

'Damocles' (Sustainability) Trident': What are the prospects for cruise tourism?

(EKD Cruise Pastoral Conference, 05 September 2023)



Crisis was Yesterday... Cruise 'Business as Usual'

Abonniert Comeback der Ozeanriesen

Trotz Umweltbelastung: Kreuzfahrtschiffe steuern rekordhohe Passagierzahlen an

Ferien auf dem schwimmenden Hotel ist weltweit so gefragt wie noch nie. Auch bei Schweizer Reisenden sind Kreuzfahrten wieder beliebt.

Start > Reisebranche - TRAVEL INSIDE > Cruise > Wird 2023 das Comebackjahr für Kreuzfahrten?

Reisebranche - TRAVEL INSIDE **Cruise**

Wird 2023 das Comebackjahr für Kreuzfahrten?

TRAVEL INSIDE - 27.01.2023

TRAVEL INSIDE hat bei Knecht Reisen, Kuoni Cruises und E-Hoi nachgefragt, was an dem Buchungsbumm bei den Reedereien dran ist.


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AKTUELL

Kreuzfahrtboom: Royal Caribbean & Co freuen sich über starke Nachfrage und hohe Preise

Veröffentlicht am 26. Juli 2023 11:56
Wirtschaftswoche 19. Juli 2023 14:05
von Hannes Zippel



Bremerhaven University

Sonntag, 3. September 2023 Newsletter Podcasts Club ePaper Archiv Shop Jobs Inside Login Abo

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Buchungsboom – doch hohe Schulden belasten den Neustart

Reedereien streichen Maskenpflicht und Abstandsregeln, ab Juli sind die meisten Schiffe ausgebucht. Aber die Pandemie lastet noch auf den Bilanzen der Kreuzfahrt.

 Christoph Schlautmann

25.05.2022 - 04:07 Uhr · Kommentieren · 2 x geteilt



THB TÄGLICHER HANDELSBERICHT

RUBRIKEN THEMEN AUSGABEN KARRIERE PODCAST



Nach schweren Jahren in den Pandemie-Jahren: Die Kreuzfahrt-Industrie ist zufrieden mit der Nachfrage 2022, Foto: Hasenpusch

Kreuzfahrt-Branchen setzt Wachstumskurs fort

02. Mai 2023

Der Kreuzfahrtmarkt setzte seinen Wachstumskurs im Jahr 2022 fort. Nach den jetzt von der Cruise Lines International Association (CLIA), dem Weltverband der Kreuzfahrtindustrie, vorgelegten Marktzahlen für Europa wuchs die Nachfrage im deutschen Markt im Jahr 2022 auf rund 1,9 Millionen Passagiere an.

Damit hat Deutschland seine Spitzenstellung als größter europäischer Markt behauptet. Das Marktvolumen nähert sich dem Niveau vor Corona mit 2,6 Millionen Passagieren im Jahr 2019 weiter an.



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



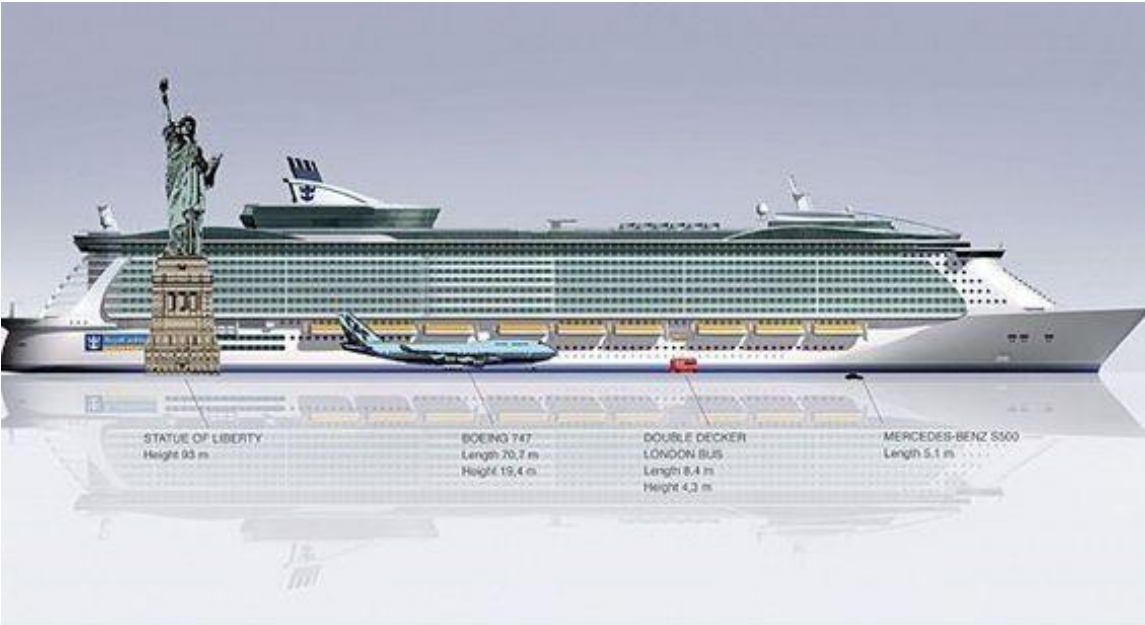
Suite Neighbourhood

Restaurant, sun deck,
restaurants, pools

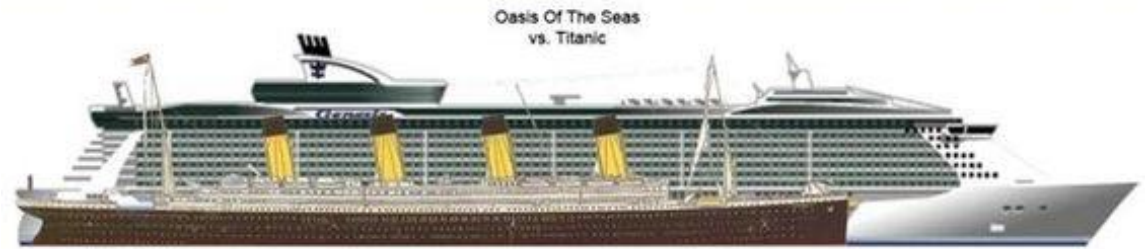


RCL's Icon of the Seas vs. Titanic

Mega Space for Passengers, Less Crew Attention!



	Titanic	Icon of the Seas
Gross Tonnage (GT)	46328	250800
Guests	2435	7600
GT/Guest (Space)	19	33
Crew	892	2,350
GT/Pax (Space)	14	25
Guest/Crew (Service)	2,7	3,2



<https://www.pinterest.de/pin/704954147903160223/>



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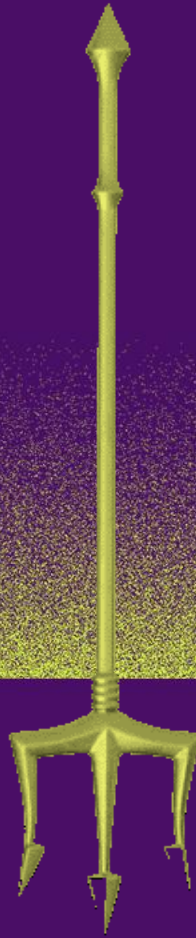
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Starting position according to Covid19

... The pandemic left the
cruise sector with large
debts and the challenge of
getting people back on
board!

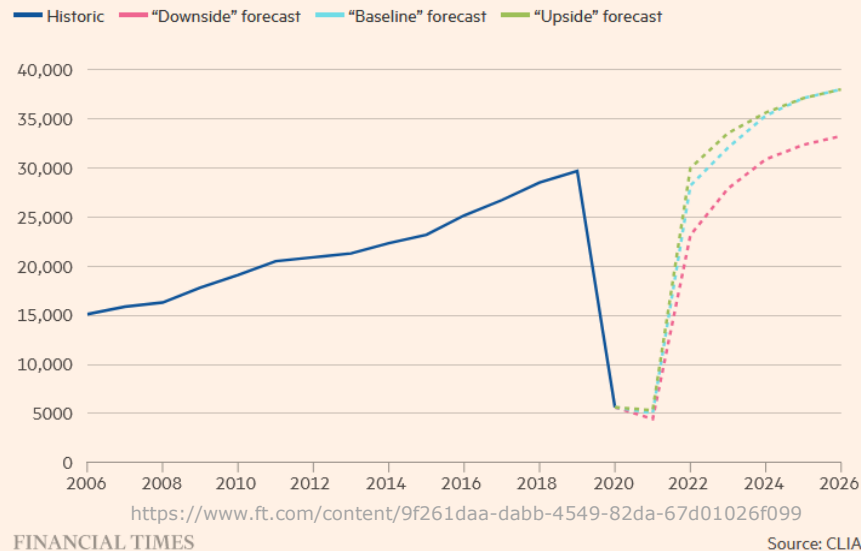


“Like the tides, We will return”... This time cleaner!

We can survive anything!

Cruise passenger numbers are expected to resume their long-term growth trajectory after the pandemic dip

Global cruise passengers, actual and forecast



Supply Impact*:

- 2019: Total fleet capacity = 581 K Pax
- 2020-21: Loss of 8% = 532 K Pax
- 2021-22: Recovery of 6% = 566 K Pax

Demand Impact*:

- 2019: 27.5 million Pax
- 2020-21: Decrease of 74% = 7.05 million Pax
- 2021-22: Recovery of 25% = 13.9 million Pax

Revenue and Spending Impact*:

- 2019: \$27.4 B
- 2020: Decrease of 88% = \$ 3.3 B
- 2021: Recovery = \$ 6.6 B = - 76% compared to 2019
- 2021 Average Pax Revenue = \$ 247 / Day = 9% less than 2019
- 2021 Average Pax Onboard Revenue = \$71 / Day = 5% less than 2019

Financial Impact (Top 3 Cruise Operators):

- 2019: Profit ≈ \$ 0,5 B / Month***
- 2020-21: 'No Sail Cash-Burn' ≈ \$1 B / Month**
- 2020-21: New Debt and Equity Capital ≈ \$12 Billion ***

Recovery
Potential

Recovery
Risk

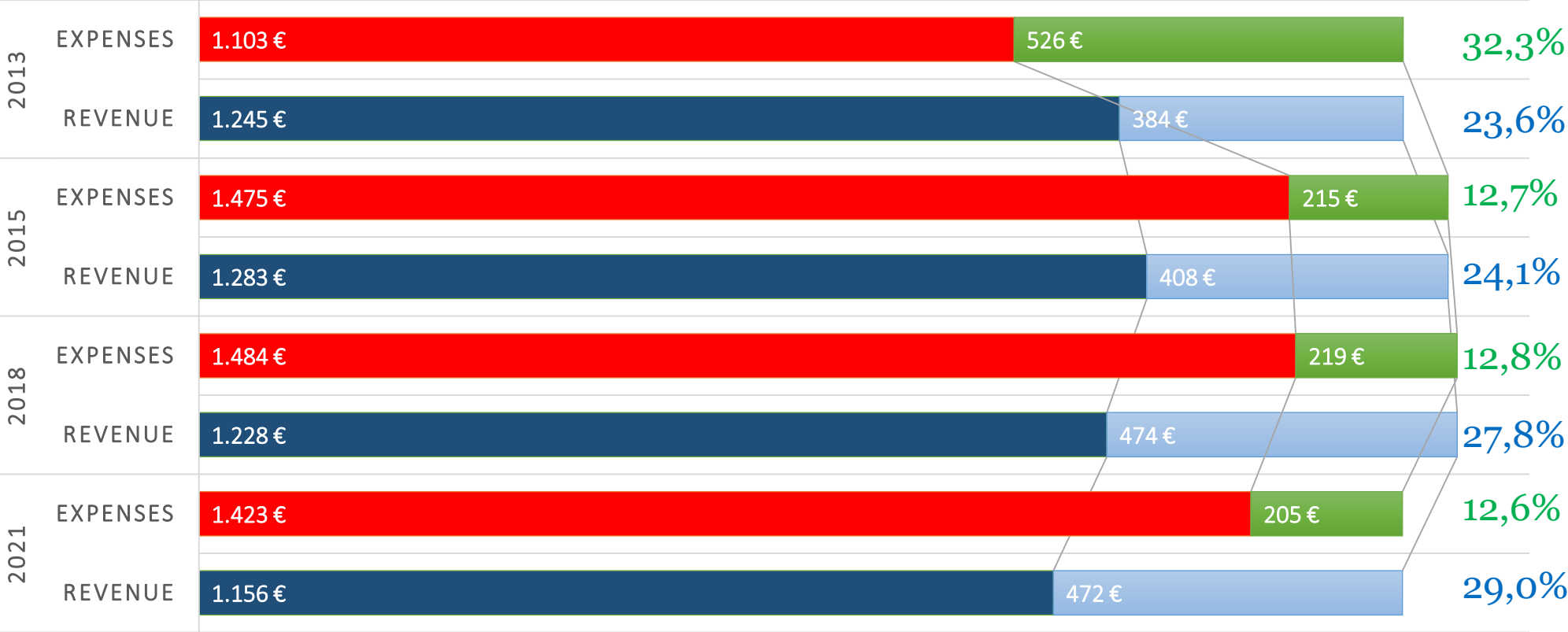


Onboard Revenue and Captive Pricing

A Driver of Ship-Size and Competition for Port-Economies?

AVERAGE CRUISER FINANCIAL BREAKDOWN 2013-2021

■ Ticket Revenue ■ OnBoard Revenue ■ Total Expenses ■ Profit before Tax



In real current prices (1 Dollar = 0.95 Euro)

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



'Damocles Trident' and the cruise industry

Cicero. (c. 45 BC). Tusculan Disputations, Book 5, Section 61

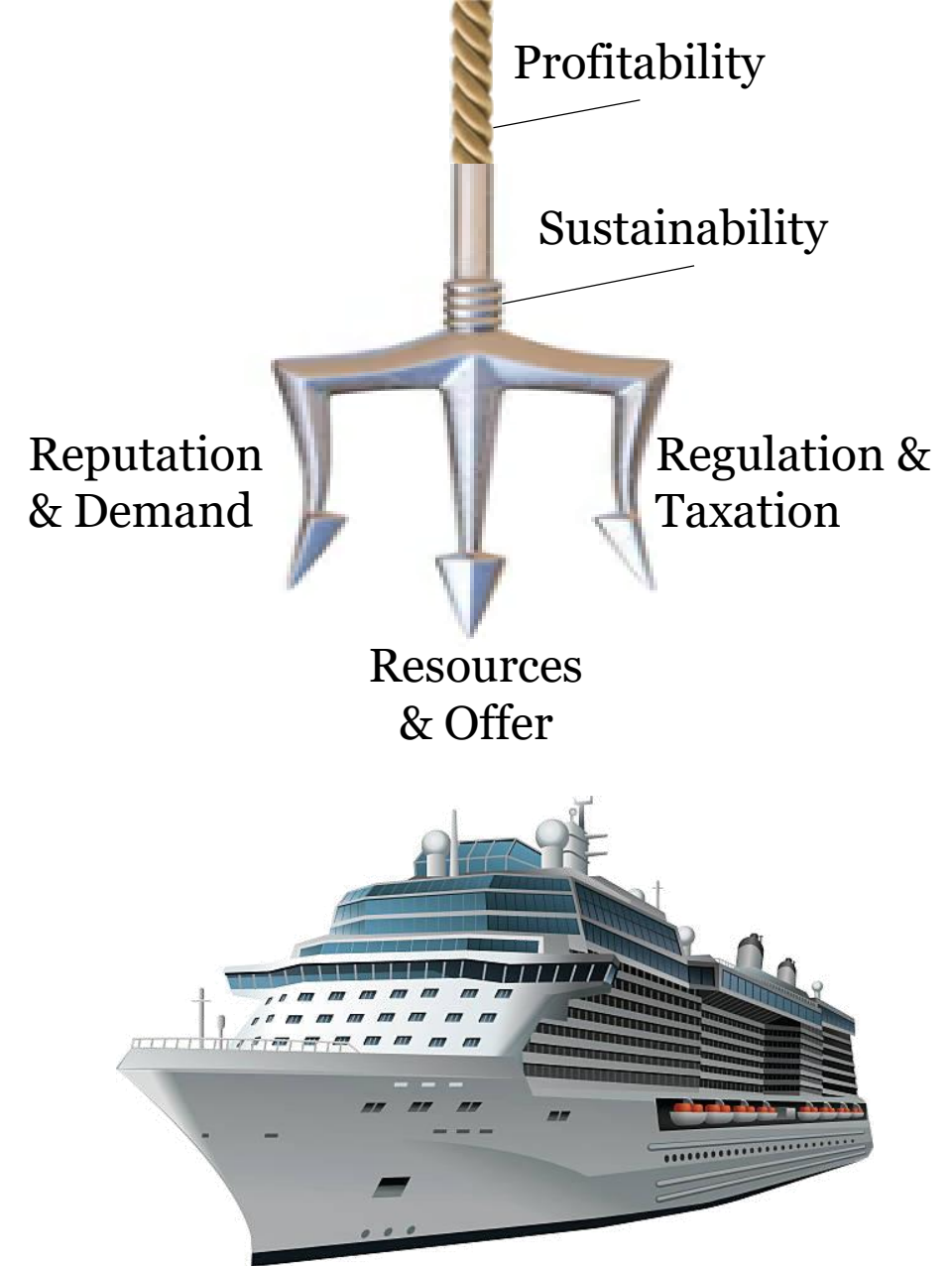
Damocles wished to experience the life of a king.

King Dionysius allowed him to change places for a day.

Damocles enjoyed the luxury, but noticed a sword above him hanging by a single hair.

He felt constant fear and realised that power comes with fears.

Damocles learned that the pursuit of power has hidden dangers.



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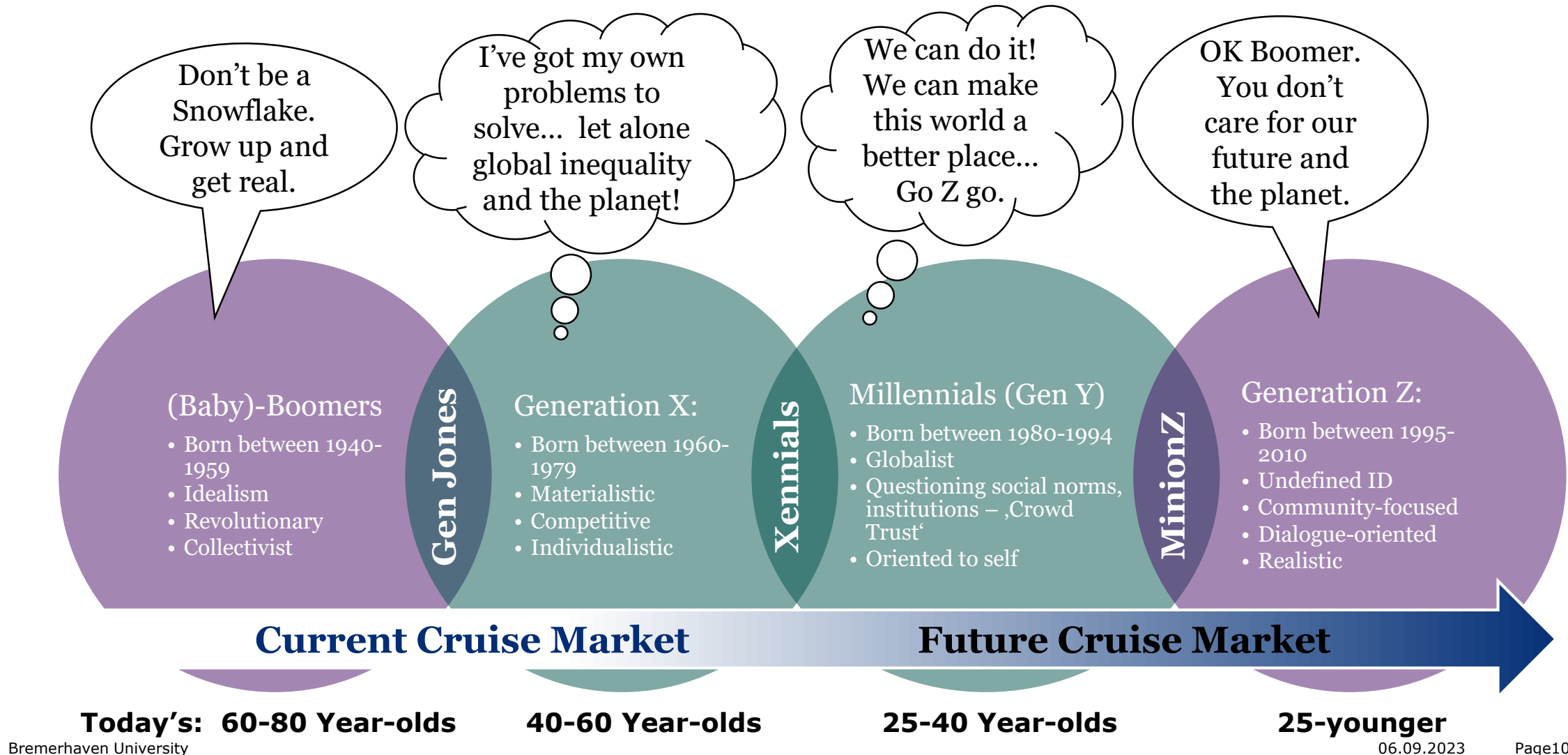
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Reputation & Demand

The challenge of an ageing
"cruise society": attracting
new and future customers.

Hey Boomer... Have a nice Cruise!

Generational conflict and cruises as a symbol for 'Intergenerational Inequity'

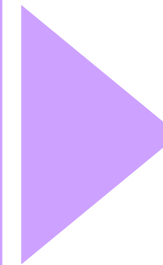


'Hedonism' is losing appeal: "Tell me how you travel and I will tell you who you are"

Modern (Cruise) Tourists distance themselves from Consumerism!

Bujarski, L. (n.d.). *The Supertraveler Manifesto*. Retrieved 10 June 2022, from <http://www.skift.com/supertraveler-manifesto>

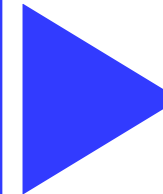
- Maxims of the Supertraveller Mindset:
 - "We want genuine brands that actually care about us and the communities that they impact."
 - "We want to come back to our ordinary worlds feeling transformed and inspired."
 - "We want the human element back in an otherwise commoditized and impersonal experience."



Story-Telling of a Transformational Experience

Robledo, M. A., & Batle, J. (2017). Transformational tourism as a hero's journey. *Current Issues in Tourism*, 20(16), 1736–1748. <https://doi.org/10.1080/13683500.2015.1054270>

- "The full potential of tourism lies in providing experiences that transform and give meaning to the lives of the people." (p.146)
- "Reviews of marketing material would help analyse how the industry markets its products in terms of their transformative power." (p.146)



Transformational experiences give meaning to the lives of people

Cave, J., & Dredge, D. (2020). Regenerative tourism needs diverse economic practices. *Tourism Geographies*, 22(3), 503–513. <https://doi.org/10.1080/14616688.2020.1768434>

- "Rising concerns about climate change, overtourism, declining employment and labour conditions and resource degradation have all highlighted the inadequacy of the current capitalist system in addressing the failures of mass tourism. Now, under COVID-19, there are calls for tourism to move beyond 'business as usual' and to find a pathway to regenerative tourism." (p. 504)



"New Sustainability" is more than Conservation... It is also Regeneration!

Bellato, L., Frantzeskaki, N., & Nygaard, C. A. (2022). Regenerative tourism: A conceptual framework leveraging theory and practice. *Tourism Geographies*, 1–21. <https://doi.org/10.1080/14616688.2022.2044376>

- "Regenerative tourism focuses its interventions on building the capacity of whole systems for regeneration, rather than managing social-ecological impacts whilst ultimately pursuing infinite economic growth." (p.10)



Adding socio-ecological value locally!



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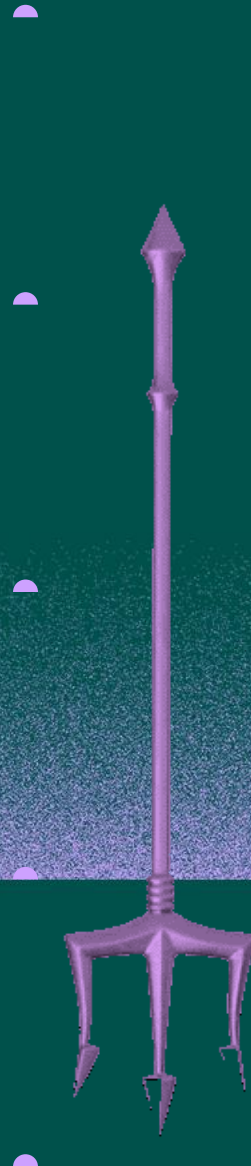
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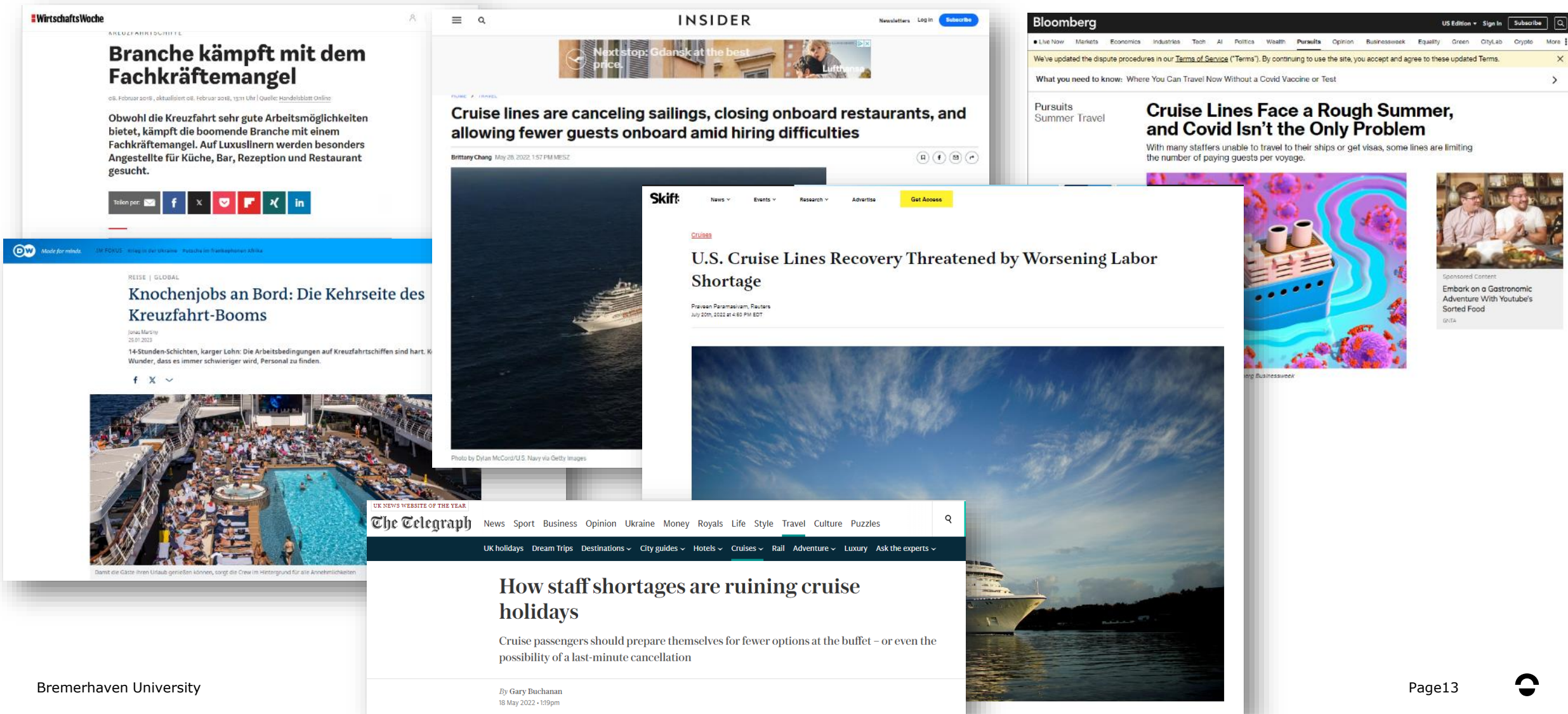
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Resources & Offer

*Skills shortage and
'emancipated'
destinations!*

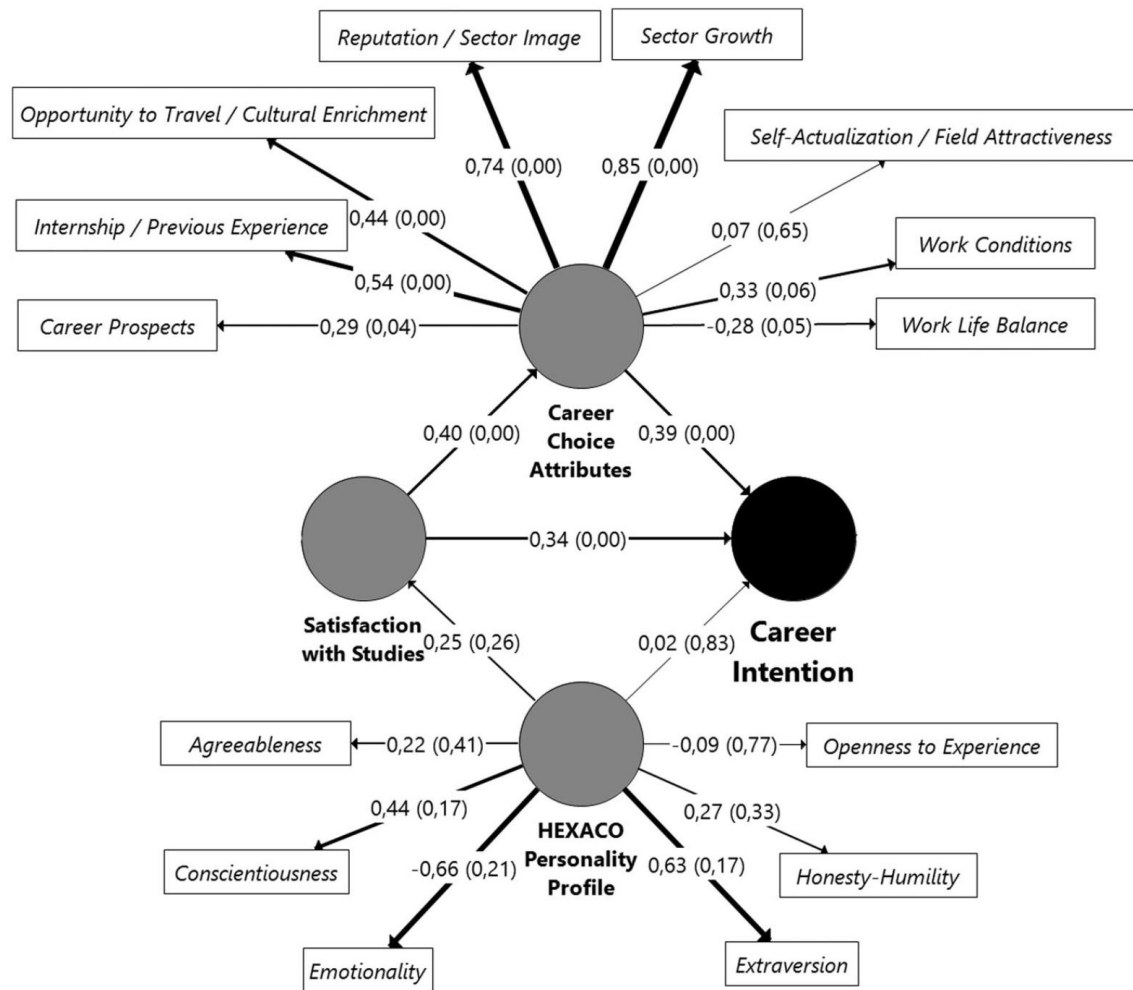


Staff shortages and COVID19 as triggers in the competition for talent...



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)



More and more destinations and their residents are questioning the actual value-added contribution of cruise tourism:
Is it worth the hassle?

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Amsterdam bans cruise ships to limit visitors and curb pollution

21 July • Comments




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A passenger terminal in Amsterdam's docklands

'They just walk around'

Why Barcelona is cutting back on cruise ship tourism

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



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Nächstes Ziel: Danzig zum Bestpreis.

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

Hannah Towner

Apr 5, 2025, 9:40 PM MESZ

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Barcelona

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'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 large cruise ship, the Azura, is docked at a port in Barcelona. The ship is white with blue accents and has multiple decks visible. It is surrounded by other smaller boats and port infrastructure.

✎ 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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26, 2022, 09:43am EST

‘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



A large cruise ship is docked at the Port of Barcelona. In the foreground, a large crowd of tourists is gathered in front of the terminal building, which has a sign that reads 'terminal B'. The scene is set against a clear blue sky with palm trees and a modern building to the left.

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

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.

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Feb 26, 2022, 09:43am EST

More restrictions on large cruise ships are expected in Norway following a report presented by a

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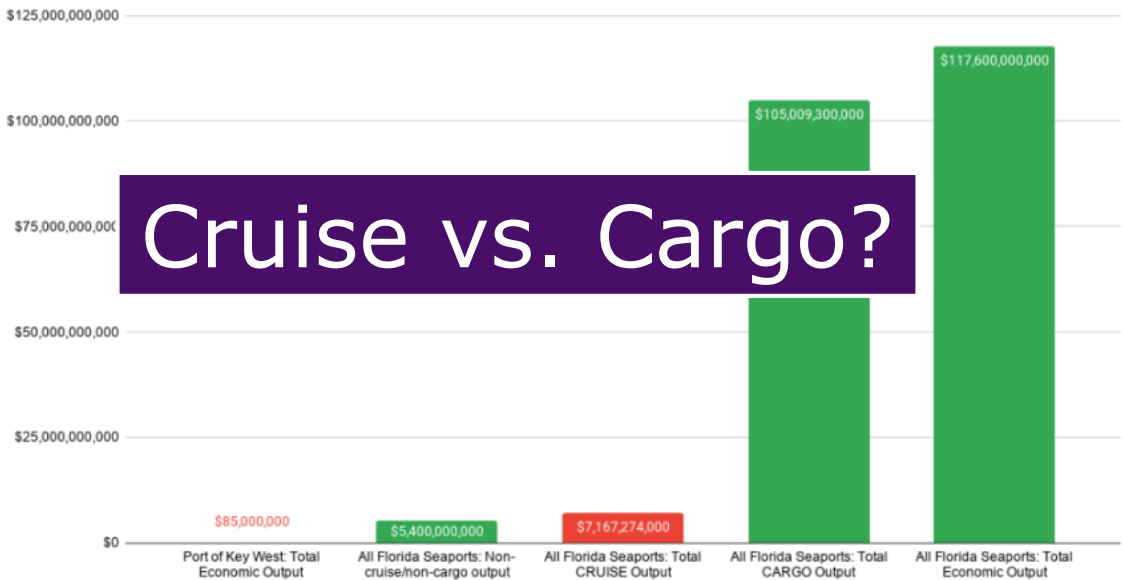


Comparative economic impact of cruising...

Cargo shipping and other forms of tourism more beneficial?

Economic Impact: Key West's Cruise Economy in Context of Florida Seaports

Port of Key West accounts for less than 1/10th of 1% of the total economic output of Florida's Seaports



The Port of Key West accounts for less than 1/10th of 1% of the total economic output of Florida's Seaports.

<https://www.safercleanships.com/news/economic-impacts-florida-seaports-and-cruise-ships-at-the-port-key-west>

Skift

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Tourism

Caribbean Tourists Arriving by Plane Worth More to Local Economy Than Cruise Guests

Sierra/Chris Shearman & Sterling, Skift
March 10th, 2015 at 11:05 AM EDT

Find average per visit and per day spend for cruise and air arrivals in three tourism economies:

Country	Cruise Arrivals	Air Arrivals	Cruise Spend Per Person	Air Spend Per Person
U.S. Virgin Islands	1,900,000	800,000	\$138-\$158 per day	\$200-\$250 per day w/o lodging
Puerto Rico	1,356,822	8,600,413	156.62 per day	\$298.15 per day w/ lodging
Bermuda	355,880	224,329	\$153 per visit	\$1249 per visit w/ lodging

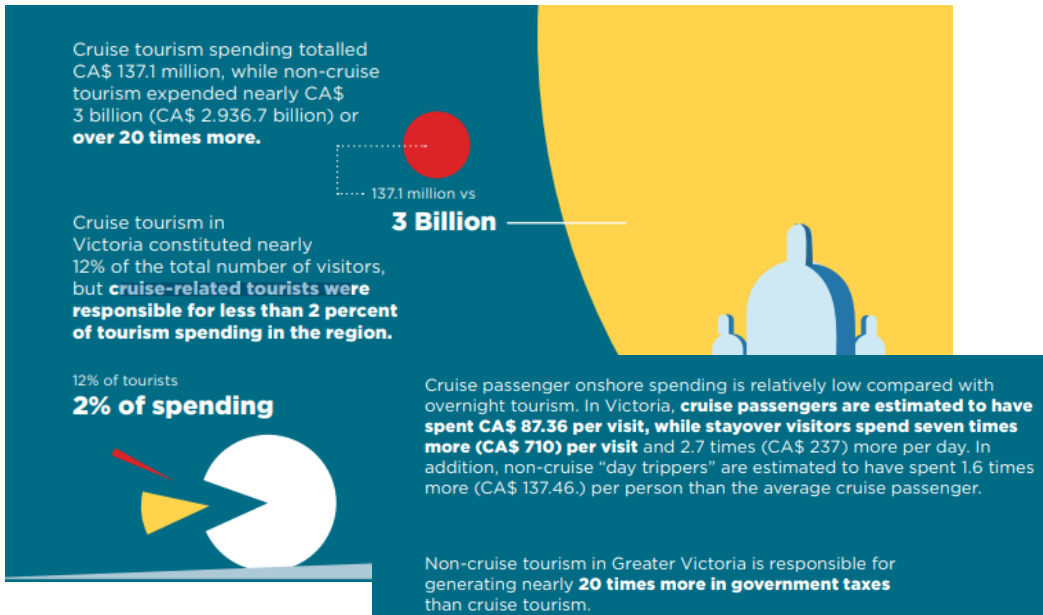
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<https://skift.com/2015/03/10/caribbean-tourists-arriving-by-plane-worth-more-to-local-economy-than-cruise-guests/>

REPORT: New analysis exposes cruise tourism benefits as overinflated myth

WEDNESDAY APRIL 06, 2022

Economic benefits of non-cruise tourism dwarf cruise tourism



Cruise- vs. Land-Tourism?

Non-cruise tourism created nearly **31 times more jobs** (37,411 vs. 1210) than cruise operations in Greater Victoria.

<https://www.stand.earth/latest/ocean-protection-shipping/canadian-shipping/report-new-analysis-exposes-cruise-tourism>

Page16



The Question of Regulation...

Regional Restrictions vs. Globalisation

Home » Activities » Bonaire's One Cruise Ship Policy

Bonaire's One Cruise Ship Policy

by Tanya Deen for the Bonaire Insider | Feb 11, 2023 | Activities, Local News, Tourism Announcements



Bonaire gets closer to enacting the “One Ship Policy.”

In a recent press conference, an update was given on the “one ship policy” aimed at a better Bonaire experience for [cruise tourists](#) as well as residents of Bonaire. By handling a maximum of one large cruise ship per day, several improvements are being made for Bonaire. For the cruise tourists, the service and experience of the island visit will improve by spreading out the number of visitors. Bonaire can also better serve the increased number of cargo ships, partly due to the strong growth in the number of inhabitants, and entrepreneurs can offer more service to visitors. This will also relieve pressure on Bonaire's infrastructure.

The “one ship policy” already came into effect last year, resulting from the Tourism Recovery Plan, but Bonaire is still seeing two cruise ships at a time due to older contracts that cannot be broken. As of mid-April, there will mostly be one cruise ship in port. However, smaller ships with less than 700 passengers will be allowed as a second ship. The revision of the criteria and requirements for port bookings was also discussed. Incentives for motivating cruise lines to visit during the low season is also being considered.

Port ≠ Land
Experience

Cruise News » Royal Caribbean News

Royal Caribbean to Increase Capacity at its Private Island

Royal Caribbean will increase capacity at PerfectDay at CocoCay to 13,000 passengers by adding Hideaway Beach, CEO Jason Liberty revealed.

By Robert McGillivray Affiliate Disclaimer Modified Date: Feb 8, 2023



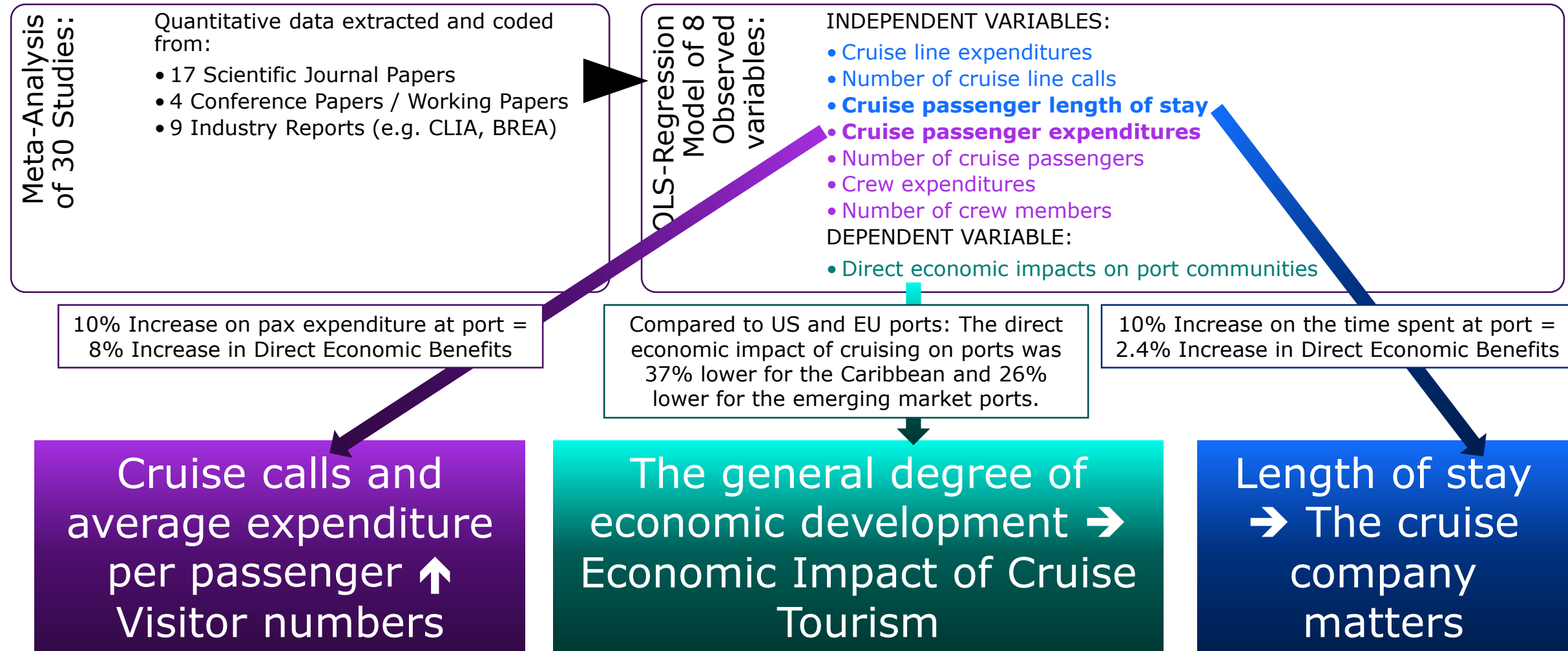
Photo Copyright: Melissa Mayntz / Cruise Hive

Royal Caribbean Group has big plans for Perfect Day at CocoCay, its private island in the Bahamas. During the recent Q4 earnings call on February 7, CEO Jason Liberty and Royal Caribbean International President Michael Bayley revealed plans to increase the island's capacity to 13,000 visitors daily.

Perfect Day at Cococay has quickly become one of the most popular destinations for cruise travelers. With the launch of *Icon of the Seas* coming and with the addition of the new Hideaway Beach, an adult-only neighborhood set to launch in the fourth quarter of 2023, the island is sure to become even more popular.

The economic impact of cruising on ports varies...

A Meta analysis of the economic impact of cruises on destinations



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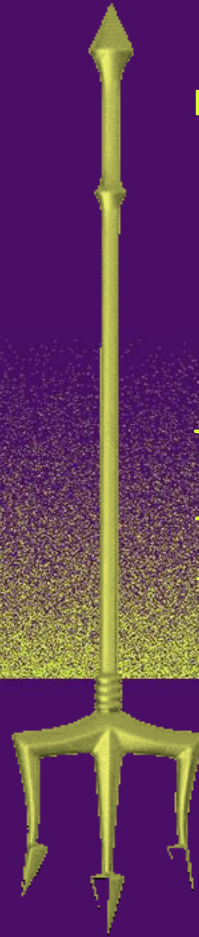
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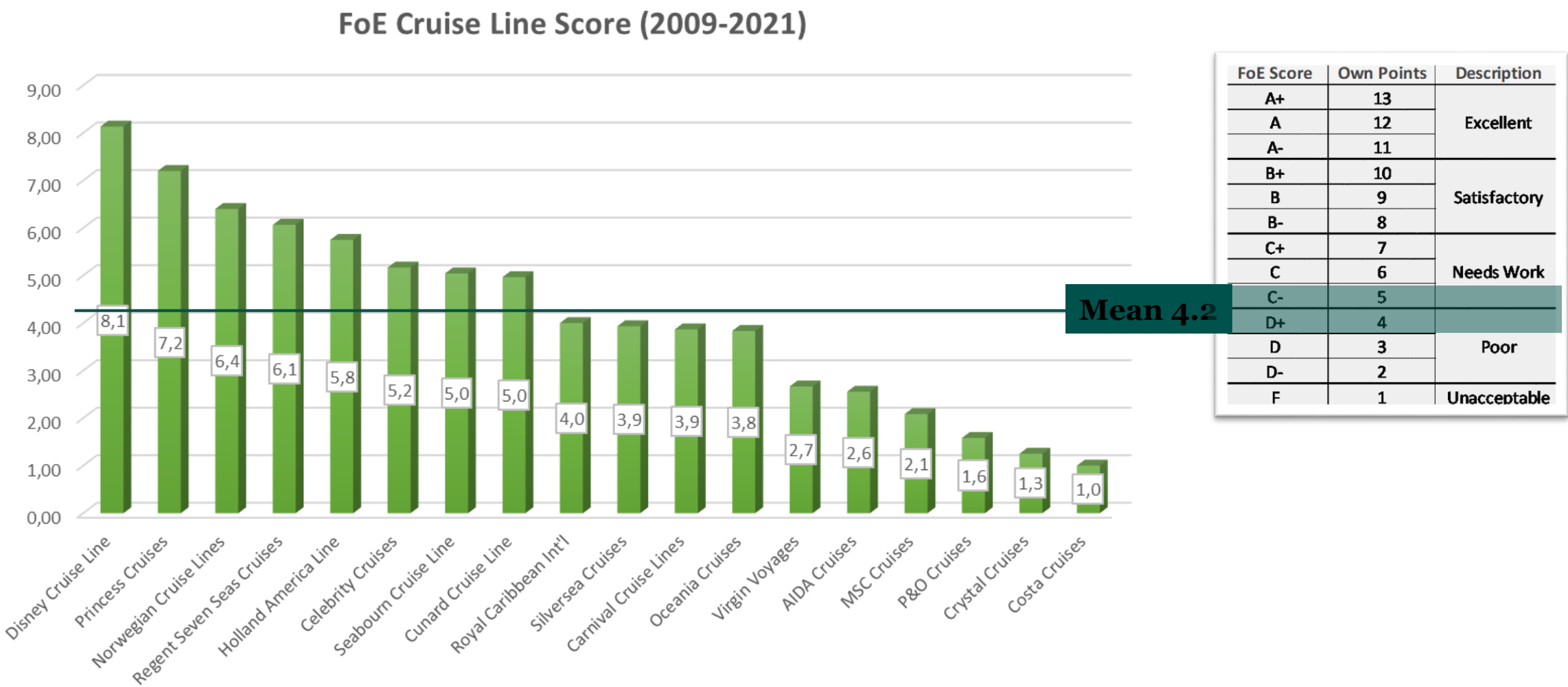
Regulation & Taxation

**... When sustainability
becomes concrete and
hurts the wallet!**



The Critics...

Environmental Sustainability - FoE Scorecard 2009-2021 (Average)



Evaluation of FoE-criteria according to Ship Class:

Large Ships score with Technology, the small ones Compliance

	Sewage Treatment (% of Total Ships)		Water Quality Compliance (% of Total Ships)					Air Pollution Reduction (% of Total Ships)				
Ship Class	Grade F (1)	Grade C (6)	Grade F (1)	D	Grade C (6)	B	Grade A (12)	Grade F (1)	Grade C (6)	B	Grade A (12)	Ship Class % of Total
Mega (>5000 Pax)	6%	94%	95%	2%	2%	0%	0%	51%	19%	26%	4%	26%
Large (3000-5000 Pax)	38%	63%	77%	16%	1%	0%	6%	56%	20%	22%	2%	47%
Mainstream (1000-3000 Pax)	25%	75%	58%	29%	4%	0%	8%	58%	10%	33%	0%	19%
Small (<1000 Pax)	29%	71%	25%	0%	0%	25%	50%	88%	0%	12%	0%	8%
Total	26%	74%	78%	2%	2%	1%	6%	58%	16%	24%	2%	100%

Sewage Treatment: Whether a cruise line has installed the most advanced sewage and graywater treatment systems available instead of dumping minimally treated sewage directly into the water.

Water Quality Compliance: To what degree cruise ships violated 2010-2019 water pollution standards designed to better protect the Alaskan coast. Ships were also failed for scrubber use since they generate toxic water pollution.

Air Pollution Reduction: Whether a cruise line has retrofitted its ships to “plug in” to available shoreside electrical grids instead of running polluting engines when docked. Or uses the lowest sulfur fuel worldwide or both.



'Damocles blade' of regulation!

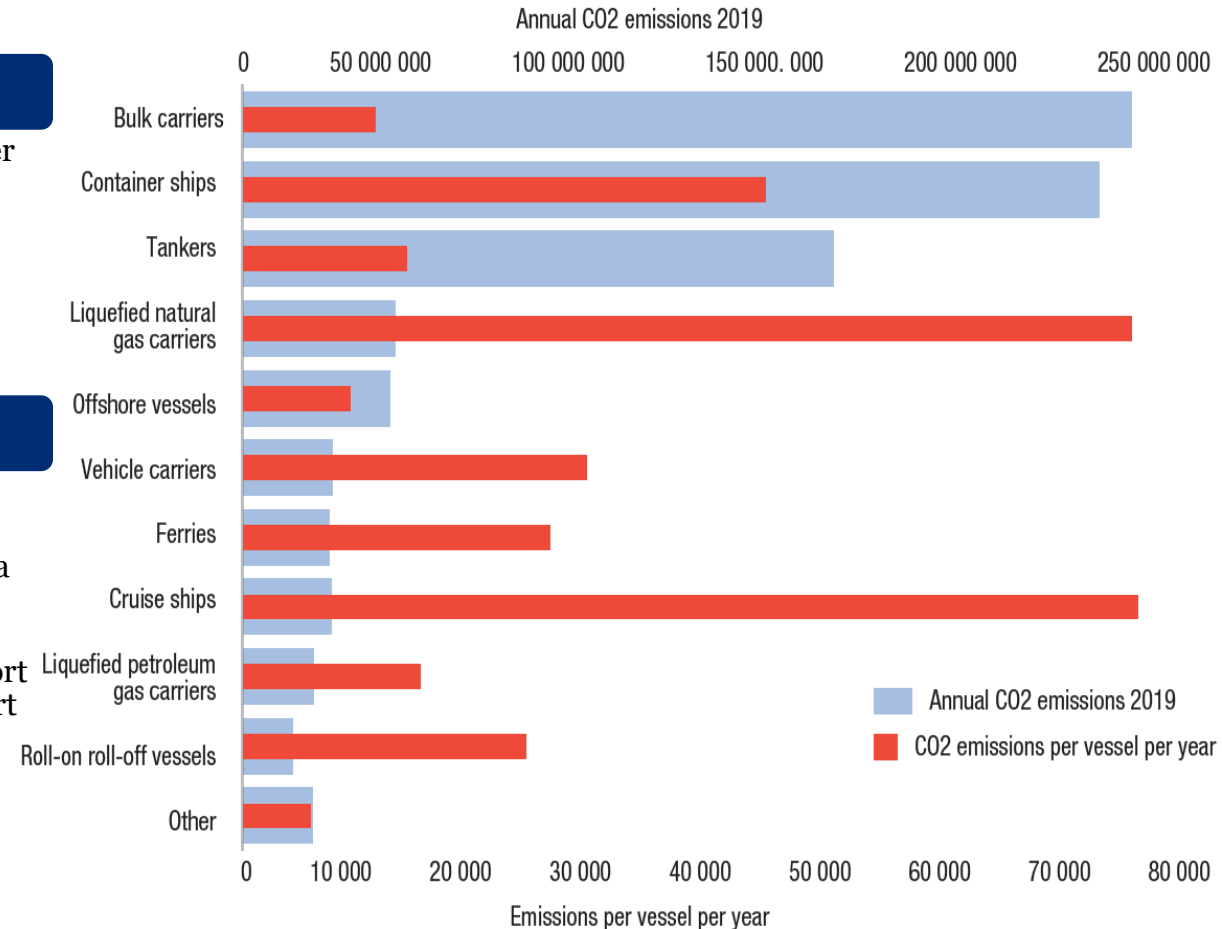
Cruise ships have the largest '**CO₂ foot**' but a relatively small '**CO₂ footprint**'.

EU Emissions Trading System (ETS)*:

- In January 2024, the EU Emissions Trading Scheme (EU ETS) will be extended to cover CO₂ emissions from **all large ships** (of 5000 gross tonnage and above) calling at EU ports, **regardless of which flag** they fly. The scheme covers:
 - 50% of emissions from journeys starting or ending outside the EU
 - 100% of emissions occurring between two EU ports and when ships are in EU ports.
 - The EU ETS covers emissions of CO₂ (carbon dioxide), CH₄ (methane) and N₂O (nitrous oxide), but the latter two only from 2026.

IMO's EEXI and CII Reporting**:

- From 2023, shipping companies will have to submit two sets of data to the IMO each year:
 - **Energy Efficiency eXisting Ship Index (EEXI)**: This is the energy efficiency of a ship (CO₂ emissions per tonne and nautical mile) compared to a baseline based on ship design (installed engine power, transport capacity and ship speed).
 - **Carbon intensity indicator (CII)**: This measures the efficiency of a ship's transport of goods or passengers (i.e. a ship's CO₂ emissions per unit of nominal transport effort - the product of a ship's capacity and the total distance travelled in nautical miles).
- From 2024, the IMO will give ships CII ratings (A-E, where A is best / least carbon intensive). The level of performance will be recorded in a "**compliance statement**" **which will** be included in the ship's Ship Energy Efficiency Management Plan (SEEMP).
 - Rating E -> plan with corrective measures to achieve a C or better
 - Rating D -> 2 more years time and plan with corrective measures
 - Rating C, B or A -> Efforts to achieve consistent A



Source: UNCTAD calculations, based on data provided by Marine Benchmark.
<https://unctad.org/news/covid-19-cuts-global-maritime-trade-transforms-industry>



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

Larger cruise ship newbuildings and reduction of operating life (esp. older ships)

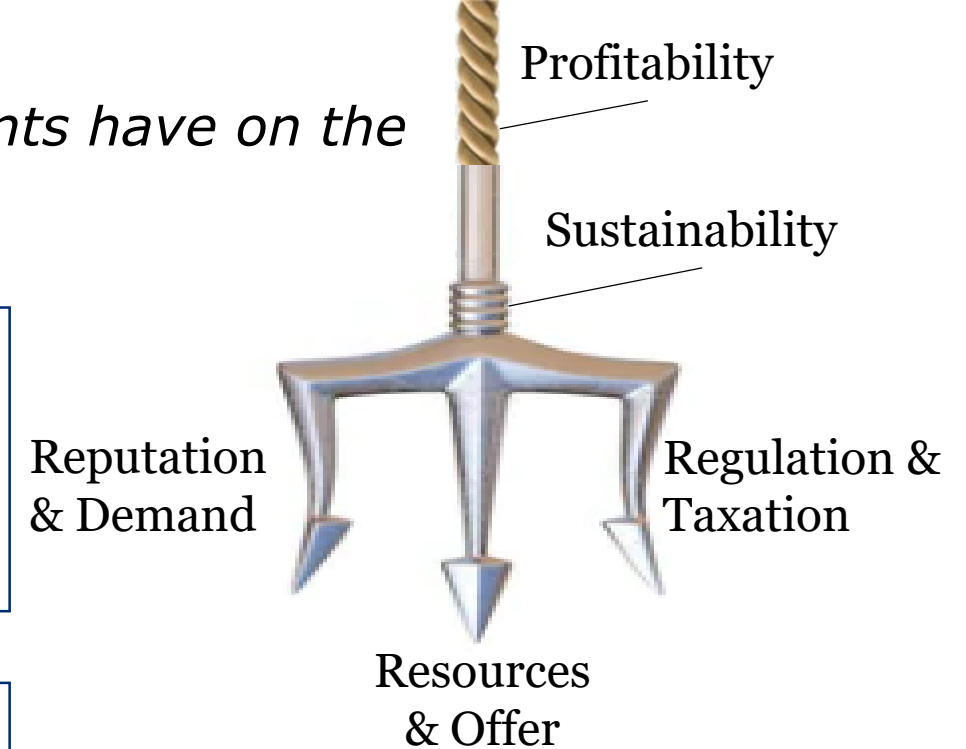
- Technologically up to date and more energy-efficient
- More control over and opportunities to generate on-board revenue
- Digital services and a lower crew-to-passenger ratio

Declining port calls and increasing home ports outside the EU

- Shipping companies shift their routes (to non-EU territories) and include their own private islands in 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 become more expensive and deliver less value for money
- Increased polarisation of markets/segments (class instead of mass), at least in Europe (i.e. return to the 'traditional' model).

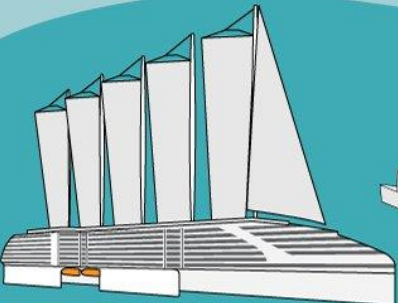


Reasons for optimism...

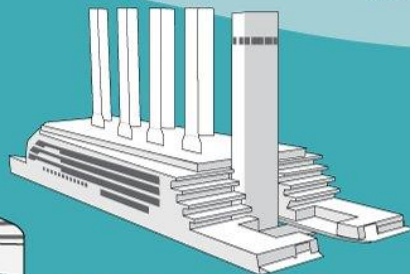
TRANSPORT

Future ship shapes

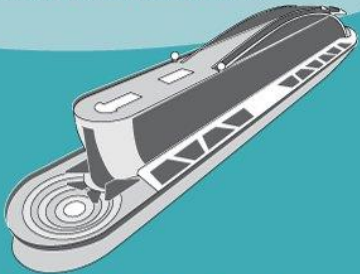
When it comes to transport, the seas are not always the first port of call. But with advances in technology it looks likely that they will continue to play a vital role. Their ability to transport huge cargo and thousands of passengers in just one trip makes them an attractive option. The industry is moving to use cleaner oil-based fuels and alternative energy – such as solar, wind power and fuel cells (electrochemical cells that convert the chemical energy from fuel into electricity) – is another innovation of these future ships.



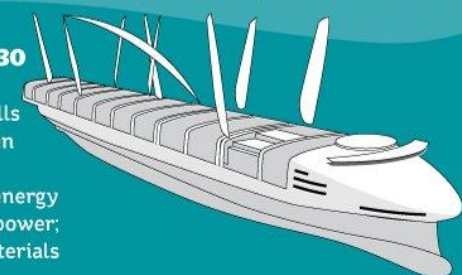
Eoseas Concept Cruise Ship
Capacity: 3,311 passengers
Crew: 1,089
Length: 305 metres
Features: four dual-fuel LNG (liquid natural gas) diesel electric generators; innovative sail concept for added wind energy propulsion




Zero Emission Activity Cruise Vessel
Capacity: 540 passengers
Length: 160 metres
Power source: fuel cells, solar and winds energy
Features: Swat (Small Waterplane Area Twin) hull; four fully automatic wing sails



"World Class" Cruise Ship
Capacity: 5,400 passengers
Features: 2,700 staterooms; all season sailing capability; LNG-fueled



Super Eco Ship 2030
Length: 353 metres
Power source: fuel cells using LNG as hydrogen source
Features: additional energy from solar and wind power; friction-resistant materials



Vindskip
Features: symmetrical aerofoil-shaped hull designed to harness wind propulsion in tandem with LNG; fuel savings of 60 per cent and reduced carbon emissions by 80 per cent compared with conventional shipping

SOURCE: FUTURISM @INEWSGRAPHICS

but at the end of the day...


WESER KURIER

"Klimawandel macht den Urlaub teurer"

Hitzewellen und Waldbrände verdarben in diesem Sommer so manchen Mittelmeerurlaub. Welche Auswirkungen der Klimawandel auf die Sommerferien hat, erklärt der Bremerhavener Tourismusforscher Alexis Papathanassis.

04.09.2023, 05:00 Uhr ⌚ Lesedauer: 5 Min 📌 Zur Merkliste

Von Christoph Barth



Mit Strandtüchern versuchten sich Badegäste in diesem Sommer vor der Hitze auf der Mittelmeerinsel Mallorca zu schützen.
Foto: CLARA MARGAIS

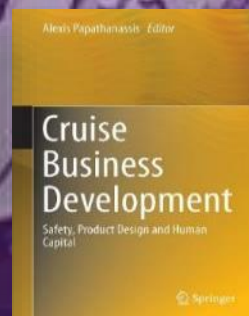
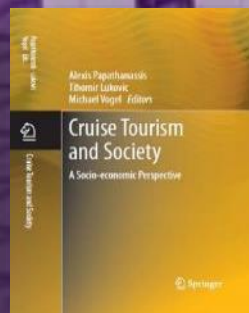
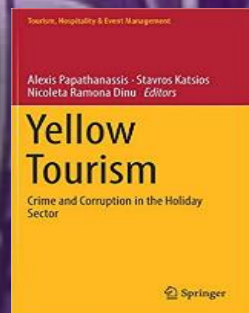
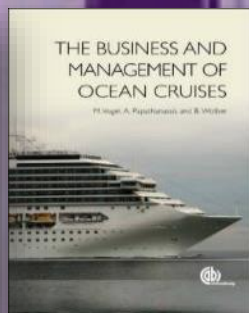
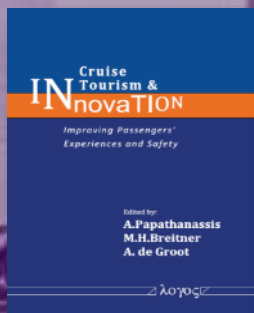




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Thank you for your attention



Future Concept-Models

From Flying Cruise Ships to Nuclear Cruises...



Where is the cruise industry 'sailing'?

