

*Monika Tomczyk*

Faculty of Management and Economics of Services  
University of Szczecin

*Ewelina Gutowska*

Department of Economics  
The Jacob of Paradies University

## Small cruise ships in the Baltic Sea Region: Conditions of functioning with particular regard to Szczecin Port

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### ABSTRACT

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The cruise ship market is steadily growing but dominated by large “mass-tourism all inclusive” ships, only able to stop in large ports offering necessary conditions and infrastructure but only marginally profiting from passengers themselves, because operators organise all activities and money is spent mostly on ships. This focus on the large cruise ships opens niche markets/touristic segments for smaller ships/ports and more individual travelling and tourists for whom targeted products have to be developed. First contacts to SCS operators show that a small market exists but that also small ships usually only stop at large ports (National Geographic Expeditions/NGE) or struggle to develop marketable products (e.g. former Hurtigruten ship Nordstjernen). The goal of this article is to show the current situation of small cruise ships (SCS) in the Baltic Sea Region with a particular focus and example of Szczecin Port.

**Keywords:** Small Cruise Ships, Szczecin Port,

**JEL Classification Codes:** Z39

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## Introduction

Sea cruises are becoming more and more popular. This type of tourism combines relaxation with traveling to interesting tourist regions with the possibility of visiting it. The authors decided to address this issue, as over the last 30 years, or in fact over the last decade (2000–2010), these services were characterized by dynamic development [Ptaszycka-Jackowska, 2012, p. 1]. Over the years, the preferences of customers using such services have changed, which forces shipowners to change their business model.

The following forms of maritime tourism are distinguished in the literature [Miotke-Dzięgiel, 2002, p.15]:

- cruises on passenger ships (so-called cruisers);
- cruises on seagoing yachts;
- cruises on cargo ships;
- cruises on merchant-passenger ships;
- ferry trips;
- cruises by fishing vessels.

For the purpose cruise market analysis we considered small cruise ships as the cruise ships that have a LOA (length overall) equal or less than 250 m and that sail in the Baltic Sea Region in 2018.

## Small cruise ships in the Baltic Sea Region in 2018

Table 1 below includes the list of cruise lines which own and operate small cruise ships with an LOA equal or lower than 250 m sailing in the Baltic Sea Region in 2018.

**Table 1. Vessels ≤ 250 m operating in the Baltic Sea Region in 2018**

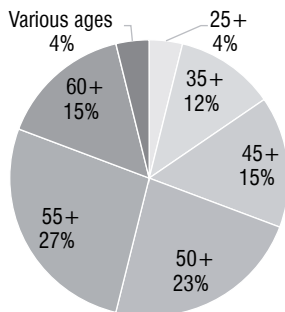
Cruise Line	Ship	Type	LOA (m)	Beam (m)	Draft (m)	GT	Pax (LB)	Crew	Number of Cruises in BSR in 2018
Aida Cruises	AIDAaura	Contemporary	202.9	28.1	6.2	42289	1266	418	7
Aida Cruises	AIDAcara	Contemporary	193.3	27.6	6.2	38600	1186	370	9
Aida Cruises	AIDA luna	Contemporary	249	32.2	7.3	69203	2050	634	3
Azamara	Azamara Journey	Premium Plus	181	25.5	5.8	30277	694	3	4
Birka Cruises	Birka Stockholm	Niche	177	28	6.6	24728	1468	181	11
Cruise and Maritime Voyages	Astoria	Budget	160	21	8	16144	550	200	4
Cruise and Maritime Voyages	Columbus	Budget	247	32.2	8.2	63524	1620	634	3
Cruise and Maritime Voyages	Magellan	Budget	221.6	28	7.5	46052	1452	660	2

Cruise and Maritime Voyages	Marco Polo	Budget	176.2	23.5	8.2	22080	844	356	3
Crystal	Crystal Serenity	Luxury	250	34	7.6	68870	1080	655	2
Fred Olsen	Balmoral	Budget	218.2	28.2	7.26	43000	1350	510	6
Fred Olsen	Boudicca	Budget	205.5	25.2	7.2	28338	880	329	4
Fred Olsen	Braemar	Budget	195.9	22.5	5.4	24344	929	371	4
FTI Cruises	Berlin	Budget	139.3	17.5	4.9	9570	352	170	1
Grand Circle	MV Corinthian	Niche	88.4	15	5	4077	98	70	6
Hansa Touristik	MS Ocean Majesty	Niche	135.3	19.2	6	10417	535	235	2
Hapag-Lloyd Cruises	Europa	Luxury	198.6	24	6	28437	408	267	4
Hapag-Lloyd Cruises	Europa 2	Luxury	225.4	26.7	6,3	39500	516	370	2
Hapag-Lloyd Cruises	Hanseatic	Luxury	122.8	18	4.7	8378	184	122	2
Holland America	Prinsendam	Premium	204	32.3	7.2	37845	835	443	2
Holland America	Rotterdam	Premium	237	32.3	7.8	59885	1404	644	2
Noble Caledonia	Island Sky	Premium	90.4	15.3	3.9	4280	118	66	2
Noble Caledonia	Serenissima	Premium	87	13	4.7	2598	118	50	4
Oceania Cruises	Nautica	Premium	181	25.5	5.8	30277	684	373	3
Peace Boat	Ocean Dream	Niche	205		7.5	35265	800	270	1
Phoenix Reisen	Albatros	Niche	205.5	25.2	7.6	28018	884	340	1
Phoenix Reisen	Amadea	Niche	192.8	24.7	6.2	28717	584	243	1
Phoenix Reisen	Artania	Niche	230.6	29.5	7.8	44348	1200	537	2
Phoenix Reisen	MS Deutschland	Niche	175.4	23	5.8	22496	520	280	1
Plantours	MS Hamburg	Niche	144	21.5	5.1	14903	420	170	2
Ponant	Le Laperouse	Luxury	128	18	4.4	10000	180	110	1
Ponant	Le Soleal	Luxury	142	18	4.9	10600	264	139	2
Princess	Pacific Princess	Premium	180.4	25.5	5.9	30277	668	373	2
Pullmantur	Zenith	Budget	208	29	7.2	47255	1376	642	18
Regent Seven Seas	Seven Seas Explorer	Luxury	223.8	31	7.1	54000	738	542	8
Regent Seven Seas	Seven Seas Navigator	Luxury	170.7	24.7	6.4	33000	504	324	1
Saga	Saga Pearl II	Premium	164.4	22.6	6.11	18591	446	252	4
Saga	Saga Sapphire	Premium	199.6	28.5	8.3	37012	752	406	4
Seabourn	Seabourn Ovation	Luxury	211	28	6.4	40350	604	450	6
Seabourn	Seabourn Quest	Luxury	198	25.6	6.5	32000	450	330	1
Sea Cloud Cruises	Sea Cloud II	Luxury	117.1	16	5.4	3849	96	58	1
Silversea	Silver Spirit	Luxury	195.8	26.5	6.6	36009	540	378	8
Silversea	Silver Wind	Luxury	155.8	21.3	5.3	16927	296	196	2
Viking Ocean Cruises	Viking Sea	Luxury	227	28	6.3	47800	944	465	6
Viking Ocean Cruises	Viking Sky	Luxury	228	28.8	6.3	47000	930	550	7
Viking Ocean Cruises	Viking Star	Luxury	227	28.8	6.3	47800	930	602	4
Viking Ocean Cruises	Viking Sun	Luxury	218.2	28.2	7.3	43000	930	510	8
Windstar	Star Breeze	Luxury	133.8	19.2	5	9975	208	164	3
Total	Total								Total
26	48								186

Source: BA Europe, cruise timetables and individual cruise webpages.

According to the presented data in the Baltic Sea Region in 2018 48 Ships navigate on 26 Cruise Lines.

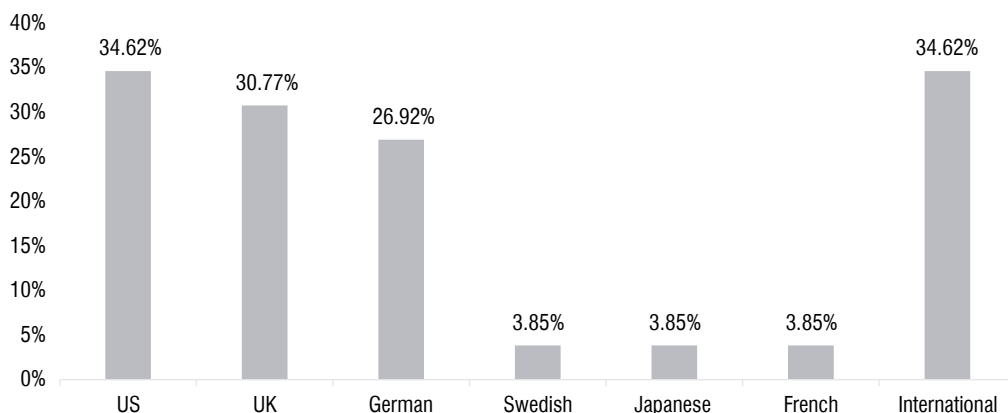
**Diagram 1. Age structure of passengers**



Source: Own elaboration based on BA Europe and cruise webpages.

The largest group of cruise customers are persons aged 55–60 and 50–55. The smallest number of people are between 25 and 35 years old. A fairly clear correlation can be observed between the age and number of passengers. Older people are more likely and more numerous to take advantage of this type of recreation. It can be assumed that the main reason for this state of affairs is flexibility and the possibility of combining active and passive leisure, without the need to use road transport. The contribution of “young” tourists, i.e. up to 35 years of age, is marginal – only 4%. It is extremely difficult to interpret this result without conducting additional, extended studies. The lack of interest of this group may be due to its specificity (e.g. inconvenient deadlines, expensive tickets) and the leisure preferences of young people (orientation towards more active and independent leisure). The macroeconomic context must not be overlooked, either, especially as regards the ageing population and the migration of European citizens.

**Diagram 2. Nationality structure of passengers**



Source: Own elaboration based on BA Europe and cruise webpages.

The data presented in Figure 2 does not add up to 100%, as it does not reflect individual persons but rather groups of passengers on individual voyages.

Most of them came from the United States, Great Britain and Germany. Many of the respondents were classified as “international”. All the countries distinguished in Figure 2 belong to the group of highly developed countries, characterized by high information awareness and the wealth of their citizens. This proves that the popularity of cruises does not depend on ticket prices, and also the reason is not informational regional air-tightening. Although it cannot be assumed that information about this form of recreation is advertised equally in different countries, in the age of the Internet it is not a sufficient argument.

## Overview of Szczecin Port and destination characteristics

The following two tables provide a detailed list of the port and destination characteristics and services related to cruise operations in Szczecin. The information is used for the assessment of the port and the destination’s current position as well as recommendations for the future.

**Table 2. Port overview**



Szczecin	
Destination name	Szczecin
Port name	Port of Szczecin
The Port's official webpage:	<a href="http://www.port.szczecin.pl/en">http://www.port.szczecin.pl/en</a>

Port information		
Number of piers available to cruises	4	
Main pier for cruises	Waly Chrobrego and Pasażerskie for lower draft ships Polskie berth for all draft ships	
Type of berth (passenger, cargo, bulk traffic, ferry)	Waly Chrobrego; representative berth Polskie berth; commercial berth for general cargo Pasażerskie; representative berth (only river cruises)	
Pier dimensions	Length	270 m
	Depth	Waly Chrobrego: 7.0 m at MWL Polskie berth: 9.50 m at MWL Pasażerskie: 6.0 m at MWL
Maximum ship size that call dock here	Length	Waly Chrobrego: 215 m Polskie berth: 215 m
	Beam (width)	Waly Chrobrego: 26 m Polskie berth: 31 m
	Draft (depth)	Waly Chrobrego: 6.5 m at MWL Polskie berth: 9.15 m at MWL Pasażerskie: 5.5 m at MWL
	Air draft (height)	n/a
Width of turning basin	280 m	
Fender type	Waly Chrobrego: Trellex Fender System Mx and Mv Polskie berth: "Hamburg" type fenders	
Bollards capacity	Minimum 40mts and every 16 m or 20 m	
Tides	No	
Port development plans (new pier, new regulations, dredging, etc.)	<ul style="list-style-type: none"> <li>– The limitation to accommodate cruise vessels is due to the current fairway dimensions: 80 m wide and 10.5 m deep</li> <li>– By 2022 the port plans to extend the fairway to 100 m wide and 12.5 m deep</li> <li>– This will allow vessels with LOA 260 m, beam 32 m and a draft of 9.5 m to enter Szczecin</li> <li>– To allow larger vessels to dock close to the city centre Pasażerskie and Waly Chrobrego need to be deepened, but that is not scheduled yet.</li> </ul>	
Can buses wait beside the ship?	Yes	
Can guests walk in the port area?	Waly Chrobrego berth: yes Polskie berth: no Pasażerskie: yes	
Distance to the city centre	1 km from Waly Chrobrego and Pasażerskie 5 km from Polskie berth	
Distance to main attractions	1 km from Waly Chrobrego and Pasażerskie 5 km from Polskie berth	
Restrooms available at the pier	No	
Facilities for persons with disabilities: ramps, toilettes	No	
Tourism information available at the port (type)	Yes	
Additional port information	The port of Szczecin collaborates with the port of Świnoujście which is located directly at the Baltic Sea. In Świnoujście vessels with max draught of 8 m and max length of 270 m can berth at Władysława IV quay – directly adjacent to the city centre – or at alternative berths for vessels with max draught of 13.2 m and max length of 270 m.	
Anchoring		
Tendering available	No	

Port reception facilities		
Fuel type available & delivery method	Standard marine fuels, delivery by barge or by truck	
Waste discharging at the port	Solid waste	Yes
	Waste water	Yes
	Sewage	Yes
Fresh water available?	Yes	
Is the pier cleaned before calls?	Yes	
Navigation		
English map available for the captains?	Yes	
Channel information	Length	68 km
	Width	90 m
	Depth:	10.5 m
Navigational time to reach the port from the entrance of the channel	4–4.5 hours	
Clearance procedure & duration	EU rules apply	
Pilot service available?	Yes, 24/7	
Are pilots compulsory?	Yes, for LOA > 60 m	
Tugs available?	Yes	
Are tugs compulsory?	Yes, in the number declared by the Harbour Master	
Quantity and power of tugs available	Conventional or azimuth tugs with BP up to 55 mts	

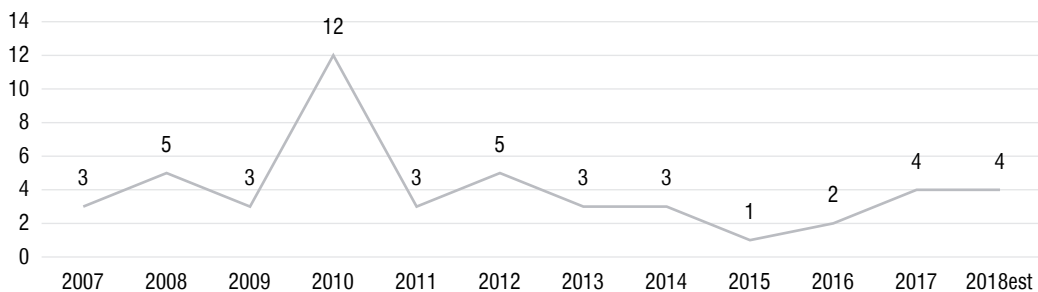
Source: Completed by Marta Borowska from Żegluga Szczecińska and Media Dizajn, <http://www.port.szczecin.pl/en>

## History of cruise calls in Szczecin in the last 10 years

The following section breaks down Szczecin's cruise statistics for the past 10 years provided by Marta Borowska from Żegluga Szczecińska. The number of calls and passengers are analysed as well as the cruise lines which have visited Szczecin.

Diagram 3 and 4 illustrate the development over the past 10 years for Szczecin in terms of cruise calls and cruise passenger visitation.

**Diagram 3. Cruise call statistics for the port of Szczecin in 2007–2018 (est.)**

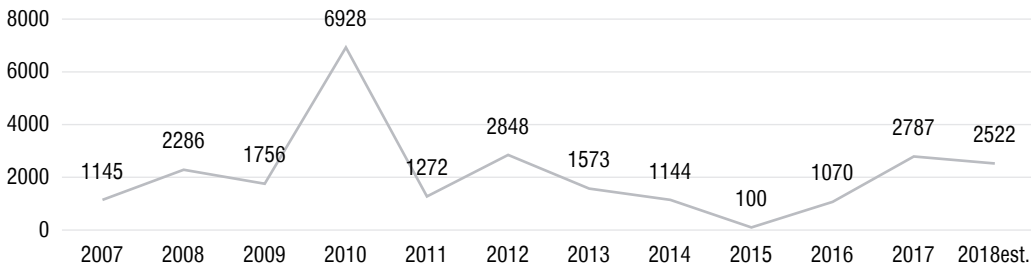


Source: Żegluga Szczecińska.

Szczecin received a total 44 cruise calls between 2007 and 2017, including two calls from a German school ship in 2010 and one from a Norwegian school ship in 2016. According to the information from Żegluga Szczecińska, 4 calls have been confirmed for 2018, including a call from a Norwegian school ship.

Diagram 4 illustrates the cruise passenger visitation in Szczecin per year between 2007 and 2018.

**Diagram 4. Cruise passenger statistics for the port of Szczecin in 2007–2018 (est.)**



Source: Żegluga Szczecińska.

A total of 22,909 cruise passengers visited Szczecin between 2007 and 2017 and in 2018 around 2,500 passengers are expected to arrive. Please notice that this number is an estimate based on the maximum passenger capacity of the vessels calling in 2018.

In 2010 Szczecin experienced a significant increase from 3 calls in 2009 to 12 calls in 2010 (two of these calls were conducted by school ships) and almost 4 times as many passengers.

With the exception of 2010, the cruise business in Szczecin has been fluctuating, as there has been no major strategy or continuous efforts dedicated to the cruise activity.

According to Table I, the details of the individual calls between 2007 and 2017 (excluding the four calls from school vessels) and for the expected calls in 2018 are as follows:

- Szczecin received 44 calls between 2008 and 2018, operated by 16 different cruise lines;
- The cruise calls were operated by vessels with a LOA between 59 m and 236 m (the later exceeding the LOA port restrictions);
- The cruise vessels carried between 100 and 929 passengers;
- Based on the port restriction 27 of the 44 calls (61%) docked at the Wały Chrobrego pier in the city centre, while 15 calls docked at the Polskie pier and two are unknown.

Fred Olsen and Phoenix Reisen have been the most frequent visitors with 6 calls each in the past 10 years followed by Saga, Seabourn, Silversea and Hansa Touristik with 4 calls each in the same period. The majority of the cruise lines (63%) have made between 1 and 3 calls to Szczecin in the past 10 years. Szczecin is not a marquee port but a secondary port which cruise lines normally use as a filler port between more recognised (marquee) ports on their itineraries. Therefore, cruise lines tend to alternate between smaller ports similar to Szczecin every year.



Although these cruise lines and specific vessels called Szczecin in the past it does not mean that they are able or willing to call again. Some cruise lines have changed their deployment patterns and are currently not operating in the region (The World, Semester at Sea), other are no longer operating (Delphin Kreuzfahrten, Voyages of Discovery) and some have called Szczecin once or twice without returning, despite continued operations in the Baltic Sea Region with vessels fit for the port (Grand Circle, Regent Seven Seas, Cruise and Maritime Voyages, Noble Caledonia and Windstar Cruises).

A return of a cruise line should never be taken for granted, it requires hard and continued effort from the destination and its cruise network.

## Summary

According to the port overview completed by Marta Borowska from Żegluga Szczecińska, the maximum size for a vessel to be allowed to dock safely in the designated cruise port near the city centre in Szczecin (Wały Chrobrego) is: LOA of 215 m, a beam of 26 m and a draft of 6.5 m.

Wały Chrobrego pier is the best option for the cruise lines due to the central location but the pier depth is too shallow and bigger ships will have to dock at the industrial Polskie pier.

The vessels allowed to dock at Polskie pier are limited to LOA of 215 m, a beam of 31 m and a draft of 9.15 m, however, it is a cargo pier and cruise lines want to avoid their passengers being welcomed in these types of berths. The port is not attractive and is located away from the city centre with nothing to do within the walking distance.

The possibility of dredging the harbor area and merging the piers in the city centre to allow the larger vessels to dock close to the city centre has been discussed among the local stakeholders. However, these developments have yet to be approved. A major issue is still the long fairway and the limited turning basin, which is the major challenge for cruise vessels calling in Szczecin.

Out of 378 active cruise ships worldwide, 171 vessels (45%) would be able to dock in one of the two piers available for cruise vessels in Szczecin, while 207 vessels (55%) do not fit the port. While these odds might seem promising, it is important to remember that many of these vessels are not operating in the Baltic Sea Region and that smaller cruise vessels usually are deployed to other regions in the world.

Out of 171 small cruise ships worldwide which would be able to dock in Szczecin, 34 vessels (20%) operate in the Baltic Sea Region in 2018, while the majority (80%) represented by 145 vessels do not. Out of the 34 vessels, 24 would be able to dock safely at the Wały Chrobrego, while 10 vessels would have to dock at the Polskie pier. Although deployment changes year after year, these numbers offer an indication of how many different vessels Szczecin could potentially attract.

Table 1 provides a list of the 34 cruise vessels operating in the Baltic Sea region in 2018 which some already and others could potentially visit Szczecin. As cruise lines' deployment changes constantly, the list should be considered a guideline as to which cruise lines it would be most relevant for Szczecin to contact at this time to attract calls in the future.

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