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THE CRUISE TOURISM IN THE CARIBBEAN SPACE: SPATIAL RATIONALE AND DEVELOPMENT RATIONALE

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Abstract: *The Cruise Tourism in the Caribbean Space: Spatial Rationale and Development Rationale*. The Caribbean Sea is a symbolic area for the cruise. Despite the worldwide reputation of its destinations, the postcards which boast the charm of the region, the cruise industry analysis allows us to spotlight certain limitations and contradictions about its present development ways. The product "the cruise holiday" has evolved considerably: from now on it is the liner itself (consumption temple and floating enclave) which has become the cruiser's destination. Its opening to a mass tourism, the gigantic shape of the ships, the rationalization and improvement of costs within an ever more globalized and capitalistic market are enough premises which need to be analyzed to understand the recent evolution of the cruise and the renewed challenges for the receiving territories.

Key words: cruise tourism, destination, Caribbean space, floating enclave

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Introduction

The Caribbean Sea which includes more than a thousand islands of half – breed cultures, from the coasts of Florida to the archipelagos of Venezuela constitutes a privileged area for cruising/cruise. A cruiser within the two worlds chooses to travel in this area furrowed with more than 30 liners, mainly outside the rims of the boreal winter.

The Caribbean space made of a series of islands bathed by the sea of the Caribbean spreads over more than 4 million square km. This space discontinuous in terms of political systems brings together a mosaic of territories with different statuses: 13 independent island states, 16 territories are under North – American and European rule (France, the Netherlands, the United Kingdom) and a dozen continental islands. The gaps between the living standards are tremendous from one country to another (Duval 2000).

The most prosperous economies as the ones of the American Virgin Islands (16,890 $ US/capita) and British (14,210 $ US/capita), the Bahamas (14,960 $/capita) and the Martinique (14,360 $ US/capita) mix with some of the poorest independent states (Jamaica: 2,610 $, the Dominican Republic: 2,130 $ or Haiti: 510$ US).

The cruise tourist market is dominated by the most powerful North American **origin countries** which directs this industry and turns this activity to life. The major cruise harbour infrastructure is located in Florida, in the region of Miami, a genuine cruise world capital. For over 20 years, the boom of this activity sector is estimated at 20 million in 2004 (WTO), versus 8 million in 1998 and 1.4 million in 1980. In the Caribbean, the total number of cruisers counted from the receiving destinations amounts to 20 million (The Caribbean Tourist Organization). In this area the number of cruisers is quite similar to that of sojourning tourists (to the order of 25 million while at a world level it represents less than 3 % of the international tourist flow).

The Cruise tourism represents a significant example which highlights the development rationale which prevails today in the Caribbean space. In fact, the cruise industry, controlled by some powerful ship owners has entered the mass stage, supported by the new economic reality which involves a spatial reorganisation. The goal of this study is to present the conditions of cruising places in the Caribbean area and to spotlight the main stakes of the Caribbean territories.

I. From the Invention of the Cruise to the Advent of Mass Cruising in the Caribbean.

The young history of cruise tourism undergoes three time stages. First the premises of cruising are laid in the Caribbean during the '20, namely two decades after the launching of the first liner for cruising purpose (the "Sunniva" in the Scandinavian harbours of the Baltic Sea). In the past the first voyagers in the sugar cane islands borrowed ships meant first merchandise transportation.

In the beginning of the 20th century, the building of a new original tourist supply, consecrated exclusively to cruising, and which is clearly cut from the great transatlantic crossings is the outcomes of more determining factors.

First, we need to take into consideration the context of prohibition in the United States where cruising could mean an outlet for a few privileged who would leave their country temporarily and its waters to sail in the northern Caribbean, between the Bermudas, the archipelago of Bahamas and regain the unavoidable city of pleasures: i.e The Havanna. We also have to take into account the crises of 1929 which paradoxically, has brought benefit to the cruise. Actually certain ships owners in difficulty, faced to the consequences of the crises and mainly the slackening of the much enhanced transatlantic links, by the adoption of a strict immigration ratio, have engaged upon a reconversion to the benefit of the emerging sector of cruise in the warm seas of the Caribbean. It is worth nothing that there was a re-display of ships and not the set up of especially-designed buildings for this emerging industry. The progress of the cruise was modest in the following fifty years. The Second World War has stopped it and its re-launched was humble during 1950-1960.

The volume of consumers was still low and the old ships were less and less adjusted. The end of the exploitation of liners in France in 1974 has marked the advent of this age. The cruising industry has only found its boom along with the progress in terms of air transportation which opened new territories for the international tourism across the world.

The second decisive stage for the cruising industry can be traced during the 1970's with the installation of new enterprises, mainly the Norwegian ones on the market. They come to re-launch a market which lay in the hands of few founders. These new ship owners represented by the Norwegian Cruise Line (ex-Norwegian Caribbean Lines which re-launched France, re-called "Le Norway" in 1977) and the Royal Caribbean Cruise Line and the Carnival Corporation (1974) set up in the Caribbean and invested in the harbour bases of Florida. They elaborate genuine short-term tourist products, mainly for a week only, meant for the pleasure of cruising within the most impressing liners (70,000 tons), planed for this purpose. At the heart of the edifice there is the pool rimmed by deckchairs, areas meant for entertaining and sport, the liners take the shape of a small floating city with all the necessary services and trades and more than that.

Starting with the late '70 the basis of mass tourism is laid. It is at this time that were built the lavish ships such as the Song of America, the number of cruisers has doubled to reach 7.75 million in 1990 (cf. table 1). The supremacy of the North-American customers is still in place. But these voyages, at other times considered as reserved to the rich retired has widened to more customers. The prices go down under the conjugated effects of large liners, the time diminishing of the cruise holiday and the re-organization of itineraries.

Table 1. Cruise tourist arrivals to Caribe (1980-2004, thousands)
Source: *Caribbean Tourism Organization*

Years	Cruisers	% evolution
1980	3 805	-
1981	3 590	-5,7
1982	3 455	-3,8
1983	3 550	2,8
1984	3 720	4,8
1985	4 300	15,6
1986	5 000	16,3
1987	5 600	12,0
1988	6 340	13,2
1989	6 710	5,8
1990	7 750	15,5
1991	8 700	12,3
1992	9 400	8,0

Years	Cruisers	% evolution
1993	9 610	2,2
1994	9 776	1,7
1995	9 881	1,1
1996	10 954	10,9
1997	12 089	10,4
1998	12 434	2,9
1999	12 155	-2,2
2000	14 538	19,6
2001	14 892	2,4
2002	15 957	7,2
2003	17 966	12,6
2004	19 848	10,5

The third stage takes place in the 1990s. It is the outcome of the initiatives taken 20 years earlier. The gearwheels of mass cruise tourism are operational, the fleet is renewed, and the tours are rationalized and the product improved. The number of active ships diminishes (less than 1,400 ships during the five last years) and the gigantic "Grand Princess" is launched which can embark 2,500 passengers, the "Carnival Destiny" 3,360 passengers and 1,058 crew members. The buildings programs aim from now on to build ships of 6,000 places and even more, as announced by the Royal Caribbean (with the Genesis Project for 2009), the super-liners now become the mega-liners of 220,000 tons. The gigantic shape taken by these ships can cause some serious trouble for the harbours deprived of the appropriate infrastructure. These ships meant for the mass cruise always intermingle with some other less gigantic ships meant for the high-class customers. The average price of a one week all-inclusive cruise is of some 500 US$ / person. Accommodation is in the cabin, the on-board food and entertainment of the liners are included within the price. These appealing prices attract new middle class customers while some other offers aim for the youth (such as the honeymoons). The average age of the cruisers has started to rejuvenate to set itself at 52 years instead of 60 years in 1989.

The cruising industry is controlled by some powerful companies. The two important ship owners which dominate this area are Carnival Corp-Princess-Cruises which now controls 47,2 % of the cruising traffic in the Caribbean and the group Royal-Caribbean-Celebrity cruises in a proportion of 35,6 %. This implies that the two powerful groups have transported more than 80 % of the passengers in the Caribbean in 2003. Far behind, the Norwegian Cruise Line holds 7,9 % of the market (Cruise Industry News 2006).

The Carnival Corporation comprises very important cruising companies such as the Carnival Cruise Line, the most important cruising operator in terms of number of passengers transported, the Holland America Line, the Costa Cruises, the Cunard Line, the Seabourn Cruise Line and Windstar Criuses the group has purchased the P&O Princess in 2003.

II. Cruising in the Carribbean: Spatial Concentration and Specialisation

Opening to the mass tourism, gigantic liners, rationalization and cost improvement are enough parameters which trigger the recent evolution of cruising geography in the Caribbean space. The restructuring of the cruise translates in the space by a recentering of the circuits and an enhanced polarization of the flows to the benefit of some major destinations, of the first rank, which receive more than a million cruisers : Cozumel (Mexique), Puerto Rico, the American Virgin Islands. These destinations, associated to the Caïman Islands, Saint-Martin, the Bahamas and the Jamaica, concentrate three quarters of the vacationers in the Caribbean (cf. figures 1 and 2).

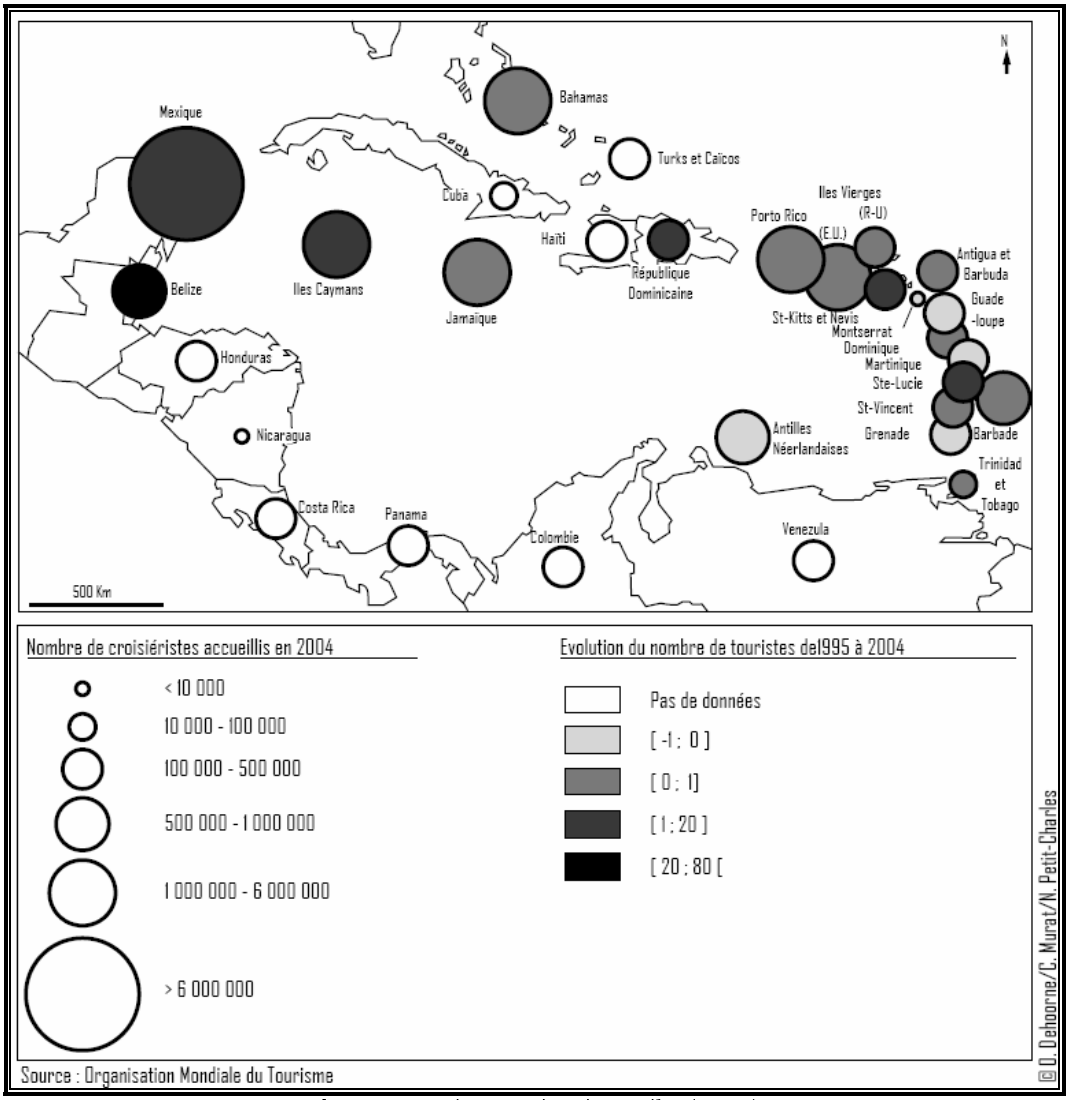

Figure 1. Cruise Tourism in Caribe (2004)

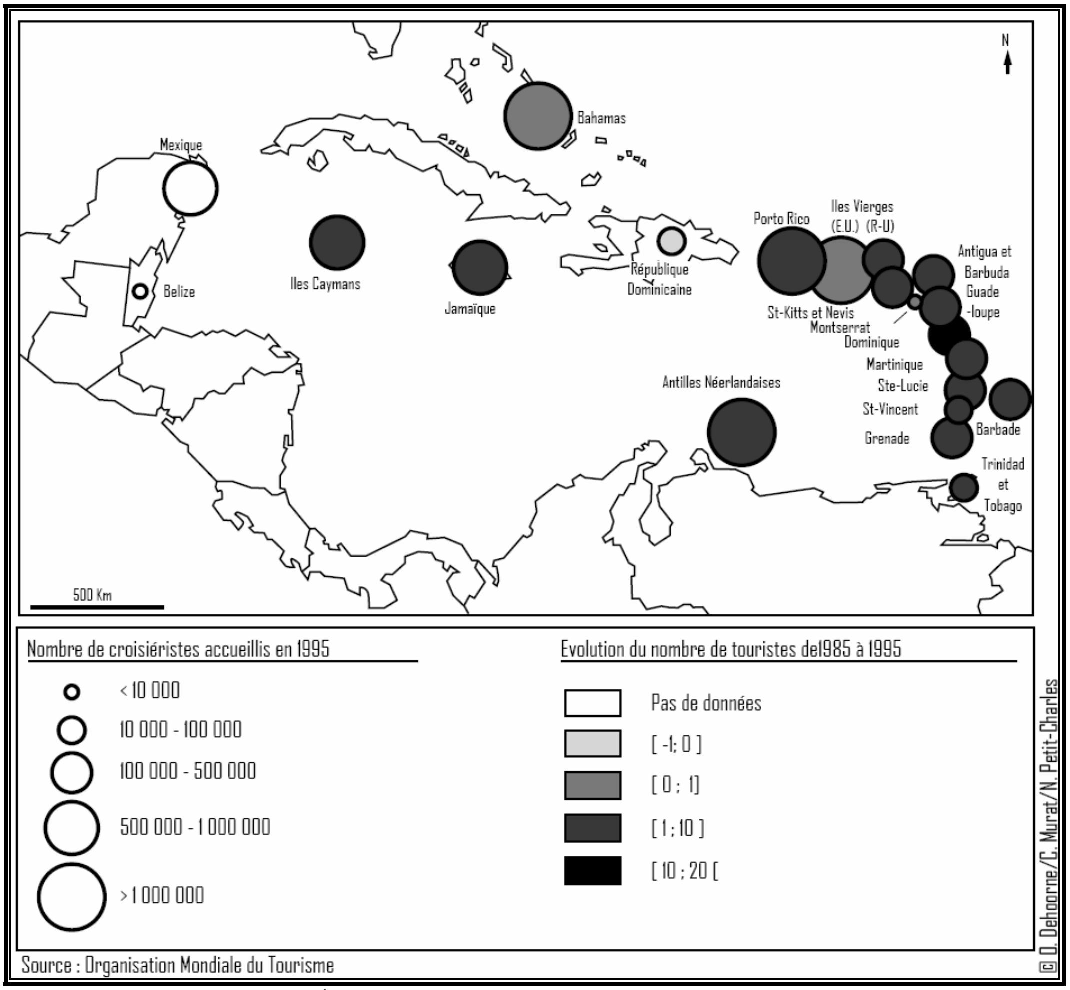

Figure 2. Cruise Tourism in Caribe (1995)

This mass tourism is most obvious in the western part of the Caribbean basin (Costa Maya, Cancun, Cozumel, Playa del Carmen in Mexico, Belize City in Belize, Colon in Panama, Key West in Floride, the Cayman Islands, Ocho Rios in Jamaïque etc.).

The activity volume has grown four times during the last ten years. This western area now concentrates 46 % of the cruise flow in 2005 versus 27 % in 1995. On the other hand the western and southern parts of the Caribbean, privileged by the cruise companies until the end of the 90s also witness a drawback in their activity. Their market share is no more than 34 % in 2005 versus 57 % a decade earlier. Some well established destinations such as Saint-Martinmaintain their position while other small islands witness a clear loss. This tendency which privileges a reorganization starting from some engine territories has precipitated as a result of the 11th September 2001 attacks. The companies choose more the destinations closer to the United States of America, such as the Bahamas (most of which has passed from 16 % in 1995 to 20 % in 2005), the Cayman Islands and Puerto Rico, better secured and less expensive. The stopovers in the western part of the Caribbean, mainly those from Cosumel are twice closer than the ones in the Lesser Antilles and therefore even less costly in terms of fuel consumption, a thing which has also become an unavoidable parameter from now on.

Geographically, the region of the Caribbean absorbs 60 % of the North-American cruise industry. The harbors of Florida (Miami, the left-hand side of the Everglades, Tampa and Carnival) and San Juan are amidst the layout (figure 3).

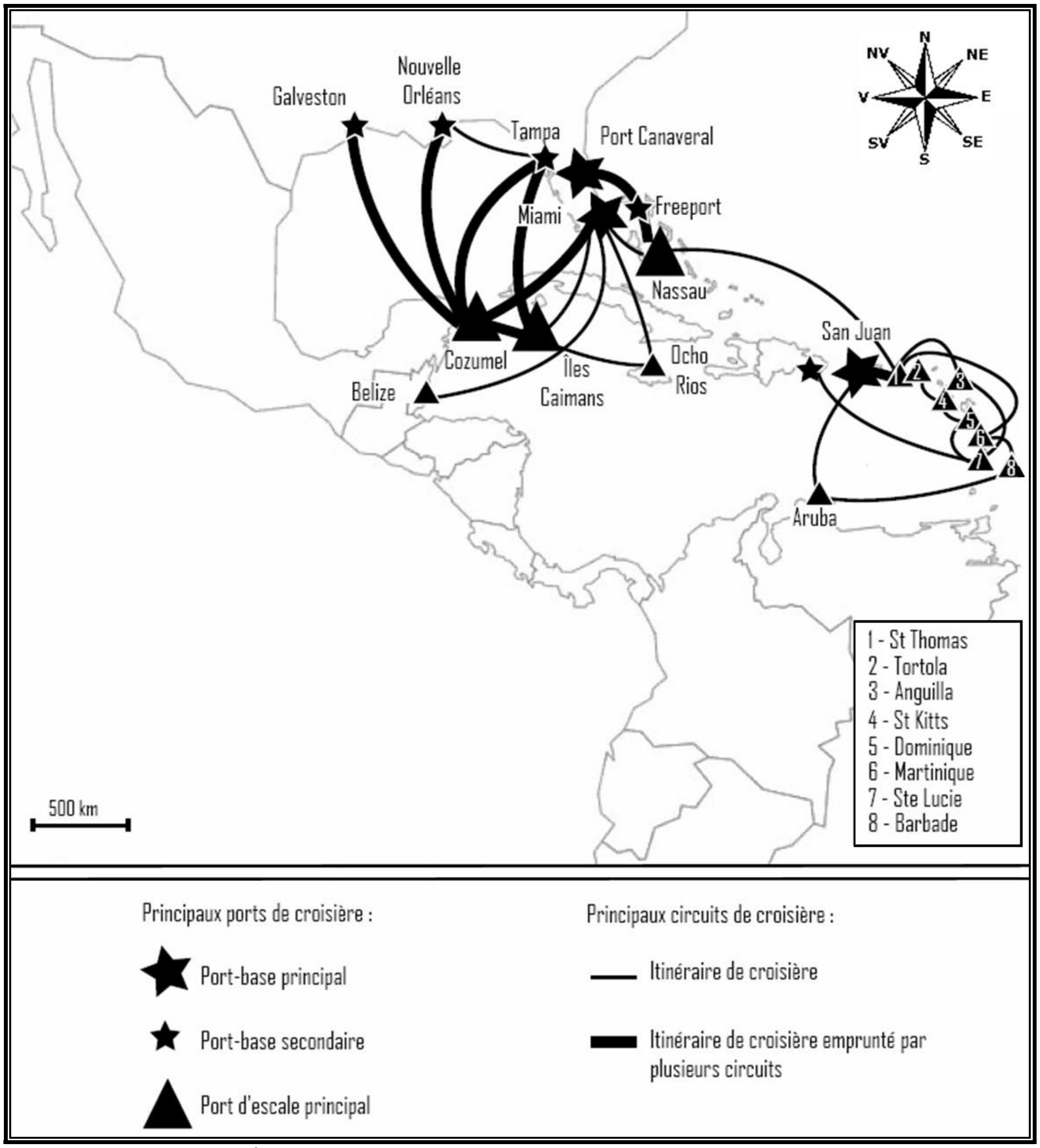

Figure 3. The main cruise itineraries in Caribe (2007)

The competition among the harbors is fierce for those who desire to settle themselves as ports of call resembling the image of Pointe-a`-Petre (Guadeloupe), Santo Domingo (the Dominican Republic), the Barbados, etc. The stakes around these harbors are huge. Besides the heavy investments necessary for the infrastructure which allow them to receive these ships they also need to have regular air service, at interesting prices with the North American European issuing metropolises of the cruisers, hotel structures which can ensure the transit nights, all this in a secure environment.

At present, the ports of Florida are close to saturation and more ship owners; among which Carnival have dislocated ships leaving for San Juan, namely the tours to the Dominican Republic also follow this direction playing the card of the accessible European clients due to their air devices which support the seaside tourist resorts of the country.

We also have to take into consideration the evolution of the products which privilege more the short stays: the most sold products of the cruise are from 3 to 4 days and for a week which surpass the classic 10-day circuits, 14 and 21 days. Now formulas propose 2 or 3-day trips and these changes have consequences in terms of the itinerary establishment and stopover choice.

III. New Stakes and Challenges of the Cruising Tourism in the Caribbean.

1. *Cruising destination, as the floating tourist bubble becomes the destination*

The innovation, the quality and the diversity of on-board products, linked to a rational management of the cost are the company's main targets. The cruise ship acts like an autonomous sojourn centre (Wood 2004, Weaver 2004), designed as a festive tourist bubble built in a park-looking background with a floating theme; a premise which facilitates the emergence of a new operator in the field of cruising such as the Disney group (2006: 265000 cabins, 3,9 % of the market). Cruising gives the opportunity to see the world, to cross "typical" places with their cultural heritage and grasp the atmosphere on board of this protective bubble. These mobile sojourn places fit Judd's (1999) concept of a "tourist bubble" and the "enclave resort" (Pearce 1989, Freitag 1994, Shaw & Shaw 1999, Cole 2004, Dehoorne 2006). They grant the customers an exclusive space, controlled, under surveillance in a secure environment exclusively dedicated to the tourists and the employees which use it.

In this context, the time passed by the consumer outside the liner is much reduced and the trips on land occur within other privileged enclaves, sometimes designed for the exclusive use of the cruisers such as Mahahual on the Costa Maya. These enclaves can also be directly controlled by the ship owners. For instance, companies such as the Princess Cruises and Disney Cruise Line possess their own islands in the Bahamas Archipelago and the Royal Caribbean International owns a sector of the Haiti coastline in the Labadde. They are also the owners of private clubs reserved for their customers in their privilege ports of call. The designing of the product directs the cruisers' expenditure, which rather relates in a certain manner to the "captive consumers" and leads us to wonder about the economic revenue for the receiving territories.

2. *The complexity of the stakes and the economic interests*

The economic relevance of the cruise needs to be understood at more levels. According to the yearly study commissioned by the International Council of Cruise Line – ICCL (Rinaldo 2006), this industry has triggered a 30 billion US dollars economic activity in the US in 2004 and some 316000 work places for incomes amounting to approximately 12, 4 billion US dollars. The sector continues to boost at a world level: eight new ships were put in service in 2004 with a capacity of 25000 individual cabins and 32 ships needs to be delivered from 2006 to 2010. Most of the revenues of the cruising remains in the origin country, namely in Florida and in the harbours which grant the most of logistics.

In the ports of call, the revenue stems from the direct expenditure of the cruisers, of the taxes wired by the passenger and the parking rights of the ships. Taking into account these exploitation strategies of the cruisers which concur to the diminishing of the contacts among their consumers and the receiving territories, the direct expenditure in the receiving harbours is limited and highly specialized. They are very variable from one destination to another.

If the average expenditure in the port of call is estimated to 109 US dollars according to the study of Price Waterhouse Coopers (Rinaldo 2006), this sum reaches 269 US dollars in the American Virgin Islands, versus 72 US dollars in Jamaica and precisely 18 US dollars in Grenada. The stopover of a 3000 passenger ship can easily inject up to 100000 euros in the economy of the island but it should be taken into account the nature of the expenditure which primarily favours the duty free shops from 45 to 67 % (Pattulo 1996: cited by Logossah 2007) and secondarily the attractions and trips (17 %) and the restoration (8 %). The outcome of the cruising for the local economy is far from being as beneficial as those of sojourn tourism.

3. *The dilemma of small islands*

The islands of the Caribbean need to engage into supplying the most efficient harbour infrastructure for the ever more imposing ships and the investments to bear with are enhanced by the gigantic ships (cf. table 2.).

Table 2. Recent and future harbour planning in the islands of the Carribean

Aruba	Renovation of the two shipping terminals for the large scale ships (mega ships) namely the ones aimed for vacationers' transportation
Antigua	New cruise and passenger terminal.
Bahamas (Freeport)	Re-planning program of 10,9 million US dollar meant for passengers, namely a centralized registration platform, comprising an anchorage for huge ships
Barbuda	Two new anchorages for the huge cruise ships.
Curaçao	Two new T-shaped keys built in Willemstad and the building of a second terminal for the receiving of liners
Grenada	25 millions US dollars investment in harbour infrastructure for the ships and passengers' receiving
Guadeloupe	Building of a new cruise terminal in Pointe-à-Pitre and a cruising village
Jamaica	Construction of a theme park and a park with historical attractions
Puerto Rico	Building of a new key n° 3 and the renovation of the 12,13 et 14 keys for the cruise.
Saint Martin	New cruise terminal which can receive more than four huge liners, airport renovation in Grand Case and enlargement of the infrastructure for taxis and buses.
Saint Vincent	15 million dollar investment for the cruise terminal.
Sainte Lucia	Set up of a new specific location meant for the cruise in Pointe Séraphine to welcome passengers.

Most harbours of the Caribbean were designed to receive ships whose size was generally less than 150 m. The planning of the new harbours with deep water is necessary. Nonetheless the real challenge is the improvement of their result so that the investments in terms of harbour planning are acceptable. But the economic revenue is limited and the competition is fierce among the islands, namely within one island as the Dominica between the harbours of Portsmouth and Roseau; the international companies favours the one which detains the best services for the least cost (Logossah, 2007). Despite all this, these territories can they neglect cruising and its tremendous impact in terms of image? Each destination undertakes to display in its advertising campaigns the poster with the most imposing cruise ship received, as a quality warranty certified by these one-day visitors.

CONCLUSION

The cruise industry has evolved considerably during the last years. The Caribbean space holds a capital place in this market, ever more globalized and capitalistic, mainly organized starting from the harbours of Florida and the extra – Caribbean capitals. The economic and trade rationale of this industry, which moves an ever larger volume of tourists slips to the receiving territories which are not able any longer to negotiate the economic conditions which can support their development.

Cruising reveals now a bubble tourism which the captive consumers leave temporarily to cross certain exotic places staged within some territorial enclaves. The strategy of the great ship owners which aim to boost their revenue through the expenditure control and therefore the consumption of their clients are assured by the present preoccupations in terms of safety, legitimate and withstanding which account for the unfolding of these sojourns within protected tourist bubbles.

In the present context concerning the economic rationale which prevails in the cruise industry, a number of small islands interrogate on the opportunity to withstand cruise tourism. The disengagements are already effective in certain destinations (such as the Martinique and the Guadeloupe) (Dehoorne 2007). Three types of arguments support this statement: primarily the impact on the local economy is far from being as expected (we do not need to forget the importance of the investments which need to be accomplished to hold the appropriate infrastructure to receive these imposing ships); secondarily the present development of the cruise (whose control slips the ports of call) are in line with the sustainable development projects of these islands and the preoccupations for the ecology are serious. Last, the much boasted statement by the professionals who assert that the cruiser would return to spend his\her future vacation in those places is out of question. The field surveys certify the specific profile of this visitor who evolves in a sweet festive carefree environment of the ship, dotted by a series of short stopovers. The product “the cruise holiday”, materialized by the liner, which embodies the temple of consumption has become a destination in itself (Wilkinson 1999, Wood 2000).

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