



Hochschule  
Bremerhaven

Prof.Dr.Dr.hc Alexis Papathanassis

# **“Pikachu-Effect” and Cruise Operators: Dissecting the Business Model and the Governance Challenges of Holidays at Sea**

(Workshop on Persons on ships – University of Oldenburg, 18 June 2026)

# What is Pokémon? Who is Pikachu?

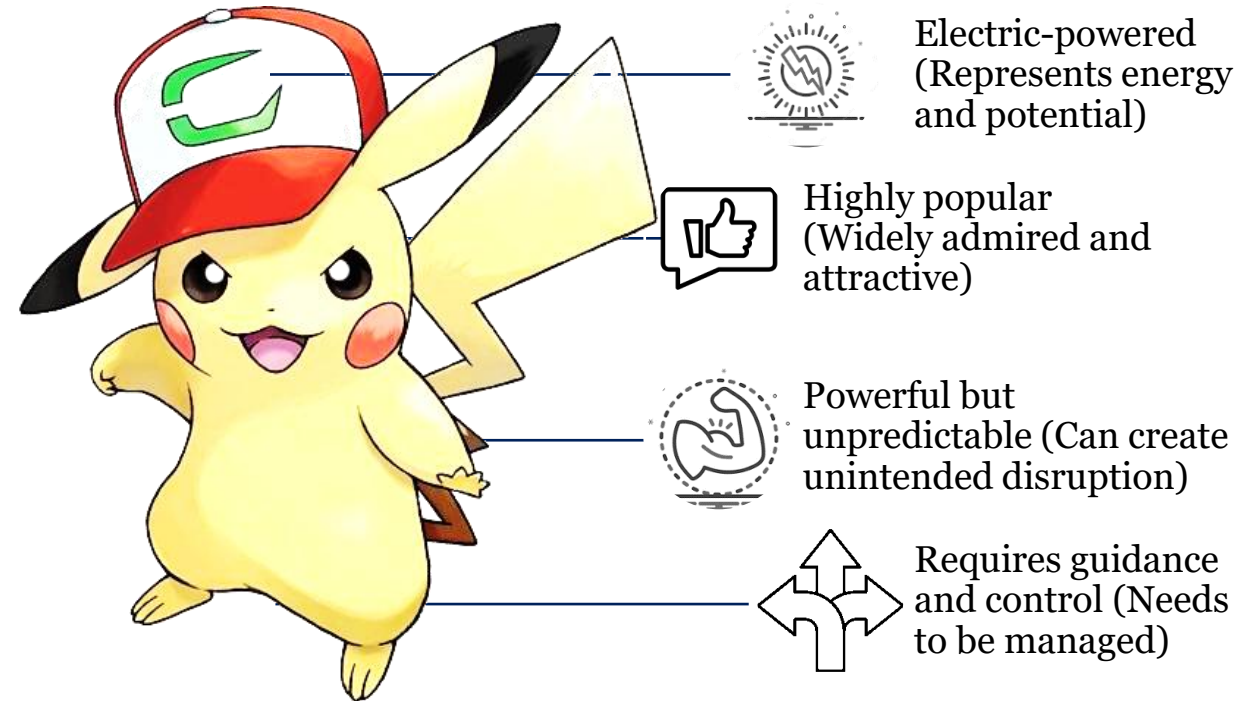
... And Why is it a Good Metaphor for Cruise Tourism?

# POKÉMON

Pokémon is a globally recognized Japanese media franchise centered on fictional creatures with distinct powers, abilities, and characteristics.

- Creatures possess unique strengths and vulnerabilities
- Trainers must guide and manage them strategically
- Power must be controlled responsibly
- Success depends on coordination, discipline, and systems of control

**Pikachu is the franchise's most iconic character.**



# Why are cruises so popular?

*For the similar reasons Pokemon is!*

## Value 4 Money:

- **Pokémon:** A single \$60 game = 100 hours of gameplay (cheap cost-per-hour entertainment)
- **Cruises:** With an average ticket price of Euro approx. 1300 for a all-inclusive holiday (incl. catering, transportation, entertainment)

## Collector's Loop (FOMO Effect):

- **Pokémon:** Players systematically hunt, catch, and catalog digital monsters to fill a Pokédex.
- **Cruises:** Travelers systematically visit, photograph (Instagrammability), and cross off different destinations (been there, done that)

## Safe Adventure ('Cruise Bubble Effect'):

- **Pokémon:** Gamers experience the thrill of exploring wild, dangerous landscapes, but from the safety of their couch.
- **Cruises:** Tourists experience exotic, foreign destinations, from the safety and familiarity of their own 'home at sea'.

## Generational Repeaters:

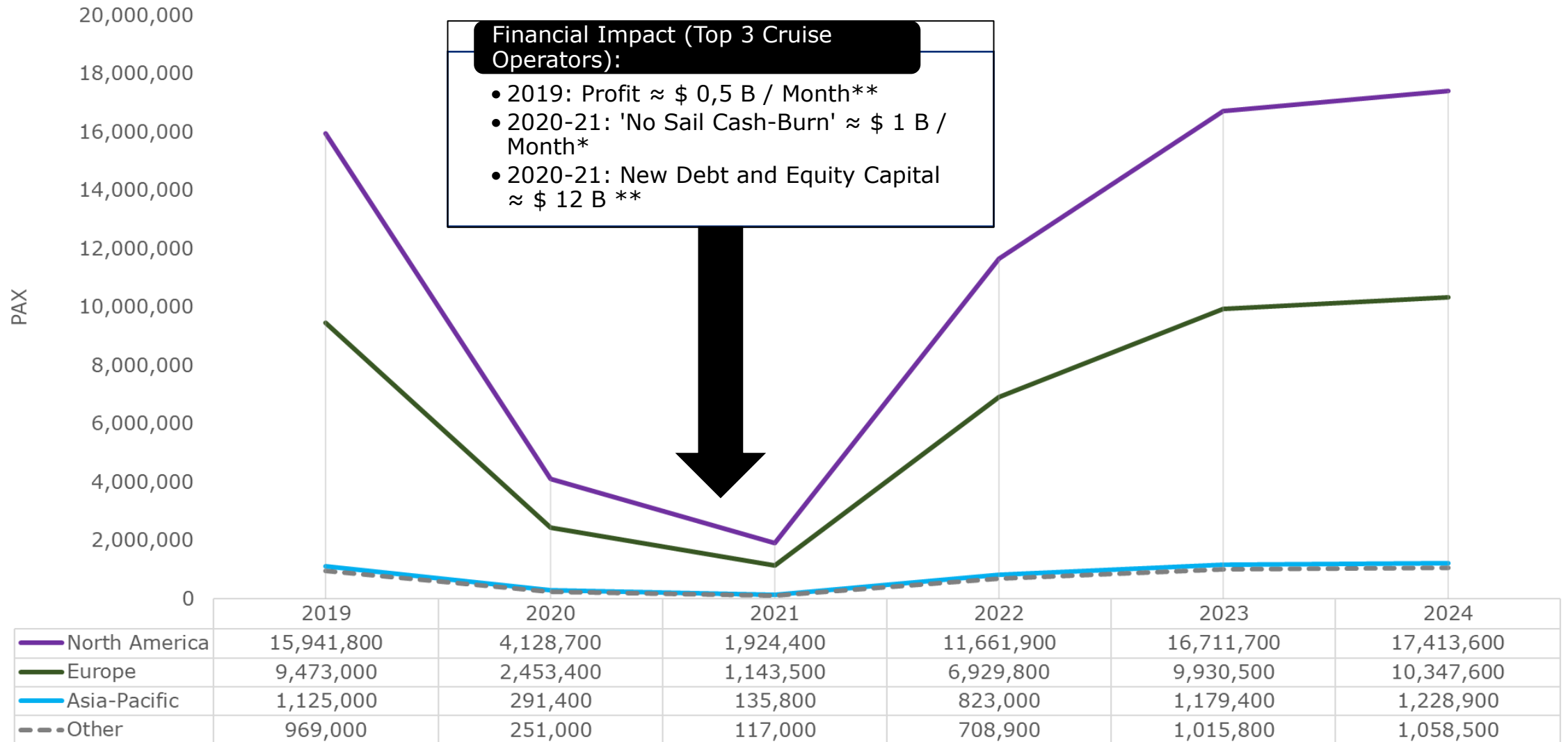
- **Pokémon:** Nostalgic Millennial parents who played in 1996 now buy the games and plushies for their Gen Alpha kids.
- **Cruises:** Grandparents (Boomers) bond with grandchildren onboard waterparks, fostering a new generation of cruise customers.



AI-generated Image



# COVID19 Effect: Cruise Tourism Resilience and Popularity



# Multi-generational Appeal... Several Source Markets!

## *Cruising as a "Killer-Combination of Holiday-features"*



### Cruise market mostly Millennial and Gen Z

"How likely are you to go on a cruise vacation in the next 12 months?" (% adults)



YouGov

<https://yougov.com/en-us/articles/51402-whos-ready-to-cruise-and-which-cruise-lines-theyre-considering>

YouGov Profiles | January 12, 2025



### Baby Boomers dominate cruise market

"Which, if any, of the following types of vacation are you planning on going on (or have already been on) in the next 12 months? Please select all that apply." (% of British adults who selected "cruise vacation")



YouGov

<https://yougov.com/en-gb/articles/52527-whos-ready-to-cruise-in-great-britain-and-which-lines-top-their-list>

YouGov Profiles | 29 June, 2025



### Reisen Sie in der Regel gern auf größeren Schiffen, z. Bsp. ein Kreuzfahrtschiff, eine Fähre oder ein Tagesausflugsschiff?

Alter (2839 Erwachsene in Deutschland - 25. September 2025)

	All	18-24	25-34	35-44	45-54	55+
Nein, überhaupt nicht gern	<b>39%</b>	23	24	32	44	49
Nein, eher nicht gern	<b>20%</b>	22	24	25	16	18
Ja, eher gern	<b>19%</b>	21	30	25	15	14
Ja, sehr gern	<b>9%</b>	12	10	8	8	9
Weiß nicht / keine Angabe	<b>13%</b>	21	12	9	17	10

YouGov

What the world thinks

<https://yougov.com/de-de/aktuelle-ergebnisse/20250925-6d5c8-2>

yougov.com

Transport, accommodation, dining and leisure activities are bundled into a single product, offering variety and a travel experience characterised by high predictability, comfort and organisational efficiency. All this is complemented by excellent value for money, which is a key factor in making the cruise industry comparatively resilient and strengthening its long-term growth potential.

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# Cruise 'Pokemon' Business

*What and how much do  
passengers actually spend? And  
how does this influence the  
Cruise Business Model?*



Thrill Island

Slide waterpark (6 waterslides)



Chill Island

Pool area (7 pools) ft largest pool at sea



Surfside

For young families, places to eat, drink, and play



Hideaway

Look and feel of a beach club, multilevel terrace, infinity pool



Aqua Dome

Theater, Tallest waterfall at sea



Central Park

Park with real plants, shops live ent/nt and restaurants



Royal Promenade

Ice arena, shops, catering venues



Suite Neighbourhood

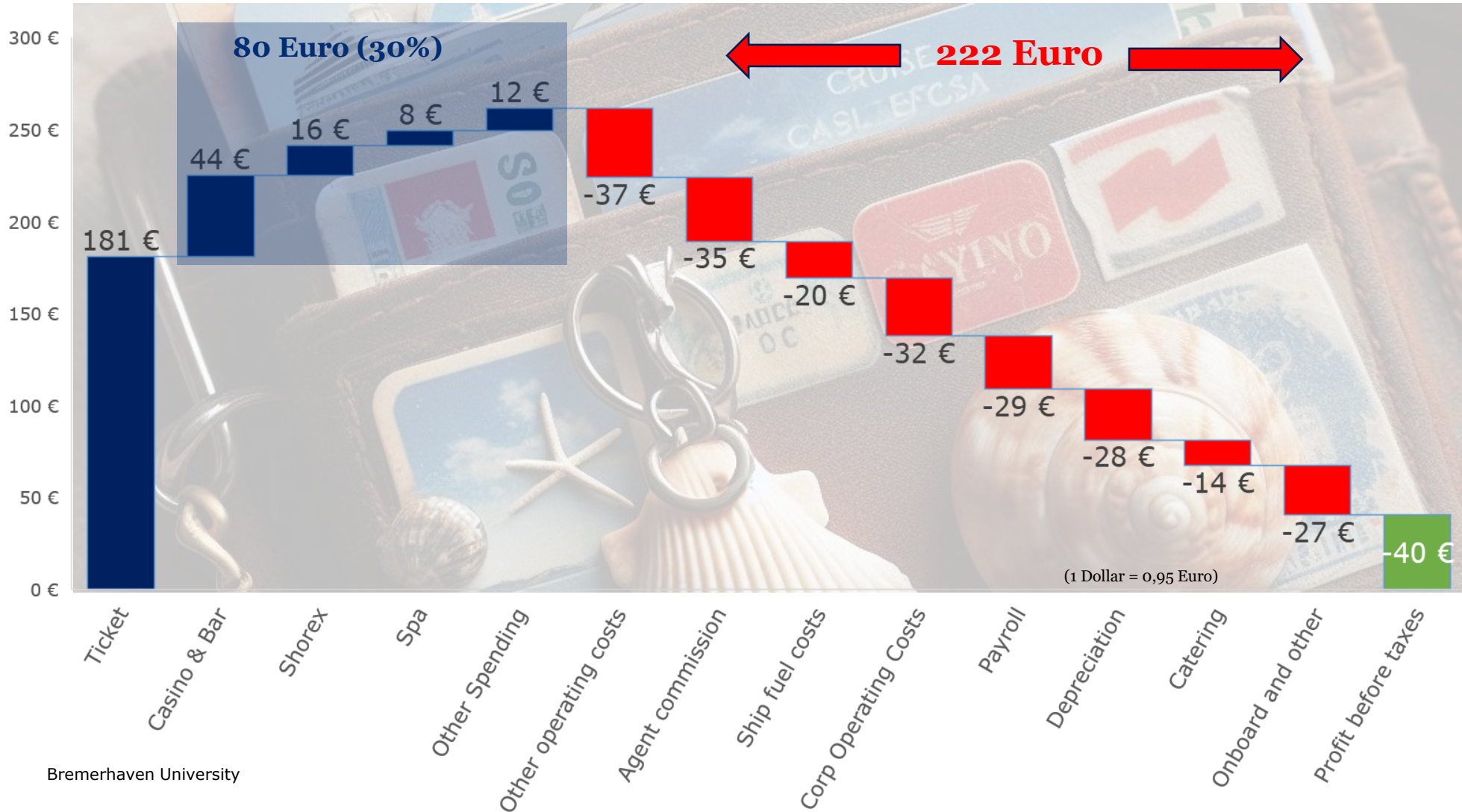
Restaurant, sun deck, restaurants, pools



The Competition on Land and Monopolies on Board create the premises for **Captive Pricing**. On Board Revenue is vital for **economic survival** and profitability

# On-Board Revenue and Captive Pricing

## Typical Cruiser Financial Breakdown 2024



The **Competition on Land** and **Monopolies on Board** create the premises for **Captive Pricing**. On Board Revenue is vital for **economic survival** and profitability

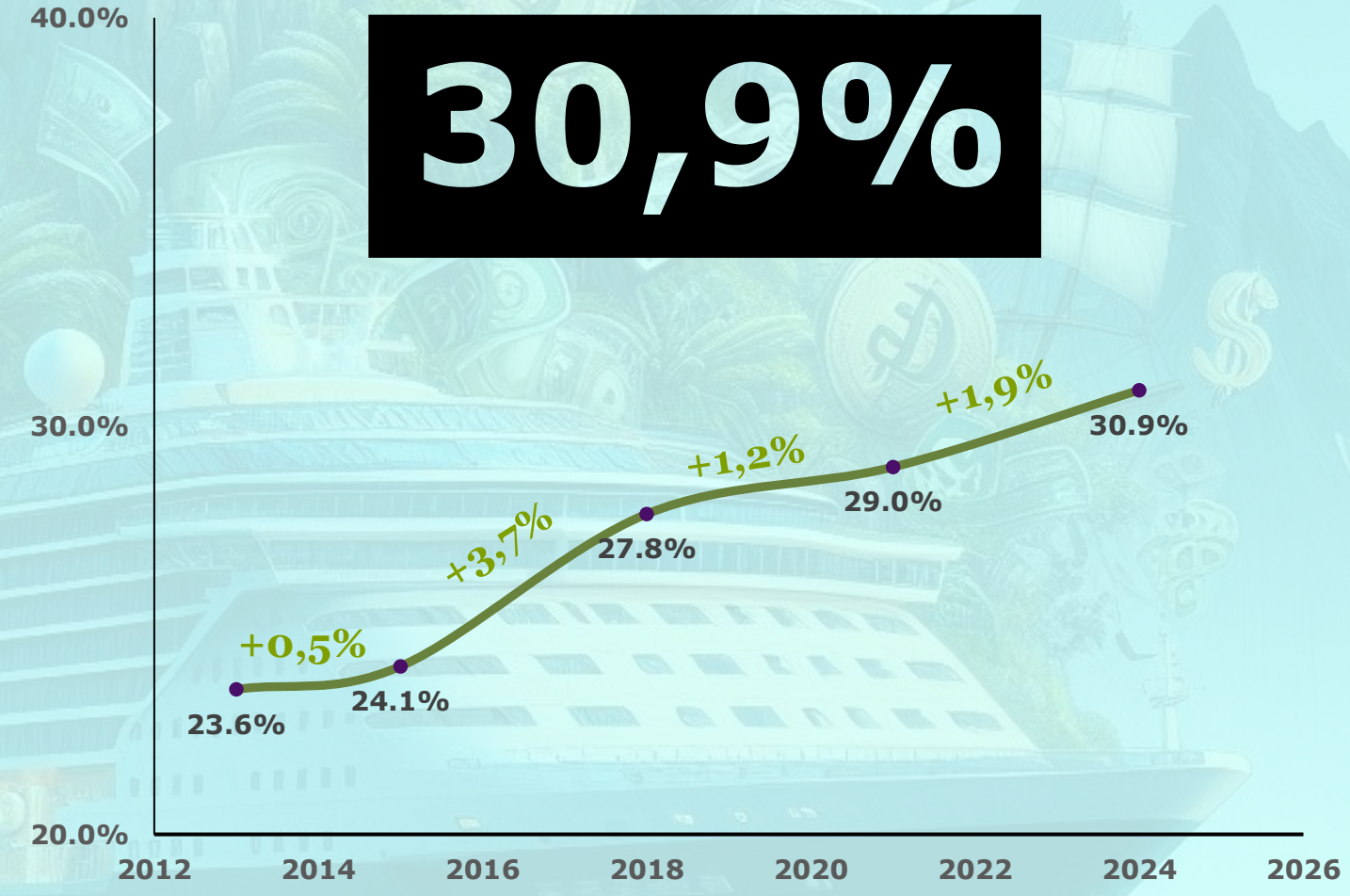


# On-Board Revenue and Captive Pricing

*A driver of increasing ship size and competition for port economies?*

**69,1%**

On-Board Revenue Development 2013-2024



**30,9%**



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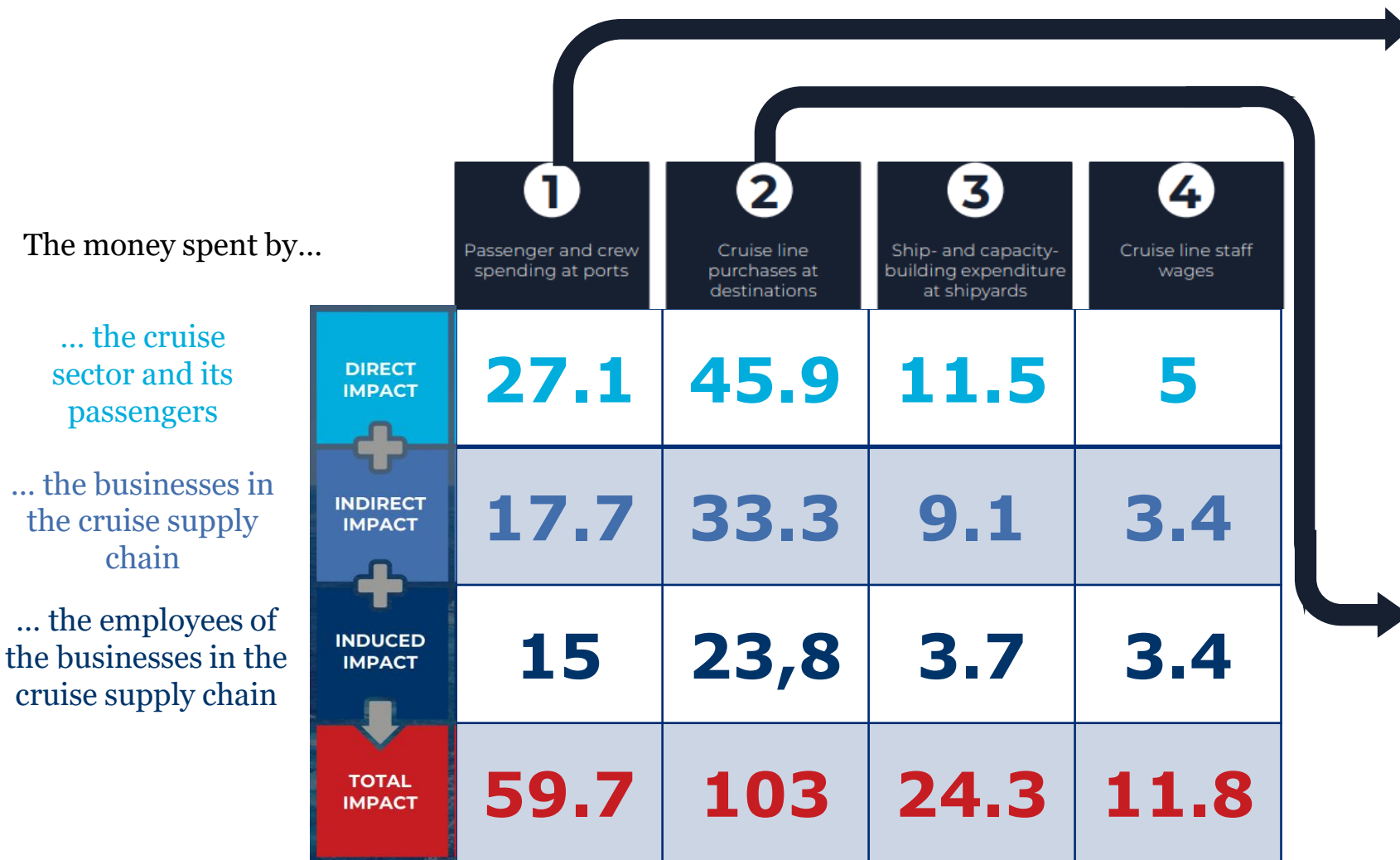
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# Cruise and the 'Pikachu Economy'

*Who benefits and who carries  
the consequences?*

# Economic Impact of Cruise Tourism (Bn\$)

*B2B has the Lion's Share of Benefits!*



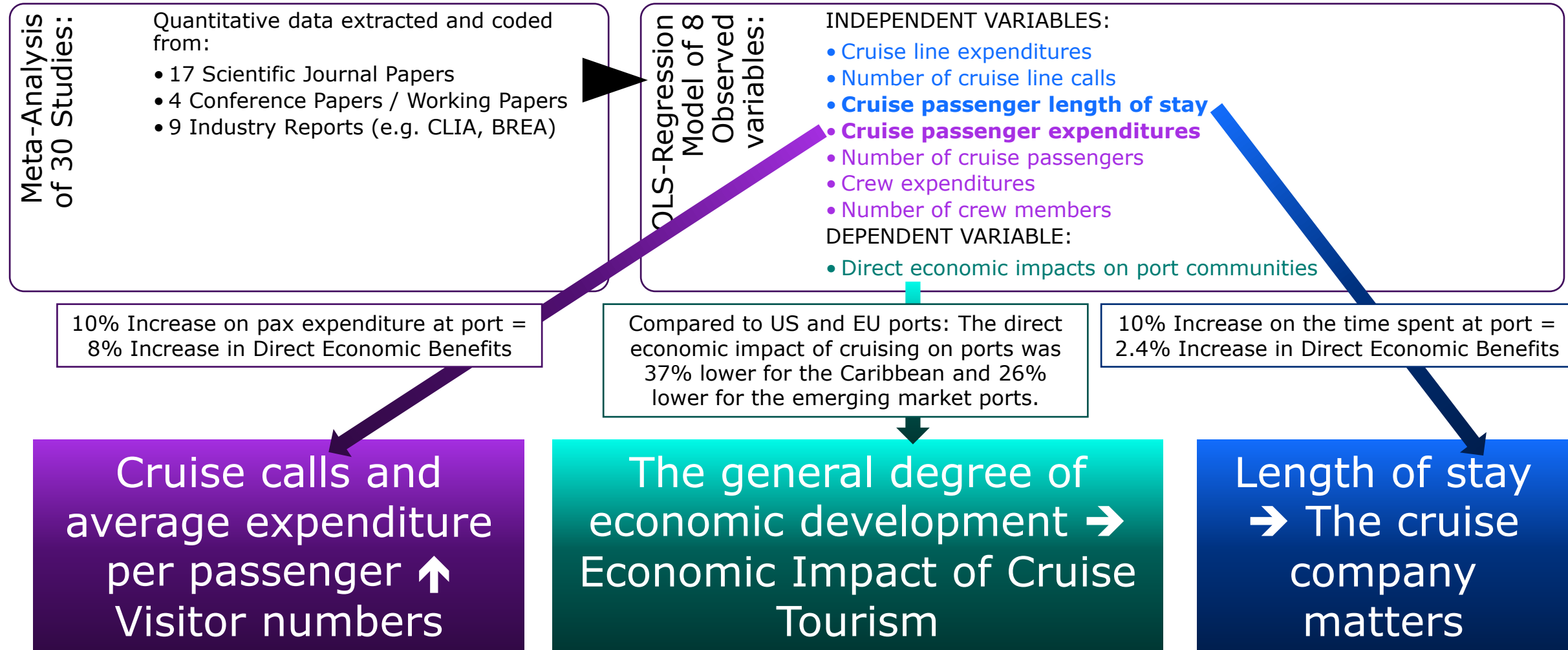
- **Onshore Transport:** Taxis, buses, car rentals, and local trains used to get around the port area.
- **Food & Beverage:** Restaurants, cafes, and bars at the destination.
- **Retail Purchases:** Souvenirs, clothing, duty-free items, and local goods.
- **Shore Excursions & Entertainment:** Guided tours, museums, and local attractions.

- **Provisioning & Supplies:** Large volumes of local food, fresh produce, beverages, and other supplies needed to restock the ship.
- **Port Fees & Taxes:** Dockage, berthing, and pilotage fees paid directly to local port authorities and governments.
- **Excursion Payments:** Wholesale contracts paid to local tour operators, transportation providers (buses, boats, guides), and local attractions.
- **Maritime Services:** Expenditures for tugboats, line handling, and local waste disposal or recycling services.
- **Onshore Power:** Utility payments for shoreside electricity where local Onshore Power Supply (OPS) infrastructure is available.



# The Ports...

## A Meta analysis of the economic impact of cruises on destinations



# Cruise Sustainability Headlines

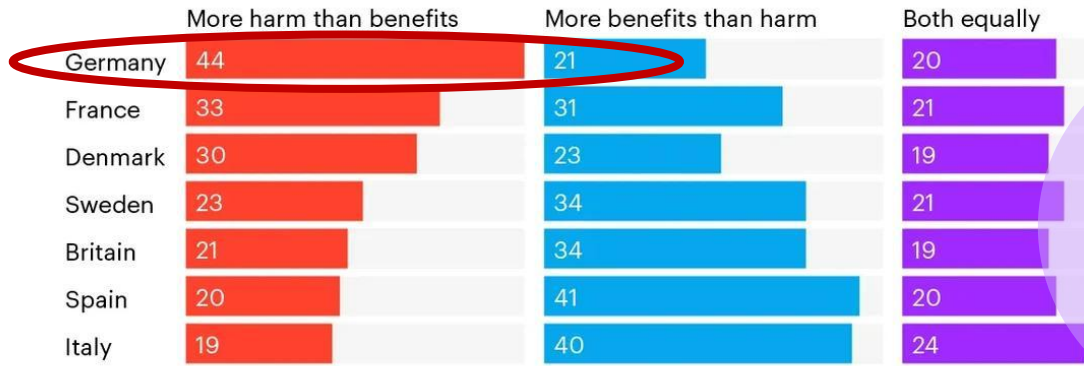
Public scrutiny in the headlines... In all dimensions!



# Economic Impact Perceptions... vs Reality!

## Eurotrack overtourism study: Germans have a particularly negative view of the impact of the cruise ship holiday industry than compared to other Europeans

Thinking about each of the following components of the tourism and travel industry in your country, do you think they bring more benefits than harm, or more harm than benefits? [Cruise ship holiday industry] %



Generally speaking, do you have a favourable or unfavourable view of each of the following components of the tourism and travel industry? [Cruise ship holiday industry] %

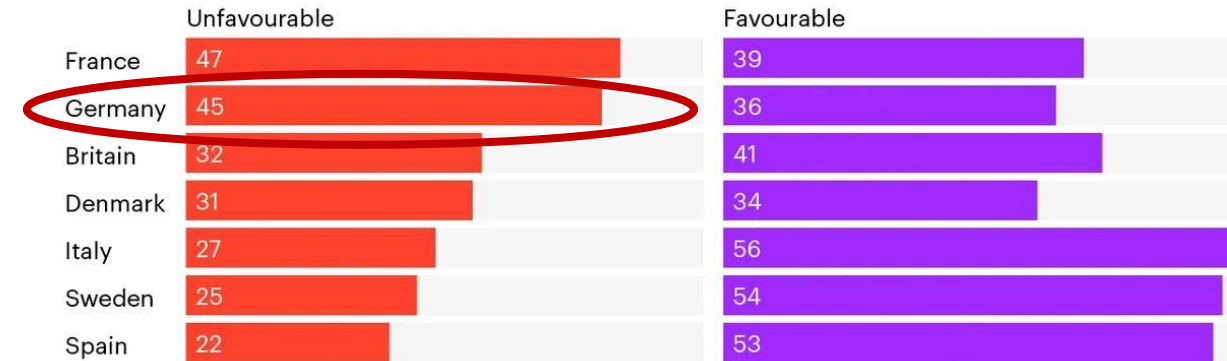


Fig. 17. Cruise industry GDP impacts by country, 2024 (€ billions)

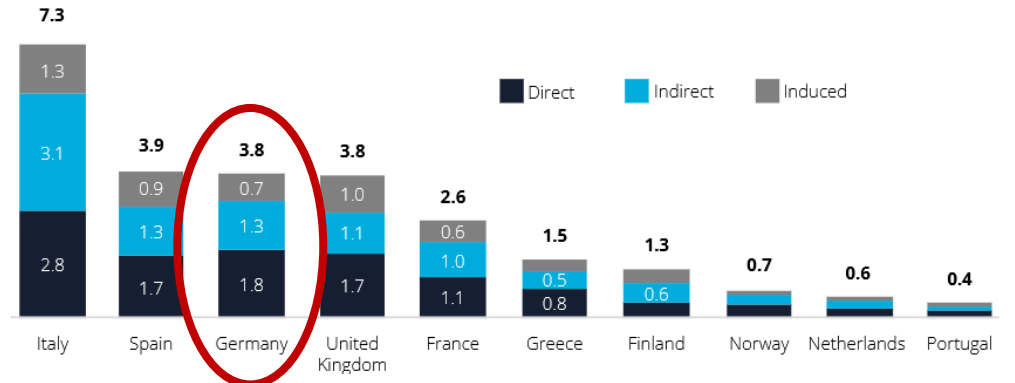


Fig. 15. Cruise industry's output impacts in Europe by country, 2024 (€ billions)

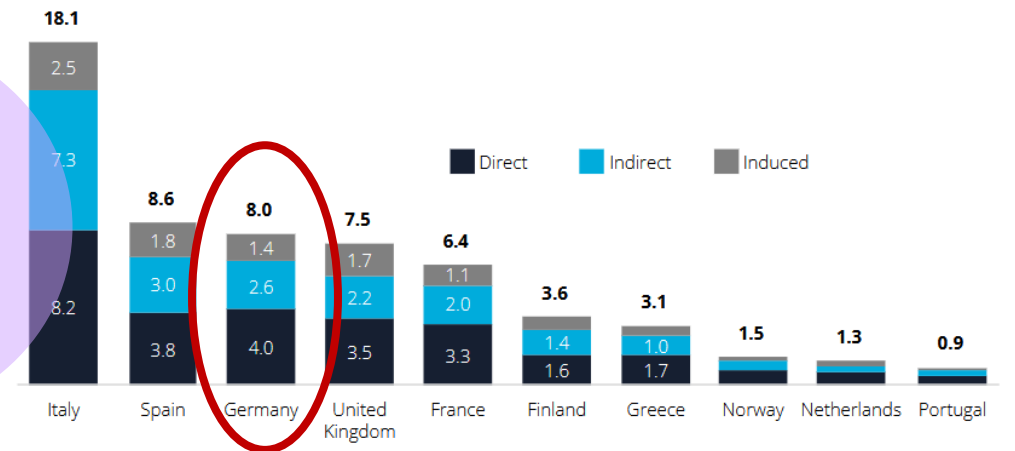
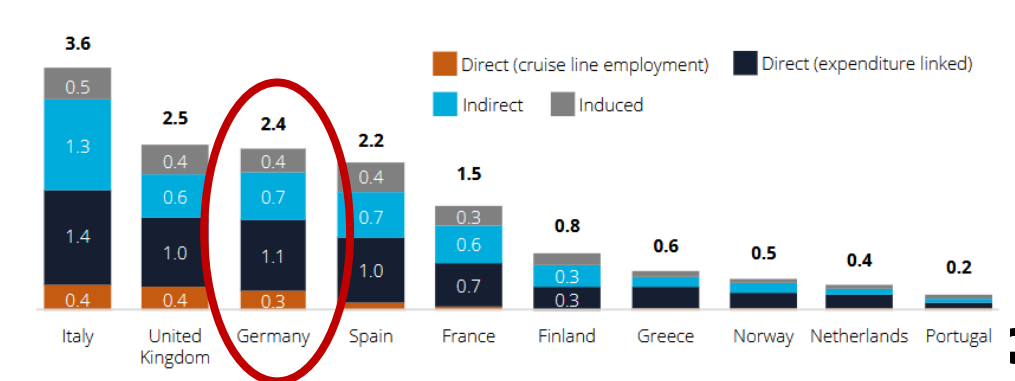


Fig. 22. Cruise industry generated wages in Europe by country, 2024 (€ billions)



# Destinations and local communities are questioning the actual value-added of cruise tourism: *Is it worth the hassle?*

**BBC** Sign in Home News Sport Reel Worklife Travel

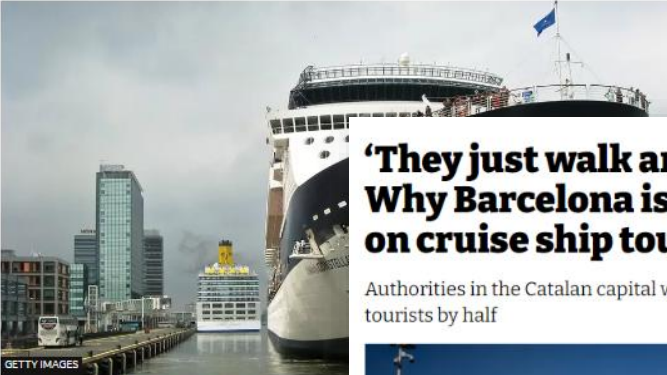
**NEWS**

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## Amsterdam bans cruise ships to limit visitors and curb pollution

21 July • Comments



GETTY IMAGES  
A passenger terminal in Amsterdam's docklands

### 'They just walk around for hours': Why Barcelona is cracking down on cruise ship tourists

Authorities in the Catalan capital want to reduce the number of cruise tourists by half



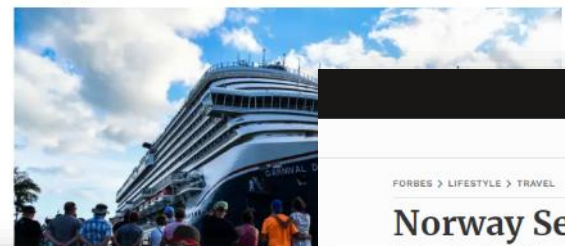
Tourists leave the passenger terminal for onward travel at the Port of Barcelona (Photo: Angel Garcia/Bloomberg via Getty Images)

INSIDER

Nächstes Ziel: Danzig zum Bestpreis.

## These US port cities are fighting to restrict cruise ships. It's easier said than done.

Hannah Tourey Apr 5, 2025 9:40 PM MESZ




Forbes

FORBES > LIFESTYLE > TRAVEL

## Norway Set To Introduce More Restrictions On Cruise Ships

David Nikel Senior Contributor @  
Travel with a focus on Norway & Scandinavia, and the cruise industry.

Feb 26, 2022, 09:43am EST



More restrictions on large cruise ships are expected in Norway following a report presented by a ... [+] GETTY IMAGES FOR P&O CRUISES

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The Observer Barcelona

This article is more than 4 months old

## 'A plague of locusts': Barcelona battles port authorities to curb cruise tourists

Councillors and residents hope to limit the number of daytrippers arriving by boat to preserve the city's streets and character



A cruise ship at Barcelona's harbour. Up to 25,000 tourists arrive in the city every day. Photograph: Pau Barrena/AFP/Getty Images

The ships, at times dwarfing the average apartment building, begin

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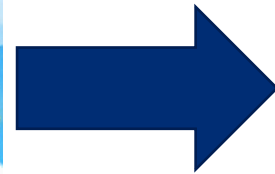
# The core dilemma of port destinations

*Are cargo shipping and other forms of tourism preferable?*



# Cruise Tourism as Pikachu

*Maritime Tourism represents a High-Value + High-Risk system*



Pikachu	Cruise Tourism
Popular and attractive	Economically attractive
Generates powerful electricity	Generates economic activity
Hard to control without systems	Hard to regulate across jurisdictions
Can create unintended shocks	Can create environmental/social externalities

Cruise tourism is powerful and beneficial... but requires careful governance to avoid disruption.

AI-generated Image



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# Winning the 'Pokemon' Cruise Game

*Key Policy Objectives*

# The “Electric Surge” and the Governance Challenge:

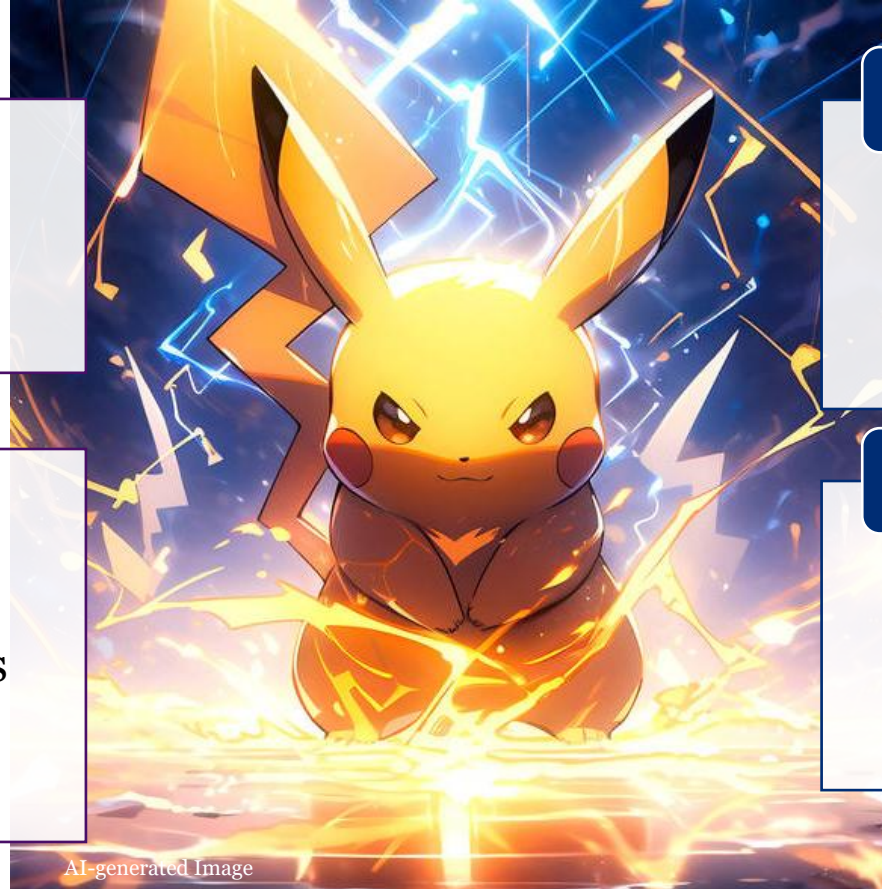
*It ignores borders and if uncontrolled can be destructive!*

## If Pikachu releases uncontrolled electricity:

- Overloaded systems
- Infrastructure damage
- Unintended disruption

## Equivalent cruise tourism impacts:

- Port congestion
- Air and marine pollution
- Waste management pressures
- Overtourism
- Community resistance



AI-generated Image

## Similarly, cruise tourism is transnational:

- Ship registered in one country
- Owned in another
- Managed elsewhere
- Visiting multiple ports

## Policy Consequences

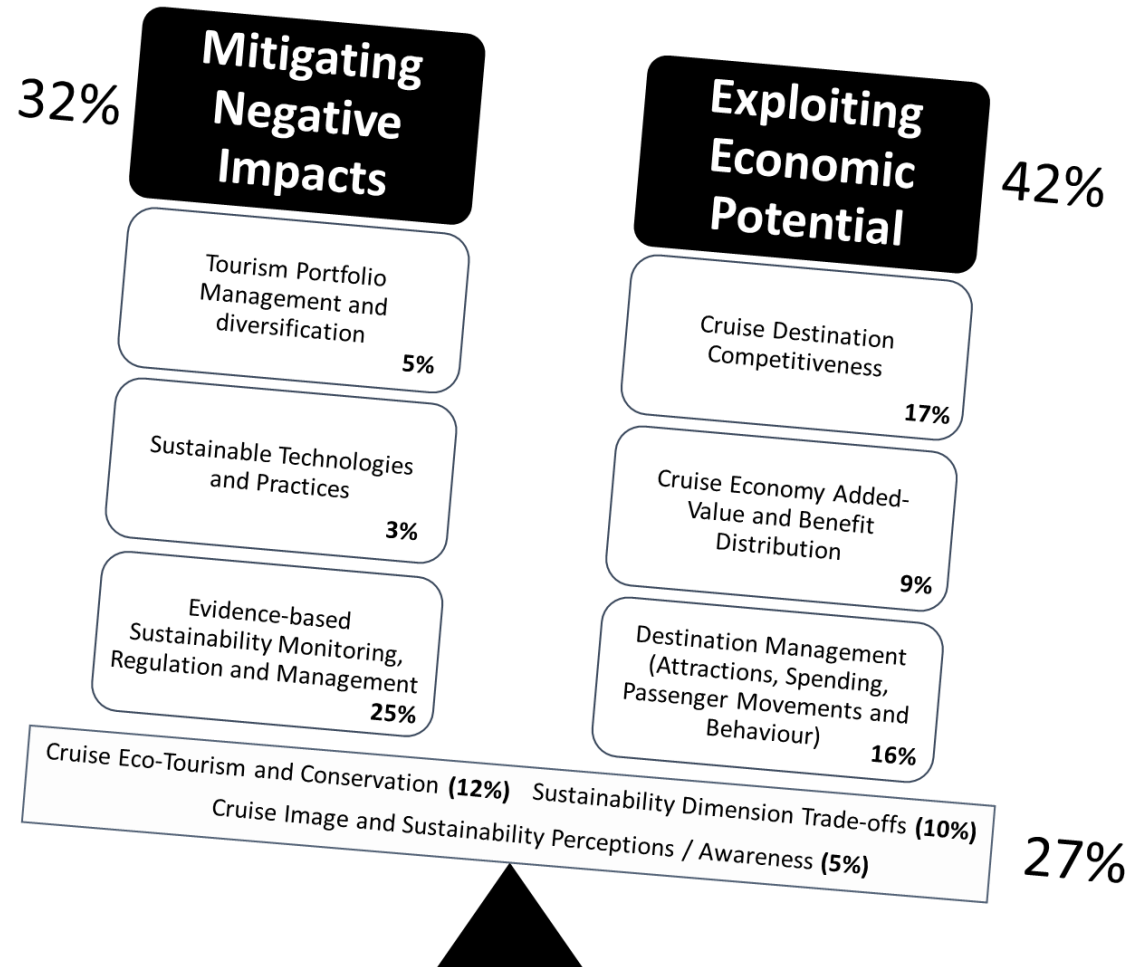
- Fragmented accountability
- Regulatory inconsistency
- Enforcement gaps
- Jurisdictional overlap

# Steering vs. Prohibition Approach to Policy



# Cruise tourism sustainability – A decade of scientific research

*Most of the Research has been on Exploiting Economic Potential...*




The percentages reflect the proportion of published sources in the selected sample for this systematic literature review (N=151)

**Ocean Decade Laboratories**

## A PRODUCTIVE OCEAN

31 May – 2 June 2022



“Tourism does not manage itself and sustainability gets lost between apathy and advocacy. Empathy is what we need. We empathise with what we experience. Tourism is experience.”

**Prof. Dr. Dr. Alexis Papathanassis,**  
Bremerhaven University of Applied Sciences

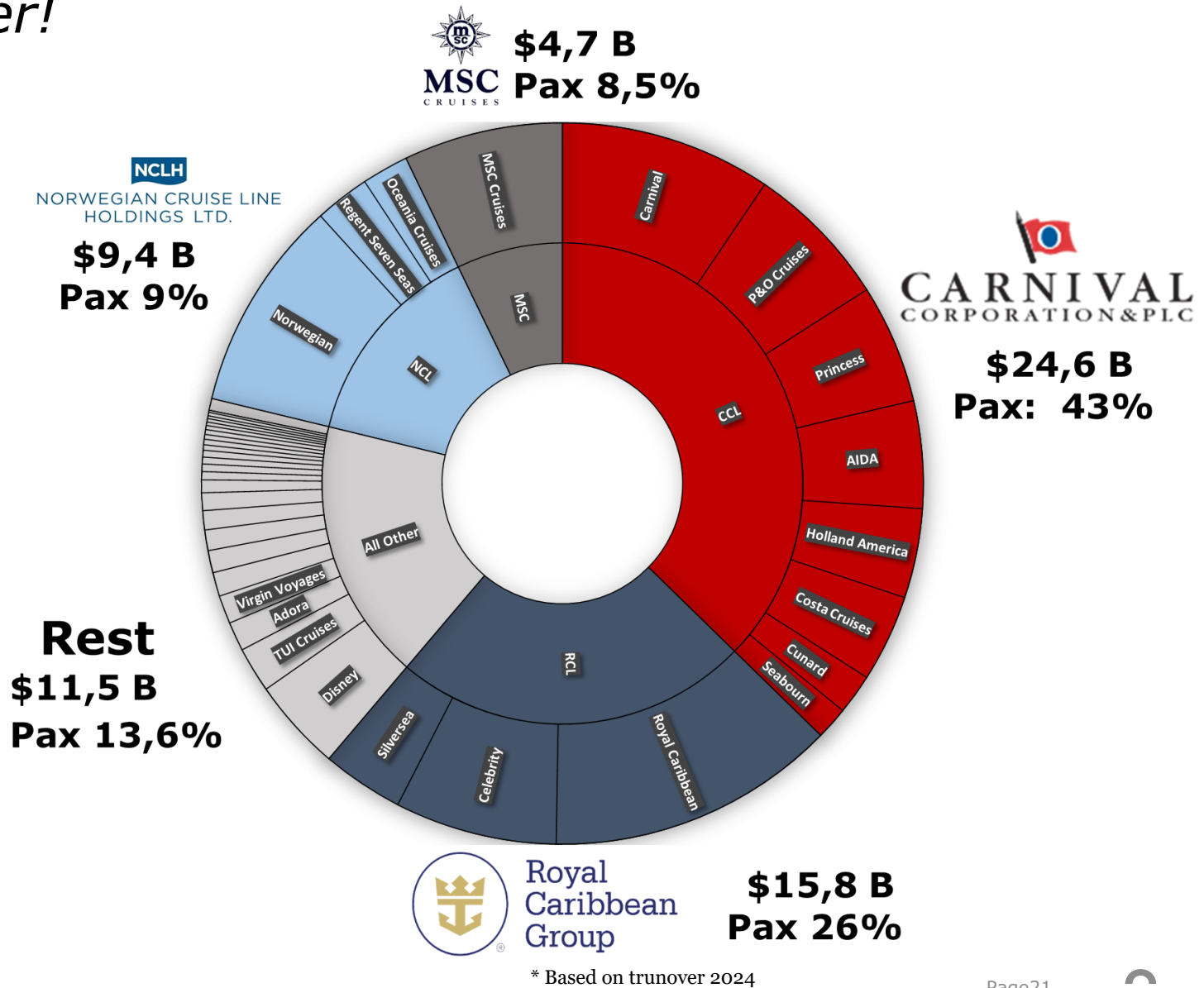
[www.oceandecade-conference.com](http://www.oceandecade-conference.com)



# Market Shares and Sectoral Concentration

## Financial- and Bargaining-Power!

A **few** cruise corporations control **deployment** of large **capacities** and indirectly the benefit and guest-spending distribution **within** and **between** sailing **regions**... And can **afford** penalties and lengthy legal **battles**!



\* Based on turnover 2024



# Cruiseships as destinations and destinations as cruiseships: *'Dry-Cruising' - The emergence of private islands*

TRAVEL WEEKLY

## THE EVOLUTION OF CRUISING'S PRIVATE ISLANDS

Some passengers say they don't care where the ship goes, as long as it stops at the cruise line's exclusive destinations. Executive teams are responding by enhancing private islands and building new experiences in established ports.

Another factor is anti-tourism, or anti-cruise, sentiment.

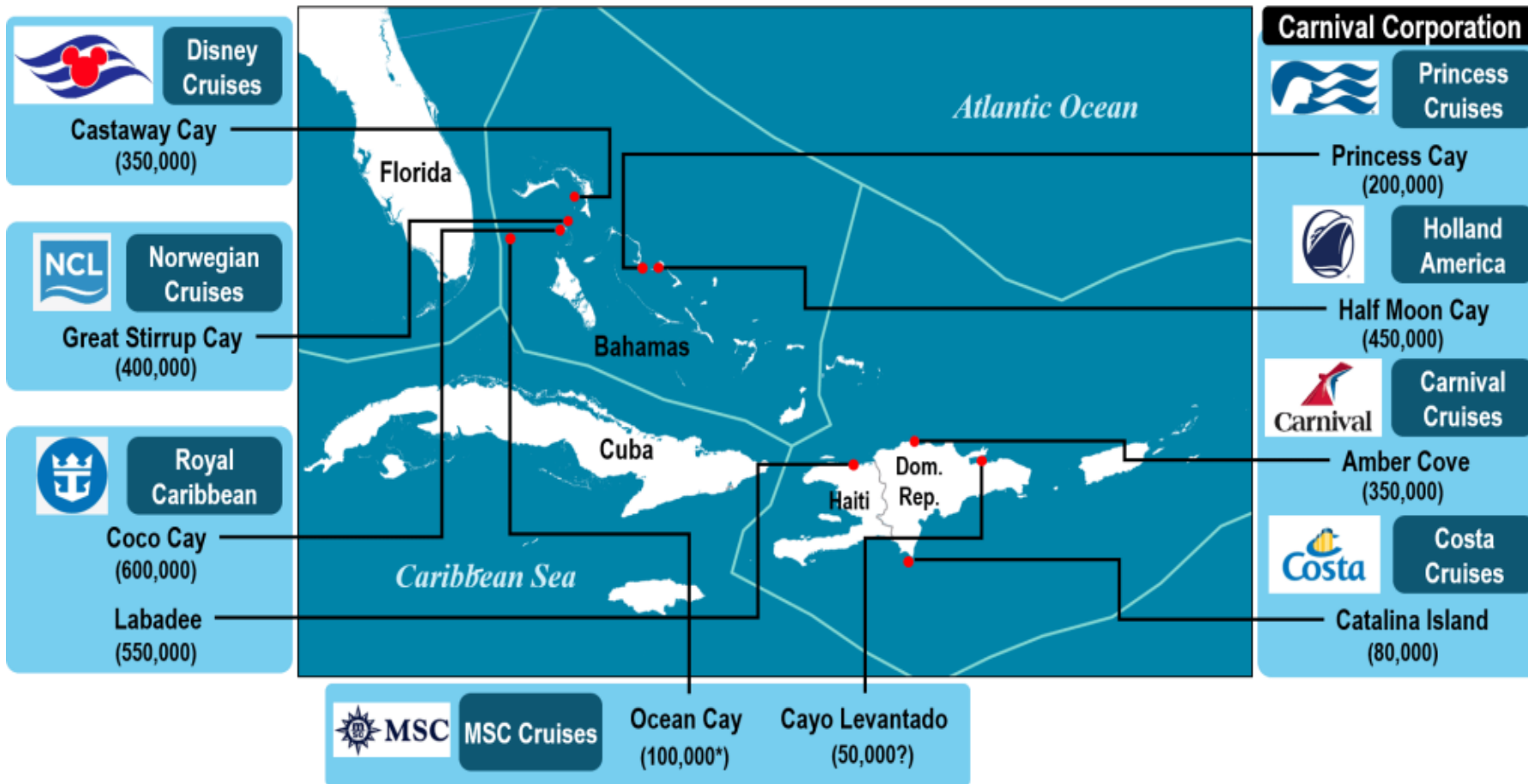
Part of the drive to develop private destinations is creating locations that can both accommodate large ships and wants them, said Koreen McNutt, senior vice president of sales and trade engagement and commercial sales officer for MSC Cruises, which opened the Ocean Cay MSC Marine Reserve private island in late 2019.

BY ANDREA ZELINSKI  
MARCH 11, 2024

Offering sandy beaches and a variety of amenities, private destinations often garner a cruise line's highest guest approval ratings. They are so in demand, some travel advisors say their clients don't care where they go as long as their cruise stops at a private island or beach. And most Caribbean-bound ships oblige, some offering itineraries that visit more than one private destination and others sailing short jaunts with only a private island call.

# Private islands of cruise companies... Leased for 99 Years!

*They can accommodate 3,130,000 guests per year*



MSC Cruises:  
Sir Bani Yas  
ABU DHABI,  
UNITED  
ARAB  
EMIRATES



MSC Cruises:  
Portuguese  
Island  
MOZAMBIQUE



Paul Gauguin  
Cruises:  
Motu Mahana  
FRENCH  
POLYNESIA



# EU Emission Trading System (ETS)

*Compliance Costs... or.... ,Eurexit'?*



## EU Emission Trading System (ETS):

- From January 2024: Extension to all large ships with a gross tonnage of 5000 and more calling at EU ports.
- Coverage:
  - 50% of emissions from voyages outside the EU.
  - 100% of emissions between EU ports and in EU ports.
  - CO<sub>2</sub>, CH<sub>4</sub> and N<sub>2</sub>O from 2026.

## IMO's EEXI and CII reporting:

- From 2023: Annual submission of two pieces of information to the IMO
- **EEXI (Energy Efficiency eXisting Ship Index)**: Measurement of a ship's energy efficiency compared to a baseline.
- **CII (Carbon Intensity Indicator)**: Measurement of the efficiency of a ship's goods or passenger transport.

## From 2024: Award of CII ratings (A-E) by the IMO.

- Rating **E**: Plan with corrective measures to achieve C or better.
- Rating **D** : 2 more years and plan with corrective measures.
- Rating **C, B or A**: aiming to achieve consistent A.

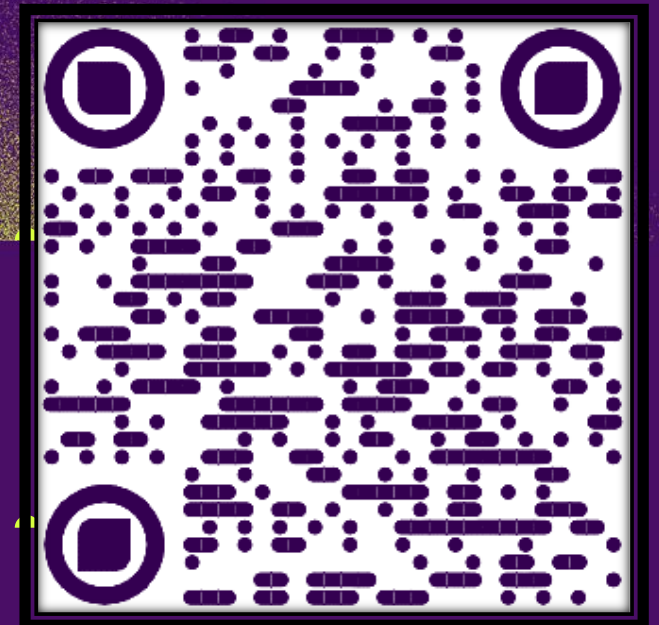


# Herding Cats: Effective Policy is about tourism architecture and long-term steering... across borders!



# Thank you for your attention

To download my presentations  
(including this one) scan here:



# Sustainability in Cruise Tourism

Balancing Growth, Oceans and Responsibility

Edited by  
Carolyn Lusby  
Alexis Papathanassis



# THE BUSINESS AND MANAGEMENT OF OCEAN CRUISES

Edited by A. Papathanassis and B. Wöhrle

## Cruise Business Development

Safety, Product Design and Human Capital



## Cruise Tourism and Society

A Socio-economic Perspective



Tourism, Hospitality & Event Management

Alexis Papathanassis - Stavros Katsios  
Nicoleta Ramona Dima - Editors

## Yellow Tourism

Crime and Corruption in the Holiday Sector



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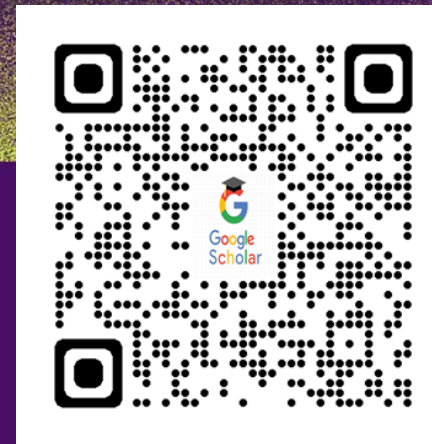
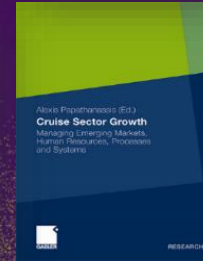
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