

STATE OF THE CRUISE INDUSTRY 2023



CLIA



CRUISE LEADERSHIP IN RESPONSIBLE TOURISM

Cruise lines are following a path to decarbonisation with advancements in technology, infrastructure, and operations

- Multiple pilot projects and collaborative initiatives are underway.
- New engines and propulsion technologies are actively being planned and tested for use on cruise ships.

Technology



Infrastructure



Operations



CRUISE LEADERSHIP IN RESPONSIBLE TOURISM

Cruise is a model for responsible and sustainable tourism

Managed tourism

- Active collaboration with ports and destinations helps maximize the benefits of tourism for communities.
- Ship arrival and departure schedules are established with ports up to three years in advance—and most passengers participate in shore excursions organized by the cruise lines with local providers—providing destinations with advance information about tourism flows so they can plan accordingly.
- Collaborative, sustainable tourism initiatives led by the cruise industry, destinations, ports, community organizations, and stakeholders are helping to achieve mutual objectives to preserve the integrity, cultural heritage, and beauty of the world's most treasured destinations for future generations.

"We're seeing the cruise industry acting much more proactively in collaborating with port managers to better manage visitor flows."

Randy Durband, CEO
Global Sustainable Tourism Council



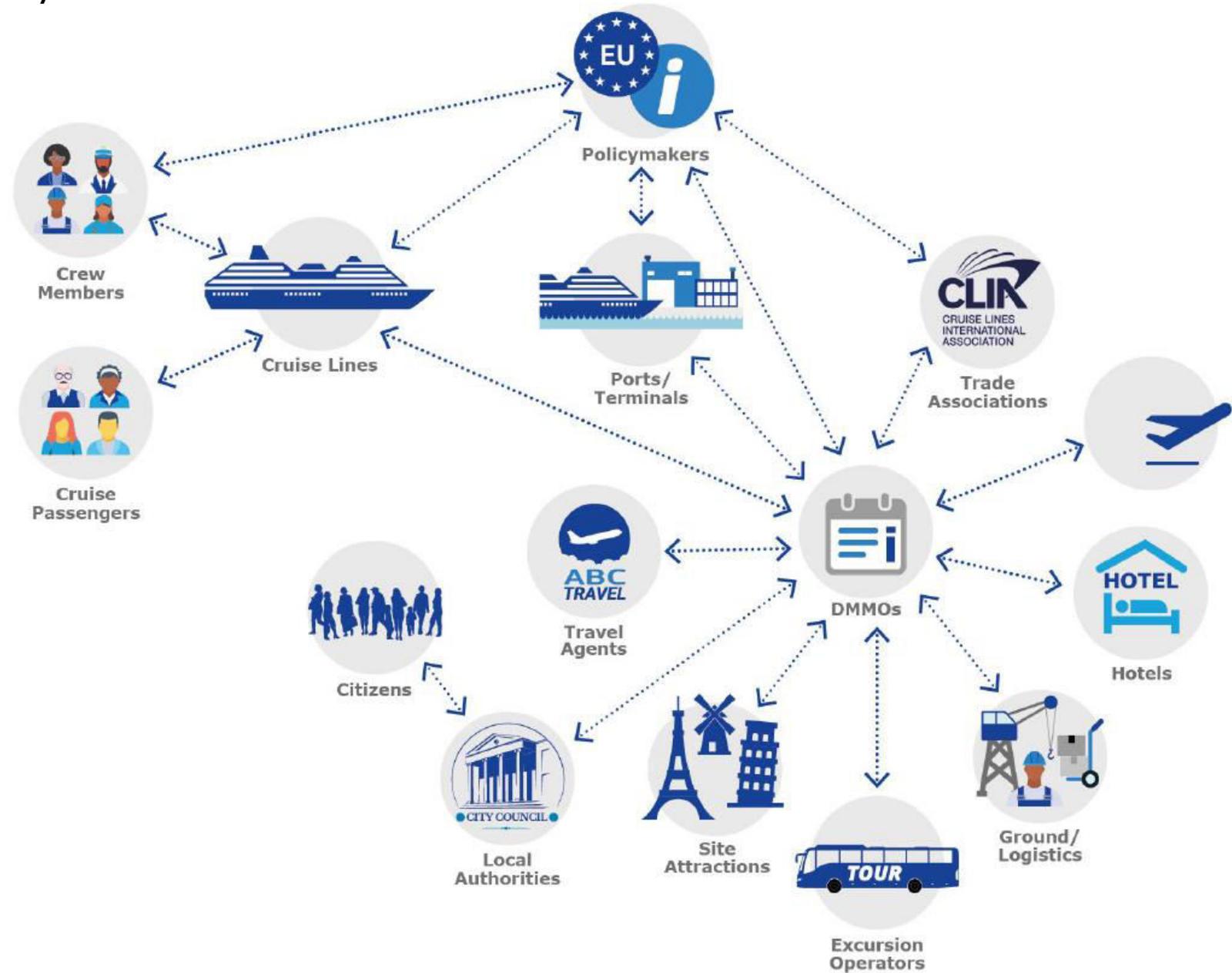


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*'The Cruise industry proved its **resilience** and financial strength during COVID-19 and it has many of the requisite strengths to ensure not only survival but **ongoing growth**.*

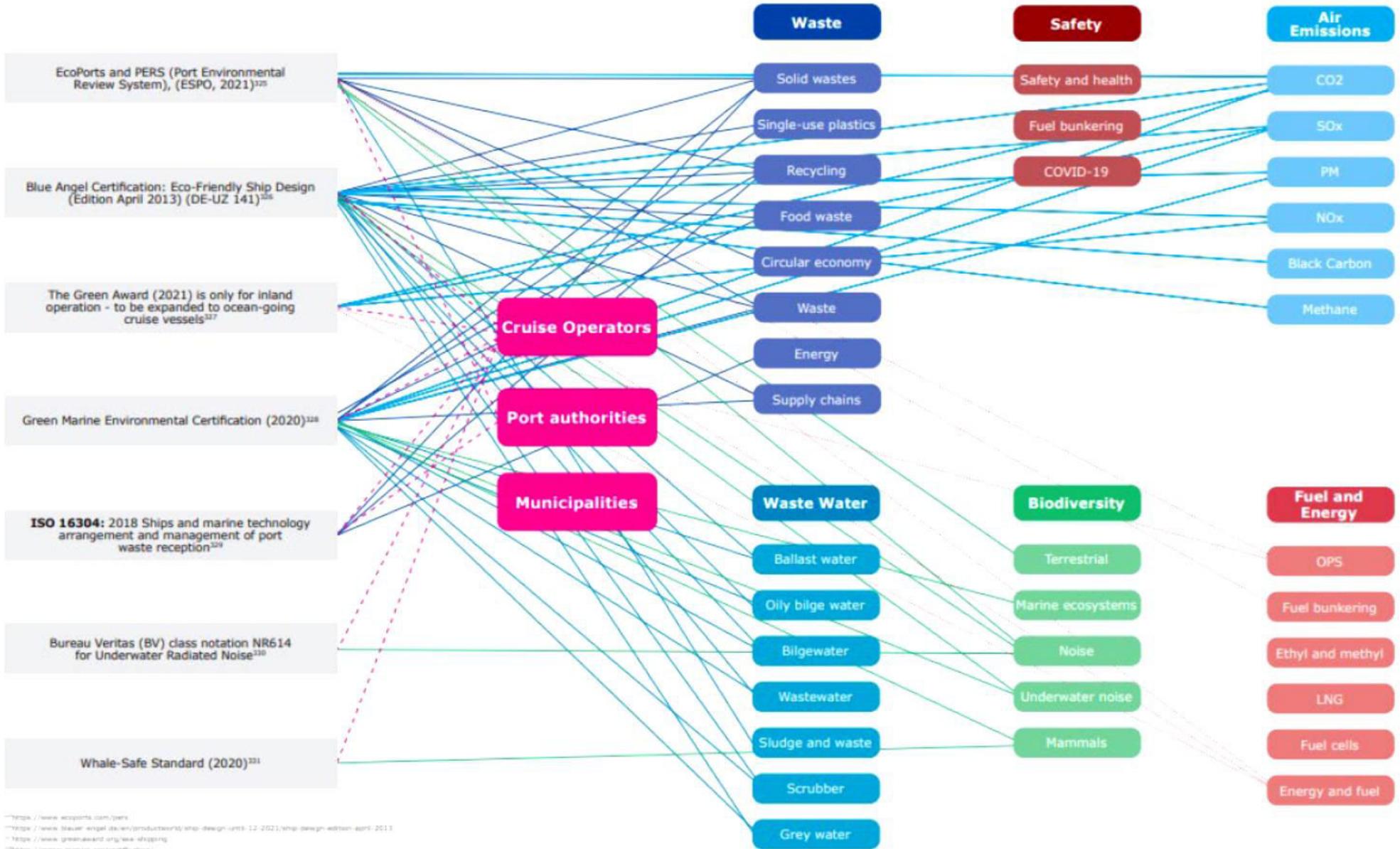
*That growth will falter if the ecosystem, including cruise lines, cannot **meet the destination management, environmental and social challenges** it is currently confronting.'*

The cruise industry ecosystem



CERTIFICATIONS AND ECOLABELS

Overview of coverage of non-regulatory measures



²²⁵<https://www.ecoport.com/pers>
²²⁶<https://www.blue-angel.de/en/products/eco-friendly-ship-design-12-2021/ship-design-edition-april-2013>
²²⁷<https://www.greenaward.org/sea-shipping>
²²⁸<https://green-marine.org/certification>
²²⁹<https://www.iso.org/standards/std/16304.html>
²³⁰<https://marine-offshore.bureauveritas.com/nr614-underwater-radiated-noise-1/nr>
²³¹<https://friendofthewave.org/wp-content/uploads/Standard-WhaleSafe-2020-NEW-ENG.pdf>

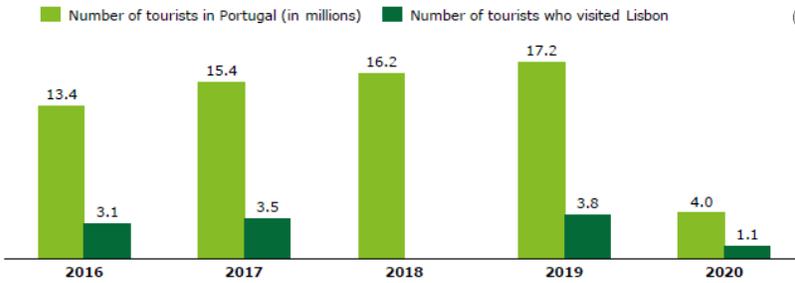
PORT OF LISBON

General tourism

313
cruise calls in 2019

571,000
Cruise passengers in 2019

€25.97²
Per cruise passenger spend on average (2018)



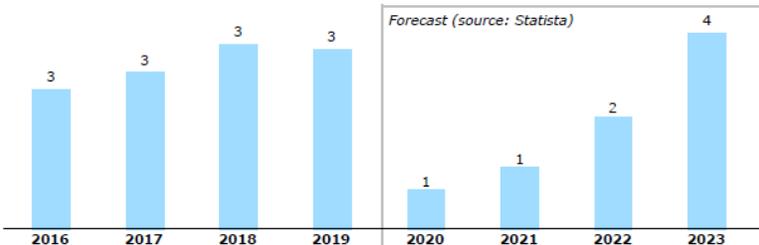
Majority of the international tourists who visited Lisbon come from¹:



They spend in Lisbon on average per day¹:

153.5 EUR / day & 4.5 nights

Industry revenue of 'travel agency, tour operator, reservation services' in Portugal (in EUR billions)

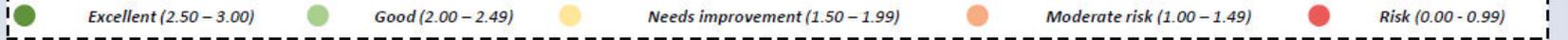


GSTC DESTINATION ASSESSMENT

Executive summary

For Lisbon, in total there were 2 respondents who filled in the survey sent as part of this study. The results show that Lisbon is performing best in its socio-economic benefits pillar with room for improvement in destination management and environmental sustainability. The results indicate that Lisbon needs to develop a system in place to cope with the heavy inflow of cruise passengers so that a balance can be achieved between the community, environment and economy. In addition, based on the interviews, it was evident that given cruise volume is a significantly smaller proportion of the total tourism volume (~1%), more attention needs to be paid to this niche industry.

IGSTC has translated the GSTC evaluation system into a 'traffic light system' with the following scoring methodology:



Destination Management	Overall score: 1.4	Environmental Sustainability	Overall score: 1.1	Socio-economic benefits	Overall score: 1.6
Destination management responsibility	Green	Protection of sensitive environments	Orange	Measuring the economic contribution	Green
Destination strategy & action plan	Orange	Visitor management at natural sites	Red	Decent work and career opportunities	Orange
Monitoring and reporting	Yellow	Wildlife interaction	Red	Preventing exploitation & discrimination	Yellow
Regulation to receive cruise ships	Orange	Species exploitation & animal welfare	Red		
Infrastructure management responsibility	Green	Energy conservation	Yellow		
Sustainability awareness of the above org.	Green	Water stewardship	Orange		
Engagement with other bodies	Orange	Water quality	Yellow		
Enterprise engagement & sustainability standards	Orange	Wastewater	Green		
Resident engagement and feedback	Red	Solid waste	Green		
Visitor engagement and feedback	Green	GHG emissions & climate change mitigation	Orange		
Promotion and information	Red	Low-impact transportation	Red		
Managing visitor volumes & activities	Red	Light and noise pollution	Orange		
Planning regulations & development control	Orange				
Climate change adaptation	Yellow				
Risk and crisis management	Red				
Public Health issues	Green				

- Managing peak volumes of cruise passengers
- Improve engagement with cruise related stakeholders to develop the industry
- Incorporate clear monitoring and reporting indicators for cruise tourism to assess the sustainability of the industry

- Challenges**
- Organise information programs to better inform the residents about the cruise industry
 - To better reap the benefits from the cruises by investing in green technologies to maintain the 'Green Capital Award'
- Opportunities**

GOOD PRACTICES EXAMPLES

- Cruise-specific Onshore Power Supply (OPS) at the cruise terminal of Altona
- Environmental Ships Index (ESI) at-berth module that calculates cruise ship emissions at the berth that it is planned to implement in various EU ports
- Sustainable cruise terminal in the Port of Tallinn, Estonia
- Holistic approach to tourism in Dubrovnik, Croatia
- Waste reduction programme 4GOODFOOD implemented in at least 8 EU destinations;