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Cruise tourism in the Baltic and Bothnian Sea
- A pilot study on maritime tourism

Seagull
An EU Interreg III B project

af

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Preface

Commissioned by the Interreg IIIB project *Seagull*, the Centre for Regional and Tourism Research has carried out a survey of cruise tourism in the Baltic Sea region. The goal of the Seagull project is to strengthen co-operation among the Baltic Sea countries, and tourism is considered a possible strategic focus area.

Just as globally, tourism is a fast growing phenomenon in the Baltic Sea region. Especially for the new EU member countries tourism appears to be one of the most important instruments for economic development. This has led to increased competition among the destinations around the Baltic Sea.

The report shows that cruise tourism is one of the areas in which obvious advantages and synergies could be gained through co-operation. The Baltic Sea countries are visited by about 10 per cent of the world's cruise tourists and there is a tendency that even more cruise tourists will choose the Baltic Sea because of safety and security reasons as well as new and interesting destinations.

The survey and analysis suggest a number of specific opportunities for co-operation, which can contribute to a better utilization of the potential for cruise tourism and thereby positively influence the economic development in the Baltic Sea region.

Peter Billing
March 2005

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1 Introduction

Cruise tourism is not the biggest branch of global tourism and it has often been regarded as just an expensive pleasure for grey and wealthy pensioners. The revenue for the towns visited has been said to be very low.

Lately, there is, however, an increase of interest in cruise tourism among tourism researchers (Douglas & Douglas 1996; Morrison et al 1996; Moscardo et al 1996; Bull 1996; Dwyer & Forsyth 1996; Cockerell 1997; Dickinson & Vladmir 1997; Burt 1998; Cartwright 1999; Peisley 1999, 2000; Frantz 1999; Gmelch 2003).

Douglas & Douglas (1996) provide a historical background to cruise tourism. They focus upon the South Pacific and describe the different phases of cruise tourism development, which in many ways is general: the start in 1884 as a subsidiary activity to mail transport, the luxurious interwar period when cruising came in to its own as a desirable tourism experience (with for example the possibilities of playing cricket on deck), jet aircraft development during the 1960s which provided severe competition for ocean liners, the international crisis in the 1970s with booming fuel prices, and finally the unavoidable transformation of ocean liners to cruise liners.

Morrison (1996) and *Moscardo* (1996) make a social psychological analysis of the cruisers. Morrison provides a background description of today's cruise industry and states that, in the 1990s, land based resorts are struggling to maintain their market share while cruise liners continue to grow. In order to meet that challenge, some hotel chains have found it worth while to diversify into the cruise business, like Radisson, Holiday Inn and Hyatt International.

Peisley (1999) points in his documentation of the global cruise ship industry to its failed attempts to position certain products in niche markets. The markets do not seem to be mature enough to support niche marketing. Although cruise excursionism, he argues, is one of the fastest growing segments of the tourism market, only the Caribbean and Mediterranean basins are significally impacted by the cruise ship sector (Peisley 2000). He is also concerned about overcapacity, since 50 additional cruise ships are expected to join the cruise fleets between 2003 and 2006.

Franz (1999) points to the environmental problems connected to increasing cruise tourism. He mentions congestion problems at the ports and the social problems related to convenience flags with poor working conditions and low wages. He also mentions avoidance of corporate taxes and flouting of anti-pollution regulations.

Cockerell (1997) discusses river cruise tourism and documents UK river cruise passengers. Political events in certain areas of the globe seem to be changing river cruise patterns. The very popular Nile is now giving way to rivers in Eastern Europe, especially the Neva-Volga connection.

The Baltic Sea is a growing market but has long traditions within cruising tourism. Before World War I, cruise traffic was substantial between the eastern coast of the Baltic on one hand and Sweden/Denmark on the other hand. St Petersburg in particular was of great interest. During the interwar period, St Petersburg/Leningrad disappeared as a target for cruising because of the Russian revolution but, since the Baltic States became free nations thanks to the treaty of Brest-Litovsk in 1918 (with additional treaties for the separate states in 1920), they remained popular destinations especially for Swedes. Figures from 1939 strongly indicate this (Lundgren 2003). Rügen and the southern Baltic coast were also very popular (Helfer 2004). World War II and the iron curtain during the Cold War made cruising to the eastern coast of the Baltic Sea impossible. The period after the fall of the Soviet Union in December 1991 has seen a rejuvenation of the situation, making it similar to that before World War I & II, with St Petersburg again a leading port.

The economics of cruising have been discussed in terms of the general conditions for and development of the cruise industry. *Hobson* (1993) states that in order to talk about the cruise industry, the product and the market place must be defined. He finds that cruising is a single but segmented market with highly differentiated products. He divides the market into four segments: mass, middle, luxury, and speciality.

Bull (1996) defines the product as something that performs *essentially the same function or possesses some basic homogenous characteristics…(which) may lead to an identifiable price nexus* (p. 29). In the long run this will probably happen. Concerning markets, a great variety of market characteristics exist because of geographical conditions and government priorities. He gives an overview of these characteristics in a matrix:

Table 1. Overview of cruise markets

Location/type	**Comment**	**Supply/markets**
River, canal, lake cruises	Several markets according to location	Small, shallow vessels, often domestic markets
Special interest (sailing education, exploration)	World-wide markets, highly differentiated	Purpose-built vessels, specialist crews, degree of monopoly through differentiation
Long distance ocean cruising	Single world market	Large vessels, often relying on *tradition* and luxury, resources acquired internationally
Extended ferry *mini-cruises*	Usually domestic	Joint product with car ferries
Short ocean cruises	World market, heavily dominated by US	Mostly large purpose-built vessels

Source: Bull (1996).

Bull finds that the cruise industry differs in investment strategies from other types of tourism industry. Normally, an investment in tourism is made in a specific country with a national bank connection and a national connection in one or other way to the company. Cruise companies have no connections to a destination when they invest. The capital is purely international and the industry is *footloose*, as Bull says. It is an extreme example of multinational capitalism.

Dwyer & Forsyth (1996) discuss the economic impact of cruising and problems attached to measuring it. They show in a matrix the different sources of economic impact:

Table 2. Cruise expenditure and regional and national effect

Type of expenditure	Item purchases	Impact
Passenger		
Airfares to/from destination		National
Internal travel	Road, rail, air	National, regional fares
Add-on expenditure Turn-around	Accommodation, meals Tours and attractions	National, regional share
Port expenditure	Meals, tours, shopping	Port region
Operator		
Port expenditure	State/government Port charges Towage Stevedoring	State and region Regional Regional Regional
Provedoring	Bunkering Stores Service (waste, water)	National Regional and national Regional
Crewing	National crew Port expenditure foreign crew	National Regional
Ship maintenance		Regional
Marketing at the destination		National and regional
Taxes	Income tax, customs duty, departure tax	National and regional

Source: Dwyer & Forsyth (1996).

The Caribbean is the main area for cruise tourism. In a study of tourism on Barbados, *Gmelch* (2003) states that cruises contribute to more than 50 % of the arrivals in Barbados but less than 10 % of the revenue. In an interview with the island authorities, an official says: *We're still not sure what we want from cruise tourism…In some ways they are more of a burden to the infrastructure than an asset. But then there are locals who benefit from the cruise-ship visitors…Overall, I don' t think cruise visitors make enough of a contribution to offset their impact on the infrastructure. But governments in the region don't agree, and some spend a lot of money on infrastructure to accommodate cruise passengers* (p. 185).

To sum up, cruising was from its beginnings in the 19th century a subsidiary business to mail transport or car ferries. The introduction of jet air traffic made it necessary for ocean liners to differentiate their activities and include cruising in their portfolio. The cruise industry has only in the 1990s developed into a business on its own. Today land-based tourists activities are trying to strengthen their positions by joining the cruise market. Cruise tourism is a fast growing tourism segment but with little impact outside the Caribbean and Mediterranean Seas and with few possibilities to create niche markets. The Baltic Sea has traditions in this area and will probably increase its share of total cruise markets in the future. Different trends are possible: bigger ships, more direct control over passengers and ports from the cruise lines, and environmental and social problems.

A lot of questions arise when discussing these trends. What is the impact of 9/11 and other terror threats? Is the trend towards bigger ships sustainable or will there be a diversification of the fleets in order to attract different destination markets? Will the market become mature enough for niche segmentation? What will the market look like and which role will cruising play for the destinations? How will the cruise industry cope with the environmental and social problems connected with it?

This study is a pilot study and can of course not give answers to these questions. The objective of the study is to investigate some ports in the Baltic Sea with reference to cruise tourism and to see how different actors at the destinations cooperate in order to meet the needs and trends of tourism and how they are related to the cruise operators. The impact of cruise tourism for the different destinations is also discussed but in a rudimentary way. In order to get a broader picture of cruise tourism, some observations of the passengers have also been made. The ports investigated are Kalmar, Karlskrona, Rönne, Klaipeda, Kurzeme area and Kemi. Stockholm, Copenhagen, and Luleå are mentioned. The findings will hopefully provide a basis for further studies on a more general and deeper level.

Chapter 3 is based upon Carl Henrik Marcussen's study, (*The Baltic Sea Cruise Market 2003-2004 – Opportunities for the Bothnian Arc).* Chapter 6 is based upon Jan Pedersen's and Kristine Munkgaard Pedersen's observation (not yet published). The rest is written by Per Åke Nilsson.

The study was financed by the EU project Seagull, an Interreg III B project for the Baltic Sea (www.eurobalt.org).

2 Background

Cruising has been recorded since Cook Travel Bureau organised a trip to Nordkap in 1875. A slight increase in cruising took place up to the 1930s when air transport took over a lot of sea transport. The decline in ocean liner shipping since the 1950s led to the development of the cruise industry. Most shipping lines diversified into cruising but they were not entirely successful since vessels, built for long-distance deep-sea voyages, were not built for cruising. Such ships have particular difficulties anchoring alongside docks in shallow water. New companies emerged with a focus upon cruising, like Greek, Norwegian and Russian companies, based predominantly in Caribbean or Mediterranean waters. Cunard introduced the fly-cruise concept with vessels based at Gibraltar and Naples, where passengers flew out by charter planes to join cruise ships (Holloway 2002).

A new concept of cruise holidays has emerged where cruise ships are coming to be seen as floating holiday resorts with non-stop entertainment on board. But there is also another market for vessels of typically 3,000-10,000 tons, carrying around 100-200 passengers. They aim for a market willing to pay the higher prices such vessels demand; these are able to enter smaller harbours, canals and even bigger rivers. They also meet the demand for sustainable tourism in a better way than the big vessels, not only by their construction and fuel consumption but also in their ability to visit remote places without pouring 3,000-4,000 tourists into a fragile human or natural environment (Holloway 2002).

The ideal size for a cruise ship was thought during the 1960s and 1970s to be 18,000 to 22,000 tons, carrying some 650-850 passengers. Due to advanced technology, ships have been built since 1980 with a steadily growing tonnage of up to 100,000 tons (Holloway 2002). The *Voyager of the Seas,* 142,000 Gross Register Tonnage (GRT) and operated by Royal Caribbean Line, is almost a monster, accommodating 3,114 passengers and with a skating rink, a climbing wall, street fair and a full-size basket court. Her sister ship, *Explorer of the Seas,* additionally houses a University of Miami-operated laboratory that allows passengers to observe oceanographic and atmospheric research. These opportunities are meant to keep passengers aboard the ship as much as possible. Long periods at sea are possible to cope with since the *Voyager of the Seas* has 35 bars and an extensive room service. Several of the largest cruise lines now operate their own private ports-of-call. Ordinary ports have problems harbouring these monsters and only selected ports can accommodate them (Weaver 2002, p. 157).

There are more than 250 cruise ships operating worldwide, of which 50 % operate outside US ports.

Table 3. Cruise passengers, increase in total and after national origin, 1999-2002, in million passengers

Year	N America	UK	Cont. Europe	Rest of World
1999	5.9	1.0	0.9	1.8
2002	7.6	0.8	1.3	1.4

Source: Marcussen (2004).

In 1999, 60 % of all cruise passengers in the world were Americans. In 2002, the number was even higher: about 68 %. The figures are, however, approximate and elaborated by different methods.

The Cruise Lines Industry of America (CLIA) forecast a continued increase in 2000 to 13 million passengers by 2005 and a potential long-term market for cruising of around 35 million passengers. West European shipyards like Fincantieri, Kvaerner, Chantier d´Atlantique and Meyer Werft have substantial orders for new cruise ships for 2005. Most of the ships will be bigger than 60,000 tons and some will carry almost 4,000 passengers. Most of the routes are seasonal so the operators have to move the vessels from one region to another to take advantage of peak seasons (Holloway 2002).

The Baltic regions account for 10 % of the total number of cruise passengers (Holloway 2002, p. 124). About 239,000 people cruised the Baltic Sea in 2003.

Table 4. Cruise passengers, Baltic Sea 2002, no. and after national origin

North America		UK		Germany		Sweden/Finland		Others		Total	
No	%	No	%	No	%	No	%	No	%	No	%
105,160	44	52,580	22	47,800	20	14,340	6	19,120	8	239,000	100

Source: Marcussen (2004).[1]

The typical cruise passenger used to be older, wealthy and predominantly North American. Today, the cruise market caters for all types of needs, ages and purchasing abilities. Cruising is today more of a leisure *product* than a transportation *mode.* The sea voyage with entertainment and leisure facilities within the ship is more important than the destinations reached. The excursions at the port are more important trip elements than the palaces visited (Weaver 2000). New types of products with smaller cruise ships have emerged for regional itineraries.

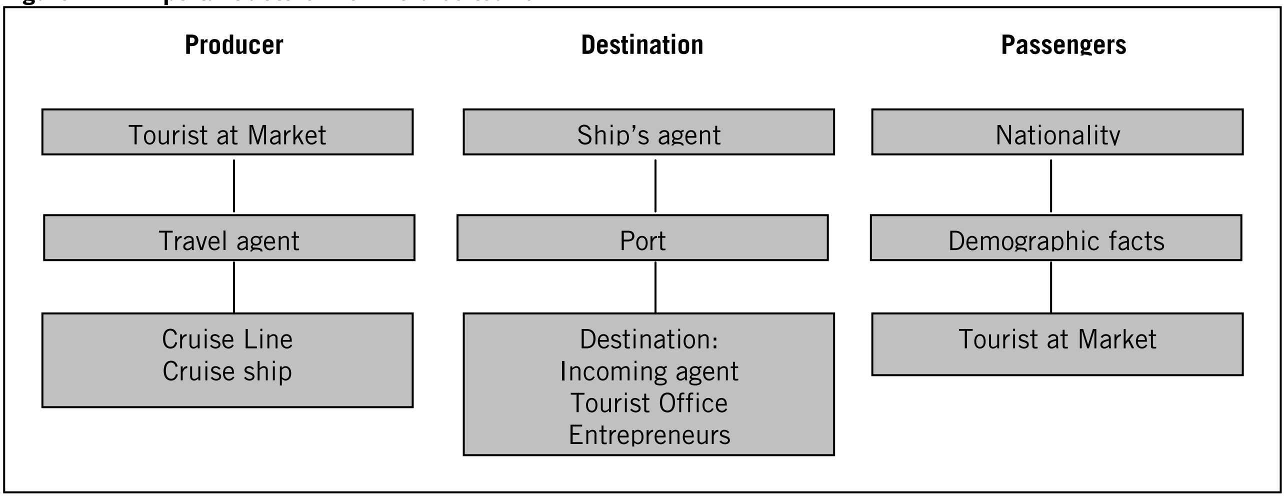
Cruising is vulnerable to events that jeopardise security. In 1985/86, *Achille Lauro*, a Mediterranean ship was hijacked and an American tourist was killed onboard. American cruise visitors decreased from 75,000 before 1985 to virtually nil directly after the incident (Burton 1997). The 9/11 attack on the World Trade Center has had a similar impact on American cruise travel in Europe, even if it has not in the US.

1 These figures are questioned in chapter 4.

3 Actors within cruise tourism at destinations

Cruise tourism has a need for several actors and relations for its activities. Their relations to each other are shown in Figure 1.[2]

Figure 1. Important actors within cruise tourism



Source: Based upon Marcussen (2004, p. 6).

In this study, the focus is upon the destination and the passengers.

3.1 Producers and markets

Important actors in the distribution of sea cruises to tourists are: travel agents, cruise lines and their ships, shipping agents, ports and hinterland network including shore excursions and shore infrastructure. For turn-around ports access via airport, road and rail is important. The Internet is starting to play a role in the distribution of sea cruises, but in Germany, for example, travel agents still accounted for as much as 73 % of the sales of all sea cruises in 2003.

There will be an increase of 9.4% in the number of calls to ports in the Baltic Sea from 2003 to 2004, from around 1,750 to 1,915. Furthermore, ships calling at ports in the Baltic Sea will increase by 7.8 % in passenger capacity from 810 passengers on average in 2003 to 873 passengers in 2004. Therefore, the number of passengers to the ports will increase by 18 %, if capacity utilisation can be kept the same as in 2003.

In 2004 there were 65 ships cruising the Baltic Sea from 43 cruise lines compared to 70 ships in 2003. So, slightly *fewer*, but *larger* cruise ships made a total of *more* calls, and brought 18 % *more* passengers to ports in the Baltic Sea in 2004.

3.1.1 The Baltic Sea cruise market in a global perspective

In 2002 the global sea cruise market constituted 7.6 million persons from North America, over 800,000 Britons and 1.3 million from continental Europe, plus about 1.4 million from the rest of the world, i.e. about 11 million passengers in total.

In 2003 about 239,000 people cruised the Baltic Sea. Americans accounted for 44 %, Germans 22 %, Britons 20 %, Swedes/Finns 6 % (mostly Swedes, weekend cruises), others 8 %. In 2004 the number will be about 260,000 cruises, i.e. 9 % more than in 2003. The Baltic Sea accounts for 5 % of the total sea cruises for Britons, and as much as 10 % for Germans.

2 This chapter is based on Marcussen (2004).

Table 5. Sea cruise passengers, 1998-2002

*1,000	1998	1999	2000	2001	2002
North America	5,428	5,894	6,886	6,906	7,600
UK	663	746	754	776	824
Germany	306	331	379	392	425
Italy	220	225	220	255	300
France	200	224	266	274	220
Spain	45	50	68	118	150
Switzerland	40	40	45	45	48
Other Europe	90	120	120	120	127
Cont. Europe	901	990	1,098	1,204	1,270
Total	6,992	7,630	8,738	8,886	9,694

%	1998	1999	2000	2001	2002
North America	78	77	79	78	78
UK	9	10	9	9	9
Cont. Europe	13	13	13	14	13
Total	100	100	100	100	100

Source: Based on *Travel Markets*, Issue No. 9/2003.

If the global sea cruise market was 12 million in 2003, or 8 % higher than in 2002, i.e. the same increase as the year before, the Baltic Sea cruise market would be exactly 2 % of the global total.

The number of people cruising the Baltic Sea in 2003 may have been up to 10 % lower than 300,000. Although Copenhagen counted 268,400 cruise passengers in 2003, the sum of the capacity for ships arriving was somewhat lower, namely 231,000. The difference is probably a result of turnaround passengers who are counted both when they start and when they finish their cruise, typically in Copenhagen or Stockholm or some of the German ports. Also passengers on ships staying overnight in the port may be counted twice.

Americans accounted for the largest share of the Baltic Sea cruise market in 2003, i.e. about 44 %. The German share is 22 % of the total Baltic Sea cruise market. If disregarding the domestic Finnish and Swedish market for short cruises, Germans would account for 23.5 %. No breakdown of the cruise passengers to Stockholm by nationality has been found. However, such a breakdown exists for Oslo.

Table 6. No. of calls and passengers by country or region – the Baltic Sea

	No. of calls per annum			Passengers		
Country	**2002**	**2003**	**2004**	**2003-2004**	**2003**	**2004**
Denmark	227	324	359	20 %	278,884	334,246
Sweden	308	386	384	4 %	327,000	341,423
Finland		224	258	26 %	194,750	244,563
East/South Baltic		756	831	27 %	627,160	793,442
Germany, Baltic		226	272	32 %	147,298	195,049
Baltic Sea		1,916	2,104	21 %	1,575,092	1,908,723

Source: Ports and on-line lists.

The Baltic states have turned out to be really attractive targets for cruise ships, probably because of curiosity but also because the two capitals have remarkably attractive towns. Sweden and Denmark compete for second place.

3.1.2 The Baltic Sea cruise market in a UK perspective

For Britons, the Mediterranean Sea is the main target for cruise trips. Almost half of the tours head for the Mediterranean while a quarter go to the Caribbean Sea. Just 10 % visit Scandinavia and the Baltic Sea and, of these, 2 % visit only Norway.

Table 7. The UK sea cruise market by destination

Destinations	**1995**	**2001**	**2002**	**2002**	**2001-2002**
Mediterranean	141,500	270,501	301,221	41 %	11 %
Caribbean	87,339	138,957	171,612	23 %	24 %
Short cruises (e.g. Cyprus)	50,000	64,413	53,372	7 %	-17 %
Scandinavia/Baltic	**26,242**	**70,555**	**70,707**	10 %	0 %
Atlantic Isles	19,194	77,081	73,137	10 %	-5 %
Alaska	10,256	16,342	16,968	2 %	4 %
Far East/Australia	6,812	16,547	14,996	2 %	-9 %
South America/Antarctica	5,000	7,321	6,433	1 %	2 %
West Coast/Hawaii	7,518	10,504	18,934	3 %	80 %
Round the World	5,418	10,218	8,824	1 %	-14 %
Total	359,279	682,439	736,204	100 %	8 %

Source: PSA-IURN CruiseStat *Annual cruise review* 2002 (UK16,342 and Europe).

Table 8. Britons going on cruise in the Baltic Sea and Norway

	1999	**2000**	**2001**	**2002**
UK-UK port				
Baltic	23,348	18,813	24,650	25,733
Norway	22,376	26,652	31,307	29,932
Scandinavia/Baltic	45,724	45,465	55,957	55,665
Fly-cruises				
Baltic, est (min)	4,834	5,979	6,431	6,954
Norway, est (min)	4,633	8,471	8,167	8,088
Scandinavia/Baltic est (min)	9,467	14,450	14,598	15,042
UK to Scandinavia/Baltic	55,191	59,915	70,555	70,707
Baltic				
UK-UK port	23,348	18,813	24,650	25,733
Fly-cruise min	4,834	5,979	6,431	6,954
Britons to Baltic	**28,182**	**24,792**	**31,081**	**32,687**

Source: Based on *Travel Markets*, Issue No. 9/2003.

About 20 % use fly-cruises for the Baltic with the same proportion for Norway alone. 2000 was a bad year but, generally speaking, the British interest in the Baltic has been growing from 1999 to 2002. A recent press release from PSA (15.03.2004) mentions an increase of 52 % Britons cruising the Baltic Sea in 2002-2003 (for UK-UK port cruises to the Baltic Sea). This figure is higher than the overall figure for the UK sea cruise market increase of 16.6 % (from 823,590 to 960,459). The fly-cruise split between Norway and the Baltic Sea is estimated to be the same as previously.

3.1.3 The Baltic Sea cruise market in a German perspective

Even for the Germans, the Mediterranean Sea is the favourite target. Almost half of all tours go to that area. The next most important targets are Northern Scandinavia and the Caribbean, with about 15 % each of all tours.

In volume the German sea cruise market increased by 25 % during 2003. The numbers of Germans going on a cruise to the Baltic Sea also increased by 25 % during 2003 so the Baltic area kept its previous share of this market - 10 % - during 2003. There may have been up to 300,000 Germans taking a cruise in the Baltic Sea that year.

Table 9. The German sea cruise market

Destinations Passengers per destination	**2002**	**2003**	**Change** **%**	**2003** **%**
Nordic countries	70,004	81,331	16	15
Baltic Sea	**42,045**	**52,486**	**25**	**10**
Western Europe/Atlantic Islands	35,729	43,917	23	8
Mediterranean	177,938	229,105	29	43
Caribbean/USA	69,543	91,883	32	17
Overseas, incl. around the world	33,153	38,626	17	7
Total	428,412	537,348	25	100
Results	**2002**	**2003**	**Charge**	
Passengers	428,412	537,348	25.4	
Passenger nights	4,325,228	5,377,077	24.3	
Revenue (million euros)	879	1.073	22.0	
Average price in euros	2,051	1,996	-2.7	
Average price per day in euros	203	200	-1.7	
Average length of tour in days	10	10	+/- 0	
Average age of passengers	49.6	48.5	-1.1 years	

Source: DRV *Der Kreutzenfahrtmarkt Deutschland 2003.*

4 Destinations

Stockholm

Stockholm is, together with Copenhagen, the most important cruise port in the Baltic Sea. It has grown continuously during the past decade except for a drop during 2002. The vessels have become bigger and bigger each year. During 2003, there were 214 calls and 202 000 passengers, of who 32 % were Americans. Of the calls, 14 were *turn-around* calls and three quarters of them were from America. Cruise lines have increasingly come to use Stockholm as a *turn around* port. That means that passengers buy a *fly-and-cruise*-package. They fly to Stockholm and stay there for at least one night on the way out or back.[3]

For 2004, competition is tougher. There are more ships available and more European ships with predominantly European passengers. There are signs that the American share is decreasing.[4]

Table 10. Number of calls and passengers 1996-2004, Stockholm Port

	1996	1999	2000	2001	2002	2003	2004[5]
Ships	128	160	180	191	175	214	219
Passengers	82,000	119,000	157,000	170,000	135,000	202,000	220,000

Source: *Kryssningstrafiken till Stockholm i ekonomisk belysning.*

The figures are maximum figures. The ships must be fully booked in order for Stockholm to achieve these numbers of visitors (see Appendix 6). According to interviews in Rönne, Copenhagen and Klaipeda, an occupancy rate of 80 % seems to be normal. Some ships also refer to other figures in reality than those connected to the *data ships* promoted.

The cruise season for 2004 starts in May and ends in September. The first ship to sail in the 2004 season on 12 May is *Constellation* (length 294 m with 1,950 passengers) owned by Celebrity Cruises.

Table 11. New ships visiting Stockholm 2004

Ship	Owner	Pass	GRT	Depth
Westerdam	Holland America Line	1,494	85,000	7.3 m
Grand Princess	Princess Cruises (Carnival)	2,600	104,000	7.5 m

Source: www.stockholm.cruise.com 2004-07-11.

Table 12. Ships with premier calls at Stockholm 2004

Ship	Owner	Pass	GRT	Depth
Jewel of the Seas	Royal Caribbean	2,100	90,090	8.1 m
Costa Atlantica	Costa Cruises (Carnival)	2,680	84,000	7.8 m
Wind Surf	Windstar Cruises (Carnival)	312	14,745	5.2 m
Rhapsody	Mediterranean Shipping Cruises			
Albatros	Phoenix Seereisen	906	24,803	9.2 m
Van Gogh	Maritime & Leasing (Travel Scope)	502	16,331	5.9 m

Source: www.stockholm.cruise.com 2004-07-11.

There will be an increase in the number of *turn-arounds* to 17. Features appreciated by the passengers are the archipelago, a charming and clean city, architecture, and attractions like the Town Hall, Wasa Museum and The Old Town. [6]

The biggest ship announced for 2004 is *Grand Princess* of 104,000 GRT, with a length of 289 m and a depth of 8.5 m. She is however, not the longest ship. *Costa Atlantica* has a length of 292 m but a depth of

3 www. stockholmshamn.se/stohamn/kryssningstrafik/index.html.
4 Communication from Claudia Quas, Stockholm Visitors Board, 2004-07-12.
5 Estimated figures from www.stockholmcruise.com, 2004-06-16.
6 www.stockholmcruise.com 2004-07-11.

only 8 m. The number of passengers are the highest in the Baltic for both and there is a difference of just 60 berths to the advantage of *Costa Atlantica*: 2,680 against 2,600 for *Grand Princess.* The smallest vessels are *Hebredian Spirit, Island Sun* and *Island Sky* (length 90 m with 90 passengers), owned by Hebridean Spirit.

The ranking list for ships which will bring most passengers to Stockholm is the following (number of calls in brackets):

1.	Grand Princess	26,000 (10)
2.	Costa Atlantica	24,120 (9)
3.	Norwegian Dream	19,267 (11)
4.	Constellation	17,143 (7)
5.	Jewel Of The Seas	14,700 (7)
6.	Noordam	10,926 (9)

The typical ship calling at Stockholm has the following average measures:

Passengers:	960
Stay at berth:	9 hours
Depth:	6.7 m
Length:	175 m
GRT:	35,996 tons.

The six most important companies are the following, with number of passengers:

1.	Costa Cruise Lines (Carnival)	38,488
2.	Princess Cruises (Carnival)	26,000
3.	Holland America Line	20,074
4.	Norwegian Cruise Line	19,267
5.	Celebrity Cruise	17,143
6.	Royal Caribbean	14,700

The economic impact is considerable and different parts of the city take a share in it. In an investigation by the Statistical Centre of Stockholm Municipality, the following figures are estimated for the tourist sector:

Table 13. Estimated economic revenue (SEK), different operators, Stockholm Port, 2003

Operator	Estimated annual revenue	Tasks
Ship's agents	70,000,000	Luggage, food supply, goods, security, etc
Guided tours	50,000,000	60-70 % of all passengers, 40 USD/person
The port	13,000,000	
Other contribution	140,000,000	Accom, Rest, Shopping, Pleasure, Other

Source: *Kryssningstrafiken till Stockholm i ekonomisk belysning.*

For oversea passengers, expenditure for shopping is double (58 %) that of European passengers (29 %). Sightseeing has the reverse figures.

In total, the economic revenue from cruise tourism in Stockholm is estimated at 273,000,000 SEK which is about 2 % of the revenue of the total tourism industry (excluding air traffic and employment effects).[7]

In order to position Stockholm as one of the leading cruise destinations around the Baltic Sea, a Stockholm Cruising Capital Network has been established. Partners are Stockholm Visitors Board, the ports of Stockholm, the Swedish Civil Aviation Administration, Arlanda Airport, SAS, ship's agents, incoming operators, transport entrepreneurs, hotels and shops. The objective is to promote and market Stockholm.[8]

7 Stockholms Utrednings- och statistikkontor (2003) *Kryssningstrafiken till Stockholm i ekonomisk belysning.*
8 www.stockholmcruise.com.

Kalmar

Kalmar had a peak in 2001 in cruise activities during the memorial celebration of the Kalmar Union when it received 12 cruise ship calls; the following year it received 17 calls. Now they are down to 5 to 6 calls per summer.

In the town of Kalmar, cruise ship activities are organised at three different levels.

First, Kalmar harbour is the partner which arranges arrivals and departures for the ships. They have some problems with the size of the ships since the deepest passage of the Strait of Öland (between Öland and Kalmar) is not more than 8 meters so big ships have to stop outside the harbour. Ships with about 200-500 passengers can come to the quay, close to the town centre and the Museum of Kalmar. Others have to anchor outside and send tender boats to the harbour but these also arrive close to the city centre. The ships carry on average about 400 passengers.

The harbour makes agreements with the cruise company using brokers or ships agents as intermediaries. For Kalmar harbour there is a local shipping agent, Bröderna Höglund, and a nation-wide agent, Unér Shipping AB. According to the local agent, using a local agent is often an advantage for the cruise companies since these have knowledge of local conditions when it comes to repairing the ship, helping sick people to hospital and so on.[9]

The port has new rules to follow since 1/7 2004. These rules can be seen as an outcome of the 9/11 events and have been recommended by the UN. They require special security measurements for landing all kinds of shipped goods at harbours. The harbour has to make a security assessment and threat analysis of its facilities and of the specific vessels coming to the quay. Kalmar Harbour interprets the regulations as a request for fences to partition off disembarking passengers and of security guards to watch the passengers when they embark and disembark. The cruise company and the crew of the ship have always been keen on security and now they cooperate with harbour staff.[10]

Figure 2. Harbour at Kalmar, just outside the Marine Museum

Photo: Lena Wikström.

During 2004 five calls were scheduled for the quay (according to Kalmar Port Authority).

9 Interview with Gustav Höglund, *Bröderna Höglund,* 2004-06-11.
10 Ibid.

Table 14. **Calls at Kalmar, 2004**

Date	Ship	Pass	Owner	Duration	GRT	Depth	Optimal quay costs
15/6	Ocean Majesty	613	Page & Moy, UK	10.00-13.30	10,417	5.4 m	18,750 SEK
17/7	Sea Cloud II	96	Sea Cloud Cruises, Malta	12.00-24.00 (Sat)	3,800	5.3 m	6,840 SEK
23/8	Vistamar	320	Plantours, Spain		7,478	4.6 m	13,460 SEK
26/9	Ocean Majesty	613	Page & Moy, UK	08.00-13.00 (Sun)	10,417	5.4 m	18,750 SEK
28/9	Vistamar	320	Plantours, Spain		7,478	4.6 m	13,460 SEK
24-25/8	Deutschland *	520	Peter Deilmann, Germany	Tue 19.00-Wed 13.00	22,496	5.8 m	40,492 SEK

* With tender boats.
Source: www.kalmar.se.

For the harbour income from shipping is mainly derived from landed cargo: passengers are not recognised as goods so there is just the quay fare, which is 1.8 SEK per GT. For Kalmar this will be a revenue of 111,752 SEK (€9,390) for the 2004 season. This will just cover the costs of the cruise ships for the harbour.[11]

Second, Kalmar Destination organises links between the cruise companies and the entrepreneurs in Kalmar. Kalmar Destination is a community-owned company with the objective of marketing and promoting Kalmar. Cruising is a minor part of that mission. In order to market Kalmar as a cruise destination, the organisation uses SeaScape Tours in Stockholm.

SeaScape Tours commenced operation in 1995 based on the idea of establishing a new company specialising in handling shore excursions for cruise lines calling at Swedish ports. SeaScape Tours specialises in the operation of shore excursions and custom-made arrangements for cruise passengers from ships calling at or turning around in Sweden. The clients are primarily international cruise lines and operators concentrating on the Baltic Sea.[12]

Destination Kalmar also arranges contacts with those entrepreneurs who want to offer something to the cruise passengers. The destination company tries to establish projects where the company takes one part while one or more entrepreneurs take another part. This project is then sold to the cruise company with Seascape Tours as mediator. All these tours are additional costs for the cruise passengers. Since the trend is for cruise packages to become cheaper and cheaper because of demographic changes among the passengers, the cruise companies compensate for this by higher revenue on sales on board and on package tours.[13]

Third, the entrepreneurs offer various services. These are available within three different zones. There is a pedestrian zone where the City Centre Association (Kvarnholmens Centrumförening) can offer shops, restaurants, banking, post and other facilities. A wider zone is managed by the community, which offers a sightseeing tour primarily tothe Castle and then around the town. For longer tours the Orrefors Glassworks and Öland Tourism arrange packages for a day trip. The Orrefors Glassworks has been the main excursion (around 70-80 % of all passengers choose this tour) but in the last few years its popularity sank to just 50 % of all the passengers. For the 2004 season no package tour has been announced, only smaller groups with a special interest in Orrefors will visit Glasriket. The head of the tourist office in Orrefors claims that this is a direct effect of 9/11. After the terrorist attack on the World Trade Center, Americans have stopped taking cruises in Europe and the Americans were Orrefors' main customers. Today, there are just British and German tourists and they do not come to Orrefors.[14]

11 Interview with Anders Sjöblom, Kalmar Harbour 2004-06-11.
12 www.seascapetours.se.
13 Interview with Jenny Rolloff, Destination of Kalmar, 2004-06-08.
14 Interview with Göran Ivarsson, Orrefors Turist Bureau, 2004-06-18.

Finally, the Regional Council of Kalmar County (Regionförbundet i Kalmar Län) is offering some assistance for marketing the region. Their ambition is to promote the whole region and the Council also hosts different EU projects with the aim of taking advantage of the Baltic Sea as a uniting and driving force in the region.[15]

Two investigations of the cruise companies and their passengers have been carried out, one in 2000 and one in 2002. In the one in 2000, *Kalmar/Öland/Glasriket – Internationella kryssningsrederiers anlöp i Kalmar hamn,* cruise companies claim that the most important thing for them when they choose port destinations is *well known towns and good harbour standard and security*. It is also important that the tour fit in with the time schedule for the route. Harbour fees are of secondary importance. The shipping agencies, rank medical help first. Among facilities at the harbour, they appreciate wind and rain shelters most but also that the tourist information centre is open and that there is taxi availability at the quay. Proximity to the city centre is also important.[16]

In the survey done in 2000, passengers from two cruise ships, *Rotterdam* and *Seaborn Pride,* were interviewed. Most passengers on both ships were from the US. Out of 134 enquiries, 121 were answered by passengers on the *Rotterdam,* which is a big ship with tender boats. Most of them had as their primary goal to see St Petersburg but also Stockholm and Berlin(!). Helsinki was also ranked highly. Most of the passengers had no expectations with regard to Kalmar. A lot of them found the tender boat trip exciting and beautiful. A few found it time consuming. According to the questionnaire about 76 % of passengers visited Orrefors. Some of them were not so happy with the tour to Orrefors, especially the fact that it did not accept US dollars. The few interviews from the *Seaborn Pride* did not differ much from those from *Rotterdam.*[17]

The second study, *En undersökning av kryssningsfartygens resenärer,* is a consumer behaviour study. The investigation is based upon a questionnaire of 180 passengers from three different ships: *Ocean Majesty* with primarily British passengers, *Bremen* with primarily German passengers and *Noordam* and *Prinsendam* with primarily American passengers. There was also a qualitative study with interviews with some selected shopkeepers.[18]

Currency was regarded as a problem. Just one third of the passengers changed to Swedish currency and those who did also spent more of their money. When one of the ships landed on a Saturday and the Orrefors excursion came back in the afternoon, most of the shops had closed and this annoyed the passengers very much. [19]

The passengers spent approximately 9,798,359 SEK according to the investigation, which means 709 SEK per person. The difference between the ships (and nationalities) were, however, considerable: Americans spent 818 SEK, British 174 SEK and Germans 123 SEK. The most popular item for consumption was glassware (4.6 million SEK), followed by souvenirs (1.8 million) and clothing/shoes (1.5 million).

In the opinion of the shopkeepers in the city, the Orrefors excursions took too much time. A more varied tour for passengers through the city was suggested.

Karlskrona

The archipelago of Blekinge is a tourist destination with a broad variety of attractions, like the harbour of Karlskrona, with the former naval dockyard and the islands outside the town, famous for their recreational opportunities.

Karlskrona has a long experience of cruise ships. During the past decade there have been 6-7 calls every summer. For 2004, there will be two calls (the ship *Black Prince* on 30/6 and *Minerva II* on 24/8.[20]

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15 Interview with Erik Ciardi, Regionförbundet i Kalmar Län 2004-06-08.
16 *Kalmar/Öland/Glasriket – Internationella kryssningsrederiers anlöp i Kalmar hamn* – Kalmar Högskola 2000 p1-8.
17 Ibid pp 9-19.
18 *En undersökning av kryssningsfartygens resenärer*(2002) Anna Widarson, Destination Kalmar pp 7-8.
19 Ibid p 6.
20 Interview with Ingegerd Holm, Karlskrona Turist Bureau, 2004-06-09.

The community of Karlskrona owns the Karlskrona Tourist Bureau and it organises all the activities around the cruise arrivals. In order to attract arrivals, it uses normally Seascape Tours but it has also used Scandinavian Tours.

Large ships can not enter the harbour but both the smaller ships and the tender boats from the big ships arrive at Karlskrona's town centre. Vessels up to 150-160 m can go to the quay in the centre of the town. Bigger vessels can stop at a new harbour further out in the archipelago. Buses wait for the passengers there and transport them to different excursions or shuttle them to the city centre. The local shipping agent is Roselius and most cruise companies prefer local agents but some use national agents.[21]

The pedestrian zone encompasses the whole commercial centre. Then there is a short sightseeing bus tour around the town – normally three buses are used for this tour. Longer tours are also taken to different places in the surroundings of the town, like Nättraby or Sturkö. These tours are guided tours, arranged by the Tourist Bureau. About eight buses per ship are used for these tours. There is a City Centre Associationsof entrepreneurs but they do not organise anything themselves.

During summer 2004 two calls were scheduled for the port (according to Karlskrona Port Authority):

Table 15. Calls at Karlskrona, 2004

Date	Ship	Pass	Owner	Duration	Depth	GRT	Quay costs
30/6	Black Prince	431	Fred Olsen Cruise Lines, Bahamas		6.4 m	11,209	15,209 SEK
24/8	Minerva II	702	Swan Hellenic Cruises, France		5.8 m	30,277	42,387 SEK

Source: www.karlskrona.se.

Figure 3. Harbour at Karlskrona, Handelshamnen

Photo: Lena Wikström.

21 E-mail from Folke Widell, Karlskrona Port, 2004-06-14.

Since 1992 there have been tours to Gdynia, Poland, from Karlskrona and in the past few years, Stena Line has arranged these tours. The company calls them cruise excursions.

Rönne

Bornholm is one of the major cruise destinations in the Baltic Sea. It competes with Visby for calls. During the 2003 season, there were 36 calls to Rönne and there were 54 calls for the 2004 season.[22] *Destination Bornholm* cooperates with regard to excursions with *Team Bornholm*, which is one of the incoming agents on Bornholm. During summer 2005, 33 calls are scheduled to take place.[23]

Three sailing ships, *Lili Marlene*, *SS Sedov* and *STS Kehrsones* have been scheduled to call at Rönne during 2004. *Lili Marlene* is owned by Peter Deilmann Reederei from Germany, has a capacity of 48 passengers and has been scheduled for fourteen calls. The other ships have been scheduled for one call each. All three ships stay overnight in Rönne, *SS Sedov* even stays several nights.

The fee for calls at Bornholm is 2.63 DKK per GRT with an additional fee for each passenger of 3.49 DKK. The total GRT for cruise ships in Rönne is 700,701 according to the preliminary list of ships for the 2004 summer season.[24] This does not mean that it is possible to multiply this figure by the fees to produce a revenue estimate since ships offshore road obviously do not pay. *Costa Europa* and *Mona Lisa* for example anchor offshore and they pay 150,000 GRT for this.

Plum, Möller og Skovgaard (PMS) is a shipping agent on Bornholm and they provide an example of what a shipping agent can offer:

- Issuing of pro forma disbursement account, pilot, tug boat, and boatmen;
- Information about all facilities in Rönne and on Bornholm;
- Supplies of fresh water, electricity, telephone;
- Clearance, provisioning, renovation, repairs;
- Agreements with tug boats;
- Contacts to all authorities.

At in-harbour docking or anchoring on the roads, let us take care of:

- In- and outward clearance with authorities;
- Services for captain, crew and passengers;
- Contacts with physician, dentist and hospital;
- Fresh water, telephone connections, banking services on board and ticket reservations in connection with crew and passenger changes;
- Contact to tour-guide organisers on land;
- Contact to shipping companies and agents in the next harbour.[25]

For the 2004 season, the 54 calls meant 212,197 GRT and 10,820 passengers available for fees.[26] This results in a 2003 cruise revenue of 558,078 DKK for GRT and 37,761 DKK for passengers, that is 595,839 DKK (about €80,000) in total.

22 Cruise Europe News, December 2004.
23 Rönne Port, www.roennehavn.dk, 2005-02-14.
24 Interview with Rönne Port, 2004-07-12.
25 http://www.pmsship.dk, 2004-07-05.
26 See Appendix 1.

Table 16. **Cruise revenue for Rönne Port 2004**[27]

	Calls	GRT	Possible revenue	Passengers	Actual revenue	Total revenue
Max capacity	54	700,701	1,842,843 DKK	23,269	81,208 DKK	1,924,051 DKK
Paid capacity	54	212,197	558,078 DKK	10,820	37,761 DKK	595,839 DKK

Costa Europa is by far the biggest ship calling at Rönne, with a capacity of 1,744 passengers. Its four calls mean almost 7,000 possible passengers and, even with a 20 % reduction, at least 5,500 passengers. The tours start in Amsterdam and continue to St Petersburg, Tallin, Stockholm, Visby and Copenhagen. The first stop is Rönne and the tours last for 11 days. The passengers are mostly from Italy and, since Bornholm has no available Italian-speaking guide, there are no arranged tours on Bornholm. The passengers just stroll around and try to get information from the tourist bureau.

According to PMS, *Costa Europa* usually has 1,400-1,500 passengers, that is an occupancy rate of about 80-85 %. When the ship called on the 24th of June, there were 14 different nationalities onboard but most of them were Italians.

Triton is the second biggest ship with 912-passenger capacity. It makes three calls to Rönne, which means 2,736 possible visitors, and with a 20 % reduction it will be just over 2,000 real passengers.[28] *Triton* is owned by Royal Olympia Cruises, a Greek company with long experience of cruises, even though the present company was established in 1995 by a merger of previous companies.

Royal Olympia Cruises presents itself at its homepage in the following way:

Since the 1980s, the Company' s summer itineraries have included the Eastern Mediterranean…the Black Sea…the Western Mediterranean…Western Europe…and the Baltic Sea (Norway, Sweden, Denmark, Estonia and Russia). Winter itineraries in South and Central America include Amzonas River …Royal Olympia Cruises firmly believes that cruising in areas like the Eastern Mediterranean, the Amazon and Orinocco Rivers and Central America should be undertaken in smaller, more intimate cruise ships, allowing passengers to experience the wonders of these fascinating destinations in numbers small enough to enhance the experience.[29]

27 With Triton excluded (see note 30), there will a loss of 912 passengers and 13,995 GRT x 3 = 2,736 passengers and 41,985 GRT.

28 In an e-mail from Royal Olympia Cruises, it was started that Triton would not sail in the Baltic during 2004. This contradictory information to what was scheduled is confirmed by Rönne port in an interview, 2004-07-12. The reason may be financial problems for the company.

29 http://www.roc.gr, 2004-07-05.

Figure 4. Port of Rönne, industrial environment
Photo: Jan Pedersen.

PMS is not the only shipping agent on Bornholm but it takes care of most of the ships. There is a Norwegian agent which deals with some of the bigger ships. Such ships lies offshore and if the weather is bad, they can anchor off Gudhjem.

Saga Cruise and *Fred Olsen* normally have British passengers and *Peter Deilman* and *Hapag Lloyd* have primarily German passengers.[30]

The bus tours, offered by *Team Bornholm,* normally involve a trip around the island, especially the northern part of Bornholm since these tours are the most popular. The offers from the agent are transmitted to the cruise companies by agents in Copenhagen. Team Bornholm sometimes arranges special tours, like art tours but the round-island tour is the most popular one. Less than 10 % of passengers are Americans (Wind Surf) while the rest are equally divided among British and Germans.

On the 5th of July, *Saga Pearl* visited Rönne and, according to Team Bornholm, 42 passengers went for a walk in town and 45 passengers booked the round tour. The rest stayed onboard. It is normal that they eat lunch onboard, they do not want to eat out in town. The buses do not stop at places where it is possible to eat since the passengers have payed for meals onboard.[31] *Saga Pearl* has a capacity of 428 passengers.

Klaipeda

Klaipeda State Seaport is the northernmost ice-free port on the east coast of the Baltic Sea. It is the most important and biggest Lithuanian transport hub, connecting sea, land and railway routes from East to West. Klaipeda is a multipurpose, universal, deep-water port, providing high-quality services complying with the requirements of the European Union.[32]

30 Interview with Sören Lind, Plum, Möller og Skovsgaard shipping agent (2004-07-06).
31 Interview with Eva Madvig, Team Bornholm, 2004-07-06.
32 http://www.portofklaipeda.lt.

The Seaport Authority of Klaipeda states, through its marketing office, that the port has a lot of history behind it, but the cruise industry is an area where only the first steps have been taken. 2004 marks a significant increase in cruise calls compared with the 2003 season. Continuous improvements in infrastructure coupled with improved cooperation between agents, port authority, and land tour operators will allow for better service, attract more calls and make Klaipeda a well-known destination on cruise operators' itineraries. The average spending per passenger in Klaipeda is about $273.[33]

The cruise ships anchor at a quay relatively close to Klaipeda city. The surrounding port area consists of industry buildings and constructions from the Soviet time and discussions are being held between the city and the port about what to do with this area. It is not an especially nice environment for the cruise passengers to pass in the shuttle bus and, according to the tourist office there are plans to establish tourism facilities like restaurants in the port area. The passengers spend about 40 euros per person, according to investigations.[34]

During summer 2004, 43 calls are scheduled for the quay.[35]

The potential number of passengers is around be 15,790, about 7,000 fewer than Rönne. If the occupancy rate is 80 %, this means in reality about 13,000 passengers. If the information about spending is correct, this will mean an annual income for Klaipeda town of US$ 3,500,000, obviously including fees for the cruise companies at berth.

Astoria and *Delphin* are the biggest ships calling at Klaipeda, with a capacity of 1,600 passengers each. Their four calls mean almost 3,200 possible passengers and, with a 20 % reduction, at least 2,500 passengers. *Astoria* and *Astor* belong to Transocean Tours, a German company based in Bremen. The tours start in Bremerhaven and continue to Visby, Stockholm, St Petersburg, Helsinki, Tallin, Riga, Klaipeda, Kaliningrad and Gdansk. Both *Astoria* and *Astor* promote calls at ports on the eastern side of the Baltic.[36]

Delphin and *Paloma I* are owned by Hansa Kreuzfahrten, a German company also based in Bremen. The two ships bring, with 100 % occupancy rate, nearly 2,500 passengers to Klaipeda, and with an 80 % occupancy rate, 2,000 passengers.

Figure 5. Klaipeda harbour

Photo: Lena Wikström.

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33 E-mail from Trofim Teriochin, Marketing Analyst, Klaipeda State Seaport Authority, 2004-06-22.
34 Interview with Romena Savickiené, director of Klaipeda Tourism and Information Centre, 2004-06-24.
35 http://www.portofklaipeda.lt.
36 www.transocean.de, 2004-07-05.

There are three main incoming agents in Klaipeda: Krawtas Travel, Relita and Klaipédos Mèja. The latter offers excursions to Neringa (4 hours), Palanga (3 hours) and sightseeing in Klaipeda (1-2 hours). The Curonian Spit (The Neringa Peninsula) is important for the German tourists. About 85 % of the Germans go to this peninsula where they can see the house of Thomas Mann and other reminders of old Germany. Most of the cruise passengers are Germans (85 % of the total number). Saga Cruises is a British company with British passengers. There are few Americans.[37]

Farm tourism has become important, since tourists find it interesting to see farm villages and farms with traits and traditions from the old Soviet era.

The excursions to Palanga allow no time for shopping since it is very difficult for busses to stop because of the traffic regulations. There is a stop at the Amber Museum but tourists can not buy anything there since the staff of the museum has no interest in exposing the amber for purchase. When tourists come to Klaipeda, they do not want to buy amber since they connect it with the museum. [38]

Klaipeda has an advantage of being *terra cognita* for Germans. Disadvantages include the port environment and old traditions within service management from the Soviet era. The old buses have, however, been changed to brand new ones since the tourists refused to go on the old buses.[39]

Kurzeme area

The Kurzeme area includes the ports of Liepaja and Ventspils on the west coast of Latvia. In Liepaja, there seem to be no cruise ship calls, according to the staff at the tourist office.[40] The Liepaja web-site indicates that there is passenger traffic but not cruising. Car ferry traffic is undertaken with Sweden and Germany and there is also freight traffic where both cargo and passengers are taken onboard.[41]

In Ventspils, the situation seems to be the same. The city has ferry connections to Sweden and Germany but no cruise ships. Both ports have *special economic zones* with arrangements for investments and special rules for customs and so on.[42]

Kemi

Kemi had its first ever call by *Maxim Gorkij,* which arrived there in June 2004. It then left for Luleå (see below).

In Kemi the ship had to anchor 10 kilometers away from the city. The 750 passengers were shuttled by buses to the city centre where they were welcomed at the *Meritori* (sea market square) by an orchestra and a lot of merchants and entertainment. Most of the passengers (650) stayed half a day at the square. It was very popular. Buses took about 200 passengers to different excursions, for example an animal park.[43]

Kemi town is eager to continue the participation in the cruise tourism business and will arrrange a seminar in January 2005 for global experts within cruising.

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37 Interview with Miglupe Holiday, director of Klaipédos Mèja, 2004-06-23.
38 Ibid.
39 Ibid.
40 Interview with staff at the Tourist Office of Liepaja, 2004-06-24.
41 www.liepaja.li, 2004-07-20.
42 www.ventspils.li, 2004-07-20.
43 Interview with Seppo Lankinen, Kemi tourist office, 2004-09-08.

5 Passengers

5.1 Background

What is the passenger like? Many writers and researchers have asked this question. The conventional picture is of an elderly couple with a high standard of living. The movie 1969 *If it's Tuesday, this must Belgium,* directed by Mel Stuart and written by Stan Margulies, is a parody of cruise tourists. This fits in with the image of the superficial tourist as Turner and Ash describe them in *The Golden Hordes* (1976). Buzard (1991) reproduces the dialogue in his book *The Beaten Track* with a more serious discussion of mass tourist behaviour but he does not try to change the general image of cruise tourists.

Douglas & Douglas (1996) give pictures of contemporary views on cruise tourism and tourists. The main aim, they say, of the round trip people *was to see the savage in all his picturesque originality* (p. 9). The arrival of the ship in port was regarded as an entertainment as much by residents as by passengers (p. 8). When jet aircraft began commercial operations, not everybody approved of flying. The editor of *Pacific Islands Monthly* wrote: *The average tourist…does not want to be hurtled across the world, ten thousand feet above the clouds, 300 miles per hour. He wants to forget the more mundane things, sit in a deck chair, watch blue water slip by, share in the pleasures of ship-board life…Tourism by air will never have the subtle appeal of a cruise or round trip* (Robson 1950) (p. 5).

Holloway (2002) gives a more moderate picture of the modern cruise tourist. He writes: *In talking about "the cruise market" one is in danger of drawing on the traditional images of cruise ships: on the one hand, ships filled with conservative and rather elderly passengers who choose to spend their days at sea playing bridge and drinking cups of bouillon, and on the other hand, ships with the image of floating holiday camps, peopled by hyperactive, middle-aged passengers looking for non-stop entertainment and five-times-a-day opportunities to eat. While undoubtedly such stereotypes exist, the image conveyed is far too simplistic* (p. 125).

Morrison et al (1996) compared cruise passengers with land based resort vacationers from five different points of view: sociodemographics, trip planning characteristics, activity participation patterns, benefits experienced, and general attitudes towards travel. Their findings indicate that cruise vacationers differ fundamentally from the other groups. Cruise vacationers were heavier users of travel agents than other vacationers, they rate benefits from the vacation very high, and their attitudes towards escorted tours and all-inclusive packages are favourable. Morrison et al find that it is a great advantage for the cruise industry to have a product which is easy to buy, requires no planning, and offers experiences without inconvenience. The target group found so far is ideal for the product, they conclude, but the question remains of whether new market segments look upon all-inclusive and escorted tours in the same way.

Moscardo et al (1996) present an extension of Morrion's article and state that cruise tourism is *a combination of experiences which includes elements from several other vacation types in addition to unique Cruise attributes such as a sense of romance and excellent dining…* (p. 61).

Three different types of cruise line dominate today, according to Holloway (2002). First, the traditional and long-established lines like Hapag-Lloyd and P&O, which are strongly dependent on their home market and repeat purchasers. Second, are the major international cruise lines, which draw on a global market. Examples of these are Carnival, Royal Caribbean Cruiseline and Princess Cruises. Third, are the smaller companies, which offer more specific and adventurous trips, like Swan Hellenic and Viking River Cruise. Holloway gives the Baltic Sea as an example of the third form of cruising. He calls the itineraries the *milk run* for small vessels of about 3,000 GRT.

Using typology as a method to study tourists and tourist behaviour has existed for a long time. *Cohen* had already started in 1972 to claim that there is no such thing as a *tourist,* it is a matter of *tourists.* He initiated a long series of efforts to label tourists with certain attributes, which at the end of the day made it easier for marketers to find segments and niches. *Wolf* (2001) is among the latest ones to follow this research approach by talking about *relaxing tourists, cultural tourists, active tourists, compromising tourists* and *individ-*

ual tourists. The cruise passengers hopefully encompass all of these types, which will make a study of them very interesting.

For this project, it has been impossible to maintain a full-scale investigation with quantitative and qualitative questionnaires and in-depth interviews. Therefore a special method has been used, launched by *Jaakson* (2003) in an article in *Annals* called *Beyond the Tourism Bubble* where he describes a study conducted in Mexico. In order to get an idea of the mobility patterns of the cruise tourists, he stood at different streets and counted people in order to see if there were any changes when a cruise ship had docked. This method is simple but rather effective and above all low-cost, even if it is time-consuming and a bit awkward for the observers.

This method has been practised in this project in Rönne and Copenhagen.

5.2 Destinations[44]

Because of the short time for this project, Rönne, Copenhagen and Luleå were chosen practical reasons. Rönne was chosen because for two of the authors work at the Centre for Tourism and Regional Research (CRT) on Bornholm, Copenhagen because it will from part of the dissertation of one of the authors, and Luleå because it is part of another project in which CRT is involved. The destinations were also chosen because they represent different types of ports, with different touristic offers and attractions. The choosing of different destinations makes it possible to compare different kinds of cities and sights and their impact on tourism behaviour.

The findings will be published in one or more articles, combined with other studies conducted by the authors.

Rönne

Report from Rönne, Monday and Tuesday 10-11 May.

Ship: *Delphin Renaissance* from Kiel to Gdansk, Monday 08.00 – 14.00
Passenger capacity: 820
On board: 615
Passengers on land from 08.00 – 09.30: 489 passengers disembarked, 80 % of those onboard.

Of these 370 (76 %) took tour buses.
There were 8 excursions. They left the quay at 08.45 and returned at around 12.45. The excursion was obviously a round tour of Bornholm.[45]

59 passengers out of the 489 (12 %) took shuttle buses. These passengers seem to have taken two hours to walk around the city. Those passengers who were pedestrians and not users of the shuttle buses spent, according to the findings from the observation study, 1.58 hours walking in the city.

The weather was nice on this day with sun and a temperature of 10 to 15 degrees.

Some observations:
All clearly identifiable pedestrian cruise tourists in Rönne did not move so far from the ship that they could not see it. They wanted to go the church, since it is visible all the time from the ship. Some hesitated to go further while others were quite far away from the ship. We could also mention that the church functions as the most visible landmark in the cityscape – therefore functioning as an aesthetic goal rather than a symbol of safety. The fact that Rönne is centred around the habour makes it almost impossible NOT to see the ship from anywhere in the town.

44 This chapter is based upon an investigation conducted by Jan Pedersen and Kritstine Munkgaard Pedersen, both from CRT.
45 Announced as a 4 h excursion for a previous ship, 06/04-04.

Table 17. Frequency study with reference to visit of *Maxim Gorkij*

	Frequency Monday	Frequency Tuesday	Change in %
Munch Petersens Vej	0.33	0.09	+350
Snellemark vest	3.25	2.75	+20
Storegade nord	1.67	0.75	+120
Krystalgade	2.17	1.33	+60
Store Torv	16.25	12.75	+25
Torvegade	9.75	6.75	+40
Søndergade-Sdr. Allé	1.60	0.65	+60
Zahrtmannsvej	1.25	0.84	+35
Kapelvej	1.10	0.42	+160
Storegade syd	1.00	0.66	+35
Snellemark øst	11.33	7.75	+45
Tornegade	1.83	0.75	+70
Østergade-Slippen	1.50	1.00	+50
Kirken – *Stien*	0.19	0.29	-50
Skansevej	0.43	0.27	+50
Sydhavnsvej	0.40	0.13	+200

With consideration of bias effects, it is nonetheless clear that the cruise tourists were most commonly to be found in the following streets:
Munch Petersens Vej + 350
Sydhavnsvej +200
Kapelvej +160
And ev. Storegade Nord +120

None of these streets has any significant characteristics in the form of sights, shops or restaurants and therefore the extreme numbers have more to do with these streets normally being empty, than it has to do with a *tourist bubble*.

All frequency studies, 12 in total, were held in nice weather, so weather conditions have had no significance for the results of the observations.

More frequency studies from Rönne were carried out in week 24 in 2004.
This week, the following ships called at Rönne:
Tuesday 8/6, *C. Columbus* (420 pass.) from 13.00 to 18.00.
Wednesday 9/6, *Kristina Regina* (240 pass.) from 10.00 to 17.00.
The same day *Lili Marlene* anchored at 21.00 with departure next day at 12.00.
Friday 11/6, *Mona Lisa* (750 pass.) from 14.00 to 20.00.
Saturday 12/6, *Black Watch* (840 pass.) from 08.00 to 17.00.

Five frequency studies were made in Rönne when there were no calls, including two frequency studies on Tuesday 11 May.

The five frequency studies when there were no cruise calls gave the following result.

Table 18. Frequency observations Rönne, week 24 (no cruise ship at the quay)

Streets	Pedestrians per minute
Munch Petersens Vej	0.59
Snellemark Vest	4.72
Storegade Nord	0.90
Krystalgade	3.30
Store Torv	21.00
Torvegade	8.10
Lille Torv	9.10
Søndergade/Sdr. Allé	0.87
Zahrtmannsvej Vest	0.60
Kapelvej	0.26
Storegade Syd	0.82
Snellemark Øst	11.50
Tornegade til Teaterstræde	2.57
Østergade tom. Slippen	1.00
Vimmelskaftet Vest	0.20
Kirkestræde til Løkkegade	0.31
Skansevej	0.36
Sydhavnsvej	0.33

The seven frequency studies when cruise ships called gave the following result.

Table 19. Frequency studies during cruise ship stay at quay, week 24

Streets	Frequency of calls	Frequency without calls	Change in %
Munch Petersens Vej	0.85	0.59	+ 44
Snellemark Vest	4.45	4.72	- 6
Storegade Nord	1.17	0.90	+ 30
Krystalgade	3.12	3.30	- 5
StoreTorv	23.14	21.00	+ 10
Torvegade	12.64	8.10	+ 56
Lille Torv	9.50	9.10	+ 4
Søndergade/Sdr. Allé	1.55	0.87	+ 78
Zahrtmannsvej Vest	0.74	0.60	+ 23
Kapelvej	1.12	0.26	+ 331!
Storegade Syd	2.05	0.82	+ 150!
Snellemark Øst	12.69	11.50	+ 10
Tornegade til Teaterstræde	2.87	2.57	+ 12
Østergade tom. Slippen	1.36	1.00	+ 36
Vimmelskaftet Vest	0.71	0.20	+ 255!
Kirkestræde til Løkkegade	0.20	0.31	- 35
Skansevej	0.34	0.36	- 6
Sydhavnsvej	0.49	0.33	+ 48

The studies, when compared to studies during the stay of cruise ships at the harbour, show that the cruise tourists gather around the church and the adjacent neighbourhood (Table 19). A reason for the choice of road taken, beside the fear of losing sight of the ship, was aesthetic values. Previous studies have focused upon short walks in the city in order to visit shops. This study points to the fact that the tourists have aesthetic values.

Copenhagen

Report from Copenhagen 13/5, 17/5 and 18/5 2004.

Thursday 13/5.
Ship: *Aida Blu* from Kiel to Kiel. Thursday 12.00 – Friday 16.00.
Passenger capacity: 1,748 (full ship).

Passengers on land from 12.30 – 14.30.
1,270 passengers disembarked, that is 73 % of all onboard.

Of these 480 (38 %) took tour buses.
There were 11 excursions. They left the quay at around 14.00 and returned at around 17.00.

20 (2 %) took a cycle tour in Copenhagen on their own bikes, brought on the ship. This cycle tour was a guided tour and started at about 13.40.

Four groups of 25 passengers, i.e. 100 (8 %) had a guided walking tour in Copenhagen. The first group left Langelinie Quay at 13.00 and returned about 2 hours later.

Some 500 (40 %) took either the shuttle buses or *open top* sightseeing buses from the Langelinie Quay.

About 170 (13 %) made their own walking tour in Copenhagen. For those whose time was measured by the observers, the time spent on walking was between 2 and 4 hours.

To sum up, fewer than 50 % of the passengers took part in an organised excursion while 75 % did so in Rönne.

Frequency studies in a big city like Copenhagen are not so useful so the observers followed the passengers instead on their self-arranged walking tours.

Monday 17/5.
Ship: *Maxim Gorkiy* from Stockholm to Oslo, 08.00 – 18.00
Passenger capacity: 650
On board: 560, mostly Germans
Passengers on land from 08.30.

About 340 (61 %) took tour buses (Copenhagen Excursions) and were back at 11.30.

Before the observers started to follow – *trail* – the passengers, 39 had started on a self-arranged walking tour.

Observer I followed a group of two women and one man over 50 years old.

08.40	They disembarked the ship
08.55-09.00	Stop at the *Little Mermaid*
09.10	The Esplanad to Bredgade
09.25	Caught sight of *Marmorkirken* (church) and walked up to it (not yet open). Left the area and back to the Esplanad
09.40	After some discussion, they visited *Kastellet* (fortress)
10.20	They left *Kastellet*
10.30	Back to quay where they spent some minutes shopping (just a couple of postcards)
10.38	Back to the ship after 1 hour and 58 minutes ashore.

Observer II followed another group on the same route to *Marmorkirken* from where they discovered *Amalienborg Slotsplads.* There, the observer lost them but they came back to the ship at about 12.00 o'clock, i.e. they had over three hour's walking. Another couple, also observed, spent two and a half hours on their walk.

Observer I followed another group after noon.

14.00	They disembarked the ship
14.15-14.20	Photo stop at the *Little Mermaid* and after that a short look at the *Albany Church* and then down the Amaliegade
14.40	After crossing *Amalienborg Slotsplads* (royal court) they visited the *Marmorkirken* and after that they walked along Bredgade
15.00	Arrival at Nyhavn and a visit to a pub *Skipperkroen* where they had a couple of pints
15.45	They bought some ice at Nyhavn and went back to Langelinie Quay

16.30 Back to the ship.

For the next day, the observers decided to follow passengers with a map in their hands and see if their behaviour differed from those without a map.

Tuesday 18/5.
Ship: *Aurora* from Oslo to Nynäshamn, 09.00 – 22.20
Passenger capacity: 1,950
On board: 1,900, predominantly British
Passengers on land from 09.15 – 10.15
976 passengers disembarked, that is 51 % of all onboard
450 passengers took organised bus excursions
61 arranged own bus tours
465 walked away on self-arranged tours in Copenhagen which is a much higher number than the Germans on the previous ships *Aida Blue* and *Delphine Renaissance*.

This is, according to Jaakson (2003) typical of the British tourists in his study. Nationality is obviously one of the *typologies* researchers try to identify among tourists in order to categorise them.

Observer I chose a couple in their 40s or 50s. They walked very determinedly with a map in their hands.

10.10	Departure from Langelinie and they were lost immediately and found themselves on the pier for the yachts
10.20-10.25	The traditional photo stop at the *Little Mermaid*
10.30-10.35	A vivid discussion over the map in front of the *Albany Church* because they could not find the bank (hidden behind a construction fence for Maersk)
10.35-10.45	They suddenly noticed the church and visited it. They seemed to be happy about finding an English church
10.45	To the Esplanad and a new discussion over the map
10.46	Eventually they spot *Marmorkirken*
11.00-11.10	Visit to *Marmorkirken*
11.10	Walk down to *Amalienborg* where another discussion over the map followed. Then they find the bay side and walk back towards the ship
11.30	They enter Hotel Admiral and stay there for 20 minutes, probably drinking coffee or beer
12.25	Return to the ship after a walk of 2 hours and 15 minutes.

Reflections:
Copenhagen obviously invites more walking than Rönne does. Cruise tourists walk without hesitation more than 500 meters from the ship if they find the walk interesting and pleasant. They choose routes from an aesthetic perspective regardless of whether they walk short or long distances.

Interpretation for the tourists could be better presented using of signs and arrows. The environment is also important (no docks but interesting architecture).

Sunday 30/5.
Ship: *Maxim Gorkiy* from Stockholm to Arendal, 08.00 – 15.00
Passenger capacity: 650
On board: 650, predominantly Germans
Passengers on land from 08.10 – 09.10
380 passengers (58 %) took organised bus excursions (8 buses)
At least 10 used open top buses
120 went walking on self-arranged tours in Copenhagen

Observer I followed a married couple in their 60s-70s.

08.45	Start and then a 5 minute stop at the *Little Mermaid*

09.10	Arrived at *Nordre Toldbod.* They stopped, looking a bit ambivalent, at the entrance to the *Kastellet* and checked the map. They wanted to come down to the bay side but the fences around Maersk construction work stopped them.
09.15	They found the way down to the waterfront.
09.30	Strolling around in *Amaliehaven* and then to *Amalienborg* and back to the park again.
09.50-09.55	They sit down on a seat outside the terminal building for BornholmTrafikken, obviously tired. After that they went down to Nyhavn, looked at the sightseeing boats.
10.10-10.45	They sat at restaurant *Cap Horn* and had a café latte*.*
10.50	They started to walk back and after a new look at the map, they decided to walk to the bay side and to the park again. They obviously found *Amaliehave* very pleasant.
12.30	They returned to the ship after 3-½ hour's walk.

Observer II followed tourists on far longer tours than Observer I. On 18/5, *her* tourists reached *Magasin* and on 30/5 they reached *Rådhuspladsen¸*even further away. They were not interested in aesthetic values, they seemed to follow the motto: as much as possible in as short a time as possible.

Reflections:
In Copenhagen, 56 % of the observed tourists took organised excursions while 72 % of the observed tourists in Rönne took guided bus tours. For self-arranged walks, the figures were 25 % and, 16 %.respectively.

One reason for this may be the intention of the tourists to get a comprehensive view of Bornholm, since that can be possible in 3-4 hours, while it is impossible in a big city like Copenhagen. The difference could also be explained by the proximity of transportation and density of attractions, which makes it possible for individuals to create avaried and interesting trip/walk.

Another reason may be the surroundings and the port environment. Langelinie in Copenhagen is a nice place while the waterfront in Rönne is an industrial area with relatively ugly surroundings. Things for tourists to do are also more abundant at Langelinie. In Rönne, there is actually nothing.

In Copenhagen, tourists actually took walks of almost 4 km, which is much more than Jaakson (2003) concludes from his investigations. The observations in Copenhagen give the impression that tourists will walk for 2 km without problems if they find the surroundings interesting.

This points to the conclusion that behaviour and typologies are highly dependent on the destination visited and not only related to the characteristics of the passengers.

Luleå
For Luleå in northern Sweden, summer 2004 was the first summer with a cruise ship call. Phoenix Reisen's *Maxim Gorkij* was the first and only ship so far to visit the Bothnian Gulf. It started in Bremerhaven on 12 June and sailed to Visby, Tallin, St Petersburg and Helsinki before it entered the Bothnian Sea and Gulf for Kemi in Northern Finland. From there it sailed to Luleå and then to Sundsvall in the Bothnian Sea (Sundsvall has had calls before) and Stockholm. From Stockholm it sailed to Baltysk in the Kaliningrad area, Gdynia in Poland and back to Bremerhaven on 26 of June.

The incoming agent is CreActive Adventures, who say that the ship will not come back within four years.

Friday 18/6.
Ship: *Maxim Gorkiy* from Kemi to Sundsvall 10.00 – 18.00
Passenger capacity: 650
On board: 580, predominantly Germans
Passengers on land from 10.30
440 passengers (75 %) took organised bus excursions (9 buses)
At least 30 walked away on self-arranged tours in Luleå

A lot of people are waiting at the quay and an orchestra performs marching music with participants from a music festival and 40 children from Norway in the orchestra. The municipality of Luleå is represented by people uniformed in red jackets (about 30 people) and there are also a lot of ordinary inhabitants watching the spectacle. There is also a signed route into town with uniformed people in red jackets here and there.

Observer II is observing in the city.
She spots a couple in their 70s. The husband has a video camera. They walk down the main street and look at almost all the shop windows. They look at the menu outside the Thai Restaurant but they do not walk in. They listen to the orchestra which is now playing in the city. After having looked at the church they walk into Macdonald's and have lunch. After that they go back to the ship.

Conclusions
This small observation study has noted several interesting points, which influence cruise tourism behaviour. The most obvious can be divided into four.

Type of destination: Tourists choose differently depending on the destination. In smaller towns in rural areas, like Rönne and Luleå, the passengers choose organised tours to a larger extent (around 75 %) than in a big city like Copenhagen (about 50 %). Those who take walks stay in town for a longer period in Copenhagen (up to 4 hours) than they do in Rönne and Luleå (2 hours).

Surroundings: Surroundings seems to have a big influence on the way the walking cruise tourists orientate themselves in the unknown urban environment. Interesting sights attract the tourists and vice versa. Interesting sights seem to be: old/spectacular architecture, shopping areas and other people/crowds. Unattractive sights seem to be empty streets and anonymous/modern architecture/industry.

Nationality: There seems to be a difference between the different nationalities and the way they choose their experiences. The British seemed to be more willing to take a walk on their own.

Age: Age and physical condition has a great influence on the mode of transportation. Elderly passengers choose to go on organized bus tours.

6 Conclusion

Development

Cruise tourism has a rather short history and there are two main development phases that gave strong pushes to its expansion: the Cook period and the jet aircraft period. Thomas Cook was the master of excursions and also saw the possibilities of sea cruising. Though him cruising has its first phases of expansion. The role of subsidiary activity to ordinary sea traffic was the main feature of cruising from the days of Cook onwards. Even when a definite breakthrough occurred with the jet flights of the 1950s, the ocean liners still used cruising as a complementary business. It was only when ocean line traffic became hopelessly obsolete in the 1970s that cruising started to become an independent industry. Today, cruising has even become an alternative to land based tourist business activities and hotel chains in particular have observed the possibilities inherent in the cruise business.

New types of cruising patterns have emerged, like fly-and-cruise and river cruising. Fly-and-cruise is in this respect very valuable for departure/arrival destinations.

Ships

The ships are becoming bigger and bigger and in many respects form *floating resorts*. Cruise companies compete to construct vessels over 100,000 registered tons and with a passenger capacity of over 3,000 berths. There are signs of over-capacity even if this has not yet materialised. The question remains of how the cruise fleet should be composed: big, small, medium, luxurious, ordinary, or thematically equipped ships.

In this report, Royal Olympia Cruises has shown that the company is ready to gamble on using small vessels for special missions but it is difficult to know if this is an exception or not. Hebridean Island Cruises and Noble Caledonia operate fleets of very small ships and they seem to compensate for their size by repeat tours. The small ships *Island Sun* and *Island Sky* together brought about 1,000 passengers to Rönne in 2004, for example. The reason for using small ships, according to Royal Olympia Cruises, is to give the passengers better opportunities to experience the tour. The same reason is behind the idea of thematic tours. Team Bornholm arranges some *art tours* but there are a minor part of the supply. The market is obviously not *mature* enough for a large-scale promotion of niche tours.

Passengers

The stereotype of a cruise passenger has been of *conservative and rather elderly passengers who choose to spend their days at sea playing bridge and drinking cups of bouillon* as Holloway puts it. This stereotype has cracked and the trend today is manifold and hard to foresee. Therefore, niche marketing has not been successful and the question is if it will be successful and, if so, in what way.

Moscardo shows that cruising has a clear marketing advantage with its all-inclusive product, which minimises inconvenience for customers to almost zero. He also shows that the product is looked upon by passengers as highly beneficial.

The new type of passenger makes it necessary for the cruise companies to differentiate the price so that excursions are recognised as giving added value for passengers and thus as necessitating extra costs.

The typology of tourists is also changing and in the Baltic rim there seems to be a radical change of nationalities. The North Americans have decreased in number and estimated figures point to a more or less dramatic drop during 2004. The Germans are keeping their grip on the market and Britons are also relatively frequent passengers. Probably, new nationalities will entry the Baltic market, for instance the Italians.

Market

The geographical market is extremely small since there are just two areas – the Caribbean and Mediterranean Seas - where cruise tourism has a recognisable impact on the whole tourism industry of the region. New areas are emerging, like the Baltic Sea, but there are still only few towns in the region which benefit substantially from it. For Stockholm, the impact of cruise tourism is, according to its own investigations, 2 % of the total tourism revenue.

This report underpins the statement that there is a clear diversification among ports in the Baltic Sea with regard to size of ships that call. The average tonnage stretches from 36,000 GRT in Stockholm to 10,000 GRT in Kalmar. The figures for passengers are 960 for Stockholm and 610 for Kalmar.

Problems

The negative impact of cruise tourism has lately been focused upon by several researchers. The concern is about environmental disturbance both with regard to nature but also to society. When big ships arrive at small ports, congestion will arise and that will have an impact on nature but also on traditions and social behaviour among local residents. Cruising also has the ability to reach even very peripheral destinations and thus delete the last few *untouched* places on the map. According to many, this will mean a lot of *paradises lost*; according to others, it will be an instrument of development for even peripheral areas.

Another negative impact is the *flag of convenience*. Many cruise line companies have their base in Bermuda, St Vincent, Mauritius or Malta where the demands on companies are fairly liberal. Above all this means low wages and little social security for the staff but also low taxes on profit for the company.

Economy

In this report, different figures have been presented on passenger spending. For Stockholm, the figure is about 700 SEK per person (around €75), for Kalmar the figure is roughly the same but it depends on the spending of American passengers. If there are no American passengers, the average spending will be about 150 SEK (€15). For Rönne, no figures have been available[46] and for Klaipeda, the figure presented by the authorities is $ 273 (€220) but that must include the total income for the port. The figure of €40 presented by the incoming agent seems more realistic.

There are also other stakeholders in the economic system of cruising: cruise line companies, ports, shipping agents, incoming agents, destination tourist organisations, local commercial life, and so on. The berth fees vary and, in Rönne, passenger fees are also used.

Destinations

The passengers are taken care of in different ways at different destinations. In general, the destinations are split into three different zones: the pedestrian zone, the sightseeing zone (with bus) and the excursion zone. However access to these zones differs radically. For a small port, like that of Kalmar, access to all zones is easy. The ships call close to the city centre. On the other hand, there are not many ships calling and no big ships. Karlskrona, with a bigger port, has both direct access and a quay further away from the city. The problem with access is solved by shuttle buses. The trip into the city on a shuttle bus is rather pleasant.

The port at Rönne and Klaipeda is not attractive for the tourists. Shuttle buses take the passengers through the ugly (for most passengers anyway) industrial port to the city centre. In Rönne it is possible to walk through the area but that takes quite a long time. In Klaipeda it is not possible to do so. In Luleå the walk through a semi-industrial area is long (about 2 kilometers) and there is no kind of transportation.

About 20 % of all passengers who prefer non-organised tours and for them the pedestrian zone is not always accessible in an attractive way. This seems to be the weak point of today's cruising. Previously, the conventional type of passenger expected an organised transfer or tender boat to the city. Today, there is probably a stronger demand for self-arranged visits to the city centre. Shuttle buses are of course available and handy but the passengers have to be aware of when they leave and above all when they depart for the ship again.

Sightseeing tours are probably popular since they give a comprehensive view of the destination. Whether there is an increased or decreased demand trend for arranged excursions is difficult to know.

46 Niels Feerup, director of Destination Bornholm, confirmed in an interview that there is no investigation at the regional level in Denmark of passenger spending ashore, 2004-07-22.

6.1 Recommendations

Cruise tourism is one of the few instruments, which can serve as an incentive for cooperation between regions in the Sea Gull area and for a strategic plan for development. Even if there is a competition situation between destinations, there may be great advantages if the destinations are able to present their attractions in a comprehensive exhibition for passengers at the start of the cruise. In this case, the passengers can see that an art museum in Rönne may have different content from an art museum in Riga and maybe both could be worth a visit.

In order to achieve such a joint strategy, some of the following recommendations should be considered.

1. It is stated in the report that cruising has to some extent become an alternative to land based tourist business activities. This means that, if the tourists do not come to the land based attraction, it has to move to the cruise ships. One of the most significant drawbacks, shown in the report, is the decline of the role of Orrefors and Glasriket in the Baltic Sea cruise industry. Accordingly, because of the declining land-based attractions, Glasriket should in some way move aboard the cruise ships. How to do that is certainly a delicate question but perhaps possible to answer in one way or another. What about exhibitions on the ships?

   The same problems are found with the sale of amber in Klaipeda. The museum refuses to sell amber and the tourists are reluctant to buy amber in downtown Klaipeda since they suspect in-authentic products are being sold there. A joint exhibition onboard the ships together with Glasriket could be advantageous, with the products carefully exhibited and a hint of where to buy them given.

2. In order to *move* attractions onboard, a more sophisticated strategy for connections between the cruise operators and the land based operators must be elaborated. The basic structures for the next season are drawn in Miami each year at the big cruise fair. When the routes are settled and the time tables are fixed, it is time for the land based organisations to prepare for visits. The incoming agents at the destinations are the links between the cruise companies (and also the passengers) and the entrepreneurs at the destination. Normally, the incoming agents coordinate services offered by the entrepreneurs and package them and then offer them to the cruise operators. For most entrepreneurs, these services are the same as they offer all other tourists at the destination and they do not promote them to cruise passengers in any other way than they normally do. There are, however, good reasons for special treatment of the cruise passengers. One such treatment is the proposed exhibition on board the ships. This requires more engagement and activity on both the entrepreneur's side and the agent's side.

3. As said in the report, the tourists are divided into three different groups with regard to the area they visit: pedestrians close to the ship, sightseers going on bus tours and excursionists on longer tours. All these types of passengers must be catered for.

   The pedestrians must have a chance to walk on their own. To be transported by shuttle buses is of course a possibility but then they have to be on guard in order to catch the return bus in due time. It is a great advantage if the ship can get as close as possible to the city centre.

   The sightseers must be taken care of regardless of what language they speak. If a ship with mainly Italian passengers is known to be coming from spring, there must be a guide available when it arrives in July or August. Expecting a boatload of Italians just to take care of themselves is not a good idea especially as the Italians seem to be increasingly taking cruises in the Baltic.

   Longer excursions must be presented in an attractive way while the ship is still at sea and the reason for taking a long excursion, like Glasriket, Malbork or Palanga, must also be convincingly explained.

4. The type of vessel is also a critical judgement for harbours. For Rönne, Gdansk and Klaipeda, this is probably of minor interest but the rest of the harbours must consider what type of vessel they want. Small vessels give an opportunity for tailoring the tours in a more profound way. Passengers on small vessels

can more easily be attracted to visiting the destination than passengers on big ships. Joint activities for the whole group where the local atmosphere is essential will be possible to organise.

5. River cruising is not used very much in ordinary cruise offers in the Baltic. Additional trips could be offered, like tours on the Wiszla, Daugava and (why not?) Göta Kanal as a side tour. Trips on the River Neva up to Lake Ladoga and Lake Onega are very common but not connected to the ordinary cruise industry.

6. To some extent, the destinations should share their marketing efforts with the cruise companies. A distinct knowledge of what the destination can offer combined with a detailed idea of what the tourist wants should lead to a better definition of market segments. Destinations know very well what types of tourist come but knowledge of those who do not come and why is much more fragmented and scarce. Tourists from Germany, the UK and US are perhaps predictable but what do Italians expect?

7. In Kemi a market place was opened for the passengers in the middle of the town where entrepreneurs, public services and passengers could meet. Almost all the passengers were driven to that place where there were activities the whole time the ship stopped in Kemi. Events were held at the market all day so the passengers always had something to experience. The idea was very popular among the passengers and should be tested by other ports.

8. In Table 1, an overview of the cruise markets is given. The segments are *river cruise*, *special interests like sailing education or exploration*, *long distance ocean cruising, mini-cruises or extended ferry tours* and *short ocean cruises.* Long distance ocean cruising will not apply to the Baltic Sea but the rest are relevant options. For the destinations it is necessary to decide which type or types of cruising it will be wise to favour. At the moment the cruise companies decide and the destinations take what they get. A more proactive strategy may lead to more freedom for the destinations to choose a particular type of cruise. When doing so, it is important also to discuss market segments and type of vessels suitable for the expected type of cruise.

9. Table 2 shows the possible economic impact of cruising in a wider range than is normally done. It makes a distinction between revenue from the passengers and from the cruise operator. For passengers, it includes travel costs, add-on expenditures like meals, turn-around benefits (bed-nights) and port expenditures like meals and shopping. Cruise operators pay for the berth but there may also be stevedoring costs. It may be necessary to bunker and perhaps undergo ship maintenance. A comprehensive view of the economic impact of cruising on the destination would be of great value in order to judge the importance of the cruise and thereby give a picture of what resources are needed to promote it.

6.2 More research

Within the framework of a small pilot study like this, it is a bit frustrating not to be able to investigate these facts more deeply. Here are some suggestions:

1. The Baltic area has a tradition of cruise tourism but its history has not been fully described.

2. The diversification of ship size is also something that should be discussed, especially in the context of thematic tours and river cruising in the Neva-Volga-White Sea context.

3. Making a typology of tourists is essential for marketing destination ports. More sociological and psychological studies should be made.

4. More direct interviews with the passengers, especially with some form of choice modelling (where the passengers are confronted with alternatives, not only answering if they are pleased or not with the excursion) method would be desirable.

5. Market identification is also necessary for an expansion of the activity.

6. How to cope with tourists at the destination is a matter for destination development theories, with a special focus upon stakeholders and perhaps also cluster networks.

7. Above all, however, there is a need for more investigation of the economy of cruising. There must be more compatible investigations in order to understand the economy of cruising. The first thing to do should be to carry out consumer behaviour studies and economy impact studies.

8. Social and environmental impact studies should also be undertaken, especially since the cruise business is at an early phase and many negative impacts may be avoided with early investigation of possible problems.

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