



Hechschule
Bremerhaven

Cruise Tourism Sector State and Dynamics: *Institute of Maritime Tourism Update 2024*

(Nautical Association Bremerhaven, 26 Mar 2024 / Weser Yacht Club Bremerhaven, 11 April 2024)

My 2021 forecast for the recovery of cruise tourism

(Weser Kurier – 28. und 31. Jan 2021)

„Ende September geht es Richtung Normalität“

Herr Professor Papathanassis, aus Angst vor den Corona-Mutationen will die Bundesregierung die Reisen noch weiter einschränken. Wann werden die Deutschen wieder halbwegs normal reisen können? Es wird ein langsamer Prozess, die Reisefreiheit zurückzubekommen. Ich rechne mit Reisen innerhalb Deutschlands zu Beginn des Sommers, zuerst besucht man Freunde und Verwandte, dann verreist man mit dem Wohnwagen oder dem eigenen Auto und übernachtet in einem kleinen Boutique-Hotel, in einer Art Sicherheitsblase. Aber organisierte Reisen außerhalb Deutschlands wird es erst gegen Ende des Sommers geben – und das ist ein optimistisches Szenario. Und auch wenn es Ende September wieder in Richtung Normalität geht: Das Vor-Corona-Niveau von 2019 wird erst Ende 2022/An-

Der Touristik-Professor Alexis Papathanassis rechnet damit, dass der Urlaub teurer wird – und das Reiseverhalten verändert.

nicht zu verspielen, Vertrauen ist die Überlebenswährung.

Nachhaltigkeit, Slow Tourism – w Pandemie hat diese Entwicklung zugleich den Tourismus entschle-

Das klingt so, als ob der Urlaub Ja, damit ist zu rechnen. Im Mo sich die Branche, die Kapazitäten Nachfrage wird schnell wieder s Reisen wieder möglich ist, zumal

heine haben, die Grund der reduzi se steigen. Auf die Pandemie il, das müssen sic

en um ihre Existenz, stalter. Selbst Reisegi wanken. Wer überlebt

elfall eine Frage des Fi ts, eine Prognose ist n zum Beispiel sein, dass nächst wieder stär werden, weil dadurch Si cherheit versprechen. Ganz wichtig für die Branche ist, das Vertrauen der Kunden

“ Because of the pandemic, cruise fleets are being modernized and digitalized more quickly, as to better manage the flow of people on ships. Hygiene concepts are being revised and sustainable technologies are being adopted. **I believe cruises will boom again. A high-quality holiday in a controlled environment - fits well in the post-Covid future.** ”



Ökonom Alexis Papathanassis, dessen Eltern eine Touristik-Agentur auf Rhodos besaßen, ist Professor für Cruise Tourism Management an der Hochschule Bremerhaven und tritt im Februar sein neues Amt als Rektor an. Der 45-Jährige hat Wirtschaft an der University of Bath und Wirtschaftsinformatik an der London School Of Economics studiert und wurde an der Leibniz Universität Hannover promoviert. Vor seiner akademischen Karriere war er Manager bei TUI. StZ

„Eine Menge Fragen zu klären“



Alexis Papathanassis (45) ist Professor für Touristik und Management für Kreuzfahrttourismus. Er lehrt seit 2005 an der Hochschule Bremerhaven und ist seit November 2020 auch ihr Rektor.

haben. Das Geld für das ganze Jahr wird im Sommer verdient. Den Verlust der Wintersaison wäre aus ihrer Perspektive zu verkraften. Die große Hoffnung für sie und der Überlebensfaktor bleibt der Verlauf der Sommersaison.

Wie schätzen Sie die wirtschaftliche Lage der Reisebranche ein?

Genauere Zahlen habe ich nicht, aber ich vermute, dass etwa ein Drittel der Betriebe in akuten Schwierigkeiten steckt. Es ist wichtig, dass die Branche eine Basis bekommt, auf der sowohl Betriebe als auch Reisende verlässlich planen können. Der Wirtschaftsbereich Reise und Freizeit macht auch in Deutschland acht bis neun Prozent des Bruttoinlandsproduktes aus. Wir reden also über einen wesentlichen Teil der Wirtschaftsleistung mit mehr als einer Million Beschäftigten.

Wird sich das Reisen verändern?

Tourismus als Branche ist resilient in Krisenzeiten. Das haben wir in der Vergangenheit beispielsweise nach der Finanzkrise oder auch nach der Sars-Pandemie gesehen. Auf den Tourismus zu setzen, hat sich zuletzt auch immer als Strategie bewährt, um die Wirtschaft eines Landes wieder anzukurbeln. Aber das wird dauern. Angenommen, dass Reisen ab dem Spätsommer wieder möglich sind, gehe ich nicht vor Anfang 2023 von einer Normalität aus. Die Frage ist, wie viel Kapazitäten dann übrig sind und wie sich unser Reiseverhalten bis dahin geändert hat.

Halten Sie eine Einstellung des Flugbetriebs für realistisch?

Alexis Papathanassis: Grundsätzlich wäre so eine Maßnahme natürlich möglich. Ich bin kein Jurist, deshalb kann ich die rechtlichen Aspekte nicht einschätzen. Geklärt werden müssten aber auch noch eine Menge anderer Fragen. Will man den Flugverkehr allgemein stoppen, oder sollen Menschen nur noch aus triftigen Gründen reisen? Welche Ausnahmen werden definiert, wie werden sie kontrolliert? Der Teufel steckt im Detail. Ich glaube, dass die Diskussion im Moment eher dazu dient, ein Signal zu senden, um die Ernsthaftigkeit der Lage zu verdeutlichen.

Was wären Auswirkungen auf den Tourismus?

Eine Frage ist ja auch, wie lange so eine Schließung dauern würde. Momentan sind wir nicht in der Hauptsaison, weder für Reisende, die nach Deutschland kommen, noch für Deutsche, die ins Ausland reisen wollen. Der Wintertourismus ist von einem allgemeinen Flugverbot weniger betroffen, weil die meisten mit dem Auto in die Skigebiete

“ But this will take time, I suppose. Supposing that travel resumes by the late summer, I would expect a **gradual return to normality starting in 2023.** ”



Prof.Dr.Dr.hc Alexis Papathanassis

Cruise Tourism Management
Bremerhaven University of Applied Sciences

E: apapathanassis@hs-bremerhaven.de

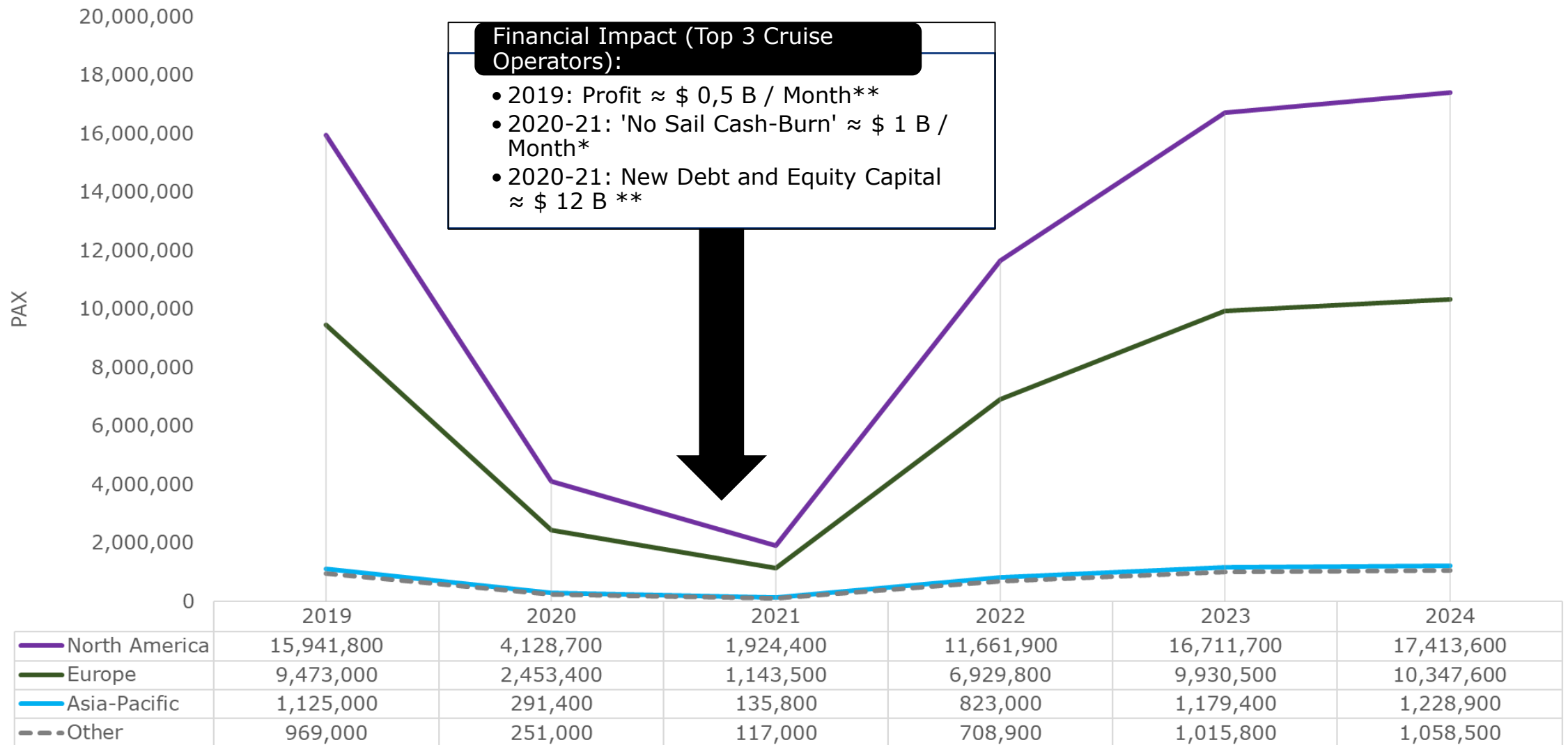
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Cruise Tourism Challenges



COVID19 Effect: Cruise Tourism Resilience



Staff shortages and COVID-19 fuel the competition for talent...

INSIDER

Next stop: Gdansk at the best price

Cruise lines are canceling sailings, closing onboard restaurants, and allowing fewer guests onboard amid hiring difficulties

Brittany Chang May 28, 2022, 1:57 PM MESZ

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How staff shortages are ruining cruise holidays

Cruise passengers should prepare themselves for fewer options at the buffet – or even the possibility of a last-minute cancellation

By Gary Buchanan
18 May 2022 · 1:19pm

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What you need to know: Where You Can Travel Now Without a Covid Vaccine or Test

Pursuits
Summer Travel

Cruise Lines Face a Rough Summer, and Covid Isn't the Only Problem

With many staffers unable to travel to their ships or get visas, some lines are limiting the number of paying guests per voyage.



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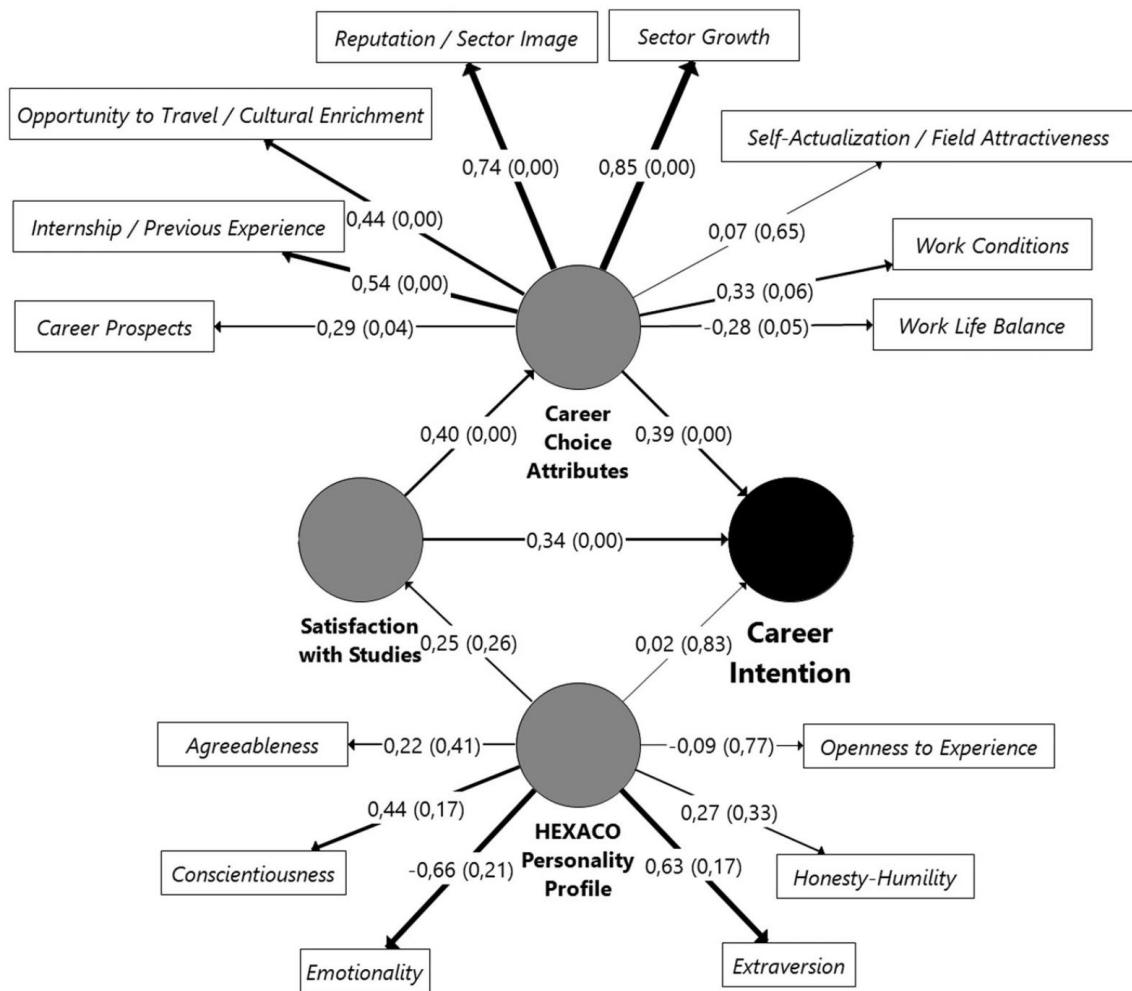
U.S. Cruise Lines Recovery Threatened by Worsening Labor Shortage

Praveen Paramesivam, Reuters
July 20th, 2022 at 4:50 PM EDT



Career Choice Attributes and Career Intention:

"Being paid to travel the world and getting stripes along the way" Story is insufficient!



"Coming to the rest, non-personality-related factors, our findings do not support the career expectation stereotypes of the younger hospitality-student generation. **Rather than focusing their decision on short term employment-focused aspects** such as: 'work conditions', 'work-life balance' and 'career-prospects', **they place particular emphasis on longer-term and somewhat idealistic considerations.** 'reputation / sector image', 'sector growth' and 'opportunity to travel / cultural enrichment' emerged as the most important aspects predicting an intention to pursue a career in cruise tourism. This has considerable implications for the cruise sector, as the sector's current recruitment narrative may prove insufficient to compensate for the negative publicity regarding sustainability and corporate social responsibility: **'Being paid to travel the world and getting stripes along the way' may not be enough to attract – not mentioning retain – young talents in the near future.**" (p.2038-2039)



Prof.Dr.Dr.hc Alexis Papathanassis

Cruise Tourism Management
Bremerhaven University of Applied Sciences

E: apathanassis@hs-bremerhaven.de

T: +49 471 4823 100

M: +49 173 613 2565

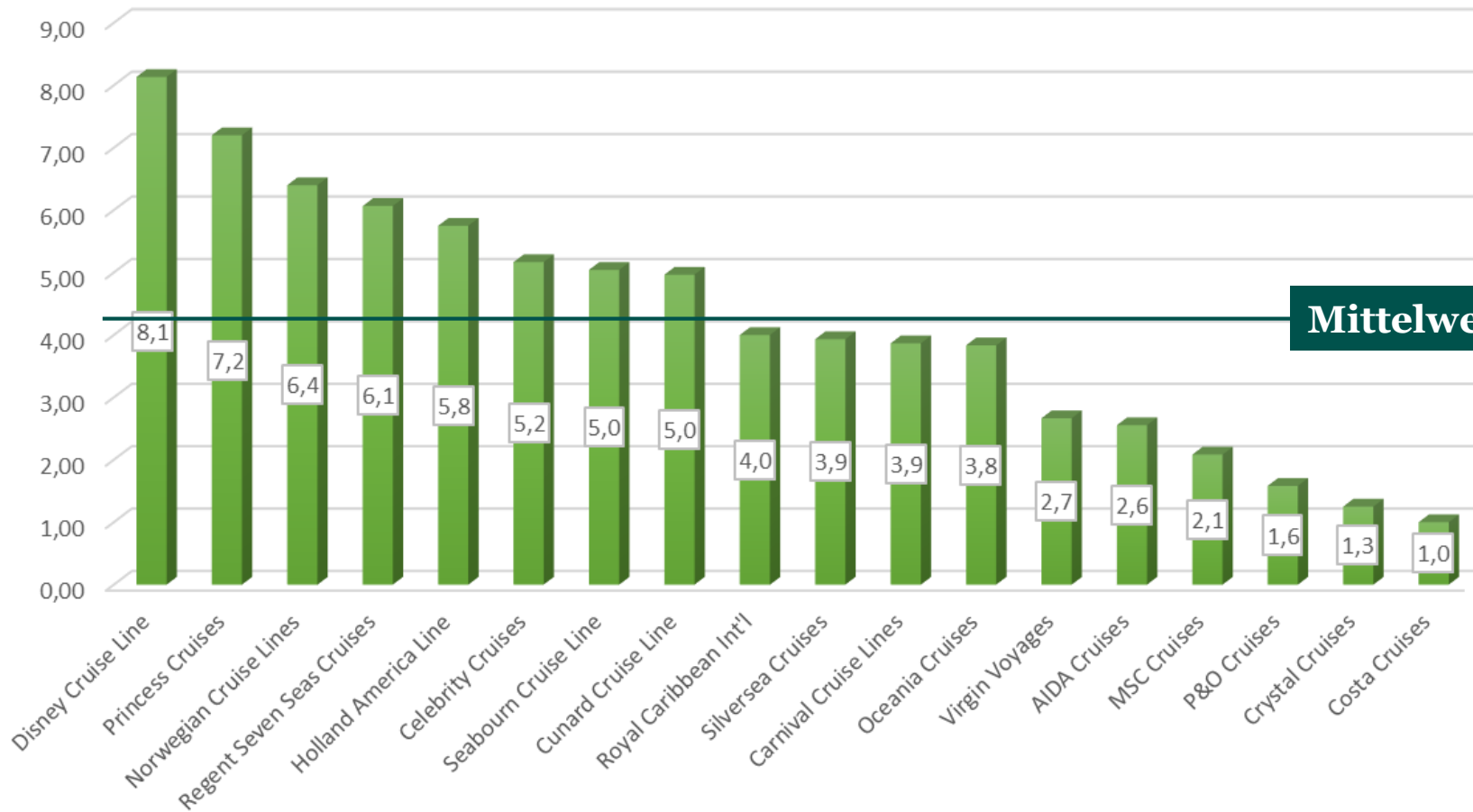
Sustainability and CSR



Cruises and Ecological Sustainability

FoE Scorecard 2009-2021 (Average Scores)

FoE Cruise Line Score (2009-2021)



Mittelwert 4,2

FoE Score	Own Points	Description
A+	13	Excellent
A	12	
A-	11	
B+	10	Satisfactory
B	9	
B-	8	
C+	7	Needs Work
C	6	
C-	5	
D+	4	Poor
D	3	
D-	2	
F	1	Unacceptable

Wastewater treatment: Installation of waste water and grey water treatment systems

Water quality compliance: Compliance with the 2010-2019 water pollution standards for the Alaskan coast (use of exhaust gas cleaning systems rated negatively).

Reduction of air pollution: use of shore power, low-sulphur fuel.



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.
 - CO₂, CH₄ and N₂O 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.



The core dilemma of port destinations

Are cargo shipping and other forms of tourism preferable?



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

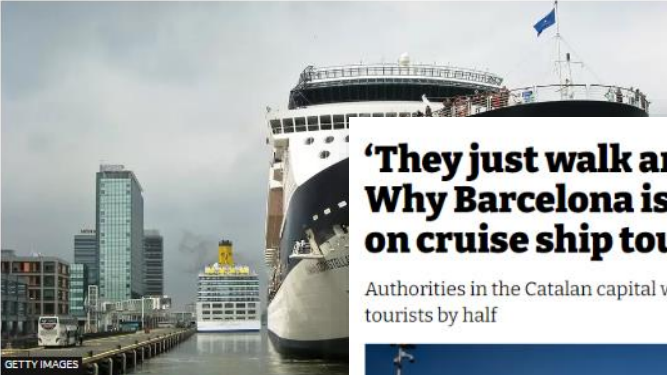
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Amsterdam bans cruise ships to limit visitors and curb pollution

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



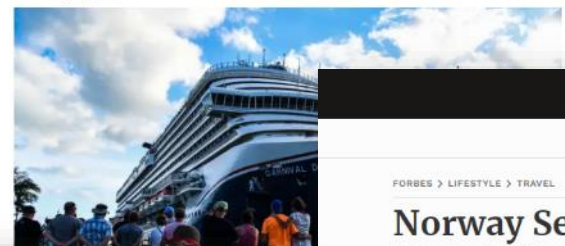
Tourists leave the passenger terminal for onward travel at the Port of Barcelona (Photo: Angel Garcia/Bloomberg via Getty Images)

INSIDER

Nächstes Ziel: Danzig zum Bestpreis.

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

Hannah Towery 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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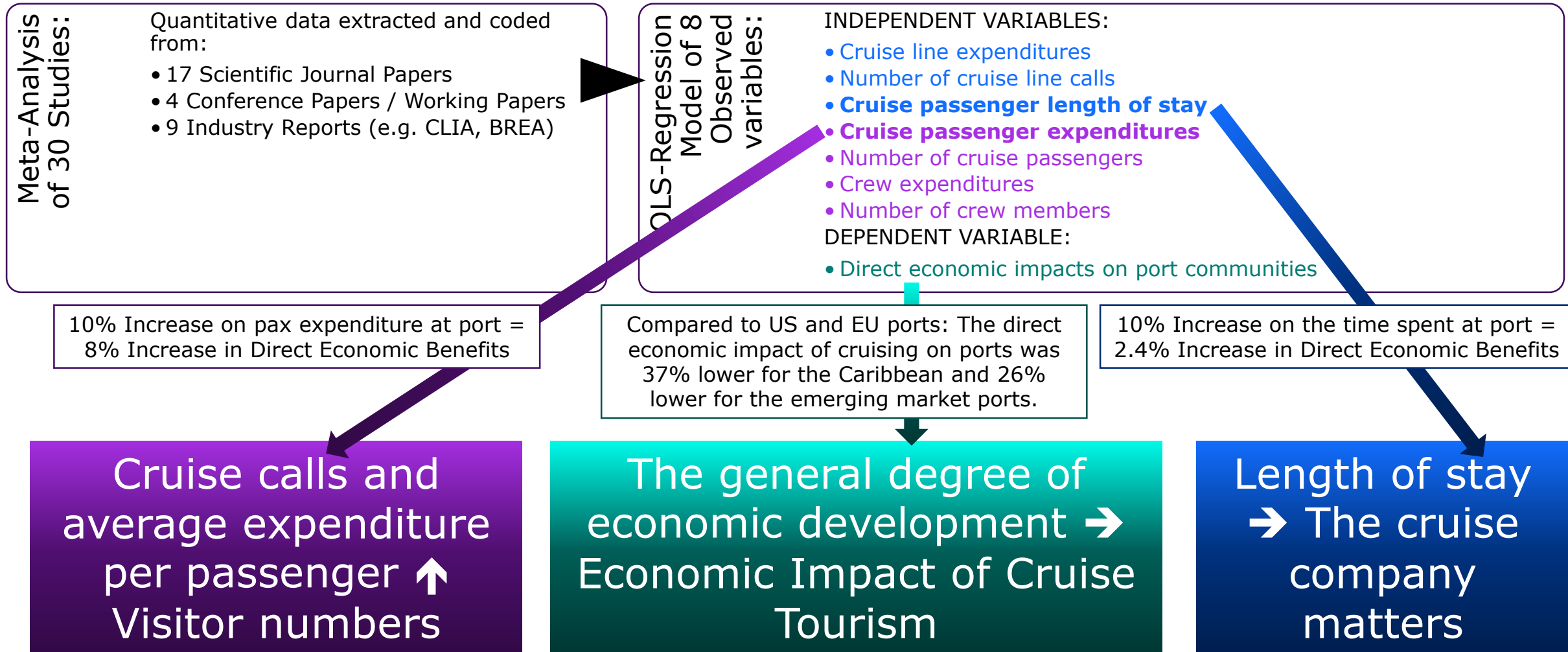
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The Ports...

A Meta analysis of the economic impact of cruises on destinations



Prof.Dr.Dr.hc Alexis Papathanassis

Cruise Tourism Management
Bremerhaven University of Applied Sciences

E: apathanassis@hs-bremerhaven.de

T: +49 471 4823 100

M: +49 173 613 2565

Future & Outlook

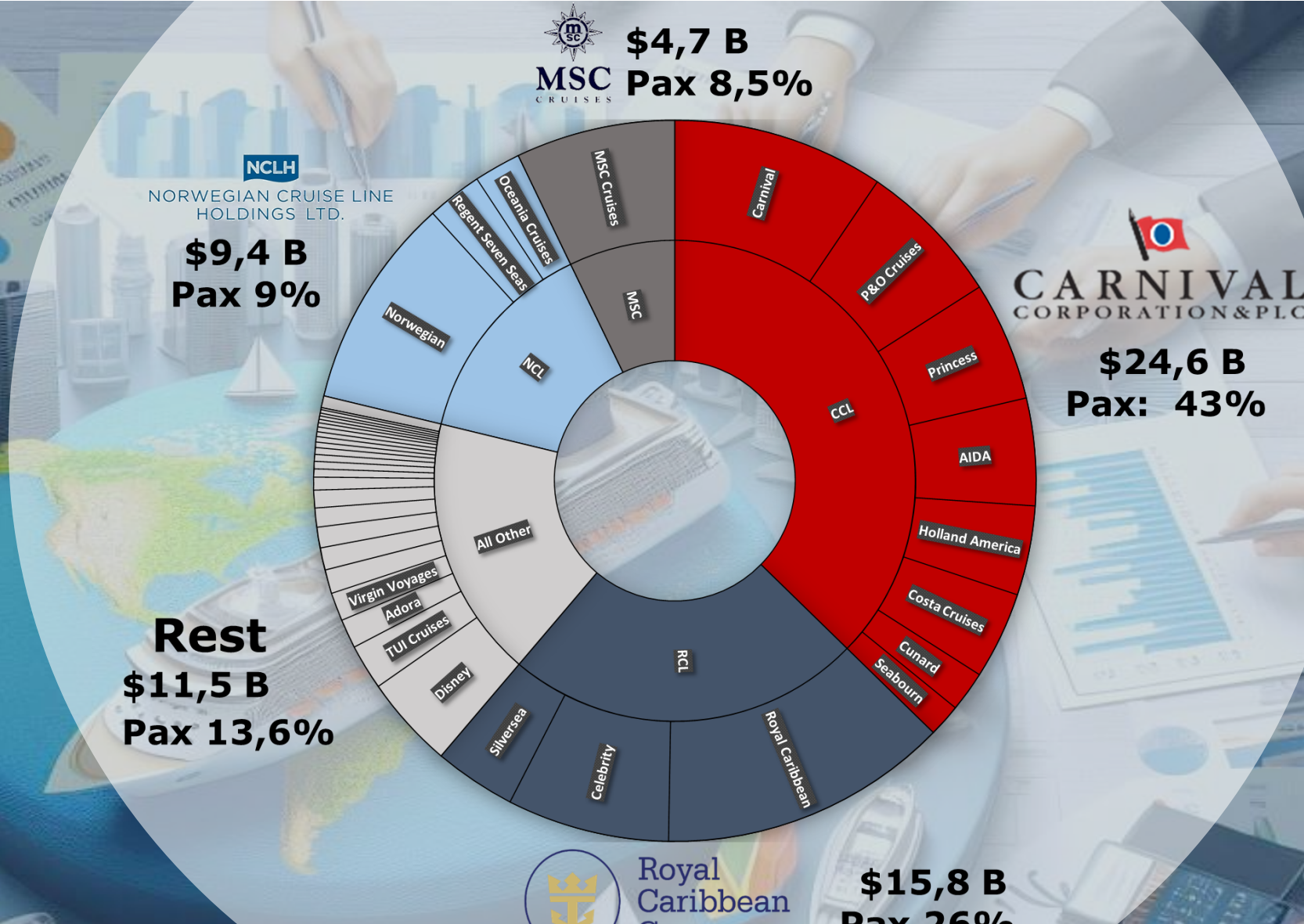


Market shares (based on turnover 2024)

'Cruise Democratship': Affordable holidays for all, market dominance for the few

Revenue:
\$ 66 B

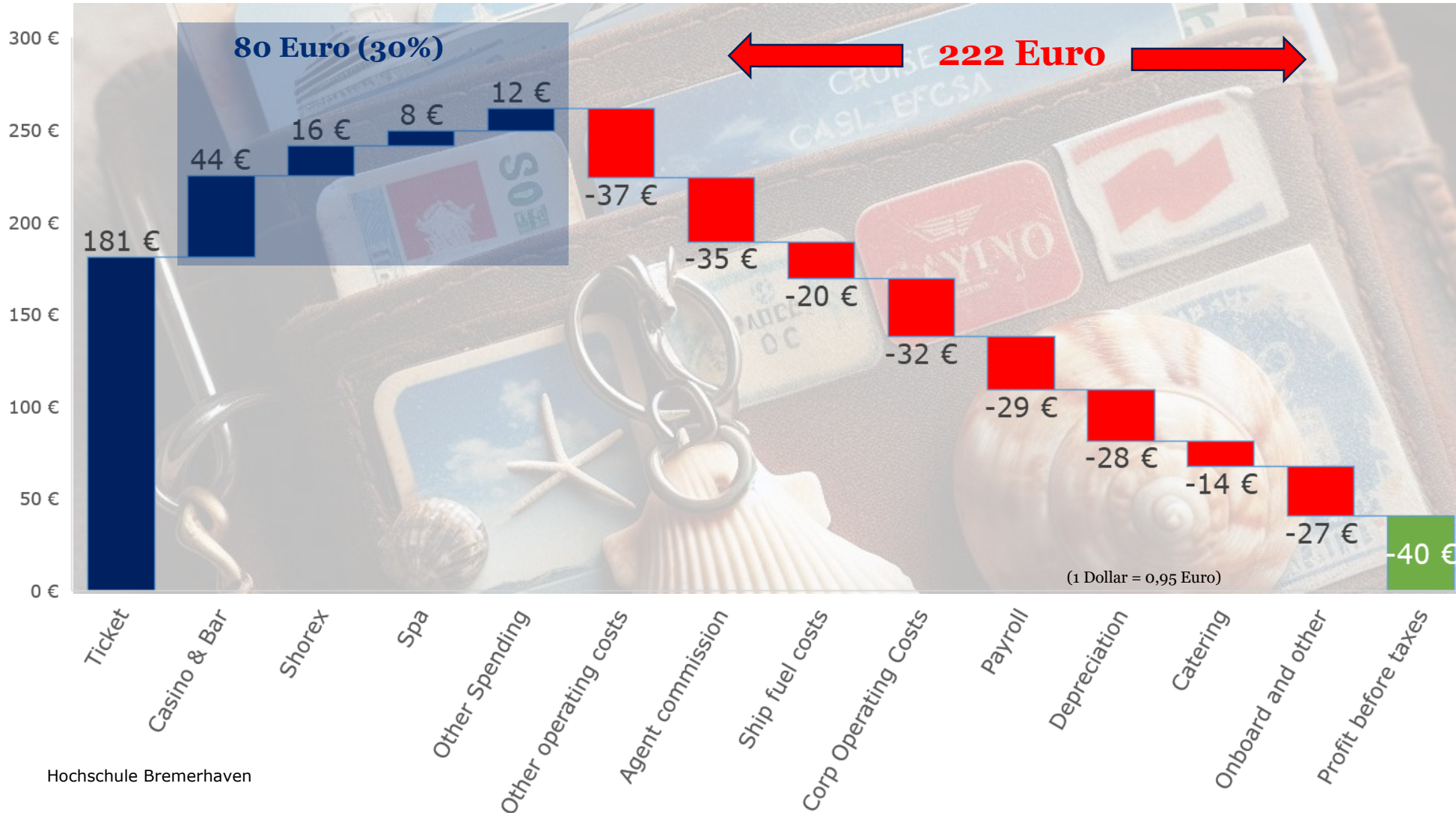
30 Mill Pax



Data Source: Cruise Market Watch (<https://cruisemarketwatch.com/market-share/>)

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

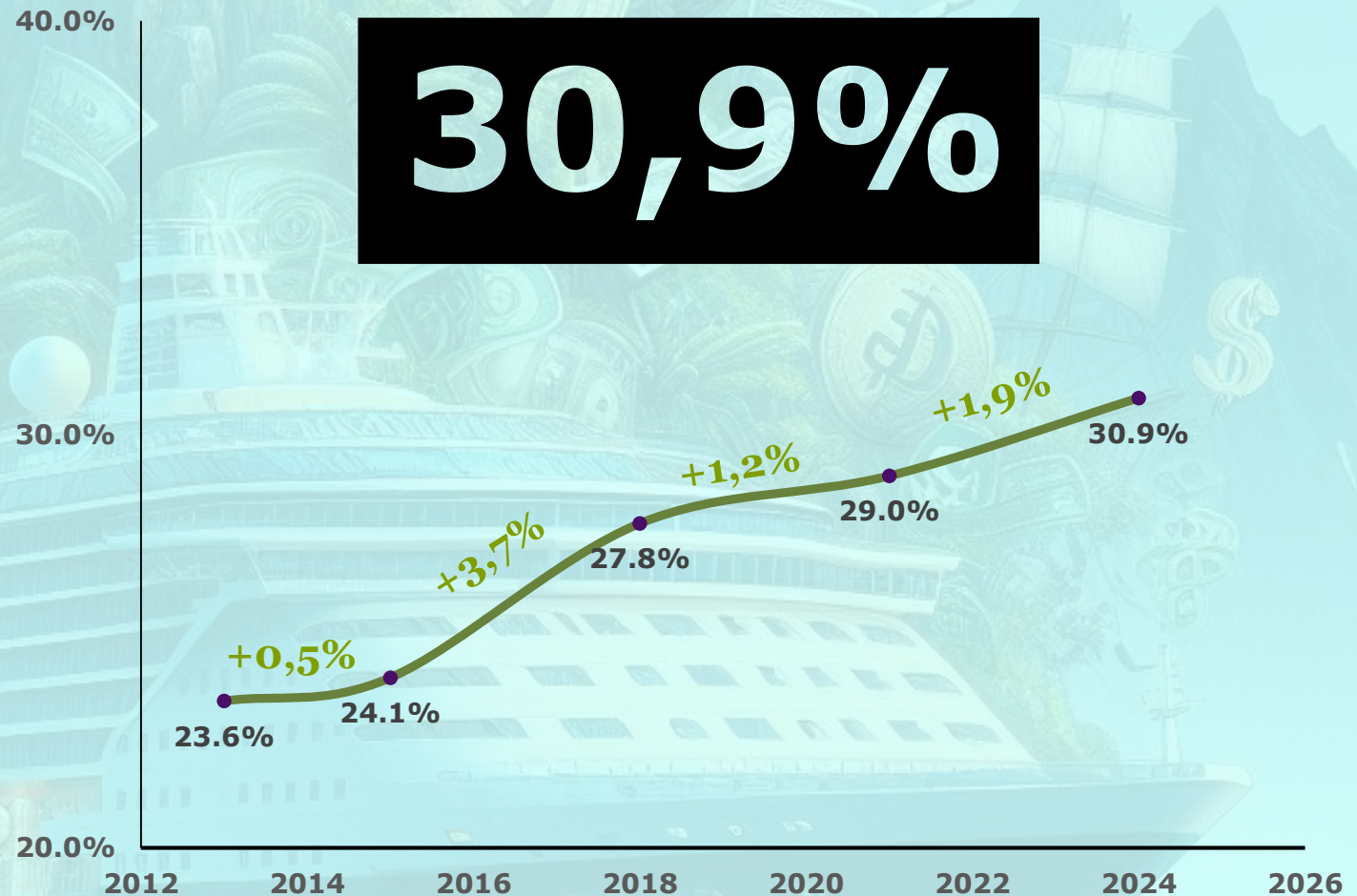


On-Board Revenue and Captive Pricing

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

69,1%

On-Board Revenue Development 2013-2024



RCL's Icon of the Seas – Polarisation trend in cruising

Floating Destination: 20 decks, 8 neighbourhoods, 10.000 pax and crew



Tonnage:
250,800 GRT

Length: 365 m

Passenger
Capacity:
7600

Crew: 2350

Fuel: LNG

Sail start:
28 January
2024

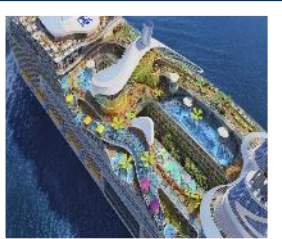
28 Cabin
Categories

8 Neighbour-
hoods/
Districts



Thrill Island

Slide waterpark (6 waterslides)



Chill Island

Pool area (7 pools) ft largest pool at sea



Surfside

For young families, with 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, boutiques, live entertainment and restaurants



Royal Promenade

Ice arena, shops, catering venues



Suite Neighbourhood

Restaurant, sun deck, restaurants, pools



RCL's Icon of the Seas – Smart Cruises

Saving space and crew costs for revenue-generating guests



High-Speed Broadband Internet

<https://secure.royalcaribbean.com/media/images/offers/featured/voom-sailings-support.jpg>



Digital Dashboards

http://pocketnow.com/wp-content/uploads/2015/11/AnthemoftheSeas__AZL2776.jpg

Dedicated Ship App



<http://www.royalcaribbeanblog.com/2014/10/05/99-days-of-quantum-royal-iq>



Robotic-Barkeepers

http://www.telegraph.co.uk/content/dam/Travel/leadAssets/32/61/Bionic-Bar_3261528a-large.jpg



Info Touchscreens



<http://prevuemeetings.com/wp-content/uploads/2014/09/Royal-Caribbean-Digital-Signage.jpg>



Robotic Entertainers

http://www.amptown-system.com/fileadmin/user_upload/News/20160219-Sinus-Award-2016/dancing-screens.jpg



Virtual Balconies

http://media.royalcaribbean.com/content/shared_assets/images/fleet/cabin_type/gallery_main/QN_studio_interior_305x202.jpg

RFID-Services & Tracking



http://images.huffingtonpost.com/2014-11-15-1408793468_wristbandinusefinalcomposite.jpg



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.

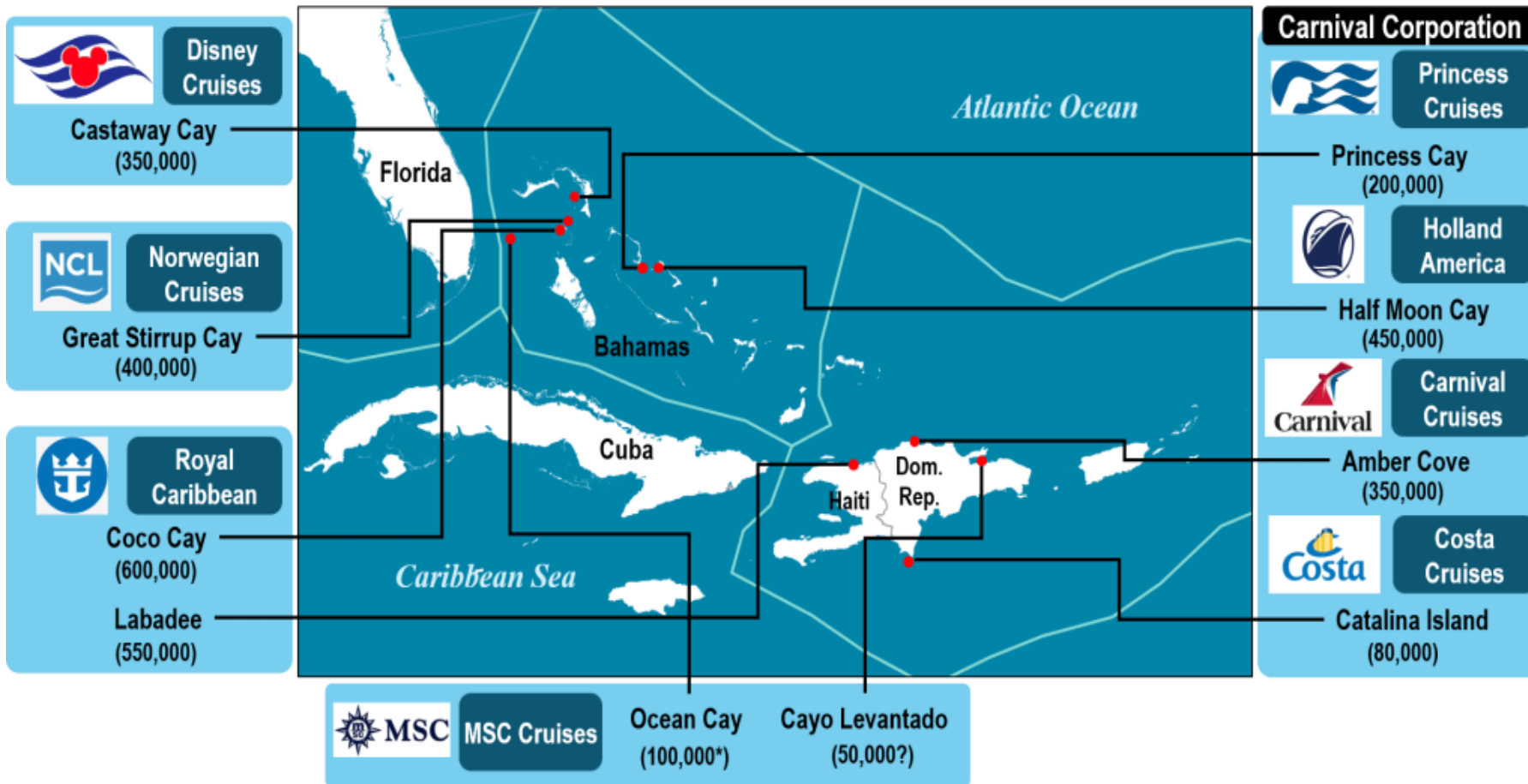
Part of the drive to develop private destinations is creating locations that can both accommodate large ships and wants them, said Koreen McNutt, senior vice president of sales and trade engagement and commercial sales officer for MSC Cruises, which opened the Ocean Cay MSC Marine Reserve private island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



CONCLUSION: *What impact will these developments have on the future and prospects of the cruise industry?*

Larger cruise ship newbuilds and reduction in service life (especially older ships)

- Technologically up to date and more energy efficient
- More control over and opportunities to generate onboard revenue
- Digital services and a lower crew-to-passenger ratio

Declining port calls and increasing homeports outside the EU

- Shipping companies are shifting their routes (to non-EU areas) and adding their own private islands to their itineraries
- The total number of ports visited is likely to decrease and focus on the main ports of departure and main points of attraction

Consolidation and 'glocalisation' of the market

- Cruises will become more expensive and deliver less value for money
- Increased polarisation of markets/segments (class over mass), at least in Europe (i.e. return to the 'traditional' model)

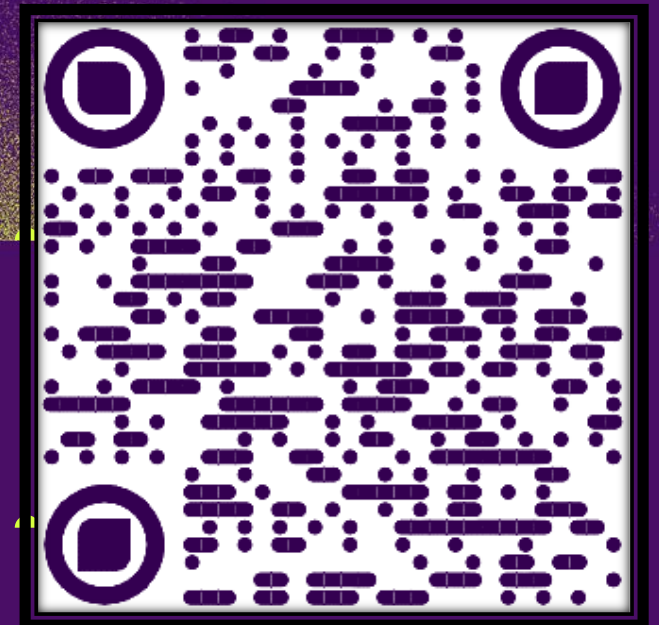


Weder ‚Fluch‘ noch ‚Segen‘... Nur ein Geschäft!



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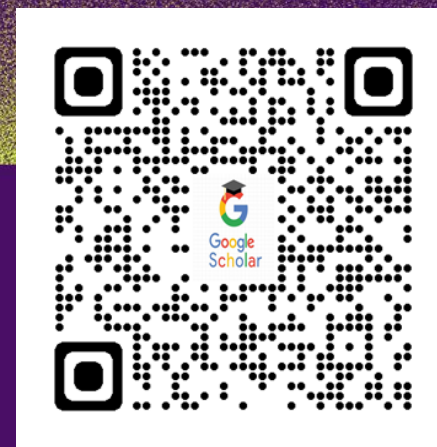
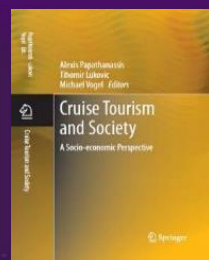
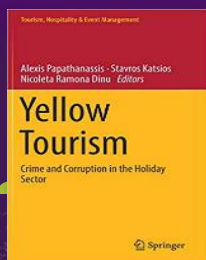
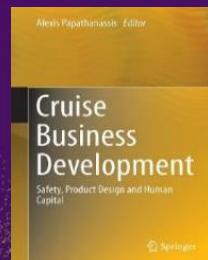
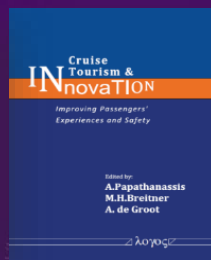
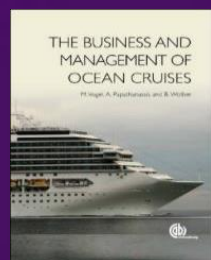
Prof. Dr. Dr. hc Alexis Papathanassis
Hochschule Bremerhaven

T +49 471 4823-100

M +49 173 6132-565

W www.hs-bremerhaven.de

E apapathanassis@hs-bremerhaven.de



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