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PROSPECTS OF DEVELOPMENT OF THE CRUISE SHIP TOURISM MARKET – THE CASE STUDY OF THE BALTIC SEA REGION

PERSPEKTYWY ROZWOJU MORSKIEJ ŻEGLUGI WYCIECZKOWEJ – PRZYKŁAD REGIONU MORZA BAŁTYCKIEGO

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Summary: In 2018 the cruise ship tourism market generated 35.5 bn USD and in the Baltic Sea Region (BSR) the rate of growth is more significant compared to other markets in the world. The figures, provided by Cruise Baltic, prove that in 2018 cruise ships carried 5.8 million passengers, which constitutes 7.7% of the average annual growth in the number of passengers carried within the BSR. The share of cruise ship tourism market in the BSR in the global market, amounts to 11.7 %. The aim of this article is to assess the potential of the BSR regarding the development of cruise ship tourism and to indicate trends for the development of this market. The study included both exploratory method and "desk research" method. In the analysis of the study results the author used quantitative and qualitative methods. The results of the research may constitute interesting study material for the entities directly and indirectly related to the cruise ship tourism market.

Keywords: cruise tourism, Baltic Sea region.

Streszczenie: Rynek usług morskiej żeglugi wycieczkowej w 2018 roku wygenerował przychody na poziomie 35,5 mld USD – w regionie Morza Bałtyckiego (BSR) wykazuje dużą dynamikę wzrostu względem innych rynków na świecie. Z danych organizacji Cruise Baltic wynika, że w 2018 roku przewieziono na statkach wycieczkowych 5,8 mln pasażerów, co dało 7,7% średniorocznego wzrostu liczby przewożonych pasażerów w BSR. Rynek usług żeglugi wycieczkowej w BSR ma udział w rynku globalnym na poziomie 11,7 %. Celem artykułu jest ocena potencjału BSR w zakresie rozwoju morskiej żeglugi wycieczkowej oraz wskazanie kierunków rozwoju tego rynku. W pracy wykorzystano metodę eksploracyjną oraz metodę *desk research*. W analizie wyników zastosowano metody ilościową i jakościową. Wyniki badań mogą stanowić ciekawy materiał poznawczy dla podmiotów bezpośrednio i pośrednio powiązanych z rynkiem usług żeglugi wycieczkowej.

Słowa kluczowe: żegluga wycieczkowa, region Morza Bałtyckiego.

1. Introduction

At present, the Baltic Sea Region (BSR) has a significant role in the cruise ship tourism market. Year by year, we can observe an increase in the demand for cruise travel (Table 1). In the report by Cruise Baltic, between 2000 and 2018 the number of cruise travellers increased by on average at the annual rate 9.5% per year from 1.1 million to 5.4 million in 2018 [Cruise Baltic 2019, p. 4], whereas average annual recorded growth has been recorded approximately at above 7 % for years, which is a better result than in other parts of the world.

Nevertheless, recently there are more and more comments concerning the detrimental effect of cruise ships on the marine environment, and numerous organizations acting for the protection of the marine environment are running campaigns to reduce the number of cruise ships entering city centres and the level of harmful emissions to the environment.

2. Research studies and trends in the development of cruise ship tourism market

In the literature there is still too little space devoted to the development of cruise shipping market in the BSR. Regular studies based mostly on basic statistics on the number of passengers transported and numbers of cruise vessels supported in cruise ports have been carried out by the organization called Cruise Baltic (CB), which annually publishes reports on the subject [Larsen 2013, p. 14], while the European Cruise Council [2012] addresses the impact of the economic contribution of the cruise shipping industry to the economic development of coastal regions [ECC 2012]. For several years in the BSR, CLIA Europe also operates and conduct studies regarding the phenomena related to cruise shipping in the BSR, however in-depth surveys of the BSR cruise shipping market is a research area for only a few scientists. It is worth mentioning here, for example, the research studies conducted by A. Serry, who raises issues of the negative impact of cruise tourism both with regard to nature and also to society [Serry 2014]. Interesting studies on the classification of base ports was carried out by M.B. Lekakou et al. [2006, p. 215]. Some authors also undertake studies on the impact of climate change on the development of the cruise tourism market, e.g. J. Hamilton and D. Maddison, and also R. Tol [2005]. The sustainable development of cruise tourism has also been a field of the scientific researches in recent years [Pearce 2013, pp. 5-77; Grammerstorf 2012, p. 2].

In view of the dynamic development of the cruise tourism market in the world, various researchers try to identify current trends of development of cruise tourism market, as reflected, for example, in the publication by E. Chen [2012]. For a stable cruise tourism market development, which has an international dimension, the regional policy applied by the territorial and national authorities and also the EU is considered to be of great importance. Numerous restrictions imposed on shipowners to protect the environment, reduce emissions of harmful substances to the atmosphere and the environment [Studzieniecki 2016; Skrzeszewska, Beran 2016, p. 313], and corporate social responsibility [Szelągowska-Rudzka 2016, pp. 115-124] create barriers to the intensive development of the cruise tourism market and force the cruise ship-owners to adapt their fleet and standards for the organisation of sailings to the legal requirements to ensure a balanced and sustainable development of urban and coastal regions. These issues are also analyzed in scientific publications worldwide.

In the world, most research studies in the field of cruise tourism are carried out in more detail and do not relate solely to clean transport statistics, but analyse motivation for voyages, as in J. Petrick [2005], the decision-making process of cruise passengers, [Petric et.al. 2007] and social behaviour of cruise passengers aboard the ships. Such studies were carried out by C.M. Yarnal and D. Kerstetter [2005, pp. 368-379].

At present, tourists more often search for more sophisticated holidays. Nowadays, the consumer demand is changing very rapidly, and tour operators must follow these changes and adjust their product offer to the needs, requirements, possibilities and preferences of potential customers. In order to meet market requirements, cruise line operators prepare very attractive holiday packages on- board and visiting the seaside tourist destinations. However we need to emphasise that the substantial seasonality of tourist demand poses significant challenges to the tour operators. For example, in order to make the best use of their fleet, ship owners search for new interesting routes for voyages in regions where, in a particular season, the weather conditions are most favourable. In such cases, the BSR becomes a perfect alternative. In the hurricane season in the Caribbean Sea, ship owners move their vessels to the Mediterranean and Baltic Sea ports.

Moreover, in the face of global competition, cruise operators compete with each other to make their holidays more attractive by promoting themed cruises such as: cruises for seniors, for art enthusiasts, educational, adventurous, culinary cruises and many others [Kizielewicz 2013, p. 37]. Preparing such attractive products would not be possible if ship owners were not ordering ever lagers cruise ships to provide all facilities for the passengers on board. Modern cruise ships are floating entertainment centres with numerous restaurants, cafés, bars, pubs, casinos, sport centres, fitness clubs, mini golf courses, climbing walls, theatres, cinemas, discos, shops as well as beauty shops, and even hospitals offering cosmetic surgery treatments, maternity wards and dentist's. In general, every customer will find tailor-made services on board of a cruise ship. The purchase of such large vessels is a huge challenge for the shipping lines, therefore to bear the costs, one can observe the concentration of capital in the shipping companies, which is also conductive to integrated promotion and provides better opportunities to attract clients from all around the world.

The intensive development of cruise ship tourism services refers to new cruise ships on the market, which significantly affects the natural environment [Klein 2010, pp. 113-130; Kizielewicz, Luković 2015, p. 247]. The serious pollution of seas and oceans with tons of plastic, sewage and fuel from ships, led to the introduction of IMO international regulations limiting the emissions of harmful substances to the environment and atmosphere. Moreover, pro-ecological organizations are very active in protecting the marine environment, they regularly monitor the environmental pollution caused by the shipping lines. Secondly, more often the authorities of famous seaside tourist destinations force the authorities of sea ports to limit the number of calls per day, to ensure the communication capacity in the region as well as comfort of relaxation, and balance the adverse impact on the natural and cultural environment and the inhabitants' comfort of living [Craig-Smith et al. 2006, pp. 107-127]. A good example is the model cooperation between the port and city authorities in Dubrovnik, where the number of cruise ships allowed to be handled in the port was limited to eight per a day in order to avoid the negative aspects of mass tourism, thanks to the deal made between the port authority and the local authority.

Another trend that can be observed on the cruise ship market is the packaging of offers to reduce the barriers related to the availability of cruises for passengers located far away from the departure port. Therefore, ship owners offer tourist packages including transport from the place of residence to the departure port, cruise and return, the so-called flight&cruise.

3. Potential of the Baltic Sea Region in the development of cruise ship tourism

In the BSR there are all types of cruise sea ports, the so-called home ports[1], ports-of-call[2], incoming ports (e.g. Gdynia – the gateway to Gdańsk) and hybrid ports. The BSR includes 20 modern cruise sea ports with appropriate organizational and technical facilities to handle cruise ships. The majority of ports are located in Germany, including one home port in Rostock, one incoming port in Wareneműde in Germany - the gateway to Berlin and two ports-of-call (Kiel and Wismar). In Denmark there are three cruise sea ports, including the most important in the Baltic the home port of Copenhagen, the unquestionable leader in handling cruise ships in the Baltic and two ports-of-call (Fredericia and Aarhus). In Poland the most important port is the incoming port in Gdynia, gateway to Gdańsk, and this is shown in its classification in the statistics (Table 1).

[1] Port where a cruise ship is based, normally for a series of cruises. May also be referred to as a base-port, embarkation port or turn around port [CLIA 2018, p. 27].

[2] Port at which a cruise ship calls during the course of cruise. Also sometimes referred to as a transit port or destination port [CLIA 2018, p. 27].

Table 1. Cruise sea ports in the Baltic Sea Region in 2018

No	Name of cruise port	Country	Number of passengers in 2018	Number of calls in 2018
1	Aarhus	Denmark	97 819	42
2	Berlin (Rostock)	Germany	657 000	206
3	Copenhagen	Denmark	869 000	343
4	Fredericia	Denmark	10 558	8
5	Gdansk	Poland	30 260	67
6	Gdynia	Poland	100 000	50
7	Gothenburg	Sweden	54 537	43
8	Helsinki	Finland	520 000	285
9	Kiel	Germany	597 848	168
10	Klaipeda	Lithuania	69 551	58
11	Kotka	Finland	2 500	5
12	Riga	Latvia	74 785	86
13	St. Petersburg	Russia	649 324	340
14	Stockholm	Sweden	619 000	268
15	Tallinn	Estonia	635 000	339
16	Visby	Sweden	75 180	75

Source: own elaboration on the base of [Cruise Baltic 2019, p. 10; ZMPG SA 2019]

Today in the BSR we can find all the leading shipping companies, including: Carnival Corporation & PLC and Royal Caribbean Cruises Ltd., Norwegian Cruise Line and MSC Cruises, TUI Cruises, Viking Cruises and many others.

The Cruise Baltic Organization has been monitoring the cruising market in the BSR for years, and based on the number of vessels handled in particular ports

Table 2. Segments of cruising market in BSR by *Cruise Baltic* in 2018

Segment of cruise market	Number of turnrounds	Port name in BSR
Small segment	0 < 24	Lubeck-Traveműnde (21), Marienhamn (16), Saaremaa (9),Malmö (9), Arendal (8), Fredericia (8), Helsingor (6), Helsingborg (1), Kotka (5), Karlskrona (6), Turku (5), Kalmar (1), Kemi (1), Kalundborg (1)
Medium segment	25 < 49	Skagen (44), Gothenburg (43), Aarhus (42), Aalborg (33).
Large segment	50 < 199	Oslo (98), Visby (75), Riga* (86), Kiel* (168), Rostock (181), Gdańsk (67), Kleipeda (58), Kristiansand (55).
X Large segment	200 <	Helsinki (285), Stokholm (268), Tallinn (339), St. Petersburg* (340), Copenhagen (343), Rostock (206).

*St. Petersburg, Kiel and Riga are not members of the Cruise Baltic, but are included in the analysis in order to show the full picture of the region.

Source: [Cruise Baltic 2019, p. 10].

provides segments of sea ports. There are four market segments, small, medium, large and X-large (Table 2).

Analysis of the report on the number of calls at sea ports in the BSR demonstrates that the unquestioned leader in the market is the hybrid port in Copenhagen, which handled 343 calls (869 000 passengers) in total in 2018, and the second is the port-of-call in St. Petersburg, with 340 calls (649 324 passengers) in 2018. The top group still includes ports in Helsinki (285 calls), Stockholm (268 calls) and Tallinn (339 calls) and Rostock (209 calls) (Table 1). It is worth emphasizing that the report is not complete since it contains information on the operation of ships in the sea ports of the BSR, which joined the Cruise Baltic organization (CB) and regularly pay the subscription. For example, the sea port in Gdynia, the most important cruise sea port on the Polish coast, withdrew its membership of the organization several years ago, which resulted in its exclusion from the statistics.

Moreover, it is worth emphasizing that the criterion of segments applied by CB is controversial since it takes into account the number of calls and not the size of the ships nor number of on-board passengers entering the port. The gross register tonnage and number of passengers on board is very important for the economic effects generated both in the port and in the seaside regions visited by travellers.

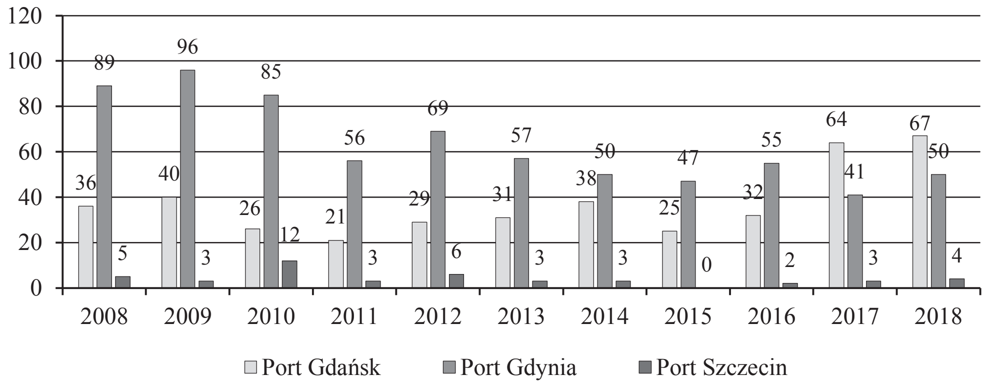

Fig. 1. Cruise ships in the Polish seaports 2008-2018

Source: own elaboration on the statistical database of: [ZMPG SA 2019; ZMPSŚ 2019].

In Gdańsk in 2018, the port handled 67 vessels, and the port in Gdynia only 50 vessels (Figure 1), but the vessels which call at Gdańsk are several times smaller and take on board maximum 1.5 thousand passengers, whereas Gdynia accepts the world's largest ships with over 6.5 thousand passengers, such as m/v "Norwegian Getaway" under the Bahama's flag, with 325.7 meters in length and a capacity of 146.6 thousand GT.

In light of the new trends, the BSR has perfect conditions for the development of the tourist market, including cruising. One can find here historical cities such as Gdańsk, Riga, Tallinn, Copenhagen and St. Petersburg, which is the main destination of cruise voyages in the Baltic Sea. Moreover, the BSR can boast about organizing numerous well-known international arts and music festivals. It is worth mentioning at least these organized in Poland, such as the Sopot Festival, the Theatre Festival in Gdańsk, and the Film Festival in Gdynia. Numerous historical locations (gothic castles, churches, cathedrals, palaces and manors) and folk culture centres as well as many entertainment events and attractive natural areas attract tourists from all over the world. Such significant potential provides perfect conditions for preparing interesting tourist packages addressed to clients with different interests, financial possibilities, and representing various groups of interests.

4. Prospects of the development of cruise ship tourism in the Baltic Sea Region

The CLIA estimates that 30 million cruise passengers will take part in cruise travel globally in 2019. Forecasts indicate that in 2025 the number of cruise ship travellers will amount to 36.3 million people (Figure 2). Such significant growth of this segment of the tourist market refers also to various limitations and threats, in particular to the natural environment.

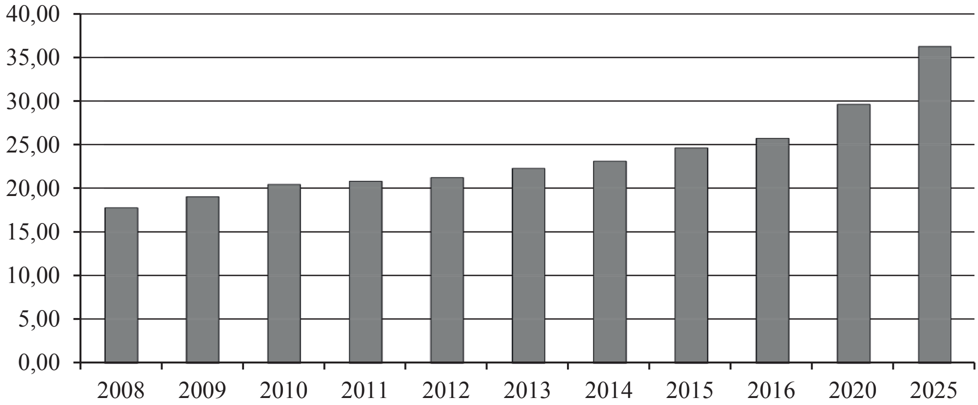

Fig. 2. Forecast for the development of cruise ship tourism in the world (in million passengers)

Source: [CLIA 2019, p. 26].

Assuming that a trend of passenger growth of on average 7% annually has been observed for more than a decade in the BSR, it is possible to estimate, with a great simplification, that in 2025 the number of passengers travelling in the BSR will amount to 8.67 million (Figure 3).

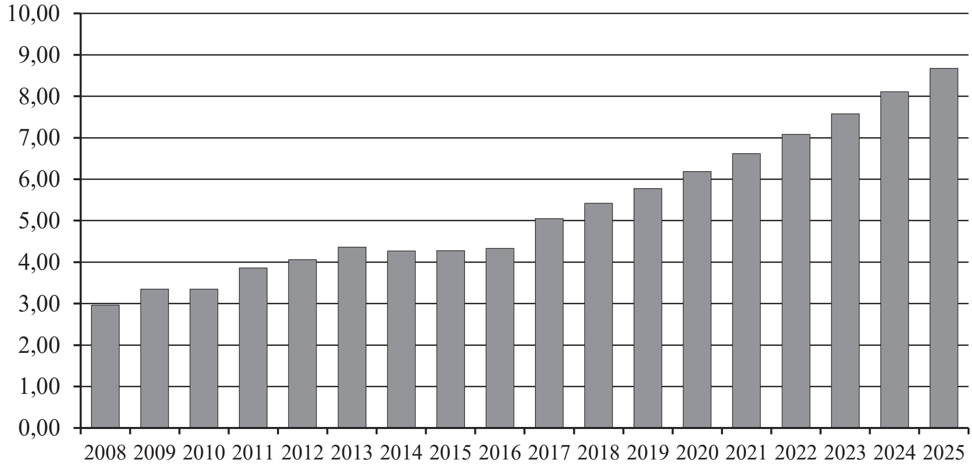

Fig. 3. Forecast for the development of cruise ship tourism in the BSR (in million passengers)

Source: own elaboration.

The number of cruises in the BSR increases most in the summer season, between the end of April and the beginning of September, with the majority organised in August. From October to March, only some cruises are organized related to visiting the northern regions of the BSR and cruises during Christmas time. The large concentration of cruises in the tourist season makes the tourist sites crowded, causing traffic jams, noise and the pollution of seaside towns, making the life of inhabitants difficult. Such a situation poses a serious threat to the sustainable development. These issues are present in port cities such as Dubrovnik, Venice, Barcelona, and Marseilles in the Mediterranean Sea, but also Copenhagen, Tallinn and St. Petersburg in the BSR, visited by nearly all vessels cruising around the Baltic Sea. The port and local government authorities are facing huge challenges since, on the one hand, all parties want to handle as many cruise ships and passengers as possible since it generates revenue for the city and the port, and on the other, it affects the standard and quality of leisure and life of the inhabitants of tourist destinations.

The most important opportunities for the development of cruise ship tourism market in the BSR include the constant search for alternative routes by cruise line operators due to the adverse effects caused by extreme weather conditions, e.g. the severe and unpredictable hurricanes within the Caribbean Sea region with the largest concentration of cruise voyages. The damage caused in the Bahamas, the Dominican Republic, Barbados and many others requires significant funds for repairs and unfortunately the earlier scheduled cruises are frequently moved to other regions in the world, mainly the Mediterranean and the Baltic Sea. Moreover, the rich cultural and historic heritage of coastal cities in the BSR, providing a perfect place for interesting themed trips for cruise ship travellers, are very popular among tourists from around the world.

An important argument for the fact that cruise market in the BSR will develop rapidly is the aspect of the growing demand due to the increased availability of cruise travel resulting from affordable prices for wider groups of travellers, and consequently, strong competition between ship owners fighting for clients.

A significant role is also linked to intensified promotional activities of the BSR as a tourist attraction and the integration of the sector within the activity of organizations and associations acting for the benefit of cruising development, such as Cruise Europe[3], CLIA Europe[4] and Cruise Baltic.

An important factor is also the implementation of international development projects co-funded by the European Commission and sea ports in the BSR in order to intensify the cruising market and standardize passenger services, such as: *„SeaSide –Developing Excellent Cultural Destinations in the Southern Baltic Area*[5], *Enjoy the South Baltic*[6], *BaltMet Promo*[7] [Kizielewicz 2014, p. 11].

Table 3. The development potential of cruise ship tourism market in the BSR

Strengths	Weaknesses
• 3 home ports in BSR; • 17 modern ports-of-call in BSR; • Rich cultural and leisure offer in coastal regions; • Historic towns and numerous architectural monuments, • Attractive natural areas, national parks and nature reserves; • Attractive cruise fares (scale effect).	• Unfavourable weather conditions during autumn and winter; • Frequent storms and thunderstorms; • Too few home ports in relations to other regions of the world; • Long distance of BSR from source markets of tourist demand.
Opportunities	**Threats**
• Actions for the sustainable development of the cruise tourism market; • Investment in port infrastructure development and renovation, thanks to support from EU funds; • EU financial support for port cooperation projects in the BSR; • Increased interest in BSR among leading cruise line shipowners.	• Strong competition from the Mediterranean Sea Region; • Unexpected violent weather anomalies; • Introduced restrictive legal provisions imposing unequal navigation rights in the Baltic and Mediterranean seas; • Ecological organisation activities aimed at limiting the number of vessels calling at historic port cities.

Source: own elaboration.

[3] Organisation representing the interests of cruise ports located mainly in Northern European waters.

[4] Organisation established to promote the interests of cruise operators in Europe and their interests with the EU institutions.

[5] SeaSide – developing excellent cultural destinations in the southern Baltic.

[6] "Enjoy the South Baltic!" − aimed at improving the image and competitiveness of the BSR as an attractive tourist destination.

[7] Baltic Metropolies, BaltMet Promo – the active promotion of the BSR globally for tourists and investors.

Nevertheless, apart from the number of positive conditions for the development of the cruise market in the BSR, one also needs to remember the threats (Table 3). Extreme weather conditions in other parts of the world exert an impact on the intensification of cruises in the BSR, but one should be aware that global warming has its negative consequences observed also in that region in the form of unpredictable weather phenomena [Dawson et al. 2007, pp. 69-83], such as severe storms and fog not favourable to cruising.

The BSR faces a significant challenge in the form of strong competition from the Mediterranean Sea region where we can find equally interesting historic places and attractive cultural and entertainment packages with more favourable weather conditions. Moreover, the location of the BSR away from the main sources of tourist demand, i.e. the USA and Asia, involves the necessary transport of tourists, which has a significant impact on the total cost of travel and makes the BSR less attractive in this aspect.

However, the most significant threat causing unequal competition on the cruise market is the Sulphur Directive, introduced at the initiative of the European Union and International Maritime Organization (IMO), causing financial encumbrance for ship owners operating in the BSR and establishing limits for sulphur emissions from 1 January 2015 from ships from 1% to 0.1%, in particular for ships propelled by HFO (*Heavy Fuel Oil*). As a result, ship owners had to bear the costs of new engines propelled by liquid gas LNG installed in new vessels and purchase more expensive low-sulphur fuel. Meanwhile, in the Mediterranean Sea region these requirements are not compulsory.

5. Conclusions

In summarising, it must be emphasized that the Baltic Sea Region has favourable conditions for the development of a cruise ship tourism service market. Modern port cities, a rich historical and cultural heritage, a developed cruise shipping sector and operating cruise line owners guarantee that the cruise market will follow the growing trend. For cruise travel operators, the region is a perfect alternative in terms of difficulties resulting from extreme weather conditions in other parts of the world and possibilities to move cruises to the BSR, mostly because of the possibility to develop package holidays related to wide cultural diversity of the Baltic states and their rich historical heritage. The investment in the last decade in the port and supra-port infrastructure, thanks to EU funds and international projects, has significantly improved the tourist-related attractiveness of the Baltic ports, observed in the growing interest among the leading cruise line operators.

An expected increase in the number of cruise ships and cruise travellers in the BSR is considered to be a positive phenomenon for some of entities, but there are some who treat this as a great challenge. In the first group there are mainly cruise travel organizers including: cruise line shipowners, tour-operators, shipping agencies and the board of seaports, as well as other entities dealing with services for ships and passengers, since they derive direct financial benefits thanks to the development of cruise tourism market. However, in the second group, there are the territorial authorities of coastal cities, and local residents, who must face the negative effects of mass tourism, in this case – cruise tourism. This is about the congestion in cities, traffic jams, litter, pollution of coastal waters and air by cruise ships, increased noise, higher prices of basic products and services and difficulties in accessing to everyday services, etc. In conclusion, it should be stressed that for the stable development of cruise tourism, cooperation between the representatives of the first and second group of interests is necessary. It is important to develop a formula respecting the rights of both parties and caring for the idea of sustainable development of cruise tourism respecting the environment and the rights of inhabitants, as was done in the city of Dubrovnik, as mentioned above.

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