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Inspire Policy Making with Territorial Evidence



POST-COVID-19 CRUISE TOURISM

Can Covid-19 become a game changer for a possible
more resilient and sustainable cruise tourism?

ESPON PEER LEARNING WORKSHOP - THE FUTURE OF
CRUISE TOURISM IN THE ADRIATIC SEA

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CONTENT

- The “MOMENT” – A historical opportunity
- Cruise industry forced mobility
- Cruise industry / Destination power relation redefine



THE BIG QUESTION

How to regain a more environmental friendly and cultural sustainable cruise tourism, with additional added value for local economies in the region?

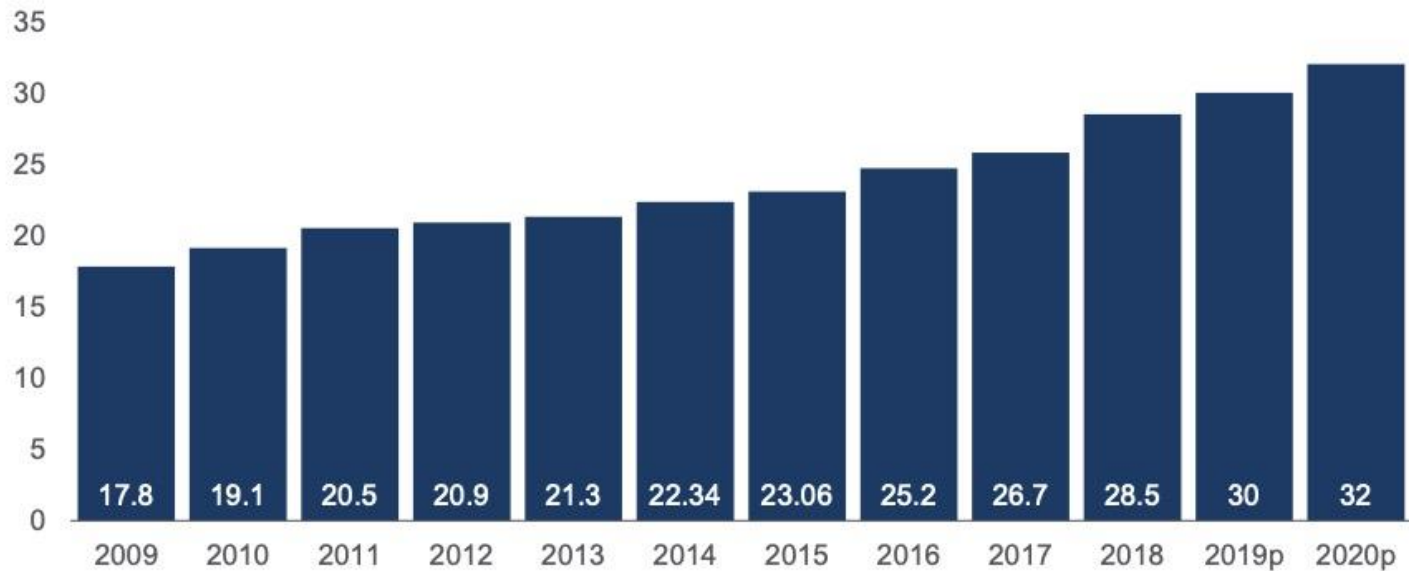


THE "MOMENT"

2020 PASSENGER CAPACITY SNAPSHOT

2020 = 32 MILLION PASSENGERS EXPECTED TO CRUISE

CLIA Global Ocean Cruise Passengers (In Millions)



p = projection

1,4 million in 1980

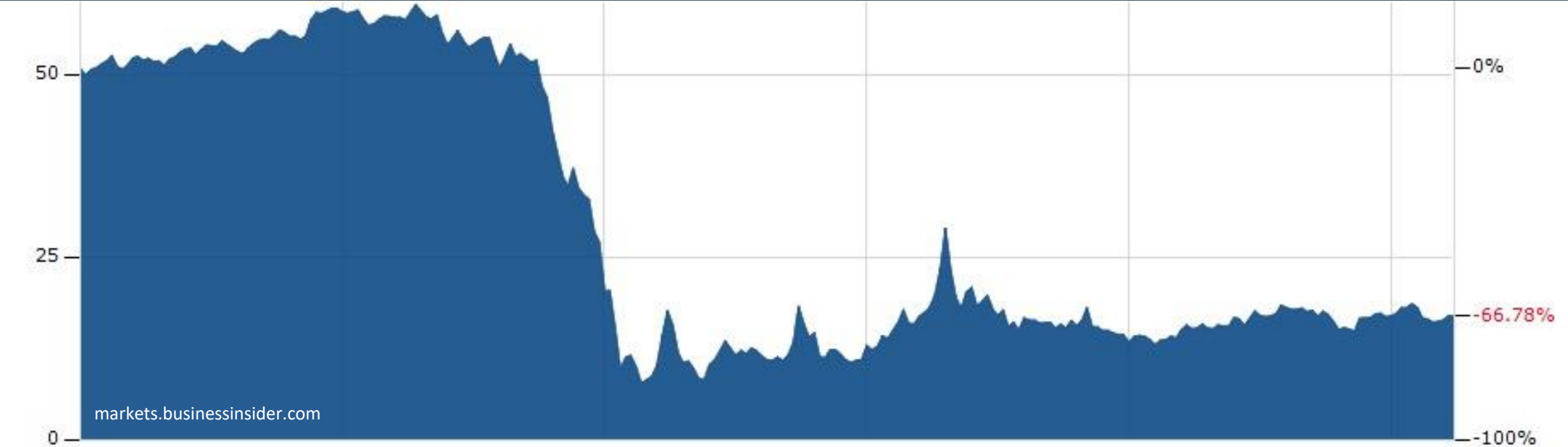
THE "MOMENT"

Cruise ships stationed in the Philippines



Source: sknnews.com

NORWEGIAN CRUISE LINE LTD STOCK – PAST 12 MONTHS



markets.businessinsider.com

THE “MOMENT”

The current pandemic offers a unique opportunity to question tourism (Fletcher et al., 2020) and this applies to existing power relations between the mobility-dependent CTI and destinations

The current period is characterized by the absence of cruise tourists, it is also characterized by the slow recovery of overnight tourism



THE “MOMENT”

This is a historic moment and an unexpected opportunity for these transformed spaces to relive, even if only for a short period of time, a world without cruises as stayover tourism slowly gets back on track

An opportunity to break the path dependency



THE “MOMENT”

This is the nature of the present opportunity...to create a revival that takes place in the framework of a sustainable development project inspired by what a holistic and equitable approach oriented towards a durable future for destinations (Sharpley, 2000)



CRUISE INDUSTRY FORCED MOBILITY

The cruise tourism industry is highly dependent on its need for new space to fix¹ its capital surplus.

In fact, it cannot do without the destinations

There are two ways of fixing the capital surpluses of the tourism industry

¹ David Harvey capital fix theory

CRUISE INDUSTRY FORCED MOBILITY

1 - BY REINVESTING ITS SURPLUSES IN ITS FLEET OF SHIPS (MOBILE CAPITAL)

The industry business model is strongly oriented towards the development of ever larger, more efficient, and more entertaining and technologically avantgarde vessels thus solving the the problem of obsolescence

TECHNOLOGICAL FIX



CRUISE INDUSTRY FORCED MOBILITY

SUPER SHIPS



CRUISE INDUSTRY FORCED MOBILITY

CRUISES TO NOWHERE that the industry has tried to implement during the pandemic is not an option!

Cruise passengers are unlikely to take part in this type of holiday and moreover these aimless trips are also an environmental aberration.



Cruise tourists don't want to just stay on the ships

CRUISE INDUSTRY FORCED MOBILITY

2 - BY REINVESTING ITS SURPLUSES IN SPACE

Corporations find themselves in a double dynamic of irreversible global mobility because, in addition to having to transport their clients, they have to make sure they have access to territories to offer as stopovers, which is the purpose of the trip in the first place

SPATIAL FIX



CRUISE INDUSTRY FORCED MOBILITY

CREATION OF PRIVATE ISLAND

Mainly a Caribbean phenomenon with some exceptions

Perfect Day at Lelepa off the coast of Vanuatu

Sir Bani Yas Island, located off the southwest coast of Abu Dhabi

Motu Mahana, off the coast of Taha'a, Tahiti.



CRUISE INDUSTRY FORCED MOBILITY

Because passengers want to get off the boat and demand more than a resort style manufactured space.

Because excursions are an integral part of the business model of cruise companies

Ultimately the “cruise tourism” product is inseparable from the concept of “REAL” destination

CRUISE INDUSTRY FORCED MOBILITY

This implies the need for cruise companies to produce tourism spaces

THEREIN LIES THE GORDIAN KNOT, IN THE ABILITY OF DESTINATIONS TO REVERSE THIS BALANCE OF POWER.



CRUISE INDUSTRY / DESTINATION POWER RELATION REDEFINE

IRREVERSIBLE MOBILITY will have repercussions in terms of power relations between the industry and host destinations, but only if the latter understand that the former are dependent on mobility and therefore on access to their potential hosts' territories.



CRUISE INDUSTRY / DESTINATION POWER RELATION REDEFINE

There was a time when the mobility of cruise lines was the basis of their negotiating power

REPRODUCIBLE DESTINATION

Host territory, where stopovers are unique and are not interchangeable, prevents the MCTI from using its mobility as leverage in negotiations, as it has done throughout the Caribbean.

NON-REPRODUCIBLE DESTINATION

CRUISE INDUSTRY / DESTINATION POWER RELATION REDEFINE

There is a need for a change of mindset

**Cruise lines need destinations more
than the other way round**

The city now receives around 30 million tourists per year, and two or three cruise ships moored at any time can mean an extra 10,000 passengers disgorged into the narrow streets and squares of Venice (Mourby, 2017).

According to an estimation cruise ship arrivals with 65,434 passengers generated the revenue of around EUR 5 million for Slovenia in 2013 (Risposte Turismo, 2014). This is still negligible in comparison to EUR 2.09 billion (RTV SLO, 2014) that foreign tourists spent in Slovenia that same year.

(Zanne & Beškovnik, 2018)

CRUISE INDUSTRY / DESTINATION POWER RELATION REDEFINE



With its 762,000 visitors per year, the tourism sector one out of every five jobs in the region and 309 millions of Canadian dollars (EUR 200) in revenue for 2016.

For cruise ship tourism \$1.84 million, or 0.6% of total tourism-related benefits in the Gaspé Peninsula.

98% of the revenues remain in the hands of two ports of embarkation in Quebec City and Montreal.

(Renaud & Sarrasin, 2019)

CRUISE INDUSTRY / DESTINATION POWER RELATION REDEFINE

Destinations or groups of destinations on a regional or national scale must take advantage of their political and social capital to use the irreversible global mobility of the MCTI against it to promote LIVEABILITY

To regain a more environmental friendly and cultural sustainable cruise tourism, with additional added value for local economies in the region

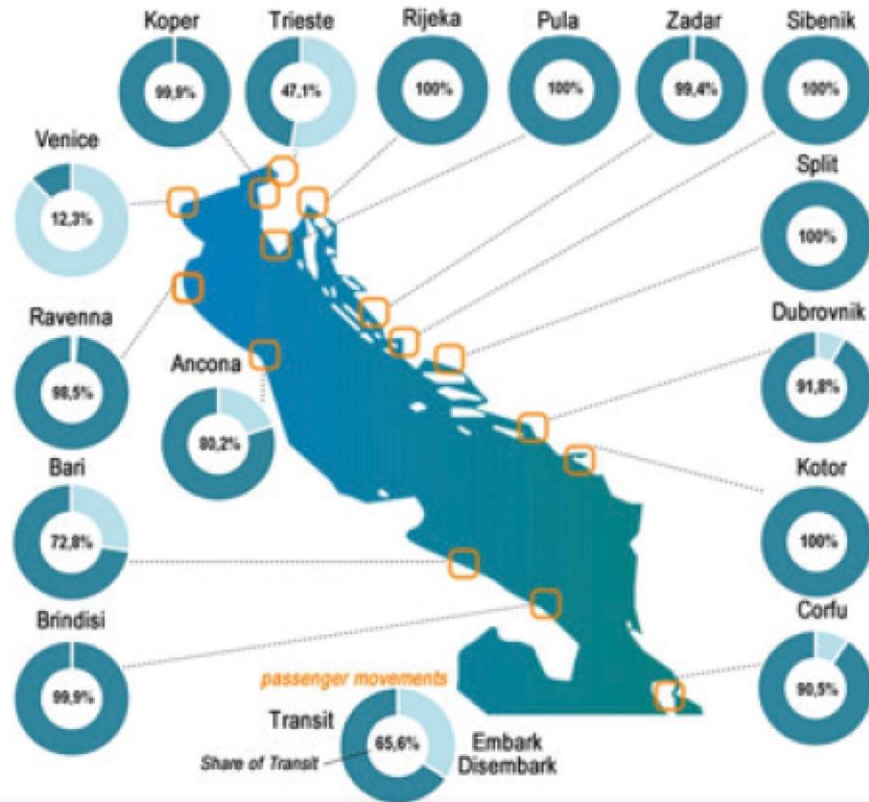


FOR THE SAKE OF HAVING A CONVERSATION THAT IS NOT GROWTH ORIENTED

LIMITS SHIPS SIZE
AGRESSIVE TAXATION
DIMINISH CRUISE ORIENTED INVESTMENT
PROMOTE REGIONAL GOVERNANCE

**It's about focusing on the concept of community quality of life through
deseasonalization, decongestion, decentralization, diversification**

FOR THE SAKE OF HAVING A CONVERSATION THAT IS NOT GROWTH ORIENTED



Each regional space has its own challenges

What about the Adriatic regional space



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ESG UQAM

École des sciences de la gestion
Département d'études urbaines et touristiques

THANK YOU!

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