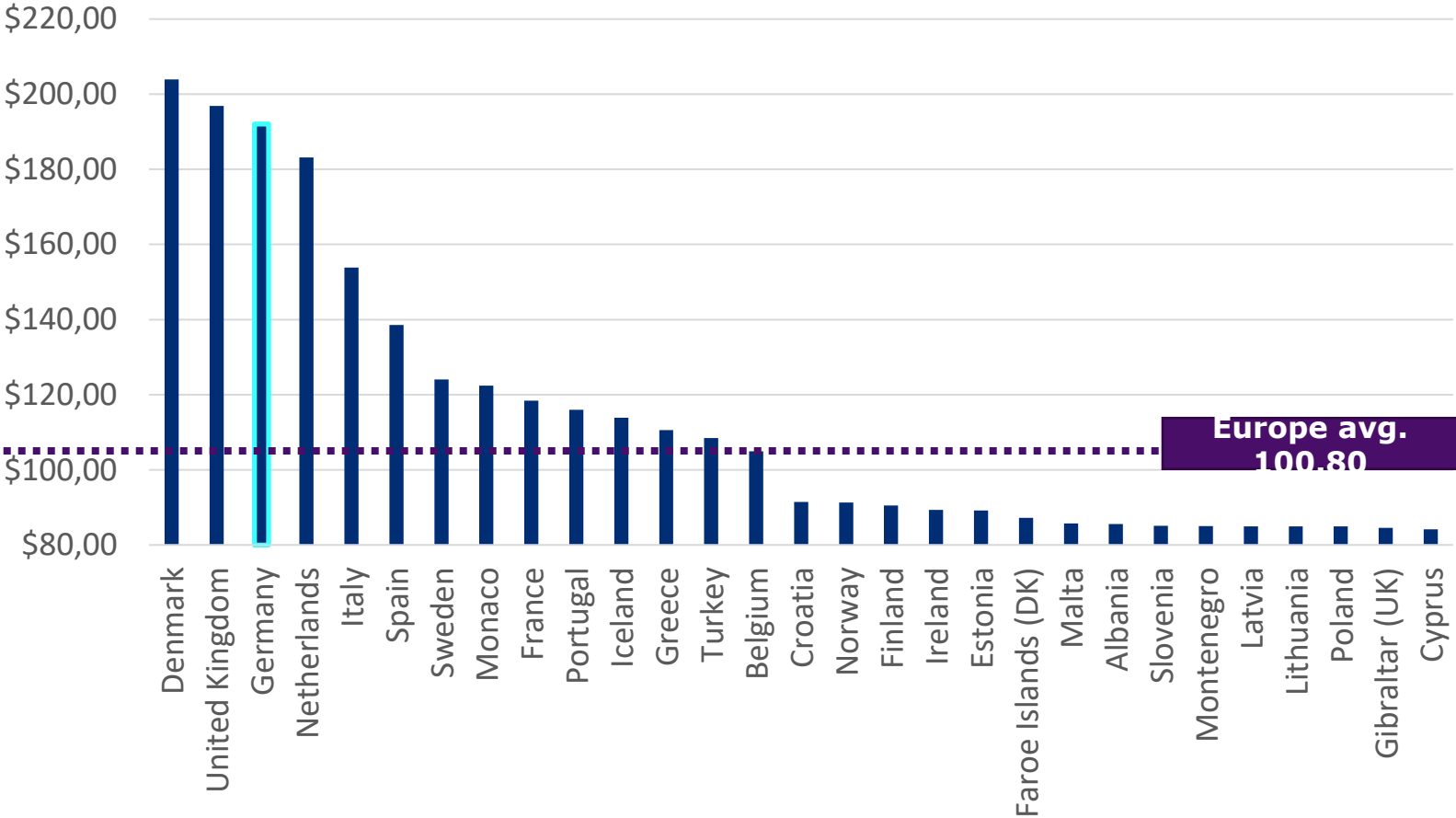
€176 ashore per turnaround passenger vs. €43 in transit
Rostock’s share is the high-yield one.



EU comparison – passenger spend per visit

(Data: 377 European ports, 2024)

Spend per Visit (USD)



169.50

Eur. homeports
(21)

:

96.70

Eur. ports of call
(357)

USD per visit. The difference lies not in the country but in the type of call.

200

USD per passenger visit in Warnemünde (as a homeport, above the German average).

The type of call is decisive!



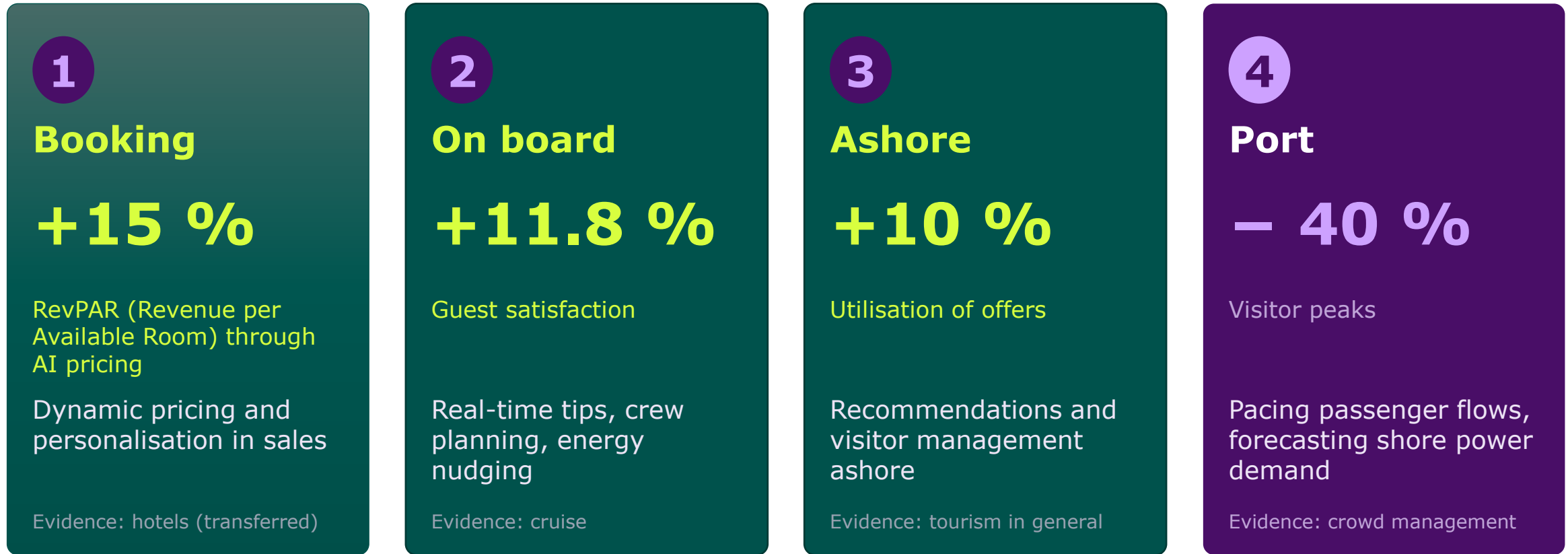
A sustainable business model rests on
knowing your customers ... and on your
customers knowing you!



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The potential of AI

The guest journey and what research shows at each stage



AI becomes a port matter: Without data access and common standards, the cruise line optimises alone.

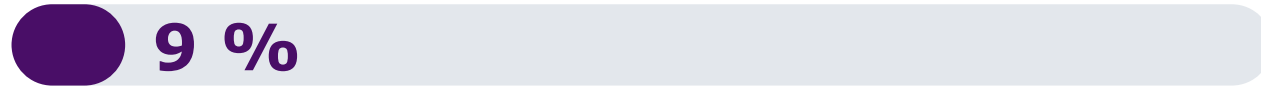


How visible is the Baltic to AI?

Own survey: 137 Baltic cruise websites put to the GEO test

GEO readiness: Ø 42/100 points

Findability for AI agents



Crawler access for AI bots



Structured data (Schema.org)



Page clarity & metadata



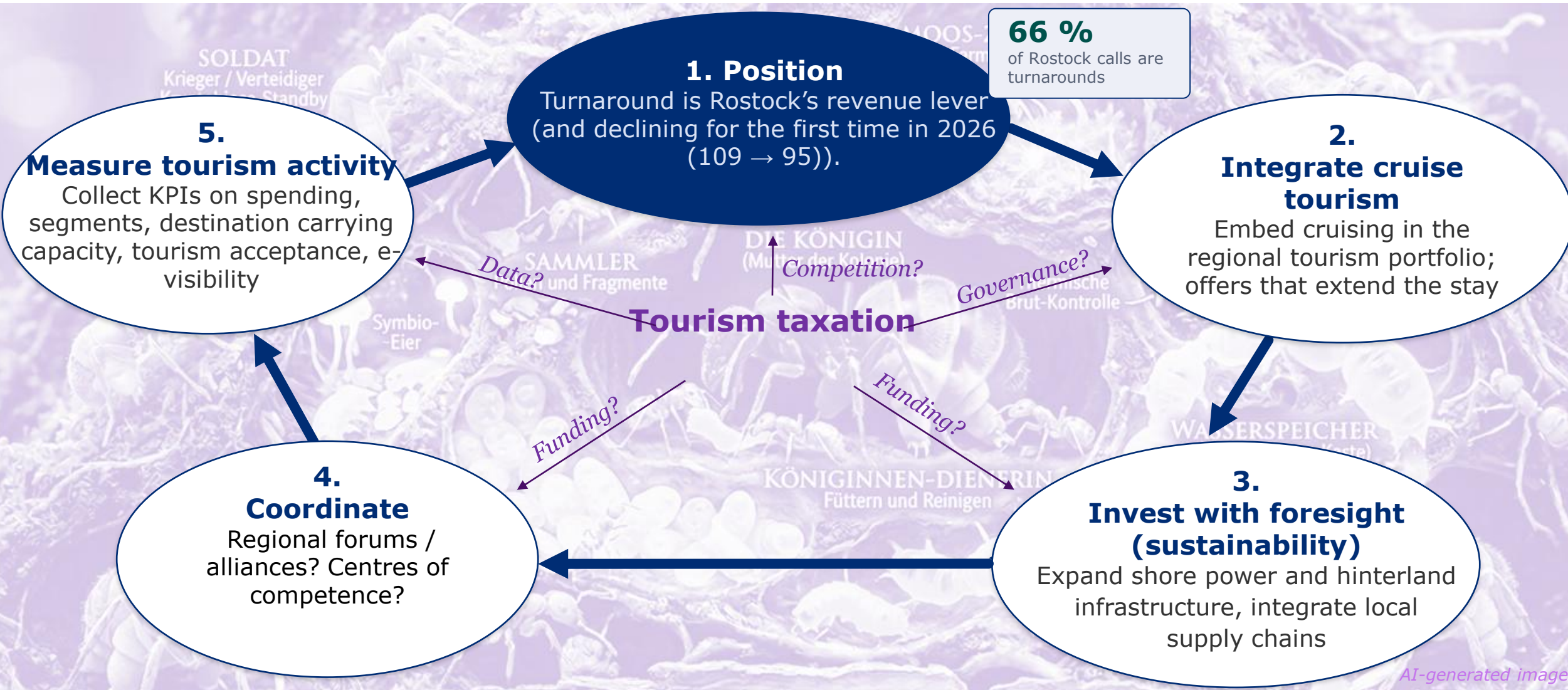
■ Access in place ■ Structural gap

- 1 Findability**
9 % of attainable points – hardly anyone guides AI agents
- 2 Structure**
56 sites score zero on structured data
- 3 Blockages**
Cruise lines and ports block AI crawlers via robots.txt
- 4 MV in focus**
Rostock Port 32, Rostock Tourism 38, Wismar 55, Kiel 58

What AI cannot read, it does not recommend. Visibility is infrastructure!

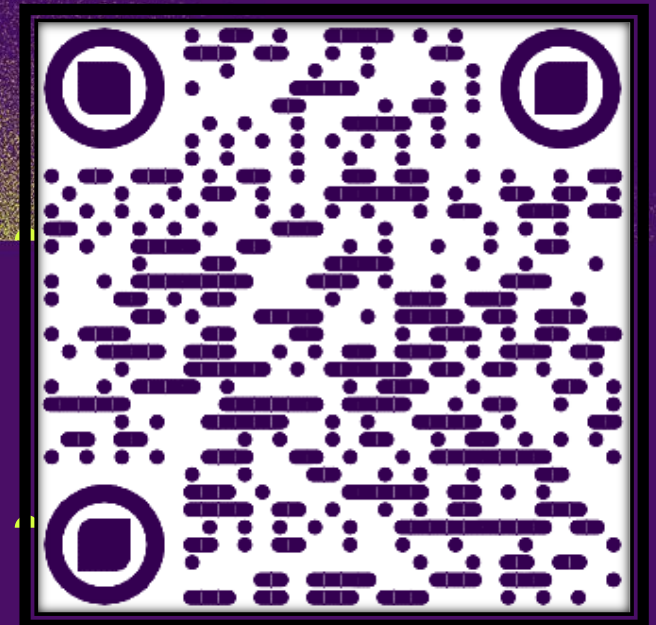
What must the region do?

Towards a 'learning' cruise region



Thank you for your attention

My presentations can be
downloaded here:





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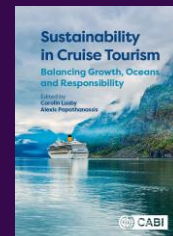
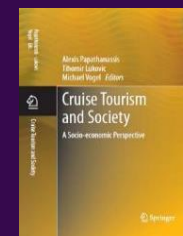
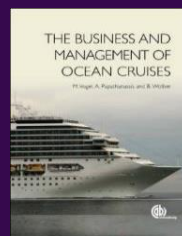
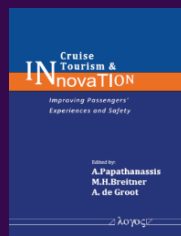
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