



The future of tourism in an emerging economy: the reality of the cruise industry in Caribbean

The cruise industry in Caribbean

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Abstract

Purpose – In the face of newly industrialised nations, there is the tendency that there will be a shift or redirect of tourists from old tourism destinations to the newly industrialised ones. While there has been a consistent growth in cruising to the Caribbean, the question is whether the growth in cruise ship calls and increase in cruise passenger arrivals to the Caribbean translate into greater development for the region's stakeholders or whether this just creates increased profits for the cruise lines, and whether there will be a shift from the Caribbean to the newly industrialised nation in years to come. This paper seeks to address these issues.

Design/methodology/approach – This research employed mixed methods approach to answer the research question. The nature of the question and data necessary to answer the question led to the choice of qualitative and quantitative techniques.

Findings – The findings from this research will, hopefully, serve as a guide for Caribbean nations to develop a better strategy to cope with the cruise tourism industry; an approach based more along the lines of inter-island collaboration as opposed to competition.

Research limitations/implications – Lack of ample data on cruise tourism in the Caribbean was one of the limitations of the study. Another drawback involved the high level of secrecy which surrounds the industry and the unwillingness of cruise lines and their associates to provide access to operational data, which they regard as confidential.

Originality/value – The Caribbean, particularly Caribbean governments, will benefit from a greater understanding of the power relations among the cruise tourism stakeholder chain and the profile of costs and benefits associated with the industry. Over the years, the Caribbean has relied solely on the economic impact surveys produced by Florida Caribbean Cruise Association (FCCA) and Cruise Lines International Association (CLIA), both of whom represent the cruise lines, in order to make projections and development plans for the industry.

Keywords Jamaica, The Caribbean, Cruise regions, Cruise tourism, Post Panamax

Paper type Research paper

Introduction

This conceptual paper on cruise tourism has been informed by two key issues. The first is the anomaly that the Caribbean region accounts for over 50 per cent of the world's market share of cruise ship passenger deployment, but generates less than 5 per cent of the industry's revenue, while at the same time imposing significant financial and environmental costs on a number of the Islands. The second is that cruise lines are being absorbed in the process of industry consolidation, so that over 80 per cent of the global industry market share is concentrated in the hands of just three cruise companies:

- (1) Royal Caribbean Cruise Lines (RCCL).
- (2) Carnival Cruise Lines (CCL).
- (3) Norwegian Cruise Lines (NCL).



This has created an acute imbalance of power, as these three companies are effectively able to dictate terms to the small Caribbean Islands on the cruise itinerary. In the face of newly industrialised nations, this situation raises serious concerns about the sustainability of the industry, as it is likely that the extraordinarily inequitable distribution of power, costs, and benefits will eventually alienate the host nations and stakeholders. To date, the industry relies heavily on public ignorance of their activities.

This paper focuses on a question that encompassed both issues: does the growth in cruise ship calls and increase in cruise passenger arrivals translate into greater development for the region's stakeholders or does this just create increased profits for the cruise lines, and will the Caribbean continue to be the preferred destinations for the cruise market?

Over the years, the Caribbean has relied solely on the economic impact surveys produced by Florida Caribbean Cruise Association (FCCA) and Cruise Lines International Association (CLIA), both of whom represent the cruise lines, in order to make projections and development plans for the industry. The report of these surveys by FCCA and CLIA has been markedly exaggerated in favour of their employers. For example, the figures reported are extreme and do not account for the leakage of revenue, thus misleading Caribbean nations into investing hundreds of millions of dollars into the industry with little hope of immediate recovery.

The cruise industry in perspective

Cruising is an important sub-sector of the tourism industry for two reasons. First, it is by far the most rapidly growing segment of the entire industry; and second, it is one of the few segments where there has been a remarkable concentration of power (WTO, 2003). This is in contrast to other segments where new entrants have increased competition and created a wider pattern of ownership and participation.

The Caribbean has been the most popular cruise tourism destination since the demise of the transatlantic passenger industry in the late 1950s (Wood, 2000). The region remains the world's leading destination for cruising (Lawton and Butler, 1987) due to its proximity to the USA of America, which is the world's largest source market for cruise tourism (Lawton and Butler, 1987; Hall and Braithwaite, 1990). Cruising is a highly complex tourism product, covering 34 primary destination countries, spanning more than 1,000 islands (CTO, 2003). Jayawardena (2002) sub-divides the Caribbean into three primary geographical cruising regions: the eastern, western, and southern Caribbean. De Montie *et al.* (1998, p. 161) on the other hand segmented the Caribbean into five geographical cruising areas, namely: The Bahamas as the northern Caribbean, western Caribbean, eastern Caribbean, southern Caribbean, and Deep Caribbean. The US Department of Transportation Maritime Administration (USDOT) sub-divided the Caribbean into four regions by combining the southern and Deep Caribbean into one cruising region in addition to "Cruise to Nowhere" as an optional emerging destination. The major cruise lines plying the Caribbean waters have adopted the sub-division by USDOT as defined in the list below (USDOT, 2009):

- Eastern Caribbean – Southern Bahamas up to St Maarten and Haiti in the west.
- The islands of The Bahamas.
- Southern Caribbean – St. Maarten up to South America (northern section) down to Aruba.

- Western Caribbean – Haiti traveling west, to Mexico, Colombia, and Central America.
- Cruise To Nowhere – Cruises that have no ports in between.

Douglas and Douglas (2004) in reference to the work of the WTO (2003), argue that the cruise industry has outperformed all other segments of the global tourism industry in terms of market share percentage growth over the last 30 years. The global demand for international travel grew at an annual cumulative rate of 4.3 per cent during the period 1990- 2000; the niche cruise tourism market grew by 7.9 per cent average, almost double that of international travel. Clayton (2002) contributed to this debate by arguing that the travel and tourism industries generate between them a significant percentage – possibly as much as ten per cent of global GDP - and probably account for roughly similar proportions of global capital investment and employment.

According to WTO (2003), three key facts now characterise the cruise industry:

- (1) The cruise industry competes directly with land-based resort vacation products.
- (2) Unlike land-based holiday products, which are demand-driven products, cruise tourism is supply-driven.
- (3) The cruise industry began as an American based product, which has now grown into a niche product with worldwide reach, and promotion. However, cruise tourism is still based on the US market on both the supply and demand sides.

According to Bob Dickinson (CCL's former Executive President), in Dickinson and Vladimir (1997, p. 24): The main key to Carnival's success was to position itself in the holiday market and not in the cruise market. This way, if Las Vegas attracts 28 million tourists and Orlando attracts some 40 million, then Carnival only attracts 1.5 million, with a holiday market share of 0.5 per cent. The main competitors are the land resorts and not the other cruise line companies. This is why they are considered as and called floating resorts.

The cruise tourism market is still in a growth phase, en route to maturity, and new growth must come essentially from niche markets, new market segments, and new geographic markets in addition to growth in its existing market. Critical to the growth of the market has been the transformation in the cruising concept that took place during the late 1990s where the focus shifted from the destinations to the ship itself. The cruise ships have become the focus of the modern cruise tourism industry in terms of size, innovation, and onboard experience rather than the destinations of deployment.

Today, cruise line vessels operate above 90 per cent capacity average, which far exceeds that of land-based resort hotels (Wilkinson, 1999); and the size of vessels and capacity are increasing rapidly (Patullo, 1996, p. 158; Wilkinson, 1999, p. 262), with the largest ones deployed to the Caribbean. The cruise ship has since implemented a radical shift from the traditional transatlantic transportation industry where ships were a medium of transportation for passengers travelling to various destinations. With the new focus on the ship itself as a hotel and the comfort and luxury they provide onboard, they are now becoming an important attraction competing with the Caribbean islands, which are becoming mere backdrops to these floating hotels.

The world outside essentially provides variation in scenery and a notional reason for the cruise voyage. The real focus is internal; mega cruise ships carrying in excess of 2,000 passengers are offering a wide range of luxury and pleasures comparable to and even exceeding land-based counterparts, for example, five-storey shopping malls, which are larger than any found in the Caribbean. Indeed, the cruise industry appears to be on the verge of moving from Panamax (largest vessels that can transit the Panama Canal) and first generation post-Panamax mega ships (vessels that cannot transit the Panama Canal) to even larger second-generation super post-Panamax mega ships (Wild, G.P. (International) Ltd, 2004). With the launch of the RCCL's Genesis Class, Oasis of the Seas in 2009, the third generation mega ships are now a reality. Wilkinson points out that mega cruise liners are now virtual floating islands and he questions the Caribbean's ability to cope with the new globalised industry (1999).

As can be seen in Table I, ultra-large cruise ships such as the post-Panamax vessels with the capacity to accommodate more than 2,500 passengers, account for over 20 per cent of the cruise market capacity. If Panamax vessels, which can accommodate over 1,750 passengers, are included, the percentage is over 60 per cent. Today, cruising is a well-established global industry, which in its modern form started to grow and develop from around the mid 1960s (Wild, G.P. (International) Ltd, 2004, p. 15).

Assessing the cost and benefits of cruise tourism

Wilkinson points out that further work needs to be done regarding the assessment of the real benefits to destinations derived from cruise tourism, in relation to the increasing influx of post-Panamax vessels and correspondingly growing passenger numbers. This assessment will determine whether the net returns are real or just a mere illusion. He further maintains that the analysis needs to go beyond the passenger and vessel numbers to include the wide reaching social, environmental, economic, and cultural impacts of the industry (Wilkinson, 1999, p. 263).

The industry clearly has a more complex set of costs and benefits than is commonly realised. Hritz and Cecil (2008, p. 169) in their assessment of the cruise industry at Key

Capacity range	Number of vessels	Lower berth capacity	Aggregate per cent of total berth capacity
Over 3,250	1	3,600	1.15
3,000-3,249	8	24,794	7.89
2,750-2,999	6	17,412	5.54
2,500-2,749	9	23,686	7.54
post-Panamax	24	69,492	22.11
2,250-2,499	5	11,738	3.73
2,000-2,250	29	60,088	19.12
1,750-1,999	27	50,858	16.18
Panamax	61	122,684	39.04
Sub-total 1,750 +	85	192,176	61.15
All small/medium	195	122,099	38.85
Total	280	314,275	

Table I.
International cruise fleet
in 2007 by capacity range

Source: Wild, G.P. (International) Ltd (2004)

West, Florida, USA, reveal that an influx of visitors to a destination results in economic, social, and environmental benefits as well as disadvantages.

The economic benefits are readily seen, but the costs and ancillary benefits are not usually fully evaluated. Marusic *et al.* (2007) in their evaluation of the cruise industry in Croatia argued that estimating the economic contribution of cruise ship visits is not an easy task, and various approaches and methods are proposed in the literature on the topic. In their economic assessment of the cruise shipping industry, Marusic *et al.* (2007), drawing on the work of Dwyer *et al.* (2004), proposed a framework, which included six major steps:

- (1) To determine the scope of the analysis.
- (2) To classify the types of expenditures associated with cruise tourism.
- (3) To estimate the injection of expenditure associated with each of the different categories.
- (4) To estimate different tax and charge components of gross cruise-related tourism expenditure.
- (5) To apply multipliers to estimate industry economic impacts.
- (6) To estimate the real costs and benefits associated with cruise tourism.

Dwyer and Forsyth (1998) in an attempt to understand the economic benefits of cruise shipping put forward some pertinent questions:

- What are the financial and economic benefits of the cruise tourism industry?
- How does trans-national ownership of cruise ships limit the economic impact?
- Are the economic benefits nationally distributed or are they limited to the port environs?
- What levels of net benefits can be derived from the cruise industry nationally and regionally?

Dwyer and Forsyth (1998) observed that much of the literature on the cruise shipping industry consist primarily of flattering stories which are superficial in nature and do not provide answers to any of the preceding questions. For example, the figures provided by the cruise lines and adopted by the Caribbean destinations are gross figures and do not factor in the high level of leakage in industry revenues from the Caribbean. When a full assessment is done, and costs included, the economic picture may look far less favourable for the destination.

Marusic *et al.* (2007), in response to the framework put forward by Dwyer *et al.* (2004) and Dwyer and Forsyth (1998), cruise industry critics, argued that economic benefits of cruise tourism did not take account of the social and environmental impacts which can outweigh the economic gains. Jaakson (2004) in Hritz and Cecil (2008) pointed out that the time spent by cruise ship passengers was highly regulated and controlled by cruise lines from the moment the passengers boarded the vessel. Even when they were visiting a port, most passengers do not venture beyond 200 meters from the ship, which is within their “activity path area” or “safe zone”. Dann and Porter (1997) crafted a good example on Barbados. They looked into the spending habits of cruise passengers, documenting that they spent far less than their land-based counterparts, who spent an average of US\$1,100 dollars versus cruise ship passengers’

mere US\$95 per visit. Hritz and Cecil (2008) provided a counter argument against Dann and Porter's assertion as they posited that this information could be misinterpreted. For example, there was a significant difference in the time spent ashore by cruise ship passengers, which was usually three to eight hours, compared to a land-based visitor whose visit could extend for days or weeks. The low revenues partly reflected the management and regulation of the industry by the destinations, which by almost all accounts have been feeble and almost entirely inadequate. There are signs, however, that this has started to change. For example, on March 1, 2004, according to Hritz and Cecil, the British Virgin Islands (BVI) announced a shift in policy that limits the daily capacity of mega cruise vessels calling at BVI in an effort to protect local businesses and ultimately the cruise industry itself (www.Caribbeanetnews.com 2004; Hritz and Cecil, 2008). The BVI's initiative is similar to the 1998 cruise ship policy implemented in Bermuda. Both islands have successfully introduced a cruise ship policy in an effort to address the sustainability of the cruise tourism industry.

Dwyer and Forsyth (1998) argued that literature on the economics of the industry narrowly concentrated on economic impacts (Mescon and Vozikis, 1985; Price Waterhouse Coopers, 1993). According to Dwyer and Forsyth (1998), increased expenditures from cruise tourism have a direct impact on the local economy and in particular in the local area of local tourist consumption, which has a larger multiplier effect.

Dwyer and Forsyth (1998) surmised that studies on the impact of cruise shipping could be done from either a regional or national perspective. The choice of framework is important when considering wider challenges such as unemployment and poverty reduction and the net impact of the cruise industry as compared to other industries (such as determining whether the industry actually creates more jobs than it destroys). In addition, it would also provide a framework to assess the opportunity cost of investing large sums of capital in port infrastructure development in relation to other national or regional competing needs.

From a social perspective, Sheridan and Teal (2006) suggested that increased number of cruise calls, vessel size, competition among ports, and the development of port infrastructure have necessitated significant public investment and public support. According to Marusic *et al.* (2007, p. 134) public support is necessary when hosting cruise passengers and their crew, while conversely, land-based tourism and facilities also need to cope with a sudden flood of cruise passengers and compete with them for destination attractions, services, and infrastructure. Marusic *et al.* (2007) in an analysis of the cruise industry in Alaska found that cruise ships were becoming increasingly unpopular among local residents, some of whom voted for a cruise passenger tax, turned down a proposal to improve port infrastructure, and openly declared that the cruise ship tourism was incompatible with their lifestyle (Wilkinson, 1999; Mazza, 2004; Ringer, 2006; Klein, 2007). In The Bahamas, resort guests lodged complaints against cruise passengers for spoiling the peace and tranquillity of the islands, and threatened not to return if the practice continued (Foulkes, 2006; Marusic *et al.* 2007). Other examples of similar problems in the Caribbean include Philipsburg in St Maarten, and Road Town in Tortola (McElroy and de Albuquerque, 1998; Lester and Weeden, 2004).

According to Ringer (2006), local entrepreneurs in Alaska argued that the framework for managing cruise vessels in Glacier Bay did not benefit the locals

especially in dealing with permits. In Haines, Alaska, for example, the local independent operators said they were being marginalised due to their inability to compete with the cruise line controlled pre-booked system (McDowell Group, 2002; CruiseJunkie.com, 2004; Ringer, 2006).

According to Ringer, increased real estate costs due to growth in coastal towns resulted in the inability of local residents to afford housing. This was compounded by the low wages paid by the cruise industry, which was below that paid by the traditional fishing and lodging industries (Ringer, 2006). There was also the unpredictability of the tourism market which conflicts with cruise lines, destinations over visitor taxes, and cruise cap measures. The cruise lines' threats (and ability) to redeploy ships at short notice to other areas made it difficult for Haines to rely on cruise tourism as a sustainable source of income for development (Ringer, 2006).

In Dubrovnik, Croatia, residents expressed negative attitudes towards the large number of cruise ship passengers in their town. A study of this destination by Marusic *et al.* (2007) showed that over 10 per cent of residents did not like seeing cruise ship passengers, as they considered them to be visual pollution, and reacted negatively to the periods of intense crowding when the cruise ships docked. Over 50 per cent of Dubrovnik's residents reported experiencing daily crowd-related impact and consequently changed their routine to avoid the crowds. However, Gibson and Bentley (2006) found that residents of Falmouth, Cornwall, UK, had a positive view about cruise tourism as the industry created more jobs, led to financial benefits, and development of attractions and facilities. It would seem evident that resident outlook depends on local conditions.

The extent to which residents are able and willing to tolerate some adverse impact of tourism depends on the extent to which they derive direct or indirect economic benefits from tourism activity, and the amount of disturbance they experience in their daily routine (Marusic *et al.* 2007). The level of social impact felt by residents is in most cases dependent on the stage of tourism development and resident-visitor ratio. Where the intensity of tourism activity exceeds carrying capacity, irritation and antagonism might occur (Doxey, 1975; Marusic *et al.* 2007). According to Marusic *et al.* (2007, p. 134) where the pressure of cruise passengers are experienced on a daily basis and over an extended period, the issue of the ability of the local residents to adjust and cope becomes extremely important.

Assessing environmental costs

Neto (2003) argued that natural resource depletion and degradation of the environment stemming from tourism related activities result in severe challenges, for example, the issue of waste disposal.

Johnson (2002) in a study of environmental sustainable cruise tourism used a life-cycle analysis (LCA) approach, the impacts of which include:

- Infrastructural impact – the creation of cruise facilities and ship construction.
- Operational impact – water, air quality, antifouling and accidental or deliberate discharge in the marine ecosystem.
- Distributional impact – tourist travel and logistics for supply of cruise vessel with provisions.

- Cultural impact – overcrowding by large number of passengers in one destination as highlighted earlier. This includes use of water and competition for recreational activities.
- Waste impact – including six annexes by the IMO of which the major five are oil, garbage, sewage, plastics, and hazardous waste needing proper reception facilities.

Neto (2003, p. 216) further pointed out that disposal of liquid and solid waste generated by the tourism industry is a major challenge facing developing countries and regions such as the Caribbean, which lack appropriate treatment facilities. Disposal of untreated waste has contributed to the reduction of available natural resources.

Competition in the cruise industry

Papatheodorou (2006) pointed out that there are two major competitive variables in cruise tourism industry, namely; the product and the geography. In relation to product, the primary question surrounds the definition and if it should be restricted to the cruise tourism sector or if it should take into account the wider land-based holiday industry. With respect to geography, Papatheodorou (2006) questioned whether this variable could be further segmented. Cruise tourism displays unique characteristics and as a result the two variables need to be analysed separately in relation to competition dynamics and cannot be treated as a mere extension of the wider tourism industry (European Commission, 2002; Papatheodorou, 2006).

In his further analysis, Papatheodorou (2006) argued that customer demand dynamics and demographics are significantly different from that of land-based tourism industry, for example, the average cruise passenger is older than the land-based tourist. Further, individual cruise lines operate on a national basis with regards to their bookings, head office location, legislation, and marketing while the major brands are global conglomerates such as CCL, RCCL, and NCL. This makes it difficult to differentiate between national and international geographical boundaries (Papatheodorou, 2006). Beyond this there are other attributes that are unique to cruise tourism and which have been classified by Teye and Leclerc (1998, p. 155b) as cruise tourism environment.

Dominance and oligopolies among cruise lines

According to Vollmann (1996), it is not sufficient to attain an industry to claim dominance, influence must be sustained. Two fundamental components of dominance are rivalry and power. Vollmann (1996) further pointed out that dominant firms usually have good infrastructure and strategy, and they are typically goal and process oriented. Papatheodorou (2006) argued, however, that in the cruise tourism industry, dominance is highly structured and market driven. The term applies to situations where market share is concentrated in the hands of a few major brands. In industries where concentration is in the hands of a few major firms, there is a risk that they will form an effective oligopoly using price-fixing, high barrier to exit, and other covert practices to deter new entrants (Court of First Instance, 2002; Papatheodorou, 2006). These authors believe that the dominance per se is not necessarily a problem but it can easily lead to abuse of market power and anti-competitive practices which is a serious problem. In general, most regulatory authorities are concerned more with

controlling the ability of a firm to affect the competitive environment and the customers, as opposed to other competitors. Provided that a firm does not attempt to curtail competition, most authorities take the view that firms should not be penalised for being successful (Papatheodorou, 2006).

In essence, the focus of the modern cruise tourism industry has shifted from the Caribbean destinations to the internal facilities of super post-Panamax resort ships. The industry has been transformed in relation to its product and geography and the power balance has shifted in favour of the cruise lines. The Caribbean destinations' approach to assessment of cost and benefits, environmental, and social impacts needs to change for the industry to be sustainable.

Conclusion

The paper examined the background as to whether the growth in cruise ship calls, or the increase in cruise passenger arrivals, translate into greater development for the Caribbean region's stakeholders and not just for the cruise lines. The paper further highlighted an overview of the cruise tourism industry on a global perspective and presented key issues facing the industry in the Caribbean. These issues are: the costs and benefits of cruise tourism, environmental costs, competition in the cruise industry, and the dominance and oligopolies among cruise lines. In light of these challenges, is the Caribbean nations doing enough to avoid a rapid shift in passengers pattern of growth and cruise calls from the Caribbean to the newly industrialised countries?

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