Economic Impact of Cruise Tourism in Baltic Destinations

A Study of Cruise Tourism in Terms of Economic Impact and Acceptance by Population

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II Abstract

The overtourism discussion is often conducted in connection with cruise tourism and currently relates primarily to Mediterranean destinations.
Also in the Baltic ports of Tallinn, Rīga and Klaipėda the increasing cruise tourism means additional income, but at the same time increasing numbers of tourists.

This article is intended to investigate whether the discussion on overtourism known from Mediterranean destinations is also taking place or could take place in Baltic destinations. To this end, the development and economic impact of cruise tourism will be examined in more detail. Subsequently, the attitudes of tourism managers and residents towards this type of travel will be recorded and the degree of use of the destination by cruise tourism will be assessed. In addition, the development perspectives of the three destinations are highlighted.

Cruises represent an important economic factor in all three ports and generate millions of euros in revenues from port fees and passenger expenditure.

However, Tallinn, Rīga and Klaipėda are far from having the tourism and cruise intensity of Venice and Dubrovnik. Apart from the positive economic effects of tourism, this may be one reason why a negative attitude towards cruise tourism is not apparent at present. There has not been any organised resistance or protests against cruise tourism so far. On the contrary, in some cases there is even an explicitly pro-tourism attitude.

In the future, all three destinations intend to further expand cruise tourism. This is to be achieved by increasing the number of calls and taking advantage of the trend towards increasingly larger ships. Above all, the larger ships unload more and more passengers at the same time, which increases the risk of selective congestion.

The recipe for success for the future development of cruise tourism lies in a sensitive coordination of the interests of the various stakeholders. In addition to the cruise operators, these include the tourism marketing organisations and, above all, the local population.

1 Introduction

The overtourism discussion is often held in connection with cruise tourism. In some destinations, a cruise-critical attitude has meanwhile developed among residents, who complain about the burden of crowds and emissions and doubt the economic benefits for the localities (cf. SCHNITZLER 2018; DECKSTEIN ET AL. 2019, 44 ff.). Criticism of cruise tourism primarily relates to Mediterranean destinations and has already led to a reduction or limitation of cruises in Dubrovnik and Venice, for example.

Both cities are located in the Mediterranean, the third most popular cruise destination in the world. In 10th place among cruising areas is the Baltic Sea (cf. CLIA 2019, 3; CLIA/DRV 2019, 5), which is enjoying increasing popularity, with an average of 9.5% more passengers between 2010 and 2018 p.a. (cf. CRUISEBALTIC 2019b, 4).

The countries of the Baltic Sea region, which are part of the Baltic Sea region, are thus also increasingly becoming destinations for cruise passengers. The main ports of call are Tallinn (Estonia), Rīga (Latvia), and Klaipėda (Lithuania). The increasing cruise tourism provides additional income there and represents an important economic factor.

However, the already existing day and overnight visitors there are increasingly being joined by cruise ship guests who explore the cities as part of day visits, both in groups and individually. The already significant focus on summer tourism is exacerbated by cruise ship calls during the months of May through September.

The purpose of this paper is to investigate whether the discussion on overtourism by cruises, which is well known from Mediterranean destinations, also takes place or could take place in Baltic ports of call. For this purpose, first the developments as well as economic effects of cruise tourism are examined in more detail. Afterwards, the attitude of the tourism managers as well as that of the inhabitants towards this type of travel is recorded and the degree of utilization of the destination by cruise tourism is evaluated. In addition, the development perspectives of the three above-mentioned destinations are shown.

This study does not claim to be an all-encompassing examination of the topic, but focuses on economic aspects. In order to enable a more extensive consideration, ecological and social aspects still have to be examined in more detail.

2 Cruise Tourism in the Area of Conflict between Economic Impact and Overtourism

In many destinations, cruise tourism represents an important economic factor. On the one hand, this is determined by the revenues of the port authorities and the companies entrusted with ship handling (e.g. berthing and handling fees, pilotage and tug services or supply and disposal). While the exact bases for calculating port charges are port-specific, they follow a fairly standardized system and are usually made up of the following components: Tonnage Charge, Waste or Sanitary Charge (disposal fee), Mooring or Berthing Charge (mooring fee) and Passenger Fee. The

calculation is based on the gross tonnage (GT) and the number of passengers. Discounts are usually granted for repeated calls (cf. PORT OF TALLINN 2019, 9 ff; FREEPORT OF RĪGA 2018b, 46; MINISTER OF TRANSPORT AND COMMUNICATIONS OF THE REPUBLIC OF LITHUANIA 2018, 3 ff).
An example illustrates the fee system. A cruise ship with a size of approximately 115,000 GT and 3,250 adult passengers on board (equivalent to, e.g., Costa Pacifica) pays approximately €68,500 for a layover day in Tallinn (usually 08:00 to 18:00) without discount (cf. PORT OF TALLINN 2019, 9 ff). In addition, there are the fees for other supply and disposal services as well as tug and pilotage services.
Another significant factor is the revenue generated by passengers and crew members during their shore excursions, purchases, and other use of services. In addition, the revenues of the downstream links in the value chain as well as the employment effects must be taken into account.

Cruises are also an important source of revenue for the three Baltic cruise ports of Tallinn, Rīga and Klaipėda. The ports mentioned are stopover ports (also known as transit ports), which are called at in the course of a cruise. In the case of turnaround ports (ports where a cruise begins or ends), the revenues generated by the arrival and departure of passengers and, if applicable, crew members, such as for cab rides or airport fees, are added to the above-mentioned revenues (cf. PORT OF TALLINN 2018, 6).
A 2018 study by G.P. Wild Ltd, a British market research and consulting firm specializing in cruise travel, examined the economic impact of cruises based on 32 cruise destinations in the Baltic Sea region. According to the study, which was published by CruiseBaltic in 2019, about 4.8 million passengers and about 2.18 million crew members have been counted there (cf. CRUISEBALTIC 2019a, 3). Cruises have created 12,595 jobs and generated revenues of approximately €1.5 billion. Of this, direct revenues such as passenger spending or berthing fees accounted for approximately €680 million, with passenger spending accounting for approximately €407 million, cruise line spending for approximately €249 million, and crew spending for approximately €24 million. Measured in seven key ports, a passenger spent an average of about €177 per day in a turnaround port and about € 81 in a stopover port, and a crew member spent an average of €29 (cf. CRUISEBALTIC 2019a, 6 ff). A further approx. €819 million is attributable to indirect revenues such as wages and salaries for retail employees, sales to suppliers, or tax revenues for the treasury (cf. CRUISEBALTIC 2020; BØDKER 2020).
While tourism can generate income and jobs, it can also lead to heavy demands on destinations and residents. Excessive tourism demands can lead to reaching and exceeding the capacity limit of a destination. The UNWTO defines this limit as "the maximum number of people that may visit a tourist destination at the same time, without causing destruction of the physical, economic and sociocultural environment and an unacceptable decease in the quality of visitors' satisfaction" (UNWTO et al. 2018, 5). Exceeding them can bring about the expression of an attitude critical to rejecting tourism among those affected and a fundamental overtourism discussion.
Furthermore, the paper does not claim nor does it aim to provide a detailed and accurate comparison of the three destinations. This is not possible due to the inconsistent and partly also insufficient data basis. Nevertheless, selected effects of cruise tourism as well as the attitude of the residents can be shown in a structured way on the example of the three destinations.

The consequences of such an overshoot can be seen, for example, in Barcelona or Amsterdam, where there have been protests among the residents. In Venice and Dubrovnik, the additional guests due to cruise tourism have caused a (defensive) attitude critical of tourism and led to reactions among the population and administration, which are reflected in a limitation or reduction of cruise guest numbers (cf. KAGERMEIER & ERDMENGER 2019, 67 ff.; GRAUE & FRIES 2019, 38 ff.; FRIES 2019, 52).
For example, cruise tourism in Venice (262,000 population, 5.25 million overnight visitors in 2018, of which 4.55 million from abroad, cf. STATISTA 2020) has increased from 2013 with 548 calls and 1.81 million passengers has already been reduced to 502 calls and 1.58 million passengers in 2018 (cf. CITTA' DI VENEZIA - ASSESSORATO AL TURISMO 2019, 14 and 62; PORT OF VENICE 2019; NORTH ADRIATIC SEA PORT AUTHORITY 2020, 1).
In addition, there is a service provided by the tourist information office where guests can check in advance the expected number of tourists who will be in Venice, in order to be able to switch to less frequented days (cf. CITTA' DI VENEZIA 2020). From July 2020, according to plans, day visitors will pay an entrance fee of three euros, then six euros from January 2021 (cf. GRAUE 2019). In addition, the lagoon city will in future handle ships over 55,000 GT in the Marghera district away from the city center (cf. GRAUE & FRIES 2019, 39).
Dubrovnik, Croatia, with 43,000 population, 1.265 million foreign overnight visitors, and 530 ship calls with 769,000 passengers in 2018 (cf. MEDCRUISE ASSOCIATION 2020; DUBROVNIK PORT AUTHORITY 2019), also wants to regulate ship calls more closely. The municipality plans to limit calls to a maximum of three ships at a time and to significantly increase port fees for short layovers (cf. GRAUE & FRIES 2019, 38 ff.).

But it is not only in the Mediterranean warm-water destinations that there are problems with the number of tourists: Norway's largest cruise port in Bergen, with 326 calls and 597,217 passengers (2018) (cf. CRUISE NORWAY 2020), limits the number of daily ship calls to three with a combined maximum of 8,000 passengers. Although cruise passengers account for only 20% of Bergen's visitors, their concentration on a few days a week and a few hours a day leads to selective congestion in the city. In addition, the limitation is intended to take ecological aspects into account (cf. LAßMANN 2019, 8; BERGEN HAVN 2020).

Even though the number of cruise guests in Klaipėda, Rīga, and Tallinn is significantly lower than that of the destinations Venice or Dubrovnik, which are almost year-round destinations, guest arrivals are concentrated in a shorter period in the summer half-year. In combination with an increasingly critical attitude towards cruises in some parts of the population and a growing awareness of sustainability, the development of a negative attitude towards (cruise) tourism would thus be conceivable at least also in the three Baltic destinations mentioned.

3 Research-Questions

Four questions regarding the cities of Tallinn, Rīga and Klaipėda can be derived from this:
1. how are the cruise passenger numbers developing?
2. what is the importance of cruise tourism as an economic factor?
3. is there a critical attitude toward cruise tourism among the population in the Baltic ports of call?
4. Is a limitation or reduction of cruise tourism to be expected in the Baltic ports of call?

4 Methodology

The most important cruise port in the Baltics, Tallinn, and the port cities of Rīga and Klaipėda are examined as destinations. At the end, Sillamäe (Estonia), a city planning to develop cruise tourism, is briefly considered.

In order to be able to find answers to the above questions, existing studies and statistics are reviewed as part of a desk research. In order to obtain a differentiated information base, qualitative interviews will also be conducted in the form of expert discussions. For this purpose, interviews will be conducted with senior staff members of the Tallinn City Tourist Office & Convention Bureau/Tallinn City Enterprise Department, the Port of Tallinn, the University of Latvia in Rīga, the Rīga Tourism Development Bureau, the Klaipėda State Seaport Authority, the Klaipėda Tourism and Culture Information Center, the Sillamäe Town Government, and the CruiseBaltic cooperation.

The interviews will be conducted face to face, by telephone and by e-mail in the period December 2018 to April 2020. The selection of interview partners is based on the criteria of competence, accessibility and willingness to respond.

The interview results reflect the professional assessment of the experts interviewed and do not claim to be fully representative.

Furthermore, it is assumed that the studies used in the context of the desk research were conducted in accordance with the usual standards of marketing research.

5 Results of the Desk Research and the Primary Research

In the following, the results of the desk research and the interviews conducted are presented and discussed together.

Of the three cities considered, only Tallinn has had both tourism acceptance among residents and the economic impact of cruise tourism studied in depth during this decade. Due to the broad information base, the following discussion will therefore focus on Tallinn without leaving out Klaipėda and Rīga.

With regard to a discussion of a possible congestion of Klaipėda, Rīga and Tallinn by cruise tourism, it should be noted in advance that the passenger numbers in the mentioned cities are significantly below the level of Venice or Dubrovnik.

Tab. 1 Ship calls and number of passengers 2018[1]

Port	Calls	Passengers
Venice	502	1.579.246
Dubrovnik	530	769.374
Tallinn	348	638.000
Rīga	86	74.785
Klaipėda	58	69.651

Source: own compilation with reference to: PORT OF VENICE 2019; DUBROVNIK PORT AUTHORITY 2019; PORT OF KLAIPĖDA 2020; FREEPORT OF RĪGA 2020; TALLINNA SADDAM 2019, 17.

As in Dubrovnik and in Venice, the touristically attractive city centres in the Baltic Sea region, such as in Tallinn or Klaipėda, are often relatively small. Moreover, in contrast to the Mediterranean destinations, the season is much shorter (May to September), so that the period of convergence of overnight, day and cruise guests is concentrated in a few months (and then also in a few hours a day).

5.1 Tallinn

5.1.1 Visitor and Passenger Numbers

The example of Tallinn (population 450,000) illustrates the impact of cruise tourism on a destination: in the whole of 2018, 3.93 million foreign visitors visited the city, of which 59% were overnight visitors and 41% were day visitors. Day visitors also include the 638,000 cruise guests, which thus represent 16.2% of all guests (cf. VISIT TALLINN /KANTAR EMOR 2019a, 5 and 58).

During the cruise season in the months of April to September 2018, 638,000 cruise guests visited the city in addition to the good 1,931,000 foreign day and overnight visitors (cf. TALLINNA SADAM 2019, 17; VISIT TALLINN /KANTAR EMOR 2019a, 58).

[1] As of 04/2020, not all ports have yet published the key figures for 2019. In order to ensure comparability, the values for 2018 are used.

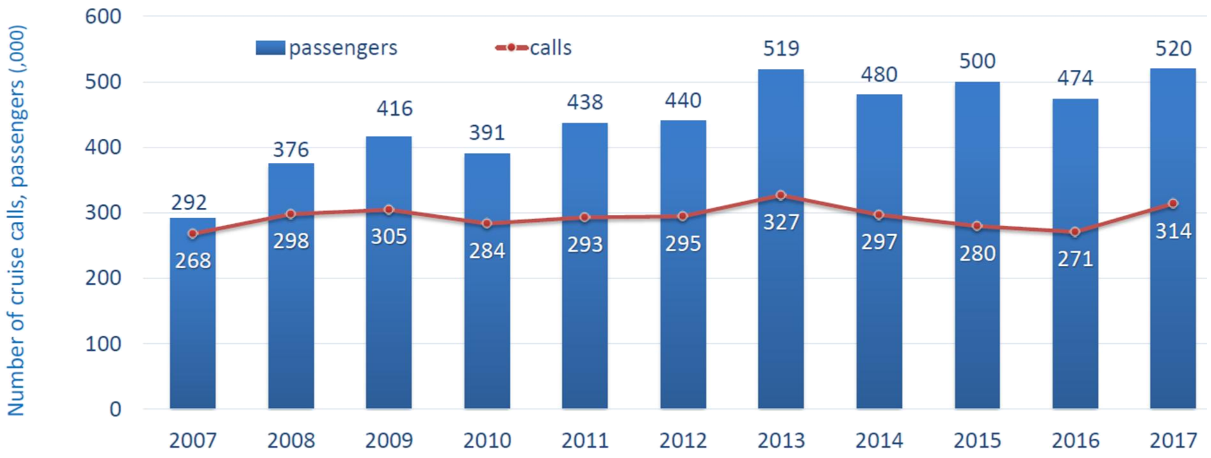

Fig. 1 Ship calls and passenger numbers in Tallinn

Source: PORT OF TALLINN 2018, 5

In August 2018 only, in addition to the 212,000 foreign overnight visitors, 298,000 day visitors also visited Tallinn, of which 163,000 were cruise visitors (5,230 per day) (cf. TALLINNA SADAM 2019, 17; VISIT TALLINN 2019 O.S.). Especially in the case of the latter two groups, it can be assumed that they primarily stay in the touristically attractive Old Town (Vanalinn) due to the short length of stay (cf. TŠISTOVA-POHLAK 2019). On peak days, more than 20,000 tourists frequent the old town, which has a population of just 4,400 in an area of 1.1 km².

These are average values that assume, for example, an even distribution of guest numbers over the month or the week. This assumption is unrealistic, at least as far as ship calls are concerned, since the routing requirements of the shipping companies mean that the calls cannot be distributed evenly over the days of the week.

5.1.2 Cruise as an Economic Factor

In 2018, the Port of Tallinn handled approximately 20.6 million tonnes of cargo and over 10.62 million passengers. The latter were distributed between almost 9.8 million ferry passengers (90% to/from Helsinki) and 638,000 cruise passengers (with 348 calls), which thus represent a share of 6% (cf. TALLINNA SADAM 2019, 6 and 17). In 2018, Tallinn is the third largest cruise port in the Baltic Sea in terms of passenger numbers after St. Petersburg and Copenhagen (cf. CRUISEBALTIC 2019b, 10).

The high number of cruise passengers leads to positive economic effects for the service providers and the subsequent links in the value chain and represents an important economic factor for Tallinn. The main findings of a study by G.P. Wild Ltd. published in 2016 and relevant here are presented in detail and are also intended to serve as an exemplary detailed presentation of the economic factor of cruise tourism.

Cruise tourism generates 6% of the port's revenue (cf. PORT OF TALLINN 2019, 8), the most important sources of revenue being cargo (40%) and ferries (32%). If the 2018 revenues of

€130.64 million (cf. TALLINNA SADAM 2019, 111) are taken as a basis, cruise-related revenues of €7.84 million can be extrapolated.

More significant than the revenues of the port companies and authorities are the revenues from cruise passengers. A further study by G.P. Wild in 2015 showed that the expenditure of cruise passengers was around €59 p. P. . With approximately 500,000 passengers, Tallinn has been able to generate revenues of almost €30 million from passengers alone (cf. ARRO 2015).
54% of the cruise passengers who go ashore in Tallinn have booked an organised shore excursion. This costs an average of €44.90 (cf. Port of Tallinn 2018, 12). If one relates this expenditure to all passengers, each one spends an average of € 24.16 on organised shore excursions. In addition to these shore excursions, passengers spent a further €34.90, which is allocated as follows:

Tab. 2 Expenses of cruise passengers during shore leave
(excluding costs for a guided shore excursion) (2015)

	percentage of shore visitors who have made such an expenditure	average expenditure amount	weighted average expenditure amount
Food and beverage in restaurants	59,8%	€ 11,61	€ 6,94
Public transport and taxi	12,7%	€ 14,64	€ 1,87
Watches and jewellery	10,9%	€ 41,85	€ 4,56
Clothing	24,8%	€ 25,29	€ 6,27
Local handicrafts and souvenirs	69,7%	€ 16,80	€ 11,71
Entertainment/nightclubs/casinos	0,6%	€ 17,73	€ 0,10
Museums and galleries	11,0%	€ 7,71	€ 0,85
Other expenses	15,6%	€ 11,61	€ 2,60
Total expenditure on shore leave			**€ 34,90**

Source: own compilation with reference to: PORT OF TALLINN 2018,13

Added to this are the expenses of crew members who have shore leave in Tallinn.
The crew members spent an average of €20.57, which is allocated as follows:

Tab. 3 Expenses of crew members during ashore (2015)

	percentage of shore visitors who have made such an expenditure	average expenditure amount	weighted average expenditure amount
Food and beverage in restaurants	25,2%	€ 29,29	€ 7,38
Public transport and taxi	3,7%	€ 10,61	€ 0,39
Watches and jewellery	1,2%	€ 111,67	€ 1,36
Clothing	9,3%	€ 68,66	€ 6,42
Local handicrafts and souvenirs	8,5%	€ 32,22	€ 2,75
Museums and galleries	1,6%	€ 4,00	€ 0,07
Other expenses	4,9%	€ 45,20	€ 2,20
Total expenditure on shore leave			**€ 20,57**

Source: own compilation with reference to: PORT OF TALLINN 2018,15

With regard to the number of crew members who made a shore visit, there is only one figure from 2012. In that year, 61,800 crew members visited Tallinn on 294 calls and spent a total of €1,397,785 (cf. VISIT TALLINN/TALLINNA SADAM 2012).

5.1.3 Acceptance of Cruise Tourism

What leads to popular resistance in Venice or Dubrovnik finds more understanding among Tallinn's residents. 87% of the residents surveyed on their attitude towards tourism are proud that so many foreign guests visit the city (cf. TŠISTOVA-POHLAK 2020). Only 5% of the residents express the wish for significantly fewer guests in this survey conducted in 2017. More than half of the respondents, on the other hand, believe "that there should be no limits to growth of visitor numbers in Tallinn (57.4%) and that there is room for numbers to grow (45.4%)" (CENTRE OF EXPERTISE LEISURE, TOURISM AND HOSPITALITY 2018, 39). Moreover, the majority of Tallinn's population does not see increasing tourism as a problem, but rather as an opportunity (cf. TŠISTOVA-POHLAK 2018).

If one asks not the inhabitants but the guests of Tallinn, the danger of overtourism also does not seem to be present. Only 8% of visitors would like fewer tourists, for 17% it could even be more. The vast majority (73%) is in favour of maintaining the current status.

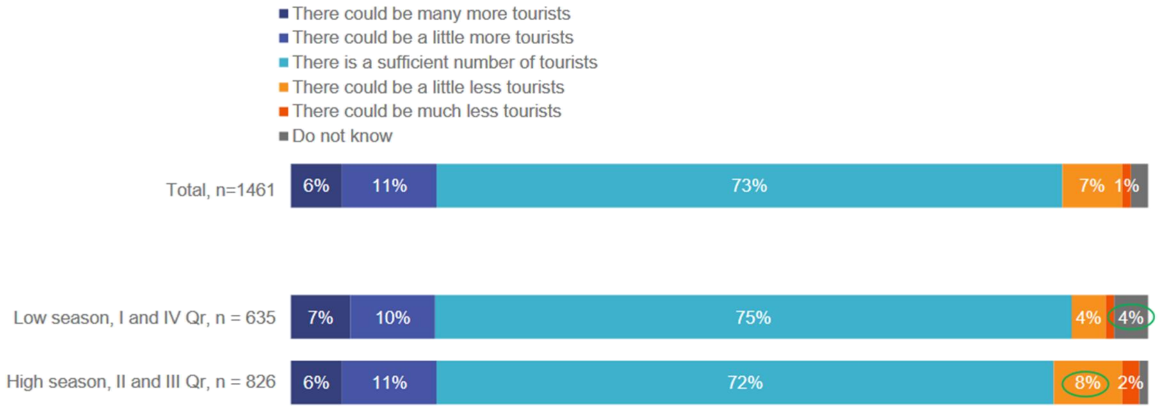

Fig. 2 How would you as a guest evaluate the number of tourists in Tallinn according your personal experience?

Source: VISIT TALLINN/KANTAR EMOR 2019a, 46.

However, if only cruise passengers are asked, just under a third would like fewer or significantly fewer tourists, and only 8% would like more. Slightly more than half advocate maintaining the current level.

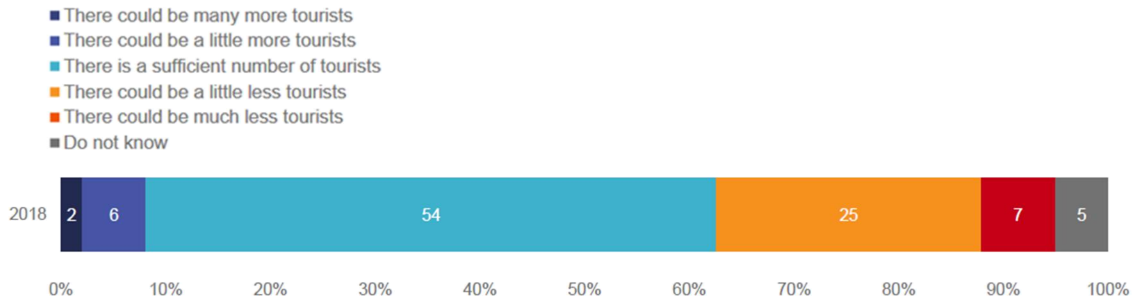

Fig. 3 How would you as a cruise-passenger evaluate the number of tourists in Tallinn according your personal experience?

Source: VISIT TALLINN/KANTAR EMOR 2019b, 33.

98% of cruise passengers in Tallinn would recommend a visit to the city and 47% would be very or fairly likely to visit the city again, this time as part of a land-based trip (cf. PORT OF TALLINN 2018, 25).

In general, the overtourism debate does not seem to be as heated in Tallinn as in some Mediterranean destinations. There has been no organised resistance or protests against cruise tourism in Tallinn so far (cf. TŠISTOVA-POHLAK 2020). However, e.g. the survey results especially of cruise passengers show that carrying capacity limits are becoming visible.

5.1.4 Future Development of Cruise Tourism

The Tallinn Municipality has not yet planned any measures that could restrict cruise tourism. However, the tourism marketing organisation Visit Tallinn would like to better manage tourist flows in the future. Helena Tšistova-Pohlak, Head of Marketing Bureau Visit Tallinn, names as a priority goal "to find smart ways how to inspire cruise visitors to visit other areas of Tallinn in addition to the Old Town and how to distribute cruise visitors throughout the city more evenly throughout the day" (TŠISTOVA-POHLAK 2020).

The port company sees its development direction primarily in improving the passenger service infrastructure and increasing the service speed. The growth from the Asian source market is also to be taken into account (cf. TALLINNA SADAM 2019, 10).

5.2 Rīga

5.2.1 Visitor and Passenger Numbers

Cruise tourism also plays an important role for Rīga, the largest city in the Baltics with a population of 697,000, but not to the same extent as for Tallinn.

In 2018 (the year of the 100th anniversary of the state of Latvia), the city recorded 3.5 million foreign visitors (cf. LASMANE 2019; LATVIA100 2019), of which 1,484,152 were overnight visitors. To this were added 232,635 Latvian overnight visitors, so that the city has hosted a total of 1,716,787 guests. Rīga thus combines approximately 61% of guests and also overnight stays in the whole of Latvia (cf. CENTRAL STATISTICAL BUREAU OF LATVIA 2019, 7). Of the 3.5 million foreign visitors, 74,785 were cruise passengers who visited the city during the cruise season between May and September, accounting for 2.1% of guests. Overall, cruise tourism plays a rather minor role (cf. SŪNA 2020).

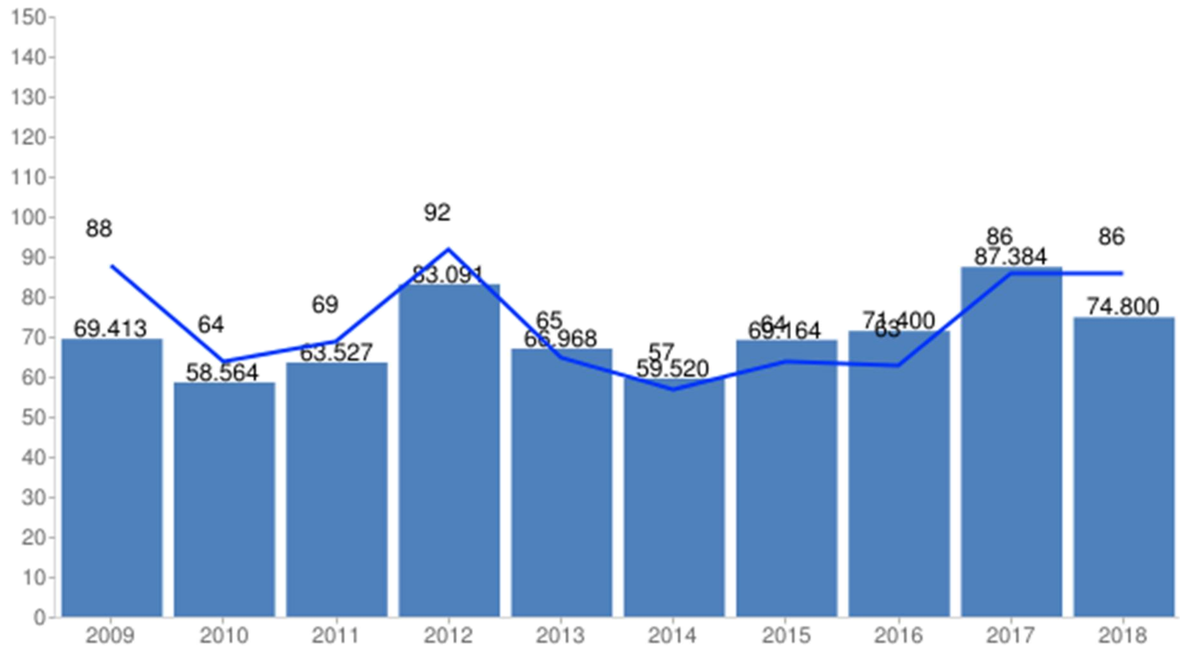

Fig. 4 Ship calls and passenger numbers in Rīga

Source: FREEPORT OF RĪGA 2020

The observed cyclical fluctuations in the number of calls and passengers can be explained by the planning of the cruise operators. In order to offer customers variety in the respective cruising areas, the same ports are not called at every year, but ports are also included in or excluded from the routing from year to year (cf. FREEPORT OF RIGA 2018a, 41). This does not apply to the highlights of a Baltic cruise such as St. Petersburg, Stockholm or Tallinn, but certainly to cities such as Rīga or Klaipėda.

5.2.2 Cruise as an Economic Factor

The port of Rīga is one of the largest ports in the eastern Baltic Sea in terms of cargo, but cruise shipping currently plays a rather subordinate role. Of the 796,000 passengers handled there in 2018, 74,785 were cruise passengers, underlining the dominance of ferry shipping, which generates 90.6% of passengers (cf. RĪGA CITY DEVELOPMENT DEPARTMENT 2020, 35).

In 2018, the Freeport of Rīga port company's revenue from cruise shipping amounted to €1.01 million. In comparison, €2.84 million was generated from ferry shipping. Of the port company's total turnover of €47.5 million (cf. BEČA 2020), cruise shipping thus accounts for 2.1%. Based on the port's schedule of fees, it can be calculated that a cruise ship with a size of approximately 115,000 GT and 3,250 passengers pays €41,400 for a berth day (cf. FREEPORT OF RIGA 2018b, 46). The expenditure of cruise passengers, e.g. for shore excursions, shopping or meals, is estimated at €46 p.p. (cf. SŪNA 2020; BEČA 2020).

5.2.3 Acceptance of Cruise Tourism

At 74,785 (2018), the number of cruise passengers is within a manageable range compared to other destinations. This is due on the one hand to the number of calls, but also to the fact that the port of Rīga is not located on the open sea, but 18 km away on the Daugava River. This places restrictions on the cruise ships calling at Rīga due to the depth of the water, the clearance height under bridges and the size of the harbour basins.
If the number of calls of 86 in 2018 is distributed over the five months (approx. 150 days) of the cruise season, on average approx. 0.6 ships are in port per day (cf. FREEPORT OF RIGA 2018a, 41).
On the shore side, cruise passengers are spread over several areas of the city: the medieval old town, the Art Nouveau Quarter, the market halls originally planned as zeppelin hangars or the many wooden buildings are spread over the city area, which allows for a decentralisation of tourist flows (cf. VAN DER STEINA 2019¸ LATVIJAS UNIVERSITĀTE 2019, 10).

Both the limited berth and handling capacities of the port and the decentralisation of the main sights mean that it is not possible to state that the city is overcrowded. Dr. Aija van der Steina, Senior Researcher at the University of Latvia, states: "One ship per day (about 3000 tourists) is not a big deal for Rīga`s capacity. At this moment there is still capacity left" (VAN DER STEINA 2019). There has not been any organised resistance or protests against cruise tourism in Rīga either (cf. VAN DER STEINA 2019; SŪNA 2020).
From the perspective of the Rīga Tourism Development Bureau, overtourism is also "not yet a problem" (LASMANE 2018). Even in the peak months of July and August, hotels are only up to 80 % occupied. However, there can be occasional capacity bottlenecks (when several or larger ships are in port) between 10 a.m. and 4 p.m. at certain sights in the Old Town or the Art Nouveau Quarter (cf. LASMANE 2018; SŪNA 2020).

5.2.4 Future Development of Cruise Tourism

A restriction of cruise tourism is not expected in Rīga, instead "a capacity to grow" (VAN DER STEINA 2019; cf. SŪNA 2020) is seen.
In its 2019-2028 development programme, the Freeport of Rīga aims for Rīga to be included in the route planning of the main cruise operators. It aims to double passenger and call numbers to 150,000 passengers and 150 ships per year over the next ten years (cf. FREEPORT OF RĪGA 2019).
The bottleneck is currently the port's berthing and handling capacities. The capacities of the passenger terminal are not sufficient to handle several larger ships at the same time (cf. FREEPORT OF RĪGA 2018a, 25). Overall, the port's infrastructure needs to be adapted to the increasing size of cruise ships (cf. SŪNA 2019; FREEPORT OF RĪGA 2018a, 42).
In principle, however, the expansion measures do not have a short-term effect, but rather a medium-term one. In this context, not only the construction times of new port facilities have to be taken into account, but also the lead times of cruise operators with regard to their route planning (cf. ANDERSONS 2019).

An overload of Rīga by cruise tourism cannot be determined at present. A carefully planned expansion of berthing and handling capacities can help to ensure that the carrying capacity limits of selected attractions are not exceeded in the future.

5.3 Klaipėda

5.3.1 Visitor and Passenger Numbers

Klaipėda is the third largest city in Lithuania with a polulation of 157,000 (2014). In 2018, Klaipėda recorded a total of 243,400 overnight visitors and approximately 2 million overnight stays. Almost half (121,100) came from abroad (cf. STATISTICS DISSEMINATION AND COMMUNICATION DIVISION 2020; EKT 2019). The number of day visitors is reported at approximately 146,000, of which approximately 73,000 are foreign visitors (cf. NENIŠKIENĖ 2020). Of these, 69,651 are cruise passengers (2018). Their high share in the total number of day passengers can be confirmed for almost the entire decade, peaking at 61.5% in 2017 (cf. PERITUS PARTNERS 2018, 5).

Klaipėda has only been visited by cruise ships since 1999 and has since seen a general growth in ship calls and passenger numbers, but the growth curves are quite unsteady. As in Rīga, this can be explained by the alternating routing plans of the cruise operators.
The construction of the Cruise Terminal (2003) and the Central Klaipėda Terminal (2014) underline the growth ambitions of the only deep-water port in Lithuania (cf. KOVALEVSKIENE et al. 2017, 73)

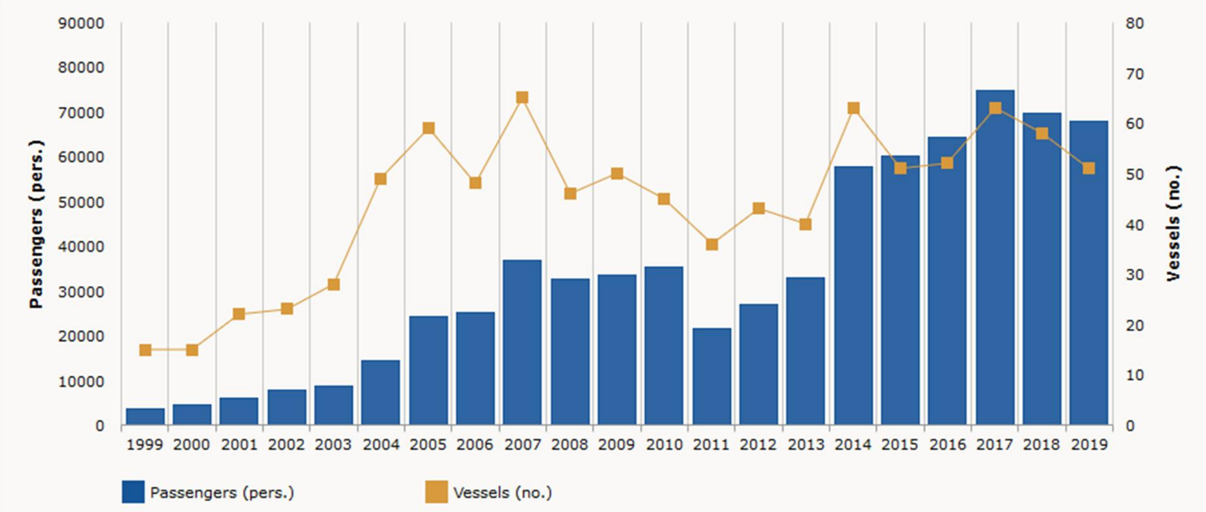

Fig. 5 Ship calls and passenger numbers in Klaipėda
Source: PORT OF KLAIPĖDA 2020

5.3.2 Cruise as an Economic Factor

Klaipėda is the fifth largest port in the Baltic Sea with 46.58 million tonnes of cargo handled, as well as the largest container port in the Baltic States. In 2018, Klaipėda handled a total of approximately 392,000 passengers, of which 69,651 were cruise passengers (17.8%) on 58 ships.
The terminals in Klaipėda are operated by different companies. Two terminals are designated for cruise ships: The comprehensively equipped cruise terminal, commissioned in 2003, is very centrally located and only a few hundred metres from the old town centre (cf. KLAIPĖDOS LAIVŲ REMONTAS 2020).
The Klaipėda Central Terminal, built in 2014, is located about 5 km from the city centre and offers berths for three ships (cf. CENTRAL KLAIPEDA TERMINAL 2020).
Should several large cruise ships come to Klaipėda at the same time, it is possible to switch to the Container/RoRo Terminal, which is about ten km from the centre. From there, passengers can take a free shuttle bus to the city centre. (cf. GONTIER 2020).
Both the number of cruise ships and the number of passengers are lowest in Klaipėda of the three destinations studied. Of the total 7,081 ship calls (of which approximately 3,000 were commercial) in 2018, cruise ships accounted for only 58, or 0.8%. Cruise tourism generates 2% of the port's revenue (cf. GONTIER 2020).
In addition to revenue for port operations, cruise passenger spending is a major source of income for bus companies, retail shops, city guides, cafés and restaurants. The average passenger expenditure is estimated at €50 p.p., of which 50% is spent on organised shore excursions and 50% on shopping, restaurant visits, taxi rides, museum visits, etc.. The corresponding expenditure by crew members is estimated at about half (cf. GONTIER 2020; KOVALEVSKIENE et al. 2017, 74).
The expenditure of the 69,651 cruise passengers - excluding the expenditure of the shipping companies for port operations and excluding the expenditure of crew members - generated revenues of approximately €3.48 million in Klaipėda in 2018.
The revenues of the downstream links in the value chain still have to be added.

A 2018 study by the consulting firm Peritus Partners found that cruise tourists in 2016 (52 calls with 64,265 passengers) generated revenues of approximately €3.07 million and secured 43 - 61 direct and indirect jobs in the Klaipėda region. The revenues generated by cruise ships for the Klaipėda State Seaport Authority alone amounted to €680,000 (cf. PERITUS PARTNERS 2018, 5 f.; GONTIER 2020).

5.3.3 Acceptance of Cruise Tourism

The overall rather low number of guests (243,400 overnight and approx. 146,000 day guests p.a. with 157,000 population) does not suggest an overload by tourism. However, the generally high proportion of cruise ship guests in the total number of guests, who stay in the destination on certain days and then usually between 9 a.m. and 5 p.m., as well as the small old town centre could lead to the assumption of selective burdens.
However, this cannot be confirmed. On the contrary, both those responsible for tourism and the population do not currently see any congestion in the city and have a positive attitude towards cruise tourism (cf. GONTIER 2020).

It is true that the touristically attractive city centre is quite small. However, it is only one point of attraction for the guests. Important tourist attractions such as the seaside resort of Palanga or the Curonian Spit are located outside the city and provide a diversion of tourist flows. However, the first signs of selective congestion can be observed in the latter: "The first problems of congestion are ... observed in the Curonian Spit, especially when more than 15 - 20 buses arrive to excursions in sensitive natural areas" (PERITUS PARTNERS 2018, 7).

There has been no organised resistance or protests against cruise tourism in Klaipėda. Rather, for many residents, the arrival and departure of a cruise ship represents "a popular event" (GONTIER 2020); residents have a positive attitude towards cruise tourism and also see that this type of tourism positively influences the image of their city abroad (cf. GONTIER 2020).

A special feature in Klaipėda is the concept of so-called "Personalised Greetings", which has been implemented since 2015 as a cooperation between the port authority and the city administration. The aim is to take care of the cruise guests personally and make them feel welcome. When a cruise ship moors in Klaipėda, a band plays a welcome tune. Furthermore, each guest receives a small gift on arrival and a mobile post office and a tourist information centre are open at the cruise terminal during the berthing period (cf. KLAIPEDAINFO/PORT OF KLAIPEDA 2020, 13; GONTIER 2020).

5.3.4 Future Development of Cruise Tourism

In the Lithuanian Tourism Development Programme 2014-2020 (cf. OECD 2020), cruise tourism is not a top priority, nor is there a clear concept for the future development of the cruise sector. Nevertheless, the expansion of the cruise sector, including increased cooperation with tour operators and intermediaries, is seen as a possible development direction (cf. KOVALEVSKIENE et al. 2017, 73).

The city and port authorities plan to align the infrastructure with the growth and future requirements of cruise tourism. For example, the trend towards ever larger ships is to be met with a deepening of the harbour basin (cf. PAUKSTE 2020). The opening of another centrally located cruise terminal at the mouth of the Danės River is planned for 2024 (cf. GONTIER 2020).

Problems can arise when several and/or larger ships call at Klaipėda. More efficient handling procedures, a greater choice of shore excursions and intelligent mobility solutions are needed here in order to be able to manage the increasing number of cruise passengers (cf. PERITUS PARTNERS 2018, 7 f.).

6 Answers to the Questions

6.1 How are Cruise Passenger Numbers Developing?

Apart from the annual fluctuations caused by the cyclically changing routing of the cruise providers, the number of cruise passengers has increased in all three ports considered in the period 2008 - 2018.

Tab. 4 Trends of passenger numbers, ship calls and passengers/ship

Port	**Tallinn**	**Rīga**	**Klaipėda**
Cruise passengers 2008	376.000	50.176	32.461
Cruise passengers 2018	638.000	74.785	69.651
Increase	+69,7%	+49,0%	+114,6%
Number of calls 2008	298	76	46
Number of calls 2018	348	86	58
Increase	+16,8%	+13,2%	+26,1%
Passengers per ship 2008	1.262	660	706
Passengers per ship 2018	1.833	870	1.201
Increase	+45,2%	+31,8%	+70%

Source: own compilation

Klaipėda recorded the highest growth in all values, although the initial values there were the lowest. The reasons for the strong growth are, on the one hand, the navigability of the port for

large ships (deep-water port) and, on the other hand, the construction of new terminals, which are also geared to the new generation of ever-larger ships.
The growth in Rīga lags behind that in Klaipėda and Tallinn. The port facilities do not offer the capacities as the other two seaports, moreover, navigation on the Daugava with large cruise ships makes high demands on the skills of the nautical staff.
The high growth values for Tallinn are remarkable, which can thus further expand its leading position among the three Baltic ports considered.

6.2 What is the Importance of Cruise Tourism as an Economic Factor?

The economic factor of cruise tourism has a different weighting in the ports considered, but is nevertheless of great importance in absolute terms.
Expenditure by passengers, crew members and shipping companies for berthing fees and expenditure for other port services such as pilotage and tugboat services or supply and disposal services lead to income for state and private institutions and service providers as well as the downstream links in the value chain and also create jobs.

The economic importance of cruise tourism can be measured on the one hand by the turnover generated by cruises, and on the other hand by the share of cruise passengers in the total number of tourists (day and overnight guests). All of the following values refer to 2018, unless otherwise stated, and only capture the first stage of the value chain.

In Tallinn, the 638,000 cruise passengers represent 16.2% of all foreign tourists. In the Port of Tallinn, they account for 6% of all 9.8 million passengers handled. The Tallinn port company Tallinna Sadam generated an extrapolated turnover of €7.84 million from cruise tourism, which is 6% of the total turnover.
In addition, there is passenger turnover of approximately €30 million and crew turnover, the absolute amount of which is not available.

In Rīga, cruise passengers account for only 2.1% of foreign tourists. Of the 796,000 passengers handled in the port, 74,785 were cruise passengers, representing a 9.4% share.
The port company Freeport of Rīga earned €1.01 million from cruise tourism, representing 2.1% of its total turnover.

In Klaipėda, the 69,651 cruise passengers represent 35.9% of foreign tourists. The port handled a total of approximately 392,000 passengers, with cruise passengers accounting for 17.8%.
The Klaipėda State Port Authority generates about 2% of its total revenue from cruise tourism. A study calculated revenues of €680,000 from cruise shipping for 2016. It should be noted here that in addition to the Klaipėda State Port Authority, there are other companies in the port that also provide services and charge for them. In addition, there are passenger revenues of approximately €3.48 million and crew revenues, the absolute amount of which is not available.

Tab. 5 Overview of selected cruise-related key figures p.a. (2018)

Port	**Tallinn**	**Rīga**	**Klaipėda**
Residents	450.000	697.000	157.000
Foreign tourists (day and overnight guests)	3.930.000	3.500.000	194.100
Cruise passengers	638.000	74.785	69.651
Share of cruise passengers in foreign tourists	16,2%	2,1%	35,9%
Share of cruise passengers in total passengers handled	6%	9,4%	18,8%
Berthing fees for one ship 115,000 GT, 3,250 pax	€ 68.500	€ 41.400	€ 44.650
Revenue of the port company from cruise shipping	€ 7,84 Mio.	€ 1,01 Mio.	€ 680.000[2]
Share of cruise shipping in total revenue of the port company	6%	2,1%	2%
Further income of the destination per se from cruise shipping	€ 30 Mio.	k.A.	€ 3,48 Mio.

Source: own compilation

In summary, it can be said that cruises are an important economic factor in all three ports studied and generate millions in turnover. In terms of guest numbers, cruise tourism has the greatest relative importance in Klaipėda, the smallest of the destinations considered. The city has also recorded the highest growth in cruise tourism.

6.3 Is there a Critical Attitude Towards Cruise Tourism Among the Population in the Baltic Ports of Call?

Such an attitude is currently not discernible among the inhabitants of Klaipėdas and Rīgas. And also in Tallinn, the destination with the largest number of cruise guests, cruise tourism is predominantly viewed positively by the residents.

One possible trigger of a critical attitude among the population towards (cruise) tourism is the ratio of tourists to inhabitants. This can be measured with indicators of tourism density, such as tourism intensity (cf. FREYER 2015, 535; EISENSTEIN 2014, 90 ff.). Not all of the destinations considered measure the number of day visitors, so it is not always possible to make a statement about the total number of guests present. Also, in some cases only the numbers of foreign guests are recorded. In order to enable comparability of the figures, the overnight stay figures of foreign guests are used below.

[2] 2016

The tourism intensity calculated in this way on the basis of foreign overnight guests will presumably not differ significantly from the tourism intensity on the basis of all overnight guests due to the comparatively low population figures of the three Baltic states.
The use of a destination specifically by cruise tourism can be illustrated by the ratio of the number of cruise guests to the number of inhabitants and is referred to here as cruise intensity.
For comparison, the corresponding values for Venice and Dubrovnik are listed here.

Tab. 6 Ratio of foreign overnight stays and cruise guests to population (2018)

City	**Tallinn**	**Rīga**	**Klaipėda**	**Dubrovnik**	**Venice**
Residents	450.000	697.000	157.000	43.000	262.000
Overnight visitors from abroad	2.318.700	1.484.150	121.100	1.265.000	4.549.000
Foreign overnight visitors per inhabitant (tourism intensity based on foreign overnight visitors)	5,15	2,13	0,77	25,5	17,4
Cruise passengers	638.000	74.785	69.651	769.000	1.580.000
Cruise passengers per inhabitant (cruise intensity)	1,42	0,11	0,44	17,88	6,03

Source: own compilation

Tallinn, Rīga and Klaipėda have nowhere near the tourism and cruise intensity as Venice and Dubrovnik. This, in addition to the positive economic effects of tourism, may be one reason why a hostile attitude towards cruise tourism is not currently evident. There has been no organised resistance or protests against cruise tourism so far. On the contrary, in some places there is even an explicitly pro-tourism attitude.

In Tallinn, the destination with the highest tourism and cruise intensity, such an attitude can be confirmed among the inhabitants.
The vast majority of residents are proud that many foreign guests visit the city, also by cruise ship. An equally clear majority is very positive about further growth in the number of guests and sees tourism as an opportunity rather than a risk. It should be noted, however, that in the corresponding survey the basic population is all 450,000 inhabitants, but only 4,400 live in the Old Town, which is mainly affected by the tourist flows.
For the vast majority of visitors to Tallinn, the status quo of guest numbers is acceptable, only a few would like to see fewer, and some visitors could even imagine more guests.
If, on the other hand, one asks the cruise guests, a somewhat different picture emerges. Only just over half would like to see the status quo maintained, for just under a third it could be slightly or significantly fewer tourists. This is probably due to the fact that cruise ship visitors visit the city in the high season months, which usually coincide with the cruise season. A temporal and spatial concentration of tourist flows is the result. This has a particular impact as most of the sights are located in the walled and rather small old town of Vanalinn.

A permanent congestion of Tallinn by cruise passengers cannot be determined. However, there are sporadic peaks of congestion on cruise-intensive days.

Rīga has the lowest cruise intensity of the cities considered. The city's location limits the type and number of ships calling at the city. Currently, less than one ship is in port on average during the cruise season; the share of cruise passengers in Rīga's guests is just 2%.
Like Tallinn, Rīga has an attractive medieval city centre. However, it is not surrounded by a city wall and is thus visibly limited, but is surrounded by partly ruined, but partly still clearly recognisable remains of Vauban fortifications. Many sights are located outside the city centre, which means that the streams of tourists are spread out over the entire extensive city area.
The low burden of cruise tourism in Rīga has also meant that there is no discussion of overtourism so far. However, there may be selective capacity bottlenecks at some attractions.

Of all the destinations considered, tourism in Klaipėda is most strongly influenced by cruises. The city shows the strongest growth in both passenger numbers and calls, and the share of cruise passengers in all guests is highest here.
The touristically attractive old town is the smallest of the three cities considered. However, the tourist flows are also distributed to attractions outside the city, so that there is no congestion. The city administration and port authorities are extremely sympathetic to cruise tourism, which is expressed, for example, in the concept of "personalised greetings".
This cruise-friendly attitude is shared by the residents, who also see the passengers as ambassadors of their city, who carry on a positive image and recommend the city to others.

6.4 Is a Limitation or Reduction of Cruise Tourism to be Expected in the Baltic Ports of Call?

Due to the non-existent resistance among the population, it is not to be expected that politics and administration currently envisage a curbing of cruise tourism. On the contrary, both the tourism marketing organisations and the port authorities are aiming for further growth. Nevertheless, selective carrying capacity limits have been identified.

In Tallinn, the destination with the highest tourism intensity and the highest absolute number of cruise guests, it is therefore planned to distribute the flow of visitors more evenly throughout the day and also to direct it spatially in such a way that congestion is avoided. The port company is striving to improve the service infrastructure and speed in order to make passenger handling more efficient.

Rīga's main plan is to expand port capacity and aims to double passenger and call numbers over the next ten years, which will be made possible by expanding port facilities and increasing the city's inclusion in shipping companies' routing. Due to the current low cruise intensity, some growth is conceivable, but with a doubling there may well be a risk of selective congestion.

Klaipėda is also currently expanding its port facilities to allow more and larger ships to call. However, the state does not yet have a clear concept for the further development of cruise tourism. In order to be able to manage the increasing number of cruise passengers and anticipate the first signs of congestion, handling procedures are to be accelerated, intelligent mobility solutions and a greater number of shore excursions offered.

In summary, it can be stated that all three destinations considered intend to expand cruise tourism. This is to be achieved by increasing the number of calls and taking advantage of the trend towards ever larger ships. Above all, the ever larger ships discharge more and more passengers at the same time, which increases the risk of punctual congestion. New excursion options can be developed in the existing ports of call in order to direct and equalise tourist flows. "The tourist product must be more broadly positioned by offering guests alternatives to the already overcrowded destinations" (PECHLANER in: DIGNÖS 2019).

Overall, therefore, growth with a sense of proportion and the consideration of sustainability aspects are required in order to avoid the emergence of overtourism tendencies.

The desire for growth can be promoted through the membership of Klaipėda and Tallinn in the marketing cooperation CruiseBaltic.

The desire for sustainability can be promoted through participation in the Green Cruise Port programme. This EU Interreg-funded programme aims to promote sustainable development of cruise tourism in port areas and investments in environmentally friendly port infrastructure in the Baltic Sea region (cf. FEHRS, I. 2019, 2; HPC HAMBURG PORT CONSULTING 2019, 36 ff.). All three ports studied are cooperation partners here.

7 Conclusion

The current overtourism discussion is very often held in connection with cruise tourism, with Mediterranean destinations such as Venice and Dubrovnik mostly being used as examples.

The aim of the study has been to find out whether and to what extent this discussion is or can also become an issue in the Baltic States. For the most important port cities Tallinn, Rīga and Klaipėda it could be determined that this is currently not the case and is not to be expected in the near future. In the three cities, cruise tourism plays a role that varies in intensity but is always important and is seen as a positive economic factor that induces income and jobs and offers an opportunity to increase international awareness as well as the willingness to recommend and repeat.

Regardless of the intensity of cruise tourism, a tourism-friendly basic attitude is recognisable both among the port and tourism institutions as well as among the inhabitants (as far as can be measured). In the course of the survey, there were no indications that cruise tourism is exempt from this. In some cases, an explicitly cruise-friendly sentiment is even discernible among the residents.

In general, the intention is to further expand cruise tourism, either by expanding port facilities or by increasing the efficiency of existing facilities. Capacity limits are not yet seen in the destinations considered. However, a sense of proportion is required in all growth efforts, especially if the aim is to double passenger numbers.

It should be critically noted that primarily representatives of the port authorities and tourism organisations were willing to answer the questions and therefore there is a danger that their statements have influenced the results of the study. However, there are neither formal nor informal groupings in the destinations considered that could have articulated a possibly existing cruise-critical attitude in a bundled way.

Irrespective of this, it was not possible to take a holistic view.

In order to be able to conclusively assess the topic of a possible cruise-related overtourism in the Baltic States, social and ecological aspects should be examined in detail in the future.

8 Outlook

Even if the overtourism issue is not currently topical in the Baltic States, it is the task of those responsible for tourism to develop sustainable strategies in good time in order to be able to anticipate and counteract possible tendencies in this direction.

For example, in order to reconcile the interests of residents, local tourism stakeholders and the cruise industry, the city of Dubrovnik and the Cruise Lines International Association (CLIA) agreed to cooperate in July 2019. "Together, with the help of sustainable tourism management, they aim to preserve Dubrovnik's World Heritage Site and develop the city into a model for sustainable tourism in the Adriatic region and beyond" (CLIA 2019).

In order to manage the flows of cruise tourists, on the one hand, calls at existing ports can be equalised, but on the other hand, new ports can also be called at. With regard to the development of entirely new ports for cruise tourism, there is very little potential in the Baltic States; the touristically attractive ports are already integrated into the call plans of the shipping companies.

One of the few exceptions is the small town of Sillamäe with its unique ensemble of Stalinist architecture in Estonia, which is currently not visited by cruise ships. Here, an existing industrial quay is to be developed into a ferry and cruise pier (cf. SILLAMÄE TOWN GOVERNMENT 2018, 40).

The town hopes that this will bring more visitors, which will then also lead to the expansion of the tourism infrastructure.
The development department of the city of Sillamäe sees the target group more as smaller cruise ships with up to 800 passengers that make a stop in Sillamäe on their way to or from St. Petersburg (cf. MAKARYEV 2018).

The recipe for success for the future development of cruise tourism lies in a sensitive coordination of the interests of the various stakeholders. In addition to the residents, these include the "shipping companies, which need the right slots for good routing, ports, which earn money from the berth times, and cities, which want tourists - but just not too many" (V. PILAR 2019, 11).

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Interviewpartner face to face

LASMANE, I.: Marketing Account Executive, Riga Tourism Development Bureau, 12.12.2018

MAKARJEW, A.: Specialist of Department for Development, Sillamäe Town Government, 07.12.2018

TŠISTOVA -POHLAK, H.: Head of Marketing Bureau Visit Tallinn, 10.12.2018 van der Steina, A.: Senior Researcher, University of Latvia, Rīga, 25.03.2019

Interviewpartner via phone

Gontier, K.: International Relations Manager, Klaipėda State Seaport Authority, 16.03.2020 und 30.04.2020

Schwartz, B: Leiterin Marketing, Lübeck und Travemünde Marketing GmbH, 30.03.2020

Interviewpartner via E-mail

Arro, S.: Head of Marketing and Communication Department, Port of Tallinn, 25.03.2020

Beča, L.: Marketing Specialist, Freeport of Rīga, 21.05.2020

Bødker, C.: Director of CruiseBaltic, 30.04.2020

Gontier, K.: International Relations Manager, Klaipėda State Seaport Authority, 25.03.2020

Lasmane, I.: Board Member, Rīga Tourism Development Bureau, 15.04.2019

Neniškienė, J.: Manager, Klaipėda Tourism and Culture Information Center, 11.05.2020

Sūna, E.: Deputy CEO for Port Development Matters, Freeport of Rīga, 15.05.2020

Tšistova -Pohlak, H.: Head of Marketing Bureau Visit Tallinn, 22.07.2019 & 05.03.2020