Mass-tourism caused by cruise ships in Tallinn:

Reaching for a sustainable way of cruise ship tourism in Tallinn on a social and economic level

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Preface

In front of you lays my master thesis which was the final objective of my study of Cultural Geography and Tourism at the Radboud University. After years of studying, I can proudly say that I finished everything and that I am graduated. My studying career was a quite a long one and not always that easy, but it has been a wonderful time where I have learned many things and developed myself. The process of the master thesis, from the beginning till the end, reflects these previous years perfectly. Although I am the one who will receive the degree, I could not have done this without the support and help of many during the years of studying in general and during the writing of this thesis in particular. Therefore I would like to thank the ones who helped and supported me.

I want to start by thanking my colleagues at Estonian Holidays and especially Maila Saar, Lars Saar and Mari-Liis Makke. They gave me the opportunity to conduct my research at their company and assisted me in this where needed. Furthermore they introduced me in the world of the cruise tourism industry. Their anecdotes intrigued, surprised or enjoyed me. But they also gave me the chance to experience working in the cruise tourism industry with even being a tour guide for a family excursion. But I do not want to thank them only on a professional level, as they also introduced me to Estonia and Tallinn wonderfully and immediately let me feel at home.

Secondly, I want to thank my supervisor Huib Ernste for his guidance and advice during the writing of my thesis which made me revise my research choices constantly. His critical reflections kept me keen and critical on my work and kept me improving it. Although we have not had that many meetings, those meetings were very valuable for me and I enjoyed them.

Furthermore, I want to thank all the respondents who helped me via the interviews. Without their contribution, it was not possible to write this thesis and conduct this research. They made me realize that cruise tourism is not just an industry, but an industry with impacts on various organizations and people. Extra thanks for the excursion managers of the Aida and Costa ships who showed me around their ships.

Lastly I want to thank my friends and family for supporting and motivating me to write my thesis. Their interest made me feel even more enthusiastic to write and research. In particular I want to thank study association Mundus for the moments of stress-relief and coffee, Marju Meschin for helping me to settle down in Tallinn, Cas van Hardeveld for reviewing the thesis and giving critical feedback and Quint Verschuren for a linguistic check.
Abstract

Although nowadays cruise tourism is on hold due to the COVID-19 pandemic, it is a booming part of the tourism sector, especially in the relatively new destination of Tallinn in Estonia. During the last few decades, tourism in Estonia grew rapidly, including its cruise tourism sector. In mainstream media the impacts cruise tourism has on destinations are mostly limited to mass-tourism and over-tourism, but the impacts are more than the quantity of disembarking passengers. It provides employment and income and it leads to innovation. However, it could also impact a destination in a negative way. Not only by huge numbers of disembarking passengers but also via congestions on roads, an increase in criminal incidents or Disneyfication.

This means that cruise tourism has an impact on various dimensions and aspects. As this part of the tourism industry is a sector that keeps growing, it is necessary to guide it in the right direction and to make sure that the negative impacts do not exceed the positive impacts. Therefore, the concept of sustainable tourism has been introduced which aims to maintain or improve the tourism sector at a destination in such a way that it is sustainable for all stakeholders at the social, economic and environmental level.

In this thesis, this concept of sustainable tourism is the central point. Related to this concept is the framework of indicators that could show how sustainable cruise tourism is at a particular destination. The framework in this thesis distinguishes two dimensions: the social and the economic. Each dimension contains several indicators, varying from local income to passengers’ spending and from community restrictions to health and wellbeing. These fifteen indicators are operationalized and used to research the sustainability of Tallinn’s cruise tourism.

The thesis makes uses of three data collection methods: literature review, interviews and observation. The points of view from the various stakeholders (visitors, industry and hosting community) have been taken into account and are represented. Via the collected data the current state of sustainability of the cruise tourism industry in Tallinn has been investigated. Furthermore, it became possible to research how this industry could be improved and how it could become (more) sustainable.

Based on the results, it can be concluded that the cruise tourism industry in Tallinn is relatively sustainable: the economic benefits are present and many people work in the tourism industry, whether or not temporary. The downside of cruise tourism is apparent as well, though this is mainly related to the amount of disembarking passengers. The ratio of residents who live in the touristic area to cruise passengers is developing negatively and at this moment, this is the biggest threat that Tallinn faces.

To solve this, the stakeholders of the cruise tourism industry should cooperate and focus on spreading of the cruise passengers. This can be done by spreading the cruise passengers across the city during their disembarking, but also by reconsidering the cruise arrival schedule.

To conclude, to tackle the few negative impacts of cruise tourism in Tallinn, one should focus on cooperation. By doing that, the cruise tourism industry in Tallinn will stay an import sector in the economy of the city.
5.2.7 Protections of archeological places ................................................................. 36
5.4 Economic impacts ............................................................................................. 37
  5.4.1 Income from cruise tourism on total regional economy ................................ 37
  5.4.2 Employees in the cruise sector .................................................................. 39
  5.4.3 Passenger’s spending ................................................................................. 39
  5.4.4 Startups in cruise tourism .......................................................................... 40
  5.4.5 Changes in public investments and profits ............................................... 41
5.5 Sustainable tourism ......................................................................................... 42
  5.5.1 From theory... .......................................................................................... 42
  5.5.2 ... to practice: Venice and Barcelona ......................................................... 43
5.6 Sustainable cruise tourism in Tallinn .............................................................. 44
  5.6.1 The sustainable aspects of Tallinn’s cruise tourism .................................. 44
  5.6.2 Further improving the sustainability ......................................................... 45
6. Final findings and discussion ............................................................................... 50
  6.1 Reaching sustainable cruise tourism in Tallinn ........................................... 50
  6.2 Discussion .................................................................................................... 51
References ............................................................................................................. 54
Appendixes ........................................................................................................... 60
  Appendix A: Interview guide ........................................................................... 60
  Appendix B: observation scheme ..................................................................... 61
  Appendix C: participant observation report tour ............................................ 62
  Appendix D: Observation report tour operator ............................................... 63
1. Introduction

In this master thesis, research has been conducted towards the mass-tourism in Tallinn and, specifically, the mass-tourism caused by the docking of an increasing amount of cruise ships and cruise ship passengers (Del Chiappa, Lorenzo-Romero, & Gallarza, 2018; Institute of Shipping Economics and Logistics, 2016; Stefanidaki & Lekakou, 2014). Cruise tourism got more and more attention over the last few years with a peak during the last few months. Due to the COVID-19 pandemic, cruise tourism came in the news negatively. As some cruise ships, like the Diamond Princess and the MS Zaandam, had several confirmed COVID-19 cases and even some deaths (Lalkens, 2020; Moné, 2020; Ship Technology, 2020), governments began to see the ships as floating epidemic centers which could threaten their cities and countries. They were afraid that an incoming ship would bring the virus ashore and infect their population. Therefore (local) governments prohibited ships and cruise lines to dock, leaving the ships and it’s passengers floating at sea. This corresponds to the image many people have when they think about cruise ships: enormous ships dropping loads of tourists in cities like Barcelona and Venice (Stefanidaki & Lekakou, 2014). Nevertheless, the destinations of such cruises are not only the ports of such major cities but also lesser-known cities like the capital of Estonia: Tallinn.

1.1 Tourism in Estonia and Tallinn

1.1.1 The tourism sector

The tourism sector in Estonia and Tallinn has been growing for several decades, mostly since the end of the USSR and when Estonia joined the European Union in 2004. In those years, Estonia had, together with the other Baltic States of Latvia and Lithuania, the largest growth in tourism of Europe (Druvaskalne & Slara, 2006). But even fifteen years later, the amount of tourists is increasing: in 2018 Estonia had 6 million foreign visitors of whom 2.8 million are one-day tourists and 3.2 million stayed overnight (EAS, Visit Estonia, & Estonian Tourist Board, 2019, p. 1; Ministry of Economic Affairs and Communications, 2015). This amount of tourists is almost three times bigger than the total population of Estonia (1.3 million) (Statistics Estonia, 2018). In 2018, Tallinn received almost 50% of the tourists in Estonia, making it not only the biggest city in the country, but also the largest and most important regarding tourism.

Of the 3.2 million ‘foreign overnight visitors’ that Estonia receives, 65% spent the night in Tallinn, leading to 2 million people of whom half a million stay overnight in the months of July and August in 2018 (EAS et al., 2019). However, Tallinn also receives a huge number of one-day visitors. Of these one-day visitors, 635,000 were cruise passengers (Tallinn City Enterprise Board & Tourism Department, 2018). Distinctive for these cruise tourists is that they arrive all at once and stay for a certain time. During this time they will stay mostly in the Old Town and leave it in the late afternoon or early evening. This implies that all these tourists really ‘flood’ the city and the Old Town (Stefanidaki & Lekakou, 2014; TNS Emor, 2014). The high season for cruise tourism is during the warmer summer months (June and July), while during winter there are hardly any visitors (Laurmaa, 2018). For example in July 2017, almost half a million tourists visited the city of Tallinn. To put this in relation, one needs to take into account that Tallinn counts 435,000 inhabitants (Laurmaa, 2018). Next to the increase in tourists, the revenues have increased as well. The total of 6 million foreign visitors brought in a total amount of €1.98 billion in 2018 only, which is also an increase of 4.6% compared to 2017 (EAS et al., 2019, p. 1).
The increase in these flows of people and money could partly be seen as a consequence of the national policy. Immediately after the dismantling of the USSR, the Estonian government implemented the Estonian Tourist Board. One year later, an international fair was held in Tallinn, which grew into an annual event. Following this, tourism grew rapidly and within 5 years it accounted for 20% of the national export (Tooman & Müristaja, 2014). Although the tourism sector in Estonia kept growing rapidly, the share within the national GDP decreased. However, it is still relatively high with a current 15.23%, which is higher than the two other Baltic states and, for example, countries as Spain, France and the United States (Figure 1.1) (World Travel and Tourism Council Data, 2019). Estonia is in the 54th place if it is compared to all the countries in the world (including disputed countries like Macau, Aruba and the US Virgin Islands).

Although the share of GDP is already quite high, the policy of the national government towards tourism is rather positive and even focuses on promoting Estonia even more, as the country is not known for being a tourist destination (Ministry of Economic Affairs and Communications, 2015; Tooman & Müristaja, 2014). This policy aim is copied into the policies of local municipalities like Tallinn, as they have the ambition to put Estonia and Tallinn on the map as well (Tallinn City Council, 2013). Next to the aim of promotion, it is also the national aim to decrease seasonality and to spread the visitors more evenly throughout the year (Laurmaa, 2018; Tooman & Müristaja, 2014).

Organizations related to the tourism sector in Estonia are large contributors to the position tourism has in the GDP. Within 10 years, the number of accommodations grew from 480 to 1,200, and tour operator companies from 260 to 360 (Tooman & Müristaja, 2014). Nowadays, Tallinn possesses one-third of the accommodations in Estonia.

![Figure 1.1 ranking of 15 random countries based on the contribution of tourism to their GDP (source: World Travel and Tourism Council Data, 2019)](image)
1.1.2 Tallinn’s touristic areas
The city is build up as a complex mix of very different neighborhoods. There are creative, gentrified ones and areas in which the former Soviet/Russian style is very noticeable (containing a concrete jungle of apartment blocks). Furthermore, some neighborhoods are deserted and fall apart while the city center of Tallinn looks like a Disney park (Kooij, 2015). While the post-Soviet neighborhoods are laying on the outskirts of the city and are not deemed to be very attractive for tourists, the center of Tallinn is with the neighborhoods of Kalamaja, Telliskivi, Sadama, Maakri, Kompassi, Südalinn and especially Vanalinn, the Old Town (see Figure 1.2).

However, the Old Town is not so much attractive to local citizens but focuses more on tourists as a Disney park or museum, as Kooij refers to (2015, p. 15). The other neighborhoods, however, are attractive to both tourists and local citizens. Kalamaja and Telliskivi are for example two neighborhoods where gentrification occurred and which are nowadays famous for displaying the “hipster culture”. These neighborhoods are full of wooden buildings that are being renovated in order to become more modern. Especially in Telliskivi there are many fancy bars and restaurants that contribute to this feeling. On top of that, on the border between Kalamaja and Telliskivi, a huge market hall (Balti Jaam) has risen with very different kinds of economic activity, varying from typical market stands to antique and second-hand shops. Though these neighborhoods are at this moment mainly areas for the locals, it is already promoted as touristic places (Postma, Papp, & Koen, 2018). The following is stated on the internet about the market hall: “The new market is something of a community centre, too, drawing in locals for their everyday shopping, but its unique atmosphere, its fascinating selection of antiques and its brewery also make it a great place for tourists to explore” (Visit Tallinn, 2019).

The neighborhood Sadama contains the whole Old Town Port area including the terminals for both ferries and cruise ships. However, in the south-west of this neighborhood, the Rotermann quarter can be found. This quarter is, just as Telliskivi, a former industrial area which now has been greatly renovated and consists of many fancy shops, restaurants and offices (e.g. Brewdog, Pull&Bear, Bershka). However, at this moment this area looks more like an area for the local higher middle class, instead of a real touristic area. The other three neighborhoods (Maakri, Kompassi and Südalinn) could be regarded as the downtown area for shopping with big shopping malls like Viru Keskus, Solaris and Stockmann. Though the shopping here is mostly done by the locals, (cruise) tourists go there as well because the can find a broader range of goods and lower prices.
Lastly, there is the neighborhood of Vanalinn, the Old Town, which is by far the most touristic part of the city. This neighborhood is the remainder of the medieval city Reval. It is still partly surrounded by the medieval walls, and built upon a hill with the “upper-town” (or Toompea) as its peak. Most buildings here are built centuries ago and remind of the middle ages. Among these buildings are the major touristic hot spots like the town hall square and its buildings (Tallinna Raekoda), the Saint Olaf church (Oleviste kogudus), the Freedom Square (Vabaduse Väljak), the Danish King’s garden and the Viru gate. But also the Russian Orthodox Alexander Nevsky Cathedral, Tall Herman (Pikk Herman) and the two viewing platforms on Toompea are very popular among tourists.

Although these neighborhoods are the most important areas regarding tourism activities, other areas inside the boundaries of Tallinn attract a lot of tourists as well. In the western part of the municipality lays Rocca al Mare, an area that contains lots of nature and an open-air museum and in which public holidays are often being celebrated. To the east is the major city park Kadriorg, which includes the Kadriorg palace and the art museum KUMU. Close to this lays one of the most important areas of Estonia: the singing grounds. A bit further north is the memorial for the communist era located, together with the museums of history and film. All the way up in the north of the municipality is the neighborhood of Pirita which consists of the Olympic yacht area, ruins of a cathedral, sandy beaches and forests.
The increase of tourist numbers and the flows of tourists to these areas boost the tourism sector and generate substantial economic growth in Tallinn. At the same time, it may lead to unintended consequences, such as social problems, environmental problems, problems on infrastructure (Francis, n.d.; Statista, 2018; Stefanidaki & Lekakou, 2014). When these massive flows of tourists focus on one specific destination, roads get clogged, more cars and busses are being used and, in the case of overtourism, criminality and noise disturbances could occur (NRC, 2018; Stefanidaki & Lekakou, 2014). These negative impacts may also prompt resistance from the local community against cruise tourism. If no action is taken, this kind of cruise tourism will not be sustainable and cannot endure in the future.

1.2 Relevance

1.2.1 Social
As the sustainability of cruise tourism in Tallinn is certainly not given, it will be important to address these problems and to come up with measures to make cruise tourism more sustainable. To do so, one first needs to get a better picture of the local effects and the impacts of cruise tourism in Tallinn. Stefanidaki and Lekakou (2014) distinguish three dimensions of sustainability: the social, economic and environmental dimension. At the same time also different actors and stakeholders are involved, which each have their own ideas about what is sustainable and what is not. Furthermore, each has different measures at their disposal to increase the sustainability of cruise tourism in Tallinn.

This research project aims to get a better and more detailed picture of the different aspects of the sustainability of cruise tourism in Tallinn. Based on this knowledge it is possible to develop some first ideas of how and by whom one can improve the sustainability of this important sector in the economy of Tallinn. To do so we aim to look at the issue of sustainability from the perspective of the different stakeholders and their demands in cruise tourism.

1.2.2 Scientific
While cruise tourism is booming (Institute of Shipping Economics and Logistics, 2016), also more scientific attention was given to its sustainability issues. Partly because the ships themselves are highly polluting, but also because of the direct effects on the places they visit. Especially in the Mediterranean and Caribbean cruise tourism has taken a high flight and has been intensely investigated (Asero & Skonieczny, 2018; Jaakson, 2004; Kizielewicz, 2013). Cruise tourism in the Baltic Sea Region is less well known and therefore attracted less scientific research. As the Baltic Sea Region is a different region with its own local situation and carrying capacity, it is nearly impossible to generalize knowledge from Mediterranean and Caribbean cases to the Baltic cases. Contributing to the knowledge about cruise tourism and its effects in Tallinn was one of the motivations of this research project.

Until now the scientific research on the sustainability of cruise tourism mainly focuses on the environmental and ecological effects (Font, 2000; Garay-Tamajon, Canoves-Valiente & Prat-Forga, 2014; Vayá, Garcia, Murillo, Romaní & Suriñach, 2018). Only rather recently other dimensions of sustainability, like the social and economic, get more attention. For this purpose, Stefanidaki and Lekakou (2014) set up a general but also elaborate framework of concrete indicators for environmental, economic and social aspects. It is this framework of indicators which are taken as a starting point in this research. Furthermore, this research project investigates whether this framework is solid and applicable to research the sustainability of cruise tourism.
Given the limitations of this Master Thesis Research project, we also need to be selective, and will, therefore, focus on those dimensions which until now have been rather under-investigated, namely the social and economic aspects.

So, in general, this research project will extend our knowledge about the economic and social sustainability of cruise tourism in Tallinn and produce concrete data corresponding to this. Next to this, this research will test and provide knowledge about tools for researching sustainable cruise tourism.

1.3 Research aim and question

1.3.1 Aim
Based on the social and scientific relevance, the research objective has been formulated. This research will aim at gathering knowledge about the social and economic sustainability of cruise tourism in Tallinn and test whether a contemporary research framework is applicable to use in research on cruise tourism. All of this will be specifically researched for one destination (Tallinn), which could eventually lead to a change in the local policy to create a more social and economic sustainable form of cruise ship tourism.

1.3.2 Research questions
To succeed in this research objective, one main question is formulated:

How can cruise ship tourism in Tallinn be sustainable on a social and economic level?

This question is still relatively broad and thus will be supported by the following sub-questions:

- How does the cruise tourism manifest itself in Tallinn?
- What are the effects and impacts of cruise tourism in Tallinn on a social level?
- What are the effects and impacts of cruise tourism in Tallinn on an economic level?
- How does sustainable cruise tourism look like?
- In what way is cruise tourism in Tallinn already sustainable? And how can it become (more) sustainable?

These sub-questions will be answered one by one. As every sub-question goes a bit further and deeper than the previous one, a small step is set every time towards answering the main question. Eventually, an answer to the main question can be given and could thus be linked to the aim of the research.
2. Framework

2.1 Trends in cruise tourism: causes and effects

As mentioned before, Tallinn receives a great number of tourists, especially during the summer. Noticing such numbers, one could state that tourism in Tallinn resembles mass-tourism (Laurmaa, 2018). These flows of tourists contribute to the growth of the tourist sector and contribute to the economic development of the city. However it could have problematic consequences as well, like social problems, environmental problems and problems on infrastructure (Francis, n.d.; Statista, 2018; Stefanidaki & Lekakou, 2014). Possible consequences of massive flows of tourists moving to destinations are that roads could be jammed, there is an increase in demand for cars, busses, planes and ships and over-tourism could be reached which causes noise problems and criminality (NRC, 2018). It is thought that over-tourism occurs because municipalities have the idea that the more tourists they receive, the better it is for the municipality. Therefore such municipalities and destinations try to attract more tourists (Francis, n.d.).

For many years, and in some cases even today, the focus lies on attracting more tourists. This is also the case in Tallinn. According to the tourism section in the development plan for 2014 till 2020 (Tallinn City Council, 2013) the city aims to put Tallinn more on the map. The focus of the municipality lies in attracting more tourists and to reach an overall growth in tourism. There is no focus on the welfare of the local society and its citizens (Tallinn City Council, 2013).

Besides the existence of pro-tourism policies, over-tourism could also be caused due to the increased ease in traveling. It has become easier and cheaper for people to travel to a particular destination as prices are very low (Eugenio-Martin & Inchausti-Sintes, 2016; Pellis, 2018) and due to new modes of transport like immense cruise ships (Francis, n.d.; Pfeijffer, 2018). More specific factors in an increase in the amount of cruise tourism lie in different trends which are related to the arguments of Eugenio-Martin and Inchausti-Sintes (2016), Pellis (2018), Francis (n.d.) and Pfeijffer (2018). As cruise ships are a relatively new mode of transport (Francis, n.d.), the ships keep increasing in size and capacity. Nowadays, some cruise ships can accommodate over 5,500 passengers and 2,000 crewmembers (ISL, 2012). This makes them look like floating hotels with all extra services on board such as various restaurants, entertainment podiums, hairdressers, swimming pools and even a beer brewery (see figures 2.1 and 2.2.). Or as Dowling and Weeden (2017) cite: “the provision of combined services of transportation, lodging, food, entertainment, visitation of tourist locations and similar services, carried out by tourist vessels.” (Ackema et al., 2017, p. 8). Especially the combination of the increase in size of the ship and the “visitation of tourist locations” are important for this thesis as this consequently lead to more passengers who are going ashore as the ship docks at a certain port.
Together with the policy to attract more tourists, the trend of bigger cruise ships could lead to mass-tourism and in some cases even over-tourism. However, it is necessary to explain what mass-tourism is. Mass-tourism is, in this research project, defined as: “participation of large numbers of people in tourism, whatever the tourist activity may be” in which “the holiday is mainly standardized, rigidly packaged and inflexible” (Vanhove, 1997, p. 51). In this way, cruise ship tourism could be seen as a
form of mass tourism. To determine whether this is exactly the case, one should look at the way it is “standardized, packaged and inflexible” and the exact numbers of tourists.

As a consequence of cruise tourism, cruise passengers are flooding into the cities as soon as the ship docks and the passengers flock together to visit the port (city) within a short time-window. This leads to a particular space-time bubble in which the tourists are experiencing the destination (Jaakson, 2004). Though, this is not necessarily the ‘problem’ for the receiving city, as the local authorities also want to attract these tourists and want them to experience the city. As a consequence, these ‘standardized, packaged and inflexible’ forms of tourism (Font, 2000; Vanhove, 1997) become normalized, eventually leading to the Disneyfication of a city (Bryman, 1999; Choi, 2012; Pellis, 2018). This implies that the city becomes an exclusive ‘product’ which is completely customized to the needs of the masses of tourists (Font, 2000). As a consequence, it is only focused on tourists and not on the needs of other stakeholders.

2.2 Sustainable tourism

The trends that are apparent in the (cruise) tourism sector have an impact on several domains and stakeholders. Most logically, trends that enable people to travel cheaper and easier to destinations have their impact on the stakeholder group of tourists (Eugenio-Martín & Inchausti-Sintes, 2016; Francis, n.d.; Pellis, 2018). Furthermore as described in the previous section, local governments and municipalities try to attract more tourists as the tourism sector is a substantial part of their economy. Therefore a growth in the tourism sector is logical. However, tourism and tourism trends do not only have an impact on the tourists themselves and the economies of destinations but also on other fields and stakeholders such as the living environment and the hosting community (Del Chiappa et al., 2018; MacNeill & Wozniak, 2018). For example, one could think about the differences in Venice since COVID-19 (Castelfranco, 2020), as during the pandemic the water in and surrounding Venice is clear again. Furthermore, squares like the San Marco are almost completely empty due to the closing of hotels which replaced households throughout the last decades (Castelfranco, 2020; Saini, 2020). Less crowded attractions due to the pandemic is a logical consequence, but, as in the case of Venice, there are not even local citizens in the public space. Due to tourism, local citizens move out of the city center (Asero & Skonieczny, 2018; Pfeijffer, 2018).

This briefly shows that tourism has an impact on other fields than only the economy. This is one of the reasons for conducting this research project. Now during the COVID-19 pandemic it is more noticeable, but it was already apparent that tourism does not only have an economic impact but also impacts other fields and stakeholders. To make sure that the negative impacts on one field and its stakeholders do not exceed the positive impacts on another field and its stakeholders, a research focusing on the impacts but also on the needs of the various stakeholders is needed. For doing this, one could use several research strategies and theories focusing on one specific field or group of stakeholders. Although this could be useful to gain specific knowledge of that field or group of stakeholders, it focuses only on one and does not focus on the overall picture. One theoretical concept that does focuses on the overall and is developed to gain a balanced tourism sector is the concept of sustainable tourism.

This concept is the main concept in this research project, as the thesis tries to determine how cruise tourism could be more sustainable. Sustainable tourism is a response to mass-tourism which focuses mainly on attracting more tourists (Page & Connell, 2009). Until now, there is not one universally accepted definition of sustainable tourism, though several attempts have been made. Swarbrooke tries
to define it as tourism “which is economically viable but does not destroy the resources on which the future of tourism will depend, notably the physical environment and the social fabric of the host community” (Swarbrooke, 1999, p. 13). In this case, the ‘resources’, which are the hosting community of Tallinn and mostly its medieval city center, may not be ‘destroyed’ (Swarbrooke, 1999). The United Nations World Tourism Organization (UNWTO) also gives a definition. They define sustainable tourism as “tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities” (UNEP & WTO, 2005, p. 12). With this second definition, sustainable tourism thus does not only prevent tourism to ‘destroy’ the resources in the host community, but it also focuses on the current and future impacts.

As may be clear, both definitions focus not only on the environmental aspects but also on the social and economic aspects of the hosting community. Though, these are still relatively broad issues. Several studies have been done towards sustainable cruise ship tourism; most of them focus especially on the environmental aspects (Font, 2000; Garay-Tamajon et al., 2014; Vayá et al., 2018), but some also incorporate the social and economic aspects (Del Chiappa et al., 2018; MacNeill & Wozniak, 2018). One research by the UNWTO (2016) reviews the impact of cruise ship tourism on the environmental, the social and the economic level. The way in which they operationalized these three dimensions are (UNWTO & APTEC, 2016):

- **Environmental**: on the marine degradation, air pollution and noise pollution.
- **Social**: on the congestion, cultural heritage degradation and community disruption
- **Economic**: on the benefit and vitality and the leakage and multiplier effect. However, the economic dimensions are more intertwined with the other two.

In relation to these dimensions, the UN has set up 17 Sustainable Development Goals in 2015 (UN, 2019). These development goals are very broad and are meant to be incorporated into different kinds of industries and economies throughout the world. One could think of the goal to end hunger or the goal to persuade gender equality. As the UNWTO is the agency of the UN that focuses on tourism, they apply these goals as well and operationalize them which make them applicable for the tourism industry. Although the UNWTO supports all of the 17 Sustainable Development Goals and states that tourism can contribute in achieving these goals, their main focus is on just three of these goals as tourism is an economic industry (UNWTO, 2020). Therefore, they focus on goals 8, 12 and 14 as these have the strongest link with economic activities and thus with the tourism industry.

- **Goal 8**: “Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all.”
- **Goal 12**: “Ensure sustainable Consumption and Production patterns.”
- **Goal 14**: “Conserve and sustainably use the oceans, seas and marine resources for sustainable development.”

Besides the UNWTO, the Cruise Line International Association (CLIA) is also aware of the 17 Sustainable Development Goals and therefore incorporates them in their own policy and the policies of their members. However, as the CLIA represents the cruise industry, they acknowledge that there are several goals which are most affected by cruise tourism (CLIA, 2017a; Global Cruise News, 2017). The CLIA, therefore, wants to focus on these goals as the effects on those are the strongest according to them. The CLIA therefore focuses on goals 7, 8, 9, 11, 13 and 14:

- **Goal 7**: “Ensure access to affordable, reliable, sustainable and modern energy for all”
- **Goal 8**: “Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all.”
- Goal 9: “Build resilient infrastructure, promote inclusive and sustainable industrialization and foster innovation”
- Goal 11: “Make cities and human settlements inclusive, safe, resilient and sustainable”
- Goal 13: “Take urgent action to combat climate change and its impacts”
- Goal 14: “Conserve and sustainably use the oceans, seas and marine resources for sustainable development.”

Although the UNWTO and the CLIA are both active in the tourism industry, they differ on their Sustainable Development Goals. The UNWTO focuses on goals 8, 12 and 14; the CLIA focuses on goals 8, 9, 11, 13 and 14. Based on this, one could assume that the CLIA goes deeper and works more precisely to reach sustainability, while the UNWTO maintains a relatively broad economic approach.

These goals are thus contributing to the concept of sustainable tourism in such a way that they are meant to improve or maintain the fields which are affected by cruise tourism. This corresponds to this research project as we aim to find an answer on how cruise tourism in Tallinn can be sustainable on a social and economic level. Therefore the goals focusing on these dimensions are relevant for this research, while the others can be considered as irrelevant. This means that goal number 8, 9, 11 and 12 are relevant for this research project.

Although the definition of sustainable tourism as given by the UN and the Sustainable Development Goals can be considered as research tools for this project, they are still relatively broad as they provide a certain aim and vision. This means that a concept which is specially developed for the social and economic field of cruise tourism should be discussed.

2.3 Carrying capacity

In the previous section sustainable tourism has been introduced. This concept and the related Sustainable Development Goals enable one to create a certain vision and aim to reach sustainable cruise tourism in Tallinn. However, it is not specified how this could be reached and how one could state whether a certain cruise destination is already sustainable. This leaves us with a gap that has to be filled. Furthermore, the before mentioned definitions and goals aim to create a balance in such a way that the impacts of tourism do not destroy the resources of a destination (Swarbrooke, 1999) but also aim to keep the needs of all stakeholders in mind in such a way that the tourism could continue (UNEP & WTO, 2005). As this is not only focusing on the tourists, but also on the hosting community and the destination, one should consider the impacts of tourism on several fields and make sure that the negative impacts do not exceed the positive ones. Every destination is different and thus has its own limits to growth. At some point, the tourism industry can develop even further, but the negative consequences are too big and thus the peak has been reached.

To determine the ‘peak-tourism’ of Tallinn and to research how it could become sustainable on a social and economic level is the central point of interest in this research project. This can be done following the concept of carrying capacity.

The concept of carrying capacity focuses on the impact of tourism at a particular destination, while keeping the tourists’ experience at a predetermined level (Stefanidaki & Lekakou, 2014). The capacity is determined by three elements, namely the goals of management (purpose of activity), the behavior of the tourists and natural resources. The idea behind ‘carrying capacity’ is that touristic activity at a specific destination should not have a negative impact. The question is, however, a negative impact on whom? This leads to two different definitions where one is from the consumer point of view and
the other from the producer point of view (O’Reilly, 1986; Stefanidaki & Lekakou, 2014). On the one hand, this leads to the focus of carrying capacity laying on “the quality of visitors’ experiences” and the other on “the acceptability of the host communities” (Stefanidaki & Lekakou, 2014, p. 44-45). The first mentioned is mainly focused on the tourist and the number of tourists that could be attracted. The “acceptability of the host communities” focuses on the hosting community and the number of tourists they would accept (O’Reilly, 1986). In this master thesis both of these ideas are used, as tourism is based on experiences that tourists are seeking and without a hosting community, an experience cannot exist at all (MacCannell, 1973). By using both ideas and keep both the tourist as well as the host community in mind, a direct link with the UNWTO (2005) definition of sustainable tourism can be noticed. The full concept of carrying capacity linked to sustainable tourism is stated as “the maximum number of people who can use a site without an unacceptable alteration in the physical environment and without an unacceptable decline in the quality of experience gained by visitors” (Mathieson & Wall, 1982, p. 21 in: O’Reilly, 1986).

Stefanidaki and Lekakou (2014) use the carrying capacity concept by operationalizing it and setting up a framework with different indicators that corresponds to the three dimensions of sustainable tourism (social, economic and environmental). They distinguish those indicators in core and secondary indicators, at which the latter are context dependent and the core indicators could be used for the whole cruise tourism industry. With these indicators, it is possible to research cruise tourism and therefore these indicators will contribute majorly in this research. In Tables 2.1, 2.2 and 2.3 below, the indicators are shown as they are presented in the article (Stefanidaki & Lekakou, 2014). The three tables combined make up for 34 indicators in total. In Chapter 3, the indicators used are discussed more extensively to give a better understanding.
Of these economic indicators, Stefanidaki and Lekakou (2014) distinguish five as core indicators. The other seven are assessed as secondary indicators. The core economic indicators are:

- Income by cruise tourism
- Changes of the income from cruise activity
- Employees in the cruise sector/total employment
- Spending per passenger
- Changes in public investments in favor of cruise projects
Out of the environmental indicators, there are twelve core indicators and only two secondary indicators according to Stefanidaki and Lekakou (2014). The core indicators distinguish are:

- Constructions that alter the natural or built environment
- Waste per cruise passenger/residents waste production
- Water consumption of cruise passengers/total water consumption
- Energy consumption per cruise passenger/total power consumption
- \( \text{NO}_x \)/cruise ship or per cruise passenger
- \( \text{SO}_x \)/cruise ship or per cruise passenger
- Number of days exceeding standards (if they exist)
- Port capacity
- Environmental violations per cruise ship
- Protected area harmed by the passengers’ activities

Table 2.2 Environmental indicators (source: Stefanidaki and Lekakou, 2014, p.48)
From these ten social indicators, six were identified as core indicators:

- Ratio of local residents to cruise passengers
- Community restrictions to locals during cruise days
- Criminal incidents with cruise passengers involved
- Port reception facilities
- Protection of archeological places
- Environment organizations or citizen organizations related to cruise tourism

In this chapter we have seen that certain trends in tourism, and in particular cruise tourism, have led to an increased impact on destinations. Although cruise tourism is an economic industry and the main impacts are on an economic level, it influences more dimensions such as the social and environmental. Following this, one should keep all dimensions in mind and pay attention to the demands of the corresponding stakeholders. This can be done via the concept of carrying capacity in which indicators from the three dimensions are introduced. Those indicators serve as tools to measure the sustainability from which the approach to cruise tourism could be adjusted. In the next chapter, those indicators are discussed further and the next step in the research project of sustainable cruise tourism in Tallinn will be taken.
3. Methodology
This chapter will discuss the taken research strategies and methods. It will start by introducing the
case of Tallinn. Secondly, we will elaborate on the framework of indicators as mentioned in the previous
section. The third and last section will discuss the three forms of data collection and how these
are analyzed.

3.1 The case study Tallinn
In this research project, three cases are discussed, namely Barcelona, Venice and Tallinn. However,
the focus lays mostly on the case of Tallinn. Barcelona and Venice are shortly researched because
cruise tourism in those cities exists for a longer period of time and, as discussed in Chapter 1.2, have
been widely researched. This is a fundamental part to understand the phenomenon in Tallinn as it
can show us how cruise tourism could develop. Though, as Barcelona and Venice are independent
destinations and are located in another context, this means that what happened in those destina-
tions would not have to occur in every destination. As these destinations are meant to explain the
situation and what has led to it, the cases of Barcelona and Venice are of explanatory nature (Yin,

However, the city of Tallinn is the main object of this research project. Following the research ques-
tions, one should approach this case study as both descriptive and exploratory as we want to de-
scribe the phenomenon of cruise tourism in Tallinn, but at the same time want to explore and con-

Tallinn is chosen because of the existence of a scientific gap, i.e. the lack of existing research about
the topic of sustainable cruise tourism on a social and economic level in Northern Europe, or the spe-
cific city of Tallinn (The European Institute, 2012; Vulliamy, 2013). Keeping in mind that the cultural
and geographical characteristics in Northern Europe are different than in the Mediterranean or Car-
ibbean, existing research about those destinations will be less applicable for Northern European des-
tinations. This means that such destinations will deal differently with issues concerning sustainable
cruise tourism than destinations in the Mediterranean or Caribbean. For example, one could think
about the fact that Mediterranean and Caribbean destinations are characterized by warm tempera-
tures and many hours of sun which enables year-round cruise tourism, while Nordic countries are in
general cold and wet leading to a cruise tourism season which is limited to the summer months (Port
of Tallinn, 2019).

Furthermore, from all of the Northern European cruise destinations, Tallinn is, compared to Stock-
holm or St. Petersburg, a relatively unknown destination for people, which is partly a result of the
fact that it had been under Soviet control and is open since 30 years. Destinations such as Stockholm,
Copenhagen and Kiel have always been open as they have been part of the “Western European
area”. Compared to such destinations, Tallinn could be considered as a relatively new tourist desti-
nation and is therefore not researched well (The European Institute, 2012; Vulliamy, 2013). This
makes it interesting to conduct a research in such a new tourist destination. Lastly, the city of Tallinn
was already known to the researcher which made it also a practical decision to choose for Tallinn.
3.2 Carrying Capacity indicators

In Chapter 2, the concept of cruise carrying capacity by Stefanidaki and Lekakou (2014) has been introduced. All the indicators from the three dimensions combined give a list of 34 indicators in total. As this research project only focuses on the economic and social dimensions, the environmental dimension is left out. This means that we dropped those indicators and got to the list of 21 indicators which corresponds to the framework of Stefanidaki and Lekakou (2014). During the analysis, we anticipated to drop more indicators when not sufficient data on these indicators were available or could be accessed within the limits of time and means of this research. Other indicators were not dropped out but merged. This was mostly the case for secondary indicators which have then been merged with core indicators. From the economic indicators, only two indicators have been removed at the start of the research (the “green” job positions and the application of green technologies) as these only differ from other indicators in the sense that they cover green, environmental issues, but could be seen as part of other indicators of the same dimension. Out of the social dimension, only the last indicator (environmental organizations) has been left out of the research. The reason behind this is that we did not encounter any during prior investigation.

Eventually, the research consisted of 15 indicators as more have been merged. The smaller dimensions of public security and health originally consisted of two separate indicators each and these separate ones have been merged together during the research project as it became apparent that they are not affected that much by cruise tourism. The economic indicators which focus on spending per passenger and spending on local products have also been merged together, as this research focuses on the spending in general and not so much on detailed spending per person.

In Table 3.1 the selected indicators are displayed according to the dimension they belong. In the third column, a brief description of how they will be researched and collected is given.
<table>
<thead>
<tr>
<th>Dimension</th>
<th>Indicator</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Economic</td>
<td>Income from cruise tourism/total regional</td>
<td>Impact of cruise tourism on the total regional economy in terms of jobs and income. How dependent is the economy on cruise tourism?</td>
</tr>
<tr>
<td></td>
<td>Changes in the income from cruise activity</td>
<td>Related to the above. How does cruise tourism change the income of people? Are there many companies?</td>
</tr>
<tr>
<td></td>
<td>Employees in the cruise sector (permanent and seasonal)/total employment</td>
<td>Locals who are working in the cruise tourism sector and compared to the total employment. (Direct employment). Also using indirect employment.</td>
</tr>
<tr>
<td></td>
<td>Unemployed finding job in the regional cruise sector/total unemployed workforce</td>
<td>Easy to find a new job in the cruise industry?</td>
</tr>
<tr>
<td></td>
<td>Spending per passenger + spending dedicated to local products</td>
<td>How much is spent by the passengers? Experience learns that expenditures are low in a port of call.</td>
</tr>
<tr>
<td></td>
<td>Startups in cruise tourism</td>
<td>Easy to start a business in the industry? Forecast of existence?</td>
</tr>
<tr>
<td></td>
<td>Changes in public investments in favor of cruise projects</td>
<td>How is the municipality/government involved? State-led or market-led? Do they invest or not?</td>
</tr>
<tr>
<td></td>
<td>Taxes and dues from cruise tourism</td>
<td>How is the financial part of the municipality/government?</td>
</tr>
<tr>
<td></td>
<td>The ratio of residents to cruise passengers</td>
<td>Is there a balance? Or is it (too) uneven?</td>
</tr>
<tr>
<td></td>
<td>Community restrictions to locals during cruise days</td>
<td>Is the local community prohibited in certain actions? Both written as unwritten rules? (rules of the game)</td>
</tr>
<tr>
<td>Social</td>
<td>Public security (police officers number/cruise passengers) + criminal incidents with cruise passengers involved</td>
<td>Increase in security measurements? The relation between cruise tourism and criminality?</td>
</tr>
<tr>
<td></td>
<td>Health and wellbeing (doctors/residents/passengers) + available means for ensuring safe transfer of locals to hospitals</td>
<td>Increase in health security measurements? The relation between cruise tourism and public health?</td>
</tr>
<tr>
<td></td>
<td>Transport frequency, capacity of services and usage</td>
<td>Accessibility of public transport, increase in public transport, traffic jams</td>
</tr>
<tr>
<td></td>
<td>Cleanliness port reception facility (mostly for homeport destinations)</td>
<td>Welcome and friendliness of the port. How is it build up? Do more passengers mean a more dirty city?</td>
</tr>
<tr>
<td></td>
<td>Protections of archeological places</td>
<td>Certain actions or rules for the protection of heritage? Or is it only being used for tourism?</td>
</tr>
</tbody>
</table>

Table 3.1 Indicators of the social and economic dimension
3.3 Data collection

The next step in the research is to apply the selected indicators in the collection of data. In Chapter 1 we discussed the research question and the aim of this research project. As we want to research how the cruise tourism in Tallinn can be sustainable, we need to know the current situation as well as the needs of all the stakeholders to make sure that the current and future impacts are sustainable (UNEP & WTO, 2005). This means that we need to go in-depth in the case of Tallinn and want to research the phenomenon in its natural context, which will be done via the framework of indicators (Clifford, Cope, Gillespie, & French, 2016). As cruise tourism is a phenomenon that has an impact on people but also on the built environment, it is necessary to gain data from different methods. This means that triangulation is applied in this research project as only then a more complete and precise in-depth view and understanding of cruise tourism in Tallinn could be reached (Clifford et al., 2016). Therefore, data will be collected via literature, via interviews and via observations.

3.3.1 Literature review

To clearly explore and research the economic and social sustainability of cruise tourism in Tallinn, we started with a literature review in which we focused on two issues: on the one hand the cases of Barcelona and Venice and on the other hand the situation in Tallinn.

To gain insight into possible outcomes of cruise tourism, we should look at other destinations such as Barcelona and Venice. The reason behind this is that if we want to understand the impact cruise tourism has on specific destinations and its community, we have to start by destinations that have already been widely researched. These serve as a preparation for what we could expect and on what we should focus when researching cruise tourism in Tallinn. In a way it is helping us to answer the two sub-questions of the effects and impacts cruise tourism has on a social and economic level, though at different destinations. Furthermore, possible negative outcomes of cruise tourism which are apparent in Barcelona and Venice, but not (yet) in Tallinn, will be recorded and could serve as a warning for the city of Tallinn. Reviewing literature on cruise tourism in Barcelona and Venice will thus provide insight in what happens or has happened in those destinations and how they tried to solve issues. Based on these experiences, the cruise tourism industry in Tallinn could thus look and learn from events from other destinations and look into the future to make sure they do not make the same mistakes or to quote Sir Isaac Newton (1676): “If I have seen a little further it is by standing on the shoulders of Giants.” To gain this kind of data, we have made use of scientific studies and popular media like weblogs and newspapers, as these latter ones will also provide us with the public opinion.

However, literature about the cruise tourism in Tallinn itself has been reviewed as well. Not only to be well-prepared before going to Tallinn but also to get familiar with the situation of cruise tourism in Tallinn. To be able to answer the question of how cruise tourism in Tallinn itself manifests, we need to understand the situation and the policy towards it, as well as the developments which led to the current situation. Furthermore, data collected from literature served as a preparation for and has been checked by the interviews which enable us to pursue triangulation.

3.3.2 Interviews

In this research project, we want to find the answer if cruise tourism in Tallinn is sustainable on a social and economic level and how it can become more sustainable. We, therefore, need to know what the current situation is, how local actors think about cruise tourism and what one expects from the cruise tourism industry. Although the first insight comes from the literature review, this data is not sufficient. Interviews with various stakeholders are obliged to find and collect data that helps to strive towards a cruise tourism industry that addresses the needs of the various stakeholders (UNEP
Besides, to completely understand the cruise tourism industry in Tallinn, motivations and reasons behind certain actions and policies are valuable. These could best be retrieved from the responsible stakeholders via interviews. Via interviews, those actors (visitors, industry, environment and hosting communities) can tell their story, how they influence or want to influence the industry, how they would like to see it and what they appreciate. Only when this information is collected, we could state whether cruise tourism in Tallinn is sustainable and how it could be (more) sustainable.

Therefore we have held interviews with people, institutions and companies who represent one of the stakeholders of sustainable cruise tourism in Tallinn. From them, the needed data (their opinions, visions, demands and wishes on Tallinn’s cruise tourism) have been collected and used to answer the research questions. Table 3.2 provides a list of interviewees and the organizations they represent.

<table>
<thead>
<tr>
<th>Person</th>
<th>Function/organization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maila Saar</td>
<td>Cruise division, Estonian Holidays</td>
</tr>
<tr>
<td>Ingrid Berezin</td>
<td>Manager Cruise and Ferry, Port of Tallinn</td>
</tr>
<tr>
<td>Liis Läte</td>
<td>Tallinn City Tourist Office &amp; Convention Bureau</td>
</tr>
<tr>
<td>Maarika Liivamägi</td>
<td>General Manager, Estonian Hotel and Restaurant Association</td>
</tr>
<tr>
<td>Anonymous</td>
<td>Cruise excursion manager AIDA cruises</td>
</tr>
<tr>
<td>Anonymous</td>
<td>Cruise excursion manager Costa cruises</td>
</tr>
<tr>
<td>Janar Prutt</td>
<td>Citizen Kalamaja neighborhood</td>
</tr>
<tr>
<td>Andrei Berezin</td>
<td>Tour guide Estonian Holidays</td>
</tr>
<tr>
<td>Eero Kotli &amp; Koit (in cooperation with Triin Talk)</td>
<td>Citizens Tallinn Old Town neighborhood</td>
</tr>
</tbody>
</table>

Although not necessarily and not scheduled, some random informal conversations have been held during the five months the researcher was on site. In general, these conversations were with Maila Saar, who was also officially interviewed, but also with two other employees of the cruise division of Estonian Holidays (Lars Saar and Mari-Liis Makke). These conversations were not intended but provided some extra data. After such conversations, memos had been made in the “reference software program” Mendeley as this software is also used for all the literature references and this program was accessible immediately after such conversations during working hours.

The framework of indicators stands central in this thesis and thus forms the basis for the interviews. However, some flexibility is used as this framework has been adjusted before and during the research. This led to the fact that some indicators are merged together and others have been dropped. Because of this flexibility, semi-structured interviews are more appropriate as this method leaves room for side steps (Clifford et al., 2016). Furthermore, as may be clear by now, we want to focus on the current situation of sustainability and the motivations behind certain actions and policies of the stakeholders and their needs. This means that we want to collect relatively broad answers from the respondents via broader questions. In this way, we can develop a better overview of the current and desired state of sustainable cruise tourism according to the various stakeholders (Verschuren & Doorewaard, 2007). This also corresponds to the argument of Giorgi (1997) that broad questions, as in semi-structured interviews, will lead to a natural setting in which respondents feel confident and dare to speak freely. This will give us the valuable in-depth data we are looking for. Finally, semi-structured interviews are the best fit as the research focuses on different stakeholders each with their own expertise. This means that some stakeholders provided more data about the local community, while others focused more on the cruise passenger point of view. To go more in-depth in each of their own expertise, we needed a research method that enabled us in doing this.
Related to this use of semi-structured interviews is the use of a clear interview guide. One main interview guide has been used, but it has been adjusted for every interview to fit for the interview and the specific stakeholder. The interview guide can be found in Appendix A. The guide made sure that all the topics were covered, but left room for an open setting in which respondents were able to answer from their own perspective and vision.

To stick closely to the carrying capacity framework of indicators, the analysis is based on the indicators as well (Stefanidaki & Lekakou, 2014). Therefore the transcripts of the interviews have been imported in Atlas.ti where they have been coded using open coding in a descriptive method, which made the data easier to grasp (Saldaña, 2009). The idea behind this is that we became more aware of the collected data and we were able to reflect on it (Saldaña, 2009). After the first round of reading and open coding, the transcripts have been reread and codes have been revised where some have been merged together or have been made more specific. However, although these codes were already helpful for analyzing the data, they stayed relatively vague. As we focus in this thesis on the framework of indicators based on the social and economic dimension, we needed to stick closely to this as well during our analysis. Therefore we needed a second cycle of coding. In this step, we used theoretical coding in which the codes have been divided between the several indicators. This means we have been categorizing them where every indicator can be seen as a separate category. Eventually this categorization went further by dividing the categories between an economic and a social category (see Figure 3.1).

![Figure 3.1 Example of a working document of Atlas.ti. The code "crowdedness" is being used in several groups and eventually part of both the economic level as the social level](image)

By following the way of open coding, rereading and recoding and lastly categorizing, the codebook sticks closely to the indicators. As a consequence, it became more convenient to carry out the analysis and to research whether cruise tourism in Tallinn is sustainable on a social and economic level. However, as described at the beginning of this section, to pursue a true and precise overview of the cruise tourism (the triangulation method), we need to make observations and check whether the collected data so far corresponds to the practices of the phenomenon.
3.3.3 Observation

Our last data collection method in the triangulation is the use of observations. As we want to be as precise and accurate as possible, we need to make sure that the collected data from every collection method corresponds to each other. The observations are thus a way to find if the previously collected data are true: is it true what is stated in the literature and what the interviewees mention? To do this, we have made use of participant observation from three points of view as these correspond to the various stakeholders of sustainable cruise tourism (Clifford et al., 2016). Furthermore, the observations allow us to base the results not only on the data following literature and interviews but also on personal experiences following the observations.

The participant observation has been done from three points of view. First by joining a group of passengers who were attending a prefixed excursion/tour. Second by observing the host tour operator at the port of call and third from our own perspective as a local citizen by living in the Old Town for 5 months. This made it possible to observe from the tourist (passenger) point of view, from the industry (tour operator) point of view and from hosting community (citizen) point of view and thus stick closely to the research object (Clifford et al., 2016). By joining the passengers, it will be possible to understand how they act and behave during a tour and if this behavior is sustainable or not according to the carrying capacity indicators. From the other side, by observing from the tour operator side, it is possible to observe how the whole part of welcoming, guiding and excursions is sustainable or not. Lastly, by living in the Old Town as a local, the impacts of cruise tourism on daily life became visible.

Several options for observations were possible, but to keep everything as natural as possible, the method of participation observations has been chosen. This kind of observation will change the behavior of the observed the least and it is most likely that everything happens in the most natural way. The researcher became part of the practices, though even then it was possible that the researcher was seen as an “unknown newcomer” (Clifford et al., 2016). This was mostly possible during the observations from the hosting community perspective, as the researcher did not speak the Estonian language and could thus be seen as a tourist.

To give some guidance to the observations, an observation scheme was set up (see Appendix B). It is based on the indicators of the carrying capacity and thus divided into the two different dimensions. Next to these two, a general dimension is added as well, which will focus on other things that could be observed. Although the observations were done from three points of view, the same observation scheme is used. However, it is possible that some issues are not that easy to observe from one point of view, while being easily observable in the other. During the observations, memos were taken digitally on a smartphone which were afterwards translated into a longer observation report. These observation reports can be found in Appendix C and D.

In summary, we want to make sure that the research project results are as true and precise as possible and therefore we make use of triangulation (Clifford et al., 2016). This means we make use of literature, interviews and observations. In these three data collection methods, we stick as closely as possible to the definition of sustainable tourism and the corresponding framework of indicators of Stefanidaki and Lekakou (2014).
4. Analysis of cruise tourism elsewhere

In this chapter, we critically reflect on cruise tourism in other cities in Europe. Although the thesis is mainly focusing on the city of Tallinn, two other European mainland cities will be reviewed in this chapter: Venice and Barcelona. By reviewing and analyzing these two cities on the problems they experience regarding cruise tourism and how they (try to) solve them, it will be easier to understand the phenomena happening in Tallinn. Next to this, solutions and actions undertaken by or in those cities are briefly reviewed as well, as these could be helpful for policymakers in Tallinn to improve the sustainability of cruise tourism. This means that this chapter enables us to start answering the sub-question of how sustainable cruise tourism looks like and it serves as a starting point on what we should focus on regarding the social and economic impacts.

4.1 Venice

The Italian city of Venice is probably one of the most famous cities in the world regarding cruise tourism. Based on the north of the Adriatic Sea, this city is a major home port as a lot of ships start (and finish) there (Asero & Skonieczny, 2018). According to statistics, in 2016 Venice had 31.7% of all cruise passengers in the Adriatic Sea. This means that the city received 1.6 million passengers (Risposte Turismo, 2017, p. 14). During the peak season, it is possible that 44,000 cruise passengers visit Venice on one single day (Responsible Travel, n.d.). It is therefore clear that Venice plays a major role in the cruise tourism in the Adriatic Sea. However, such numbers (could) also lead to problems and demands for action.

Since the start of cruise tourism in Venice, several agreements have been signed, though, these are mostly focusing on the environmental level as it is about the kind of fuel used or the problems regarding the power (and sound) of the cruise ship engines near the city. Since a couple of years, an “anti-tourism” movement started in Venice, which is focusing on the safekeeping of the city and agitate against the big ships (Asero & Skonieczny, 2018; Burgen, 2018; Responsible Travel, n.d.). These people not only want to protect the city and its surroundings for the environmental impact of the ships but also to protect the city from becoming a theme park; becoming a city with none inhabitants; and to protect the structure of the city against the masses (Asero & Skonieczny, 2018). It is known that local residents avoid the famous touristic squares and streets, as these are redundant and even try to prevent the ships from docking by blocking the ships (Stanchev, 2017). But besides avoiding these places, the local inhabitants move away from the city as they notice it is not possible to live there anymore since the living expenses keep rising (Pfeijffer, 2018; Responsible Travel, n.d.; Ross, 2015; Ship Technology, 2017). Furthermore, it seems even impossible for the younger generations to find a job in the city which does not focus on tourism as all the small local shops are being replaced with big companies which do focus on tourists (Edwards, 2017; Stanchev, 2017).

Besides the local community which is resisting the massive flow of tourists and cruise ships, UNESCO is also trying to intervene. After several warnings, UNESCO threatened Italy and the city of Venice to place the city on the endangered part of the heritage list or even to lose its UNESCO World Heritage status (Stanchev, 2017; Venezia Autentica, n.d.). According to UNESCO, both the municipality as the national government must take action to prevent this from happening and save the World Heritage site instead of choosing for the big money coming from the tourism industry (Settis, 2016; Venezia Autentica, n.d.).
However, the cruise tourism is also responsible for a great part of the economic wealth of the city and thus for employment. Many local enterprises support the cruise tourism as it creates jobs and leads to welfare (Asero & Skonieczny, 2018; CLIA, 2017b). More specifically, 4,300 employees are working in the cruise tourism industry in Venice and contribute 3.26% to the Venetian GDP (CLIA, 2017b). Besides, not only the prices for living rose in the city, but the wages as well, leading to higher incomes for people who are working in the tourism industry in Venice (Ross, 2015).

As the cruise tourism industry in Venice accounts for a high number of employment and GDP, it is possible to state that Venice profits from tourism and cruise tourism. However, the industry could count on increasing resistance from the local community. This ‘gap’ between pro and contra cruise tourism should be closed. At this moment, Italy has already prepared a possible solution called the ‘business network contract’. This could be seen as a cooperation between different types of companies and institutions being part of one bigger organization. By doing so, they could work together and make a policy for the whole region, instead of every company or institution focusing and working on its own area (Asero & Skonieczny, 2018). This could for example lead to the creation and promotion of the Adriatic Sea as one destination, instead of all the different ports as a destination on its own. In a practical sense, this could mean that cruise lines are in contact with the Adriatic Sea network and have to cooperate with this network. The network could for example decide that Venice receives fewer cruise ships to relieve the city and send these cruise ships to other, smaller ports.

### 4.2 Barcelona

One other major port city is Barcelona in Spain, which is the biggest cruise port in the Mediterranean Sea with 2.7 million passengers in 2017 and increasing every year (Caballé, Arapi, & Papachristou, 2018; Kizielewicz, 2013). Like Venice, Barcelona is also a homeport, leading to a great number of people staying a bit longer in the city than only the days on the cruise ship (Garay-Tamajon & Canoves-Valiente, 2012). However, while Venice has been a major port for many decades, Barcelona has only had to deal with it since it received the Olympic Games in 1992, which makes Barcelona a relatively new famous destination (Garay-Tamajon & Canoves-Valiente, 2012). Though, expectations are that in the coming years, the role that Barcelona will play in cruise tourism (in Europe) will only increase (Garay-Tamajon & Canoves-Valiente, 2012).

According to the Port Authority of Barcelona, the city receives approximately 800 million euros from cruise ship tourism, which is nearly €300 per cruise passenger (Rang, 2017). Considering that most cruise passengers spend on average only a few hours at the port of destination, this profit is relatively high (TNS Emor, 2014). However, more specific research towards the economics of the cruise tourism in Barcelona shows that passengers who stay for at least one night (before or after the cruise) spend on average around €200 compared to only €50 for cruise passengers who just visit the city (Vayá et al., 2018). As a home port, Barcelona receives more from passengers/tourists who stay the night than from passengers who leave the ship for a couple of hours.

Despite these economic profits for the city, a resistance against the cruise tourism is occurring in Barcelona as well (Burgen, 2018; Rang, 2017). Local citizens are afraid of losing the city together with its identity, culture and traditions because of the flow of tourists (Burgen, 2018; Ship Technology, 2017). Cities and their municipalities believe that the amount of hindrance and damage done by the flow of
passengers outweighs the profit they bring to the city (Ship Technology, 2017). Just like Venice, locals feel forced to leave the city and small companies (not focused on tourism) have to make room for big international companies (Ship Technology, 2017). Sometimes the anti-tourism movement does not stop at protesting, but even exerts to violence (Penty & Tadeo, 2017).

Action is undertaken by removing one terminal, which means extra space for the locals is created and it gives the citizens the feeling that they get the city back (ACN, 2018). Local citizens are now considered to be more important than tourists and therefore the municipality chooses to focus more on their own citizens. Also, a declaration for responsible tourism has been made which focuses on several points, including a responsible flow of passengers to “avoid overcrowding, degradation and resource space and the displacement of the local population” (Santomà et al., n.d., p. 9). Furthermore, the municipality aims to spread all the tourists and passengers over the whole city.

4.3 Standing on the shoulders of giants

The cases of Venice and Barcelona introduced us to possible scenarios for cruise tourism. It shows some of the pitfalls regarding the cruise tourism industry. Following this, we can briefly describe what we should focus on during the research project in Tallinn and start to answer the research question of how sustainable cruise tourism should look (in Chapter 5.5 we will further elaborate on this question). Based on Venice and Barcelona, we have seen that cruise tourism plays an important role in the local GDP and leads to employment. However at the same time, when the economic focus lays mostly on cruise tourism, it could lead to a homogenization of the economic climate: only businesses that focus on cruise tourism and cruise passengers are apparent at a destination. Such issues also impact the social dimension. In both destinations we have seen that the local community is afraid that their city will lose their identity and that the livability will be affected. In Venice, we even have seen that (cruise) tourism contributes to the decrease in population. Eventually, it is possible that the local community will start to resist cruise tourism and will protest against it. In both cities, this is now leading to action undertaken by the (local) government.

Based on these cases, sustainable cruise tourism thus has to focus on a climate where economic profits should be strived for, but at the same time, one should pay attention to the local, hosting community. In Chapter 5.5 we will dive deeper into the question of how sustainable cruise tourism should look like as we have then analyzed the cruise tourism in Tallinn as well.
5. Analysis of Tallinn’s tourism

In this chapter, the cruise tourism of Tallinn will be discussed where we will focus on one sub-question in each section. The analysis will follow the line of the sub-questions as stated in Chapter 1, and for each section a conclusion will be provided. Below the sub-questions are stated again to give a clear overview.

- How does the cruise tourism manifest itself in Tallinn?
- What are the effects and impacts of cruise tourism in Tallinn on a social level?
- What are the effects and impacts of cruise tourism in Tallinn on an economic level?
- How does sustainable cruise tourism look like?
- In what way is cruise tourism in Tallinn already sustainable? And how can it become (more) sustainable?

5.1 Manifestation of mass tourism in Tallinn

As explained in Chapter 1, the tourism industry in Estonia is quite important for its national economy. Although its share is somewhat lower than the peak during the early 2000s, it is still growing each year with an average of 4% per year (following the 3.9% global growth rate) (WTTC, 2019). Furthermore, as stated before as well, Tallinn is the main hub for Estonia’s tourism and thus makes up a huge part of its share in GDP. However, these rates are based on a complete year which, in the case of Estonia and Tallinn, is not very veracious as the tourism activities are considerably seasonally bounded. During the summer months, Tallinn welcomes many visitors and tourists, which is not the case in the winter months (Tallinn City Enterprise Board & Tourism Department, 2018). In July 2017 only, a total of half a million tourists came to Tallinn. Together with the other two summer months of June and August, this number reaches over 1.3 million tourists (Statistics Estonia, 2019). Though, these numbers are only the amount of tourists who spend the night and thus excludes the tourists who visit Tallinn for just one day.

One-fourth of the group of one-day visitors is coming from the cruise ships and therefore it could be considered as an import share of this group. In 2018 the total amount of one-day visitors in Tallinn was 2.71 million, which therefore includes 635,000 cruise ship visitors (Tallinn City Enterprise Board & Tourism Department, 2018). However, since tourism in Tallinn is very seasonal, the cruise ships do not arrive evenly throughout the year. The first cruise ship arrives at the end of April and the last one in mid-October (Port of Tallinn, 2019). This means that in barely six months all passengers arrive, and the city of Tallinn, which inhabits 435,000 citizens, receives 1.5 times its amount of citizens in cruise passengers. While this is already intriguing, another characteristic of cruise tourism is that the ships dock for just a few hours. In general, ships arrive in the morning and leave in the afternoon, resulting in most ships staying in the port for only 7 to 9 hours. Next to these short arrival times, are the dates of arrival. In 2018 Tallinn received 339 cruise ships, which is, considering the fact that they only arrive in six months, an average of almost 2 ships a day (Tallinn City Enterprise Board & Tourism Department, 2018). Though, this is not completely true as there are also days on which no ships will arrive, for example at the beginning and end of the season. In practice, on some days three, four or even five ships arrive on the same day, and on other days none or maybe just one arrives (Port of Tallinn, 2019). This also makes a difference in the number of passengers that enter the city on specific days. On the days that four or five ships dock, approximately 8,000 to 10,000 passengers are disembarking. This number of passengers combined with the short docking times of the ships and the
typical areas of tourism activities, results in an overcrowded and flooded city center since all of these people will enter it at approximately the same time.

In practice, this phenomenon is also clearly visible and it is experienced and underpinned by various actors. The local citizens Eero and Koit acknowledge that in their neighborhood Vanalinn, tourism is enormous. According to them, the amount of arriving passengers is too much to handle for the city, since inhabitants of Vanalinn could not even walk out their door because tourists are standing in front of it. As the researcher himself was an inhabitant of the Old Town too, he experienced this phenomenon mentioned by Eero and Koit as well and evaded the Old Town during working hours (Observations summer 2019). Next to locals, the cruise line excursion managers notice that the arrival of their ship together with other ships could lead to floods of people. Even cruise passengers themselves wonder how the city would look like with the enormous amounts of incoming passengers during the summer months as they already see a crowded Old Town at the beginning of the season in April (Observation report 27-04-2019, Appendix C). Furthermore, the (over)crowdedness is also acknowledged by the municipality, the port of Tallinn and tour operators as they all see the phenomenon and are aware that this is a challenge they have to tackle.

As the Old Town is the most popular part of the city to visit for cruise passengers, a major part of the tourists is concentrated in that area. It is however not the only location, as the cruise passengers also move more and more into the neighborhoods of Kalamaja, Teliskivi and Südalinn as is noticed by Jannar Prutt. Though, this is in a lesser way and such visits are combined with a visit to the Old Town. Furthermore, cruise passengers also tend to go to the areas of Pirita and Kadriorg which are further away. These trips are mostly done as part of an excursion and passengers go in groups by bike or bus to these areas (Observations summer 2019).

Related to this are the means of travel. In Figure 1.2 the city plan has been shown and it already became quite clear that Tallinn is a rather small city. The distance from the harbor towards the town hall square in the center of the Old Town is 1.5 kilometers which makes it relatively easy to access the city by foot (approximately 20 minutes). The higher part of the Old Town is obviously further away and will take approximately 30 minutes on foot. Although a significant amount of passengers just walk towards the city, the majority of passengers (who have not booked an excursion) travel by
shuttle bus from the terminal towards the city center (Mere Puiestee), which takes almost the same time or sometimes even longer depending on the situation as is stated by interviewees Andrei Berezin and Maila Saar. For the passengers who have booked excursions, buses are used as well. Just a few excursion groups travel by foot or bike and all the other excursion groups make use of buses, which passengers are obliged to use (Observation report 02-05-2019, Appendix D). It does not matter if the excursion is going towards the Old Town, Kalamaja or Pireta, passengers travel to these locations by bus, no matter what. Some excursions, the so-called “Tallinn highlight”, combines the Old Town and neighborhoods like Pireta and Kadriorg. After being dropped off from their bus in the Old Town, the passengers walk through the Old Town before they are picked up again and sit all the time in their bus to visit these latter neighborhoods without getting out (Observation report 27-04-2019, Appendix C).

The excursions provided to cruise passengers form an important part of the cruise tourism industry in Tallinn. However, as is stated by Andrei Berezin and supported by Lars and Maila Saar: “Nowadays most of the people are going on their own. So people [...] know now how to count the money”. Meaning that nowadays approximately 25% to 30% of the cruise passengers book excursions in Tallinn, while these numbers were considerably higher before the monetary crisis of 2008 (back then approximately 75% booked an excursion). But even with these smaller numbers it still means that many passengers, on average 800 to 1000 per ship, join an excursion. Knowing that in one bus there are seats for 40 to 50 persons, there are still 20 buses needed at minimum, and considering that there are multiple excursions in multiple languages, this amount is in general higher.

![Figure 5.2 Passengers queuing up to enter shuttle buses, with Tallinn’s Old Town already visible in the background, July 2019 (source: private collection)](image-url)
This latter point is also obvious in Tallinn regarding the cruise tourism. As excursions are given in multiple languages, it also means that nationalities are placed together, which leads to differences in behavior between groups visiting the city. When on a booked excursion, people have to follow their tour guide and there is less opportunity for free time. The groups follow their tour guide leading to the creation of a rather big line of people consisting of 30 persons on average. However, how these groups are moving differs on the (main) nationality of the group. According to the tour guide Dea and supported by the interviewees Andrei Berezin and the AIDA excursion manager, Asian people are the easiest groups to guide as they have a lack of knowledge about European history and (urban) culture and they are just interested in taking photos of all the hotspots. This tour guide stated it as the following: “a tour guide is just a shepherd controlling his/her sheep”. Other nationalities, like German or English, are more aware of all the things they see and are more interested in the stories and ask more questions during the excursions according to Andrei Berezin and Dea. However, the differences in behavior are not only noticeable on an educational level, but also in the differences in movement. While Asian people are easy to control regarding stories or anecdotes, they are considered as tough in the way of walking and moving. They spread out more blocking complete streets, do not look around where they are actually walking and do not care about anything as Andrei brings up. Though, this kind of behavior could also be heard and seen from Western passengers, as one passenger complained about a few cars driving on a normal street in the city center and wished that cars in the center were be banned (Observation report 27-04-2019, Appendix C).

Although the above briefly describes the behavior of groups during excursions, the same behavior is also observable with passengers who are not part of an excursion group. This is mostly visible with Asian people as they tend to travel in big groups of friends or families and they already form a group. But also without these groups, it is clear that the average cruise passenger is not very aware of its surrounding.

Referring back to the concept of mass-tourism as defined by Vanhove (1997), cruise tourism in Tallinn is for sure a form of mass-tourism. Most observable is that cruise tourism brings in great amounts of tourists, although it depends on seasonality and short periods of time. Furthermore, the more specific activities of the cruise tourism in Tallinn are considerably mass-tourism as it is rather inflexible regarding excursions and also standardized and packed with one specific “package” for
every excursion with no options to vary within the excursion. All of it has to be done quite efficiently and according to schedule in a short period of time, leaving no space for changes in the program.

5.2 Social impacts

As a consequence of the cruise tourism industry in Tallinn, there are quite some effects that could be addressed to the social level. These are mostly experienced by the hosting community and its local residents, but could also impact other actors like tourists and the industry. However, the social level is still relatively broad. To analyze the effects and impacts of the cruise tourism industry on a social level, this section will therefore stick to the seven revised social indicators of Stefanidaki and Lekakou (2014) as discussed in Chapter 3 and follow these to give a clear answer about the social impacts.

5.2.1 Ratio of residents to cruise passengers

As discussed before, one of the most obvious impacts is the number of passengers disembarking the ship and flooding the city, which makes the ratio of residents to cruise passengers the first social indicator. According to Stefanidaki and Lekakou (2014), the ratio is influenced negatively when more passengers arrive as these passengers lead to more crowded places, but also higher demands for certain services and goods for which the local residents thus have to wait longer or even have no access at all.

The case of having no access to services and goods is not present in Tallinn at this moment, but the ratio has been altered negatively throughout the years. Not only has the number of cruise passengers increased rapidly to a current 635,000 in 2018 (Tallinn City Enterprise Board & Tourism Department, 2018), the number of residents in the Old Town dropped significantly in just ten years from 15,000 to 2,000-4,000 according to the interviewees Eero, Koit and Triin. Moreover, even these 2,000-4,000 are an estimated number as these are just the house owners who probably don’t live there but rent their houses out (to tourists). In general, the remaining local residents are relatively fierce against tourism because of these tourism trends. The association in which Eero and Koit are active, even published a development plan for their the Old Town in which they also address the issue of tourism (Old Town Society Association, n.d.). In this plan, they sense tourism as a causation of the alienation of the Old Town residents.

In case the city of Tallinn wants to achieve a sustainable ratio, there are two options. One is to increase the number of residents, the other is to decrease the number of tourists (passengers). Logically, every destination is different in both the number of residents as in the number of receiving cruise passengers. Therefore, the perception on (cruise) tourism differs for the various destinations and there is not an universal ratio that is most suitable to achieve sustainable cruise tourism. For every destination, the way of tackling the ratio issue is therefore different. However, following the statements of local residents Eero and Koit, a suitable amount of passengers would be drastically lower than the contemporary amount. According to them, the peak lies at 5,000 passengers a day, to maintain a normal daily life for local residents. Though Koit goes further and states that 5,000 is doable, but still not a pleasant and sustainable amount. According to him, the maximum should lay at 3,000 passengers a day and then the profits exceed the burdens.

As local inhabitants experience the ratio the quickest, it is not a surprise their opinion is quite obvious and clear. However, other actors in the cruise tourism industry are also aware of the number of incoming passengers and agree that the current numbers are exceeding the sustainable ratio. For example, Mari-Liis Makke, employee of the tour operator Estonian Holidays, understands that 10,000 passengers a day is too much for the city to handle and suggest that the numbers should not surpass 5,000-6,000. The total amount of passengers a year is fine and doable and it is probably on its peak.
level at this moment as it is not growing anymore, but it should be balanced more according to Mari-Liis Makke and Maila Saar. Furthermore, Liis Läte of the municipality is also aware of this issue and also sees that 10,000 passengers could lead to “discomfort and dissatisfaction”.

A part of the responsibility lies with the port as they facilitate the incoming ships and thus the number of passengers every day. Ingrid Berezin from the port itself is aware of this responsibility and the issue of “people pollution”, but points out that it is merely a consequence of growing interest in money and economic profit instead of aiming for quality.

Regarding this indicator, it is therefore clear that at this point the ratio can be considered as unsustainable since the number of passengers compared to residents is not balanced. The total amount of passengers during the year is suitable and consequent, but it is not evenly distributed over the days throughout the year causing an unsustainable ratio of residents to cruise passengers.

5.2.2 Community restrictions to locals
In legal terms, there are no restrictions for locals during days that cruise ships embark. No laws are written that prohibit locals from undertaking certain actions or behaving in a certain matter during (non-)cruise days. However, although Stefanidaki and Lekakou only mention these kinds of restrictions, the indicator goes further than only strict laws. The behavior of locals could still be changed and could be felt as a restriction by the local citizens, the so-called “rules of the game”.

Although there are no laws present regarding this issue, locals are somewhat restricted in their accessibility and actions and thus their behavior will change during cruise days. This is strongly connected to the previous indicator, as the data show that the crowdedness is the main influencer. During cruise days, locals experience the flood of incoming passengers and their use of services as an increased pressure on these services. This leads to various changes in the behavior of the locals. Locals are for example almost forced to adjust their ways of commuting as Maarika Liivamagi brings in: “if I come here by 09:00 or already 11:00 or during the day, it’s a nightmare to get by car, even to walk also, because the groups are everywhere.” To make clear, Maarika mentions the commuting time to her work which is located at Toompea in the upper town and thus for a “normal way of commuting” she has to travel to work before 09:00. The way of transportation is however not the only ‘restriction’. According to Liis Läte and Maila Saar, the crowdedness affects the behavior of locals. They state that people tend to avoid the Old Town and its central places like the town hall square during cruise days and are not able to visit their favorite coffee shop or restaurant as these are all packed. Or in other words as is stated by Maila Saar: “Maybe people who live exactly in this old town area, which is most crowded, maybe they sometimes feel a bit disturbed, their favorite coffee shop is crowded or something like that”

Lastly, some restrictions occur regarding restaurants and cafes, but these are not specifically bounded to cruise days. Until now, the cruise season and thus the tourism season is mainly during the summer months from May till October. Logically, many of the restaurants and cafes are focusing on that period as they could make the most profit during those months. However, many of these companies are operational only during those summer months, leading to the fact that during the rest of the year many of them are closed, some even permanently as Maarika Liivamägi and Maila Saar mention. This could thus also be seen as a restriction for the locals as their (favorite) restaurant or coffee shop is overcrowded during the cruise season and closed during the non-cruise season in winter.
For this indicator it is therefore clear that official restrictions are not present, though the rules of the game which influence the accessibility of places and services have been altered. Therefore, daily life is changed in such a way that locals might feel it as a restriction or an obstruction.

5.2.3 Public security and criminal incidents with cruise passengers involved
Based on the collected data, this indicator is not affected that much by cruise tourism in Tallinn, neither positively or negatively. From several actors (cruise line, municipality, industry) there comes one clear answer which could best be described by quoting Liis Late: “of course the main problems are pickpocketing, but this is in every tourist destination”. This means that nothing happens besides some small pickpocketing, which happens everywhere around the world in all different touristic destinations. Next to pickpocketing, some velo-taxis try to scam cruise passengers by demanding more than agreed beforehand, though, according to Liis Late, the municipality is aware of this and is already acting against this by installing regulations. However, as mentioned before, these two types of criminal incidents occur everywhere in the world and are not directly related to cruise tourism. In Tallinn there is only one variable that changed because of cruise tourism, however, this is only during the days on which more than 5,000 passengers arrive. Only then the local police will send out somewhat more police officers and patrols to guarantee the safety in the city as is stated by Liis Late.

For Tallinn, this indicator is thus not that much applicable as Tallinn is relatively a safe city and criminal incidents related to tourists and cruise passengers do not increase when cruise ships arrive.

5.2.4 Health and wellbeing and the means for safe transfer of locals to hospitals
Next to the indicator of public security, this indicator is also barely affected by the cruise tourism industry in Tallinn. There are no signs of diminishing access to doctors or medical healthcare. Though, cruise tourism combined with general statistics learn that there could be a higher chance of medical needs for cruise passengers, as cruise passengers are in general somewhat older (60+). According to Mari-Liis Makke, it already happened sometimes that during a cruise excursion a passenger fainted or even died. However, this is not a reason for a change in medical healthcare and the availability of more (or less) doctors for the locals.

The only part of this indicator which could be affected by cruise tourism is the transport towards health institutions. Again, this is closely related to the masses which are brought in by cruise tourism. These masses make use of buses for excursions or as shuttle buses and this can lead to traffic jams on the main roads around the Old Town following the arguments of interviewees Andrei Berezin and Maila Saar. Logically, these traffic jams lead to longer transportation times and could be seen as negatively influencing the safe transfer to health institutions. In the next section the traffic jams and transport will be analyzed further.

5.2.5 Transport frequency, capacity of services and use level
Besides the unsustainable ratio of residents to cruise passengers, the indicator of transportation is the most observable as an indicator in Tallinn regarding cruise tourism. As mentioned above, traffic jams and congestions are huge issues. On the main roads around the Old Town and the roads towards the port area, specifically the cruise terminal and the ferry terminal, traffic is stuck during cruise days. Ingrid Berezin mentions that especially half an hour after the docking of a ship and around the end of the day, this issue is apparent as around these times all the passengers disembark or return to the ship, either by foot or by bus (Observation report 02-05-2019, Appendix D).

As was mentioned before, the distance between the port area and the Town Hall Square is just 1.5 kilometers. Despite this, buses are being used intensively and dropping the passengers off at Mere Puiestee which is barely 1 kilometer and thus just 15 minutes by foot according to Google Maps. The
intensive use of the buses thus leads to increasing pressure on the main roads (mostly Mere Puiestee, Põhja Puiestee and Toompuiestee), consequently leading to an increased time to travel from one place to the other (see figure 5.4). The fact that the passengers could be stuck in traffic is, according to Liis Late, also an issue that the municipality would like to tackle, as they want to make sure that the passengers could leave the port area smoothly so they could use their limited time in Tallinn more efficiently.

Although various interviewees (the AIDA Excursion Manager, Ingrid Berezin from the Port of Tallinn and Maila Saar from Estonian Holidays) acknowledge that the use of the buses is perhaps not that necessary because of the short distance, they are still being booked and used with the underlying reason that there are elder people and young families with babies and prams on their ships which cannot or will not walk the distance which is quoted by Ingrid Berezin: “Cruise lines, for example, they say: “oh port, do you offer shuttle buses”. No we don’t do it, it is not necessary. “how can it be not necessary, I’ve got children, I have old people and so on”. This is mostly accountable for the shuttle buses as these just commute back and forth between the port’s cruise terminal and the Old Town (Mere Puiestee). But next to these shuttle buses, many buses are being used for excursions which are less bounded to age groups as is mentioned by Maila Saar and follows from the observations (Observation report 02-05-2019, Appendix D). Where the shuttle buses only drive between the port and Mere Puiestee, the buses for the excursions take other roads as well. One of the most important ones is the road via Põhja Puiestee and Toompuiestee towards the Alexander Nevsky cathedral on Toompea. Though, with having several excursions, other roads close to the port area experience a higher usage level as well. As the excursions follow a strict program, the times these buses drive these roads are thus mainly during the morning when the ships arrive and in the afternoon when the excursions end and the buses return to the port. Unfortunately, this means that it coincides with the “normal” rush hour and at these times the roads are jammed even more (Observation report 02-05-2019, Appendix D).
The buses that are being used for passengers are not part of the public transport. These buses are private companies booked by the tour operator and only reserved for the passengers of just one cruise ship. This means that if multiple cruise ships arrive on the same day, each ship has its own buses. The more ships arrive on one day, the more buses are present in the city, the more the pressure on the infrastructure disrupting the daily life of the locals and the less positive experience of the passengers.

Though, as the buses are private companies there is not a direct increase in the usage level of public transport like buses or trams. This means that these are still mainly used by local citizens or tourists other than cruise passengers. If cruise ship passengers make use of transportation means other than the private cruise ship buses, it are barely line buses or trams, but mostly taxis or velo-taxis, which are in fact especially focused on tourists.

5.2.6 Cleanliness port reception facility
Stefanidaki and Lekakou (2014) see this indicator as most important and observable for home ports and to a lesser extent for ports of call like Tallinn, but this does not mean that the indicator is not important and investigable. In the case of Tallinn, the city is perceived by the tourists as very clean and well-maintained. As Liis Late mentions, 98% of the tourists agree with the statement that Tallinn is clean (Late, 2019). This corresponds with a survey held under cruise tourists in 2018 in which they had to describe Tallinn in three words. The word clean was mentioned in 21% of the cases and, although not directly related to cleanliness, beautiful was mentioned in 54% (Visit Tallinn & Emor, 2018, p. 34).

As may be clear, these statistics show that the city is very clean and is perceived as an attractive city to visit. For locals, it is not such a big deal and according to the municipality, the city is not cleaner as a result of tourism, let alone cruise tourism. It is just the way the city is. Though, Liis Late states that due to the fact that 98% of the tourists perceive Tallinn as clean, the municipality has it now as a goal to keep it clean in such a way (Visit Tallinn & Emor, 2018). This means that cruise tourism is not necessarily accounted for positively influencing the cleanliness of Tallinn, but does certainly not harm it.

From a negative point of view, cleanliness in Tallinn is also not that affected by cruise tourism. The masses of passengers bring in more waste, but this is mainly coming directly from the ships and the port of Tallinn correctly handles this to ensure sustainable waste management and thus cooperates intensively with the cruise ships and make use of garbage trucks following the arguments of Ingrid Berezin. In general, it can thus be concluded that this indicator plays an insignificant role regarding sustainable cruise tourism in Tallinn.

5.2.7 Protections of archeological places
One of the reasons that Tallinn is becoming more popular lies in its historical heritage as the Old Town of Tallinn is listed on the UNESCO list of World Heritage sites. As this attracts more and more tourists, this could mean that the heritage is more in danger as well because of the many tourists “using” the city. People want to visit the city as it is an old medieval city, but if they are not that aware, they may damage the heritage and tourist attractions. Luckily, until now no real problems occurred in which tourists damaged the heritage according to Liis Late. Damage that has been done to (medieval) heritage is “done by our young people, sometimes when they are a little bit drunk or something like that” as is stated by Maila Saar.

The cruise industry in Tallinn, including the cruise lines, is aware of the value of the medieval heritage and the UNESCO list. The heritage is being used greatly in excursions, but at the same time these excursions are quite beneficial for the heritage as well. Excursions provided by the tour operators take
people on “highlights tours” or “Medieval Tallinn tours” and thus visiting and showing the cruise passengers a lot of the medieval stuff in the city. During these excursions, the passengers learn the history and stories from their tour guides and get some more respect for their surroundings. In general, this even leads to donations for churches, which can be used for renovations and preservations. Though, there are other ways to gather money for this purpose. As shown at the first indicator, the city is experiencing mass tourism and local inhabitants start resisting, there are sounds of introducing a cruise passenger tax. This should lead to fewer passengers but also to a simple way of earning some money which should be used for the support and renovations of churches and other medieval structures (Postma et al., 2018).

Although the heritage is thus being used and commodified for excursions and these excursions could lead to a better understanding by the passengers and even to donations, there is a negative trend occurring in Tallinn as well. As the city is famous for its medieval Old Town, it makes sense that people working in the tourism industry make use of this. However, it could be stated that it is becoming too much and too commodified as it is leading to “Disneyfication”, which means it is becoming more like a theme park and homogenization start occurring (Bryman, 1999; Choi, 2012). Old buildings which are now pubs or restaurants use the medieval look in their whole way of business: medieval music is played, employees are dressed in medieval costumes, served dishes are typically medieval, archery could be done in the Queen’s Garden et cetera (Observations summer 2019).

Instead of an authentic city that has a rich medieval history present, the medieval heritage is taking over the city just in favor of the tourism industry. One could state that the medieval heritage is being protected strongly because of this commodification and cruise excursions, but on the other hand, it leads to the homogenization and Disneyfication of the Old Town.

5.4 Economic impacts

Next to the effects on the social level there naturally are the effects on the economic level. As discussed in Chapter 3, this could be analyzed regarding several indicators contributing to sustainable cruise tourism. This section follows the same set up as the previous one and will follow the five revised economic indicators by Stefanidaki and Lekakou (2014).

5.4.1 Income from cruise tourism on total regional economy

As the cruise tourism kept growing over the past years, the economy in the Old Town of Tallinn is also based on this tourism, as it is the most visited place of Tallinn. Here one finds most of Tallinn’s hospitality, the tourist information center, the souvenir shops and it is of course the main attraction for all sightseeing (Observations summer 2019). Next to the Old Town, the neighborhoods of Kalamaja and Telliskivi are most touristic, mostly because of the hipster areas and the Balti Jaam market. This consequently means that these are the areas where most economic activity takes place regarding cruise tourism. As passengers visit these areas the most, these are the places where they spend their money on a coffee or ice cream or buy souvenirs. While it makes sense that the economic activity is mainly centered around the Old Town, other areas of Tallinn barely get any tourist attention. In post-Soviet neighborhoods like Mustamäe or Lasnamäe, tourists are barely seen, only when inside a bus to drive through the area as part of an excursion. Logically and underpinned by Janar Prutt, these neighborhoods therefore do not profit from cruise tourism. The only way in which these neighborhoods profit is that the total economy of Tallinn (and Estonia) develops which makes sure that a higher economic standard is reached and local residents could be employed in the cruise tourism industry.
At the same time, there is no real consensus about the total profits of cruise tourism and who exactly profits. While some state (the AIDA and Costa excursion managers, Janar Prutt and Maila Saar) that many profit and the sector brings in a lot of money which helps to develop the city, others (Andrei Berezin, Ingrid Berezin, Eero and Koit) state that just a few profit and the total profits are very low. The idea of undivided profit corresponds to contemporary literature (Brida & Zapata, 2010; Jaakson, 2004). One reason why the profits in Tallinn are considered low is that only 14% of the tourists Tallinn receives is a cruise passenger according to Liis Late. Though, she also states that on average a cruise passenger spends €80 in a port of call, of which most money goes to the tour operator and transportation companies.

This is also the issue that Eero mentioned when he said: “The profits are for the few, the losses are for the many”. As the cruise passengers disembark the ship, only 30% will join an excursion organized by a local tour operator and 70% will visit the city themselves without any guide (Observations summer 2019). These 30% who join excursions pay the cruise company the money for the excursion, a price which is sometimes three or four times the prices the cruise line has to pay to the local tour operator following the statements of Lars and Maila Saar. But still, the tour operator creates some turnover per passenger for every excursion. In general, the passengers spend a few hours in the city, as part of a guided group, see some sightseeing attractions and are brought back to their ship. Some excursions are combined with a small workshop, a visit to a museum, a coffee, or a lunch, but the most booked tours are just simple sightseeing tours. With only a short break during the excursion, the passenger will not spend much money or perhaps even nothing at all, although the impact on a social level is high (as is discussed in the previous section). For the passengers who visit the city themselves, it is of course slightly different as they have more time to have lunch somewhere, drink some coffee or buy some souvenirs, though even they do not spend that much since they could get proper meals and drinks on board (Observation report 27-04-2019, Appendix C). This shows that the profits are just for a few organizations and many people do not feel the profit directly.

Moreover, local companies which profit from cruise tourism, do not profit much. Prices for excursions have to be as low as possible and cruise lines are very fierce in keeping the prices low. For them, the passenger is the first priority so they want to offer them the best quality, but also want to offer such quality at the lowest price possible. Sometimes tour operators have to lower their prices to a point at which almost no profit can be made (also because of rising prices due to inflation). The tour operators are therefore becoming sandwiched between the local prices they have to pay and the prices they can ask for their excursions which is brought up by Lars Saar. But this works the other way around as well, as the tour operator is always negotiating with local companies (museums, restaurants) about the deals they want to make. As soon as the cruise line is demanding low prices to the tour operator, this also goes indirectly to the local companies. However, following the statements of Lars Saar, cruise lines sell the excursions for prices which are sometimes three or four times the price the tour operators ask, leading to a huge turnover for the cruise line and barely any profit for the tour operator.

Where the total income of cruise tourism is already quite low according to several actors, the cruise season in Tallinn is also rather short (May till October). This means that the income which could be gathered should be generated in a relatively short period of time. The local tourism industry is aware of this and focuses on this period, consequently leading to closed shops, cafes and restaurants during wintertime which is mentioned by Maarika Liivamägi and Maila Saar. As a result, the economy of Tallinn is diminishing during these months and the risk that people are temporary unemployed increases.
5.4.2 Employees in the cruise sector

The seasonality which already leads to a difference in the amount of opened shops and restaurants during winter and summer, also leads to a difference in employment. Although only 30% of cruise passengers book a guided excursion, there are still many people employed for these excursions: not only guides but also bus drivers and assistants for the tour operator (Observation report 02-05-2019, Appendix D). These employees only work when there are excursions and although passengers do not spend that much, many restaurants, cafes and pubs open or enlarge their property (with terraces) during the cruise season which leads to a higher demand for waiters which is explained by Andrei Berezin and Maila Saar. For the whole Baltic Sea region, the cruise tourism sector was good for 2,000 jobs in hospitality, 1,600 jobs in transportation (including tour operator) and 1,200 in the retail (souvenirs) (Cruise Baltic, 2018).

Though, it is not necessarily that cruise tourism solves unemployment. As the cruise season takes place during the summer, people like students and teachers have a lot of free time. Andrei Berezin notices that many students work as a waiter and a huge part of the teachers gather extra income as a tour guide. But in general, most tour guides, who are on average somewhat elder women, have other, “normal jobs” during the year and work extra part-time as a tour guide during the cruise season according to Estonian Holiday’s Maila Saar. They are enrolled as a tour guide for several companies which enables them to work every day that a cruise ship is embarking and are not bound to the cruise lines of only one tour operator (Observations summer 2019). The seasonality of cruise tourism also leads to the situation that organizations which are active in the (cruise) tourism industry rely a lot on part-time employees as is quoted by Maila Saar: “we can’t provide them work in the winter, but still our main staff gets paid throughout the year”.

Although Janar states that it is rather easy to find a job in the tourism industry, the job of a tour guide is quite related to a person’s ability to speak other languages as excursions are not only provided in English. Quite some guides who give the excursions in another language than English have their roots in the country in which the language is spoken. This means that there are a lot of guides with French, Spanish, or Italian roots, i.e. expats who are employed in the tourism industry (Observations summer 2019).

The above shows that quite some people work extra during summer to gain more income and therefore quite some people are working in the tourism industry. However, most of them have a different fulltime job during the rest of the year and even during the cruise season. Though, as so many people earn an income from the (cruise) tourism, it can be assumed that those people are in favor of the (cruise) tourism sector (Stefanidaki & Lekakou, 2014). However, this can be disputed as Eero, who works as a salesman with souvenir products, is quite fierce against mass tourism as mentioned in the section about social impacts. However, he observes the tourism industry not from his own personal economic perspective, but on a greater scale. So even locals who are employed in the tourism industry are not always in favor of it.

5.4.3 Passenger’s spending

Thinking about tourism from an economic point of view, passengers spending is one of the first things that comes up in mind. However, many studies showed that the expenditures of passengers in port of calls are relatively low compared to expenditures of “normal” tourists (Brida & Zapata, 2010; Jaakson, 2004; Larsen & Wolff, 2015; Larsen, Wolff, Marnburg, & Øgaard, 2013). Although in this thesis there has not been any research done towards the exact figures of expenditures by cruise tourists and land tourists, the interviews provided valuable data. According to Liis Late, cruise passengers spend around €80 on average, though this is the result of a survey conducted by Cruise Baltic which also includes the more expensive countries like Sweden and Denmark (Cruise Baltic, 2018). As Tallinn
is a port of call and not a home port, expenditures per passenger are mainly on excursions and transportsations (€43.12) and on retail goods like souvenirs (€24.26) (Cruise Baltic, 2018, p. 6).

Regarding the excursions and transportations, this €43 is the price which is on average being paid by the passengers. The price the cruise line has to pay to the tour operator for those excursions is lower as the cruise line comes between the tour operator and the cruise passenger. The other major expenditure post for cruise passengers lies in retail according to Cruise Baltic (2018). This is acknowledged by several interviewees (the AIDA excursion manager, Liis Late, Janar Prutt and Maila Saar), although most of them first come up with expenditures on hospitality products like coffee, beer, lunch or ice cream. However, there is some difference visible between cruise passengers who join an excursion and ones who visit the city by themselves. During excursions, passengers only have a small amount of free time and rather get something simple to eat or drink (Observation report 27-04-2019, Appendix C; Observations summer 2019), while other passengers do not have to follow any program and thus could have some proper lunch somewhere and could easily walk into souvenir shops and take their time to find the perfect souvenir (Observations summer 2019). The ones on excursions can visit the city by themselves after the excursion, but it appeared that this barely happened. After the excursions, only a few will buy a souvenir at the small market in the port area (Observation report 02-05-2019, Appendix D).

However, as these expenditures and prices are on average, it varies between the different cruise ships and cruise lines. As stated by local entrepreneurs of souvenirs shops, it is clear that some cruise ships bring in more money than others. Entrepreneurs like Eero look up the schedule of incoming cruise ships, in order to be better prepared on what they will sell that day and whether they need some extra employees.

5.4.4 Startups in cruise tourism
The indicator of startups in the cruise tourism industry is highly connected to other economic indicators. Logically, if there is enough work and enough money to be earned, people want to start working in a certain industry and new companies start to arise. However, following classical economic models, a shake-out will occur when the industry is saturated. At this point, (almost) no new companies will enter the market (Atzema, van Rietbergen, Lambooy, & van Hoof, 2012). After some time, the number of companies is too high, which will lead to a decline of companies: some will become bankrupt, some will merge together and others will focus and specialize in a different part of the industry.

Tallinn’s local cruise tourism industry is exactly in this position. According to Maila Saar, Tallinn had its major increase in companies at the beginning of the century when Estonia became a member of the European Union. But, as she continued, nowadays there are just four or five main tour operators responsible for cruise tourism in Tallinn, while Estonia had over 200 travel agencies around 2005. Many of these travel agencies closed as they went bankrupt, closed down as a result of a lack of work, merged together or saw that the cruise industry is a really tough business with a lot of work especially during summer. Next to a decline in the number of travel agencies, there are almost no new startups either. The reason behind this phenomenon might be that the industry is saturated since many contracts and contacts between tour operators and cruise lines are already embedded for years. As a consequence, Lars and Maila Saar think it might be too difficult for such startups to gather enough work for profitable prices.

Although the number of new startups is not impressively high anymore, and the market seems to be hard to enter, this indicator is in one way sustainable as well. According to Stefanidaki and Lekakou (2014), the sustainability of this indicator relies on the fact if the (startup) companies are local or for-
eign. This means a higher sustainability is reached when a destination possesses more local companies. Regarding Tallinn and Estonia, the companies are in general all established by local residents. This could easily be related to the fact that Estonia is famous for its “easy startup climate”. In fact, some travel agencies like Traveller are even expanding to other countries as Marju Meschin notices.

5.4.5 Changes in public investments and profits

Although cruise tourism is an industry and focuses mainly on market based economic activities, local governments are involved in it as well. Although it is short-sighted: governments see tourism as a tool to create employment and thus a way to gather money form income taxes. This means that in the end it pays off to invest in tourism. By investing and making the city more attractive and accessible to tourists, more tourists could come, stay longer and spend more. Practical examples of these investments are promotions, restorations on sightseeing attractions and improving or rebuilding infrastructure.

At this moment, the aim of Tallinn’s municipality is mostly attracting more tourists and thus focusing on the quantity of tourists instead of the quality (Ministry of Economic Affairs and Communications, 2015; Tallinn City Council, 2013). This is also perceived by the local residents like Eero, Koit and Marju and together with local tourism companies, they do not feel that much support of the municipality as they might expect as Marju and Maila Saar mention. Real investments in infrastructure related to cruise tourism are not planned, though could be useful as problems occur (see Chapter 5.2.5). Acts that could be undertaken for these infrastructural problems are e.g. new locations for bus stops. However, according to Eero, Koit and Triin this means that local residents will lose their parking spots. Nonetheless, according to Liis Late, the municipality is cooperating more and more with other actors to find ways to solve problems like the over-tourism in the city and disperse the tourists. For instance, a new cooperation between the port, the municipality and the technological university (Tal-Tech) is leading to a smart solution for this problem and should enable guides and tour operators to move throughout the city in such a way that would decrease the pressure on the infrastructure and the daily life of local citizens.

The investments made by governments could lead to a more attractive and accessible city for tourists, hence could lead to an increase in the amounts of tourists coming to Tallinn and therefore an increase in employment as well. Eventually, this could mean that the city will receive more money from income taxes and dues which can be used for further investments. However, taxes could also be used to put a hold or limit the growth of incoming tourists. Although this is not yet implied, it is an issue that is being discussed in Tallinn according to Eero, Koit, Maarika Liivamägi and Marju. By implying a tax for cruise passengers, the city becomes slightly less attractive as one has to pay to enter. It could surely work for limiting the growth and handling the over-tourism, however, Maarika states that it needs to be clear how the profits of these taxes are being used. This is a point of discussion as local residents (like Eero and Koit) who suffer from (cruise) tourism want to see that these taxes are being used for them and their living environment, but others (like Maarika) propose that the taxes come from tourism-related activities and should therefore also be used for tourism-related investments. According to Maarika Liivamagi, such taxes will be implied to collect money to solve certain problems, but as soon as the problem is solved there is no clear project to invest the collected money in, leading to unnecessary investments.
5.5 Sustainable tourism

Now the impacts at the social and economic level in Tallinn are explicated following the framework of indicators, it is possible to connect this to the definition of sustainable tourism. As stated in Chapter 2.2, there are several definitions of sustainable tourism. For this thesis the definition of the UN-WTO is used as they define it as the following (UNEP & WTO, 2005, p. 12):

“Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities.”

Defining and theorizing sustainable tourism is necessary, however, this definition only provides a vague idea and does not provide any practical directions. Therefore, this section will address what sustainable tourism should look like based on the definition of the UNWTO (2005) combined with the framework of sustainable tourism by Stefanidaki and Lekakou (2014). Additionally, as Venice and Barcelona are more developed regarding cruise tourism and making it sustainable, it is possible to extract solutions and practices from these cases following the review in Chapter 4.

5.5.1 From theory...

By defining sustainable tourism, the UNWTO (2005) shows that they are aware of the risks that tourism could have on various aspects and actors, but also that it could offer opportunities for gaining profit if it is executed in a sustainable way. Furthermore, their report is a guide for policymakers to imply a sustainable tourism policy, although they mainly focus on governmental actors and not so much on other actors. As being part of the UN, the UNWTO applied the Sustainable Development Goals, which are developed by the UN, on the tourism sector. These guidelines were also used by the Cruise Line International Association (CLIA) to make them more applicable for cruise tourism (CLIA, 2017a; Global Cruise News, 2017; UNWTO, 2020). As the goals are covering different areas, not all of them are very applicable to the (cruise) tourism industry. Therefore, the UNWTO and CLIA focus on the following goals:

- Goal 7: “Ensure access to affordable, reliable, sustainable and modern energy for all” (CLIA)
- Goal 8: “Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all.” (UNWTO and CLIA)
- Goal 9: “Build resilient infrastructure, promote inclusive and sustainable industrialization and foster innovation” (CLIA)
- Goal 11: “Make cities and human settlements inclusive, safe, resilient and sustainable” (CLIA)
- Goal 12: “Ensure Sustainable Consumption and Production patterns.” (UNWTO)
- Goal 13: “Take urgent action to combat climate change and its impacts” (CLIA)
- Goal 14: “Conserve and sustainably use the oceans, seas and marine resources for sustainable development.” (UNWTO and CLIA)

To be of practical use for governing sustainable cruise tourism, these goals need to be operationalized. The list does not provide a clear-cut procedure on how to reach the various goals, which might be explained by the contextual differences between destinations. Although the UNWTO’s guide is published a decade before the Sustainable Development Goals, the (governmental) tools and instruments to change policies and planning provided in this guide are still applicable for reaching these goals.

In the guide, the UNWTO starts with ‘measurement tools’, which make it is possible to measure and monitor the tourism and its impacts and to determine the destination’s limits (the carrying capacity). Though, there are no real examples of tools and instruments for measurement as several hundred indicators are identified and these depend on the destination (context-based) (UNEP & WTO, 2005).
While the UNWTO only mentions the existence and urgency of these measurement tools, Stefanidaki and Lekakou established a framework of indicators to measure the sustainability of cruise tourism (Stefanidaki & Lekakou, 2014). However, these indicators are also partly context-dependent and, more importantly, mostly focusing on statistical data. As the indicators are meant to give insight into the sustainability of cruise tourism, they only show whether a cruise destination is sustainable or not.

By reviewing Stefanidaki and Lekakou’s indicators (2014), a first glance of what sustainable cruise tourism should look like becomes apparent. To give examples: according to them and their experts, cruise tourism is economically sustainable when the cruise passenger spending (on local products) is high or as soon as unemployed locals could easily find a job in the local cruise tourism sector. On the social dimension, cruise tourism is sustainable if the ratio of residents compared to passengers is high and if daily life is not interrupted too much in sense of commuting time, restrictions, security and health care. Lastly the environmental dimension, a destination possesses sustainable cruise tourism if the water and energy consumption of cruise passengers is relatively low compared to the whole consumption and the fewer the alterations in the environment are (both build as natural) (Stefanidaki & Lekakou, 2014). These are some examples following the framework of indicators showed in chapter 2.3.

5.5.2 ... to practice: Venice and Barcelona

How sustainable cruise tourism should look like should not be based on theory alone, but on the experiences and best-practices at other destinations as well. Destinations could learn from each other, for example in the sense of problem recognition and solution. Pursuing sustainable cruise tourism is thus a mechanism of trial and error. As there are many destinations in the world, all facing their own difficulties and having their own policies, each has its specific way of being sustainable. This leads to the fact that it is nearly impossible to clearly and generally show how sustainable cruise tourism should look like in practice as it is highly context-dependent. However, similarities between destinations can be found which could help to create an image of sustainable cruise tourism. As of this, the European cruise destinations of Venice and Barcelona will be used to show how sustainable cruise tourism should and could look like in a European mainland destination comparable to Tallinn.

In both Barcelona and Venice, cruise tourism is considered unsustainable in the sense that it receives overloads of passengers compared to local residents, leading to various problems like congestions and high ‘tourist prices’ (Stanchev, 2017). Eventually, local residents at these destinations started to protest against (cruise) tourism in an increasingly violent way making the (cruise) tourism industry in both destinations less and less sustainable. Considering the fact that a relatively huge part of the cities’ economy relies on the (cruise) tourism sector, the cruise tourism is economically quite sustainable as it not only provides an income for both the city and its inhabitants but also creates a great amount of employment (Asero & Skonieczny, 2018; CLIA, 2017b; Santomà et al., n.d.; Stanchev, 2017).

As both cities experience both the positive (economic profit) as the negative (over-tourism and social disruption) side of cruise tourism, they attempted to tackle these problems and pursue a more sustainable cruise tourism with positive impacts. Most obvious are the policies signed by national governments as is the case in Italy with the ‘business network contract’ and in Barcelona with the ‘declaration for responsible tourism’ (Asero & Skonieczny, 2018; Santomà et al., n.d.). The Italian business network contract brings many regional organizations and institutions together in one network, leading to a regional approach to cruise tourism to lighten the pressure of cruise tourism on Venice. The Barcelonan declaration is a product of local institutions focusing on the positive sides of tourism, but operating from the view of local residents and their ideas on livability.
The actions undertaken in Venice and Barcelona are partly a result of the complaints from local residents and following this, we can assume that these local residents are the initiators for changing the local cruise tourism industry. Though, these complaints start as soon as the tourism becomes increasingly unsustainable and locals decide they will not take it any longer. Therefore, a sustainable destination should start to think about sustainability and take action before its residents do. An additional effect is that, in this way, the destination will not get negative media exposure, as happened to Barcelona and Venice (Asero & Skonieczny, 2018; Penty & Tadeo, 2017; Responsible Travel, n.d.).

Although the Italian business network contract is a good way to relieve the pressure and promote the region as a whole, it is mostly moving the unsustainable cruise tourism of Venice away from Venice to other, smaller destinations on the Adriatic Sea. On the other hand, in the ‘Barcelonan declaration for responsible tourism’ concrete ideas to tackle unsustainable tourism could be found. They propose for example “supply chain management” by offering “tours or excursions that promote local culture and help to protect the traditional way of life, providing a source of income to the destination” (Santomà et al., n.d., p. 9) but also to create a sense of place which is related to the livability of the residents and the experience of the tourists (Santomà et al., n.d.). Related to this is the fact that the municipality of Barcelona is going to focus more on its local residents. A relocation of the cruise ship terminals towards the outer boundaries of the city should lead to areas becoming open for the public in the city center (ACN, 2018).

Connecting these actions to the framework of indicators, it becomes obvious that Venice and Barcelona are thriving to achieve a more sustainable cruise tourism sector by improving the following: the ratio of residents to passengers, spending on local products, community restrictions, the port capacity and emissions per cruise ship. Although both cities are working on the issue of becoming more sustainable regarding cruise tourism, currently no action beyond introducing plans has been taken. Other indicators from the framework of Stefanidaki and Lekakou (2014) are barely incorporated into plans.

5.6 Sustainable cruise tourism in Tallinn

5.6.1 The sustainable aspects of Tallinn’s cruise tourism

Evidently, cruise tourism in Tallinn is not as big as in Barcelona and Venice. While Tallinn receives “only” 635,000 cruise passengers a year, Venice reaches more than 1.5 million and Barcelona nearly 3 million. Next to this, both Barcelona and Venice are also homeports and Tallinn acts only as a port of call which means the cruise passengers are in Tallinn for only one day and will not embark or disembark the cruise ship. However, issues concerning sustainable cruise tourism are apparent in Tallinn as well as, slowly but surely, local residents are getting a more negative position towards (cruise) tourism. Following the interview with Eero and Koit, the local population’s feeling that tourism is taking over and that the municipality is not doing much to stop it is growing.

However, by reviewing Tallinn’s cruise tourism sector on the basis of the sustainability indicators as used in this thesis, it becomes possible to determine to what extent Tallinn is sustainable. This means that it could be possible that some issues on which Tallinn’s cruise tourism is sustainable, for instance from the environmental dimension, are not discussed in this section although they are apparent. These issues are in that case not researched and thus not known for the researcher at this moment.

By reviewing the social dimension it became clear that Tallinn has no official laws that prohibit or restrict residents for undertaking certain activities during days that cruise ships dock. This means that the (local) government is not placing the cruise passenger above the local resident regarding laws
and jurisdiction. It does not mean, however, that residents do not feel and perceive restrictions. The two social indicators of public security and public health do not bring in any problems as both indicators are barely affected by the cruise tourism in Tallinn: in every city around the world thefts are present and passengers with medical issues will mostly be treated onboard which is acknowledged by the AIDA excursion manager and Maarika Liivamägi (Stefanidaki & Lekakou, 2014), thus these do not affect the indicators positively or negatively. However, the indicator of public health is also slightly related to the indicator of transportation which could be improved (see next section). The indicator on which Tallinn is definitely sustainable is the cleanliness as locals do not complain about any garbage or waste issues and tourists perceive Tallinn as a very clean city. Regarding waste, both excursion managers as the Port of Tallinn state that the cooperation between them is arranged well and is not producing any problems for the local residents. Keeping in mind that the experience of tourists is also part of sustainable tourism, the cleanliness is also fulfilling those as Tallinn is considered as a very clean and beautiful city and scores almost perfect following the survey of Visit Tallinn (Visit Tallinn & Emor, 2018). At last the indicator of archeological protection at which Tallinn is also quite sustainable. Until this moment it was not necessary to establish organizations or associations to protect certain architectural or historical attractions. Following the interviews, the city of Tallinn including the industry’s actors (tour operators, guides and cruise lines) are aware of the value of those attractions and pursue to sustain them by “teaching” the cruise passengers about it through excursions, stories and legends. This could eventually lead to donations to invest and renovate those attractions according to Maila Saar. However, the archeological places and culture are being commodified more, which could threaten the authenticity of the city (Bryman, 1999; Observations summer 2019).

Regarding the economic dimension, Tallinn is relatively sustainable as well, when it comes to income and employment. Although opinions differ about how much and who exactly profit from cruise tourism, it is clear that in general the whole city profits (although some might profit a bit more than others) following the interviews with the AIDA and Costa excursion managers, Liis Late, Maarrika Liivamägi, Maila Saar, Andrei Berezin and Janar Prutt. However, there are several ways in which the income from cruise tourism could become more sustainable. The indicator of employment is the most sustainable of the economic ones as it offers quite some extra jobs during the cruise season as Andrei Berezin and Maila Saar state. During the cruise season in summer, there is a great increase in demand for tour guides and for people working in the hospitality sector which is especially interesting for teachers (as a tour guide) and students (as a waiter et cetera). The masses of incoming cruise passengers bring additional employment for souvenirs and other retail shops and, according to local shop keepers, depending on the ships even more employees are needed during certain cruise days. Regarding the indicator of passenger spending, this is not necessarily sustainable but not unsustainable either. On average people spend around €60 in Tallinn which is mostly spent on excursions and retail products like souvenirs (Visit Tallinn & Emor, 2018). Though, compared to previous years it becomes clear that the average spending stays relatively constant (TNS Emor, 2014). While the average of spent money seems quite high in the financial context of Tallinn, it could be assumed that this is not fairly divided and thus unsustainable as it is mostly spent on excursions and only 30% of the passengers join those according to Lars and Maila Saar (Visit Tallinn & Emor, 2018). This makes it quite uncertain to state that this indicator is in fact sustainable.

5.6.2 Further improving the sustainability
In the previous section the sustainability of cruise tourism in Tallinn is explicated based on the framework of indicators. This showed that Tallinn is not sustainable on all indicators as not all indicators are discussed there. But even indicators that showed quite some signs of sustainability have room to improve and could contribute to even more sustainable cruise tourism in Tallinn. The way in which
Tallinn’s cruise industry could improve regarding sustainability is discussed in this section. Each indicator will be discussed one by one, meaning that even the already (slightly) sustainable indicators will be discussed as well.

**Ratio of residents to passengers**
The most mentioned unsustainable issue in Tallinn is the ratio of residents to passengers. Although it is perceived in various ways, it is clear that there is room for improvement on this. Local residents perceive this ratio the worst as, according to them, barely anybody lives in the old city center anymore and the ratio is becoming worse every year (Kotli & Koit, 2015). Though, even actors from within the industry notice that on some days the amount of passengers is probably too much for the city (Costa Excursion Manager, 2019; Makke, 2019). For other parts of the city, both the neighborhoods directly bordering the Old Town and the ones further away from the Old Town, there are no real problems which are related to the ratio of residents to passengers. These neighborhoods are not visited that much by tourists and those are mainly inhabited by residents. Improving this indicator seems easy as either the number of residents should increase or the number of passengers should decrease. However, the first option is difficult to realize with a limited amount of space and houses. As all the passengers definitely want to visit the Old Town, this is also quite hard to decrease according to Ingrid Berezin, Liis Late and Maila Saar. However, the ratio is not constant in the sense that some cruise days Tallinn receives 10,000 passengers, and other days there are none (Observations summer 2019). According to Maila, improvements could thus be made on this point since it is based on communication and cooperation between the cruise lines and their ports of call in the Baltic Sea (like the Italian business network contract) (Asero & Skonieczny, 2018). It is even possible that the Cruise Baltic takes the lead in this. By altering the spread of the ships over the cruise season (in the whole Baltic Sea Region) the maximum amount of passengers in every port of call could be decreased, lowering the pressure on destinations. In addition to this, it is possible for Tallinn to improve even more. Although the Old Town is a must see and it is not very spacious, it is possible to relieve the pressure on the Old Town. The local tour operators and municipality are willing to and are very keen to promote other areas of the city (Kalamaja, Pirita, Kadriorg et cetera), but this is appears not to be enough. Even within the Old Town a better spreading of the passengers could already relieve some pressure and improve the ratio of residents to passengers. First signs of plans for this are already initiated by a cooperation between the Port of Tallinn, the municipality and the University of Technology TalTech with some live updates about crowdedness in the city. However, Liis Late thinks it could be wise to involve tour operators as well as they provide guides for excursions for example.

**Community restrictions**
Related to the unsustainability of the ratio is the perception of restriction by locals. Because of the massive flows of passengers during cruise days, the locals feel that they are not able to live their normal daily life and are restricted in where they could go during the cruise days. One could think about commuting between home and work, but also about visiting restaurants, cafes, shops and recreational places like parks or squares as was brought up by Eero, Koit, Maarika Liivamägi and Maila Saar. Although this will not be solved completely, it could partly be improved in the same way as the ratio issue could be solved. This way, the crowdedness will decrease and locals will experience fewer restrictions.

**Public security and public health**
The public security and public health are two indicators which do not play such a role in the sustainability of cruise tourism in Tallinn. Incidents in which cruise passengers are involved are mostly thefts, which happen everywhere in the world and is not such an issue according to the AIDA and Costa excursion managers. The security for local residents is not affected positively or negatively in this sense.
This also accounts for the public health. Even if 10,000 cruise passengers arrive at the same time, there is no impact on public health: there is no higher demand for doctors and locals are still able to access health institutions.

**Transportation**

Focusing on the transport frequency, capacity and service level, there are matters to improve as the transportation indicator is at this moment quite unsustainable. This is majorly influenced by the passengers’ chosen mode of transport between the port and the Old Town. Even for a short distance, many passengers (who do not book an excursion) take a shuttle bus to the city center, which leads to overcrowded roads and traffic jams, especially during peak hours. Although this is also partly related to the number of passengers on a cruise day, Ingrid Berezin comes up with the idea to improve it by making the road to walk to the city center clearer by signage, and to make it more attractive by e.g. adding green and art. Another way to improve this indicator is by developing a tram or metro line. This is mostly a point for the municipality as it is an issue in the public space, though cooperating with the Port of Tallinn could be helpful as they are the starting (and finishing) point. Shuttle buses will never be banned as they will be needed for people that are less able to walk for example. However, the port could facilitate in this as well, because at this moment the shuttle buses are arranged by the tour operators. This means that every cruise ship has its own shuttle buses. This is not a problem during the embarking times in the mornings as the shuttle buses are completely full (Observation report 02-05-2019, Appendix D). However, as Ingrid Berezin mentions and is underpinned by observations, after one or two hours, the buses are barely used anymore but they are still going back and forth, almost empty (Observation report 02-05-2019, Appendix D). With one ship docked in the port, this is not a problem, but with four or five ships docked in the port, this means that four or five (almost) empty shuttle buses are constantly going back and forth to the city center. Some cooperation between the tour operators and the port could lead to fewer shuttle buses needed during off-peak. Regarding the transportation indicator, no further problems are occurring as the influence of cruise passengers on the frequency, capacity and service level of public transport is not influenced that much.

**Cleanliness**

As Tallinn is already perceived as very clean by the cruise passengers (Visit Tallinn & Emor, 2018) and the hosting community, there is no indication that this indicator needs to be improved or a plan needed on how to improve it.

**Archeological protection**

The last social indicator, focusing on the protection of historical places is also relatively sustainable. There are no existent associations or organizations established to protect archeological places for the effects of cruise tourism, though Tallinn’s cruise industry and especially the local actors are aware of the value of the archeological places. Cruise lines and tour operators see the value and need of those places and know that those should be protected. Nonetheless, they also see that those places are very important in terms of providing income. To ensure the existence of these places even more, it could be recommended to make sure that the tour guides tell the right story in an attractive way leading to almost “teaching” the cruise passengers and making them aware of their surroundings. However, although the medieval culture and architecture are highly appreciated by tourists and cruise passengers, it is also leading to Disneyfication of the Old Town, which might make it less attractive to both local residents (due to the theme park feeling) as tourists (due to a decline in authenticity) to visit the place (Bryman, 1999; Choi, 2012; Pellis, 2018). Therefore the municipality and the local industry need to make sure that the Disneyfication will not exceed its limits and the city will remain authentic.
**Income**

The indicator of income showed that the cruise industry in Tallinn is in general sustainable since both the city (indirectly) and companies involved in the cruise industry (directly) make a profit. The share of cruise tourism on the total share of tourism is not that high with only 14%. However, where the industry is stating that the cruise industry is profitable for everyone and eventually leading to an income for everyone, this is not a shared opinion following Eero’s and Koit’s opinion. Clearly, companies involved in tour operating, certain museums and restaurants are directly working in the cruise industry and thus profit the most. Eventually, the whole city is profiting as companies pay income taxes. The question is, however, are those indirect profits for the city and its residents in balance with the burdens. Based on the level of sustainability on the social indicators, this is highly questionable. Solving this is, however, also a responsibility of the municipality, as they have the possibility to reinvest the money earned by taxing. In this thesis there has not been done any research on “follow the money” and therefore it is not possible to state anything about it. The income received from cruise tourism is relatively high with €66 on average and can, therefore, be considered sustainable. However, the indicator could be made more sustainable when more money is directed to increasing profits from local Estonian products, especially to gain support from local residents.

**Employment**

Regarding employment, the cruise tourism industry is already economically sustainable as it generates quite a few jobs. Andrei Berezin brings up that during the cruise season, there is a high demand for tour guides and hospitality employees. Even in retail, like souvenir shops, employers like Eero experience an increase in demand for employees. However, in practice, these jobs are mainly taken by teachers (as tour guides) and students (hospitality and tour guides) as they are the ones who are able to speak multiple languages. Although the cruise season is thus leading to higher demand for employees and more employment, it is slightly fated for a specific group of people and it does not solve unemployment. By giving a decent education to residents of Tallinn and making sure that they speak multiple languages, residents (or Estonian citizens) should have the same chances to get employed in the tourism sector. Although this seems a noble pursuit, it is apparent already (Education Nation, 2019).

**Passengers’ spending**

The spending of passengers could be considered as quite sustainable as they spend more than €60 on average per passenger (Cruise Baltic, 2018; Late, 2019). However, since most of this is spent on excursions, it is clear that the sustainability of this indicator can be improved. This indicator could become more sustainable when more money is spent on local goods, for example on Estonian handicraft souvenirs. At first, it means the spending behavior of the passengers should be adjusted, they are eventually the ones who will spend their own money and thus decide on what they will spend it. A possible way to change this behavior may lie in the utilization of marketing strategies, but this is mostly on a psychological level. One other way is to balance the spending. As the excursions are now taking the biggest share with around two-thirds of the total spending (Cruise Baltic, 2018), this could be lowered leaving more money which could be spent on retail goods or food and drinks. Although this seems that the tour operators offering the excursions will lose a part of their income, this does not have to be like that as the price they offer the cruise line is way lower than that the cruise passenger eventually has to pay to the cruise line according to Lars and Maila Saar. By lowering only the cruise line prices for excursions, the passenger has to pay less which will leave him with more money to spend in the city while the tour operator still receives the same amount of money from the cruise line. Only the cruise line will see a small loss of income, which could be covered by a bit higher prices for the cruises or perhaps for food/drinks on board.
Startups
From the economic dimension, the indicator of startups is the least sustainable. According to Liis Late and Maila Saar, this lays in the fact that it is nowadays very hard to enter the cruise tourism industry in Tallinn as there are just a few big companies (tour operators) who have all the contracts with the cruise lines. For a new company it is hard to get in if all the cruise lines stick to their long time contracts and contacts they always had with the current tour operators. As a “newbie” you should take courage and have very low prices to get some of the contracts and prove yourself, though Maila Saar thinks that even with low prices it is a question whether or not a startup will survive. Although it is hard for new local companies to enter the cruise tourism market, it is not necessarily a problem as the quality is guaranteed in this way. On the other part of the cruise tourism industry, companies from the retail or hospitality side are continuously being established. For these sectors, it is not hard to start a new company or even test a new concept as Maarika Liivamägi mentions. However, even here it is hard to stay around for multiple years as every year some new restaurants or cafes open up.

Public investments
Lastly, there is the indicator of public investments. Until now the public investments into cruise tourism were not very high which shows that there is room for improvement. This indicator is highly related to the other indicators as investments could be done to improve the unsustainable or less sustainable indicators. Slowly the municipality is starting to invest in cruise tourism, rather than only attracting more tourists. Liis Late comes up with the example of the cooperation for developing an app to relieve pressure and make the crowdedness bearable. Though, other investments are probable and sometimes even strongly needed, for example investments in the infrastructure in order to reduce traffic jams. Other investments could be focusing on the livability inside the city or the spreading of passengers to other areas of the city. The fact is that for all investments the municipality should take the lead but should cooperate strongly with the other actors involved in this specific domain. This is also what those actors (Ingrid Berezin, Maila Saar, Eero, Koit and Janar Prutt) expect from the municipality, that they take the lead and the responsibility. The main lesson to learn in this indicator is therefore that the municipality should take action. This should happen as soon as possible since current problems could be solved sooner and worse situations could be prevented. Though, according to Eero, Koit and Maarika Liivamägi, just spending money as an “investment” is not enough: sensibly speaking the investments should be real investments and really beneficial for the cruise industry or the domains connected to it (the visitors, the industry, the environment and the hosting community).
6. Final findings and discussion

6.1 Reaching sustainable cruise tourism in Tallinn

In the previous chapter, a step by step approach was carried out based on the sub-questions as stated in Chapter 1.3. Now it is important to come to a more general assessment to answer the main question of this thesis:

*How can the mass-tourism caused by cruise ships in Tallinn be sustainable on a social and economic level?*

As may be clear by now, it is difficult to state what sustainable cruise tourism should exactly look like. No destination is the same and cruise tourism is different in every destination. Tools and practices that have worked in a destination like Venice, do not guarantee that they will work in Tallinn. Though, they will definitely help by developing a sustainable policy as they could serve as examples and steer Tallinn in the right direction, or using the famous quote: “standing on the shoulders of giants” (Newton, 1676). Mistakes that others have made in the past should be used to avoid making comparable mistakes in the future.

Although this thesis does not serve as a ready-to-use policy program or vision on how to govern sustainable cruise tourism, it can certainly help steer Tallinn in the right direction and help to determine what it should focus on. It provides an insight into what has to be done to improve the social and economic sustainability of the cruise tourism industry, keeping in mind the several parts of sustainable tourism. This means that the needs of the industry, the visitors, the environment and the hosting community all have the same priority.

The most important part is by far the over-crowdedness of the city during the cruise season. Although it has some positive (economic) impacts, it is also disrupting the daily life and leading to more resistance among the local population as was brought up by Eero, Koit, Marju and Mari-Liis Makke. This issue is clearly very important since it influences various other indicators of sustainable tourism. The masses of incoming cruise passengers do not only lead to a lower ratio of residents to passengers but also negatively contribute to a perception of community restrictions and influence transportation times. On the other hand, it also leads to higher overall income, employment and the protection of cultural heritage via donations. However, it is problematic that there is an uneven distribution of all the cruise passengers during the season as on some days there are no ships docking and on other days five ships will dock (Port of Tallinn, 2019; Observations summer 2019). The easiest way to solve this is by simply distributing the ships more evenly over the season, which could be done by the Port of Tallinn as they are responsible for schedule planning. However, Tallinn is not the only port of call for ships, thus strong cooperation between Tallinn and the other ports and Cruise Baltic is needed. Although this could lead to a great relief of pressure on the city, it could mean on the other hand that from the beginning of the cruise season around mid-April till the end in October, every single day ships are coming and there are no days to rest.

Another way to relieve the city is cooperation between tour operators and their tour guides during excursions. By controlling the routes, the flows of passengers could be partially managed. While the municipality is now looking to develop a “live-action” app together with the port of Tallinn and TalTech University, it is wise to involve the tour operators in this process as well.

Moreover, the excursions provide some opportunities as well. Where the tour operators and municipality are trying to promote different excursions and places outside of the Old Town, a certain re-
Responsibility lays with the cruise lines too. Before docking, the cruise lines already give some information about their ports of call and they offer their passengers the excursions provided by the tour operators. By promoting and providing information about parts outside the Old Town, they could try to influence the behavior of their passengers and try to send them to those places instead of just the Old Town. Eventually, a less crowded Old Town will also improve the experience of the passengers themselves (Observation report 27-04-2019, Appendix C).

Lastly, the municipality could start making use of cruise passenger taxes. This works on two levels, as it is a way to “scare” away some passengers by making it more expensive for them and it is a way for the municipality to gather more (direct) income. However, these taxes will definitely get some negative critics from cruise lines and tour operators as it could be understood as a governmental/societal way to decrease interest in cruise tourism.

The sustainability of Tallinn’s cruise tourism industry is however not only based on the masses of passengers visiting the city. To make it more sustainable, the focus of the actors within the industry should also lay on issues like infrastructure and economical improvements. Regarding the infrastructure, the municipality should invest more to solve problems regarding commuting between the port and the city. This could mean that they (together with the Port of Tallinn) invest in signage and more attractive sidewalks, broaden the roads or develop a tram or metro line for example. Better use of the shuttle bus services between the port and the Old Town could also be beneficial for making transportation and infrastructure more sustainable. As the occupation of those buses differs greatly during the days, it is recommended to share the shuttle buses with each cruise line instead of using three or four shuttle buses per ship. To achieve this, cooperation between the port and the cruise lines and cooperation between the cruise lines themselves is needed.

Regarding the economical improvements, the focus should mostly lay on the spending of cruise passengers as the income and total profit of cruise tourism at a destination is rather low (Brida & Zapata, 2010; Jaakson, 2004). Although statistics show that the profit in Tallinn is relatively high with €66 on average, this is spent mostly on excursions (Visit Tallinn & Emor, 2018). Furthermore, the cruise lines profit the most from these expenditures instead of the local industry (including the tour operator) which is actually selling the product. To reach a more sustainable level regarding income and profit, the passengers’ spending should thus be slightly changed towards higher spending on local products and lowering the cruise line prices for the excursions. By doing this, the local industry will gain more profit and the passengers will probably get more for the same amount of money, which makes both the passengers happier and the locals even more supportive towards cruise tourism. The cruise lines will probably see a small income drop but could earn money via cooperating with each other, for example by sharing shuttle buses.

6.2 Discussion

This thesis’ research aimed to gain insight into the process and consequences of cruise tourism in Tallinn, specified on the social and economic sustainability. By using the framework set by Stefanidaki and Lekakou (2014) and making use of the UNWTO’s definition of sustainable tourism (UNEP & WTO, 2005) it became clear whether these frameworks are suitable and applicable to conduct a qualitative research towards sustainable cruise tourism. One thing that became very clear is the role of context, which was shortly mentioned by Stefanidaki and Lekakou (2014) and by the UNWTO (2005). Where the UNWTO was speaking of hundreds of tools to measure sustainability, they already stated that not all are needed for this purpose as their applicability depends on the destination. Related to these
measurement tools is the indicators framework provided by Stefanidaki and Lekakou’s, which is developed by many experts out of the field of cruise tourism and which consists of 34 different indicators divided over three domains (social, economic and environmental). The authors mention the difference between core and secondary indicators where the core indicators are applicable for (almost) all destinations and the secondary are context-dependent or could give more specific information about the core indicators. The indicators they label as secondary and thus as context-dependent is correct. Though, based on this thesis, some core indicators should be considered as secondary indicators as well.

One indicator that could be considered as a secondary indicator is the one of community restrictions. Sticking to the explanation given by Stefanidaki and Lekakou it became clear that this is not apparent in Tallinn and it could be assumed that in almost every destination in the Western hemisphere, the local government will not apply any restrictions to their own citizens. Though, if the perception of citizens and thus the feeling that they are excluded in favor of the cruise passenger, is brought into play, then this indicator will probably be a core indicator. In Tallinn, it became obvious that the local residents get the feeling they are not welcome anymore or are restricted in their daily life and at the destinations of Barcelona and Venice similar issues arose.

The indicator of public security could also be considered as a secondary indicator. Although there are sometimes some small incidents happening, this is not more than in other (European) destinations, both cruise destinations as non-cruise destinations. As it is not that much apparent, it could only give some extra information and is not necessarily influencing the sustainability of a destination. This raises the question of whether this should be a core indicator or not. Especially when the indicator of health and wellbeing is considered as a secondary indicator while this one is relatively the same as the indicator of public security.

Furthermore, the way these indicators were assessed in this thesis can be critically reflected. This thesis used the framework of indicators to conduct a qualitative research and thus made use of the indicators in a qualitative way. Stefanidaki and Lekakou propose to measure almost all these indicators from a quantitative view and link them to statistics. It makes sense following them and doing this as it immediately gives a quick overview of the level of sustainability in sense of statistics. However, the needs of stakeholders could best be expressed in qualitative data and results, instead of statistics.

This could also be the starting point for further research. This thesis only focused on the social and economic levels of sustainable cruise tourism and not on the environmental level, which is also covered by the framework of Stefanidaki and Lekakou. If there are already some discrepancies in the framework of the social and economic level, it is possible that they are also present on the environmental level as well. Furthermore, this thesis only used qualitative research, and barely used any statistical evidence. It is possible that measuring sustainability via these indicators in both a qualitative and a quantitative way leads to an even better understanding of the sustainability of cruise tourism in Tallinn or any other destination. However, when new policy plans for sustainable cruise tourism are written, it is recommended to base this on qualitative data.

The use of statistics is therefore also a point of improvement for this thesis. During the interviews with the respondents, the use of some statistics could have contributed to an even better overview and understanding of certain specific topics. For example, indicators like the income or employment are easier to analyze when they are quantified, instead of just being qualified as in this thesis. Next to making use of such statistics, it would have been beneficial if those kinds of indicators were operationalized in a way that they were more applicable for qualitative research.
Furthermore, this thesis contributed to the knowledge about the social and economic sustainability of cruise tourism and its processes and consequences. This enables the actors involved in this industry to adjust their policy in a sustainable way. Although it is not possible to compare Tallinn with Venice and Barcelona, it is helpful to look to other destinations to understand the problems they encountered and the way they solved them. Although it can still be justified, the choices for these destinations seemed logical at first as they are one of the most well-known ports of cruise tourism and on the European mainland, but other destinations could have been a better fit. To start with the fact that cruise tourism in the Mediterranean is year-round and not only a few months like in the Baltic Sea region. A city that is also in the Baltic Sea region would have been a better choice (Stockholm or St. Peterburg for example). Next to this is the fact that Barcelona and Venice operate as a homeport and not only as a port of call like Tallinn.

A last point of consideration is the fact that even though things change fast nowadays (the planning, contracts and policy measures for the next years are already in the pipeline), all lessons to be learned based on this thesis can only be effective on the long term. While conducting this research, contracts and plans were already being made for the years 2020 and 2021, meaning that the researched issues in this thesis could be outdated when the thesis is finished. Furthermore, while writing this thesis, the season of 2020 was about to start, although COVID-19 had its impact on cruise tourism. Of course, research like this takes time, though it would have been wise to make an even stricter research planning. As the researcher went to Tallinn for five months, it would have been perfect if in the very first month of the season (April) all the data was collected. During the other months, the data analysis should have been done as well as the writing of the thesis. In that case, the thesis could have been finished around the end of the summer in August/September and it could have been used in evaluating that cruise season for preparing the next season and apply the gained knowledge of this thesis to sustain the cruise tourism industry in Tallinn.

Although it has its threats, at this point the cruise tourism industry in Tallinn can be considered as a rather sustainable industry. The fact that this sector in Tallinn keeps growing and various stakeholders are aware of the impacts, makes us optimistic about the cruise tourism industry in Tallinn. We expect to see fruitful cooperation between stakeholders in such a way that this sector remains sustainable for everyone.
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