

Global Impacts and Trends of the COVID-19 Pandemic on the Cruise Sector: A Focus On South Africa

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Abstract

Cruise tourism is one of the major growth areas of international tourism, and the impact of cruise tourists on a national economy is similar to that of other foreign visitors. The cruise industry has, however, continuously faced exposure to various types of health risks, which can develop into health-related crises, to which both passengers and crew members are vulnerable. The coronavirus 2019 (COVID-19) pandemic has reached a critical situation on a global scale and is severely impacting on the global cruise tourism industry. This paper seeks to examine the impacts of the COVID-19 pandemic on the cruise tourism industry globally and in South Africa specifically. Desktop research was undertaken to gather data and insights on the unfolding global pandemic and its effect on the cruise sector. Secondary data from various national and international organisations was analysed, as well as current news reports and academic literature. The data indicates that the cruise sector is one of the hardest hit sectors of the tourism industry, and the economic impacts of the COVID-19 pandemic on this sector is devastating. The data further implies that the future of the cruise industry looks bleak, especially due to the reputational damage the sector is currently faced with.

Keywords: Cruise industry; COVID-19 pandemic; economic impacts; reputational damage

Introduction

The coronavirus 2019 (COVID-19) pandemic, which was declared a pandemic by the World Health Organisation (WHO) on 12 March 2020, has substantial impacts on the global economic, political, and socio-cultural systems. Sigala (2020:312) claims that “the nature, the unprecedented circumstances and the impacts of the COVID-19, demonstrate signs that this crisis is not only different, but it can have profound and long-term structural and transformational changes to tourism as a socio-economic activity and industry”. The international economic impact of the COVID-19 pandemic on the tourism sector are enormous, and shows that international tourist arrivals are estimated to drop by 78%, causing a loss of US\$ 1.2 trillion in export revenues from tourism and 120 million direct tourism job cuts (United Nations World Tourism Organization (UNWTO), 2020). The UNWTO claims that these impacts are seven times the impact of September 11, and the largest decline in the history of tourism.

The cruise industry is one of the fastest growing sectors within the tourism and hospitality industry (UNWTO, 2020). However, despite the growing popularity in cruise tourism, the sector has been increasingly exposed to various types of health risks, such as seasickness, nausea, foodborne diseases and viruses, which puts passengers and crews at serious health risks. These health outbreaks can cause catastrophic impacts on the cruise industry, and can influence passengers’ impression of a cruise line, and also their future

likelihood of purchasing a cruise product (Liu & Chang, 2020). Disease outbreaks have posed huge challenges for public health officials and the cruise industry to ensure a healthy cruise environment. Moreover, the transmission aboard ships may be exacerbated by the densely populated, semi-closed cruise environment on cruise ships, where passengers and crew share numerous activities and resources. Mitruka and Wheeler (2008:352) claim that “an infectious disease acquired during the voyage may incubate in people disembarking from cruise ships and result in outbreaks in the travellers' home communities, especially in closed settings”.

Although cruise tourism is extremely vulnerable to business risks that may lead to crisis, the impact of infectious disease outbreaks on the cruise sector remains largely unexplored. This research aims to fill the gap in the literature by examining the global impacts and trends of the COVID-19 pandemic on the cruise sector, with a special focus on the situation in South Africa. The paper further seeks to present the reputational damage experienced by the cruise industry, based on their initial response to the pandemic and their immediate implementation measures. The paper presents a preliminary overview of the impacts of the COVID-19 pandemic on the cruise industry, as data, at the time of writing, was very limited and unfolding. A similar study, post the COVID-19 pandemic, will yield a more conclusive appraisal of the impact of the pandemic on the cruise sector.

Methodology

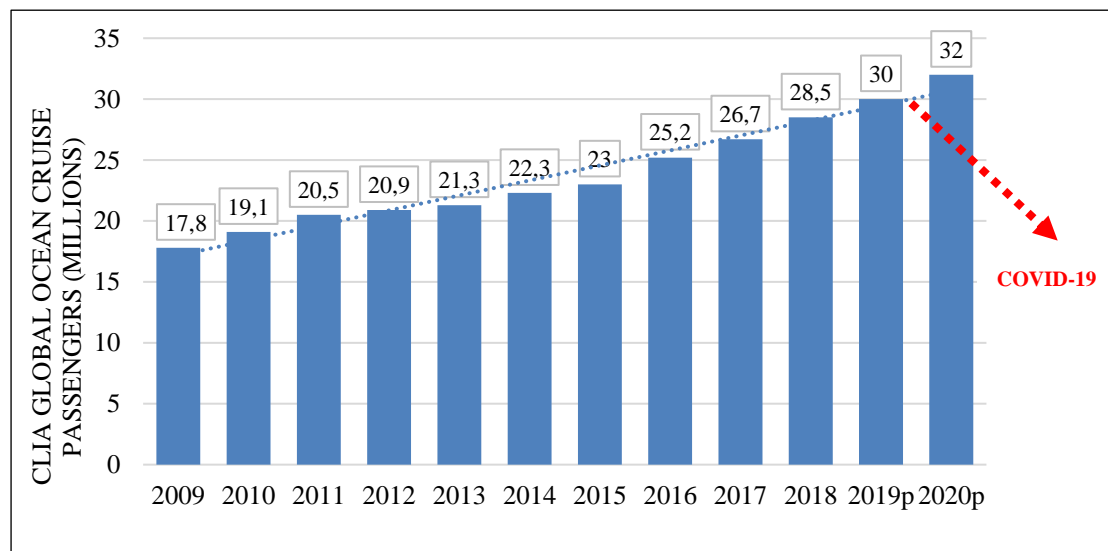
A desktop review was carried out for this paper to gather secondary data on the global impacts and trends of the COVID-19 pandemic on the cruise industry. Secondary research or desk research is a research technique that involves using already existing data. Sources of secondary data for this paper included: general web searching, company websites, governmental reports, relevant industry associations, news articles, research reports, academic literature and official statistics. Due to the recent outbreak of the COVID-19 pandemic and its impact on the cruise industry, this topic has been receiving an increasing amount of public attention, of which information is developing and is being regularly updated. This paper draws on the most recent and updated information at the time of writing. Desktop research was suitable for this research, as it allowed the collection of data from a number of different sources, and helped identify important information needs that have not been addressed through previous research. Access to the Internet and online databases was an important resource needed to carry out desktop research for this paper.

The desktop research commenced by using a few words and phrases to start the online Google search. Common groups of words used were “COVID-19 and the tourism industry”, “impact of COVID-19 on the cruise sector”, “reputational damage from COVID-19”, “economic impact of the cruise industry”, and the “cruise industry in South Africa”. Information was also accessed directly from the Websites from key organisations such as the Cruise Lines International Association (CLIA), the UNWTO, the World Travel and Tourism Council (WTTC), the National Department of Tourism (NDT), and Transnet National Ports Authority (TNPA). The latest information pertaining to the cruise industry and the COVID-19 pandemic was sourced from a number of various newspaper articles and relevant magazines, which were accessed directly. These included Independent Online (IOL), Cruise Industry News, Tourism Update, News24, Maritime Executive, The Guardian, Travel Weekly, Business Insider, and the Washington Post. Google Scholar was also used to access academic literature pertaining to the cruise sector and global pandemics.

The growth in the cruise industry and global trends

Cruise tourism is described as a vacation trip undertaken on cruise ships or “a luxurious form of traveling, involving an all-inclusive holiday on a cruise ship for at least 48 hours, according

to a specific itinerary, and in which the cruise ship calls at several ports or cities” (Research Centre for Coastal Tourism, 2012:3). According to Wondirad (2019), a cruise voyage must include at least two visiting ports apart from ports of embarkation and disembarkation. Cruises can typically occur between a minimum of two days and last for several months. Relaxation, socialisation, convenience, luxury, escape, and amenities/services have been cited as the key reasons why cruise travellers engage in cruise ship holidays. The cruise tourism industry is recognised as a rapidly growing and dynamic subsector of the global tourism industry, and is believed to be growing three times faster than the overall tourism industry Wondirad, 2019), Cruise tourism essentially began at the beginning of the 1960s, and the 1970s and 1980s experienced a period of moderate growth, with an increase in half a million passengers in 1970 to 1.4 million passengers in 1980 and 3.8 million passengers in 1990 (Brida & Zapata, 2010). Data from CLIA (2020) is presented in Figure 1, and confirms a stable growth from 17.8 million cruise passengers in 2009 to 28.5 million cruise passengers in 2018, with predictions of the global ocean cruise passengers to be 30 million in 2019 and 32 million in 2020. However, the novel coronavirus outbreak has led to a rapid decline in cruise passenger capacity from the latter part of 2019, and this will be discussed further in the paper.



p=projections

Figure 1: 2020 Passenger Capacity Snapshot
Source: CLIA (2020)

The massive growth in the cruise tourism sector is due to several factors such as the increase in the emergence of new cruise destinations and new itineraries, the introduction of modern cruise ships, the increase of cruise travel agents, the increase in consumers’ disposable income and leisure time, technological advancement, and robust marketing from cruise line companies (Perucic, 2019). In 1972, Carnival Cruises introduced the concept of “Fun ship” which marked the advent of cruises as mass tourism (Dickinson & Vladimir, 2007). Whilst the first cruise ships of the 1970s could carry about 1000 passengers, with an average weight of 30 000 tons, the increasing capacity and size of new ships also contributed to the growth of cruise tourism, and began with the inauguration of Cunard’s Queen Mary 2 in 2004 at nearly 150,000 gross tons. Other larger ships followed, such as Royal Caribbean’s Freedom of the Seas (2006), Liberty of the Seas (2007), and Independence of the Seas (2008), each having a gross tonnage of 158,000 tons. Recently, even larger and more advanced cruise ships have been built, and currently, the world’s biggest cruise ship is the Symphony of the Seas, weighing 228 081 gross

tons with a capacity for 5 518 passengers and 2 100 crew (Table 1). The rigorous growth in the demand for sea cruises has stimulated companies to invest in the construction of new and larger ships. As illustrated in Table 1, newer ships are increasing the number of berths available and are offering passengers a variety of itineraries around the world, ranging in duration from two days to three months. Evidently, a total of 115 new cruise ships are on order for delivery between 2020 and 2027, with the majority of these vessels scheduled to be delivered in 2020, 2021 and 2022. The new cruise ships will have a total of 239 802 berths with an estimated total value of US65.5 billion.

Table 1: Ten biggest cruise ships in 2017

Ship name	Cruise line	Gross tonnage	No. of passengers	Year built
Harmony of the Seas	Royal Caribbean International	226 963	5 496	2016
Allure of the Seas	Royal Caribbean International	225.282	5 400	2010
Oasis of the Seas	Royal Caribbean International	225 282	5 400	2009
MSC Maraviglia	MSC Cruises	171 598	4 500	2017
Anthem of the Seas	Royal Caribbean International	168 666	4 180	2015
Ovation of the Seas	Royal Caribbean International	168 666	4 180	2014
Quantum of the Seas	Royal Caribbean International	168 666	3 900	2017
Norwegian Escape	Norwegian Cruise Line	165 157	4 266	2015
Norwegian Joy	Norwegian Cruise Line	165 157	3 900	2017
MSC Seaside	MSC Cruises	160 000	4 140	2017

Source: Perucic (2019)

Another reason for the growth of the cruise tourism sector is the fact that usually, the ship itself is the main tourist attraction, boasting incredible on-board attractions such as extreme watersports, ziplines, rock climbing, including even golf simulators, ice-skating rinks, planetariums, boxing ring, amongst others (Brida & Zapata, 2010). Many passengers do not disembark the vessel, as there are sufficient entertainment facilities on-board, and cruise passengers are also now being offered a greater choice in some of the most state-of-the-art equipped and designed ships (Perucic, 2019).

The economic contribution of cruise tourism

Economists are generally interested in measuring supply, demand and output of the cruise tourism sector. The number of cruise passengers is typically cited as a measure of demand, and the number of ships and berths available are measures of supply. Berths are used as a standard measure of a ship's capacity, which assumes that two persons can occupy each cabin. Passenger days and passenger expenditure are usually the main output measurement of the cruise industry (Brida & Zapata, 2010). Cruise tourism expenditure has direct, indirect and induced effects on the economy of a destination. There are three main sources of direct economic impacts on port destinations which include: expenditures by cruise passengers on shore, largely through shore excursions; crew member spending, mainly on food and beverages; and cruise line purchases of shipping storage and a number of port services fees, as well as food and other supplies from local port businesses. Indirect effects result from the purchases of direct suppliers like goods from other companies. Induced effects arise from the expenditures of direct and indirect recipients produced from their increased incomes (Brida, Lanzilotta, Moreno & Santinaque, 2018; Brida & Zapatta, 2010).

Although research suggests that cruising has primarily been regarded as a cruise ship-centric form of tourism (Satta, Parola, Penco & Persico, 2015), more recent studies confirm that cruise tourists are motivated by not only the on-board ship experiences, but also the various shore attractions at port destinations, and tourists are even willing to pay more to visit attractive port destinations (Zou, Migacz & Petrick, 2017). Consequently, expenditures at port

destinations substantially contribute to local economies (Brida et al., 2014). However, although, the cruise industry has the ability to provide economic spinoffs to a port city, the lodging of large cruise ships in ports, demands a great deal of initial capital investment in both infrastructural as well as maintenance costs. Moreover, as cruise ships continue to grow larger, further investment in this area may be required (Brida & Zapata, 2010).

According to Figure 1, CLIA (2020) claims that since 2009, cruise ship passengers have grown from 17.8 million to 30 million, at an annual growth rate of 5.4%. CLIA further projected that 32 million passengers are set to travel on cruise ships in 2020, which is an increase from 30 million in 2019. Cruise tourism revenues are also believed to have grown even faster, from approximately 15.7 billion in 2010 to an estimated 31.5 billion in 2020, a compounded rate of growth of 7.2%. The global cruise industry is estimated to generate approximately \$150 billion in direct and indirect revenues from economic activities. Such economic activities include direct expenditure by the cruise lines, as well as money spent onshore by both passengers and crew staff. Direct expenditure amounted to almost US\$68 billion in 2018 by CLIA cruise lines. CLIA claims that 28.5 million passengers went on cruises in 2018 and the global per passenger spending amounted to US\$376 in the port before boarding a cruise, and US\$101 in port while visiting during a cruise. Moreover, the cruise industry creates approximately 1.177 million jobs with an annual payroll of US\$50.24 billion, at an average salary of around US\$45,000. Contrary to the general belief that cruise industry jobs are low paying, the industry has among the highest average salaries in the tourism and recreation sector.

The situation in South Africa

Holmes (2020) maintains that African cities are eyeing a bigger slice of the global cruise market, with the upgrading of terminal buildings to increasingly attract international cruise ships to ports such as Mombasa, Cape Town and Durban. In 2015, the Victoria and Alfred (V&A) Waterfront in Cape Town invested US\$4 million into revamping its cruise terminal, and over the past four years the port has received more than 150 vessels and more than 260,000 passengers. MSC Cruises has made considerable port investments in Durban and Mozambique, and Kenya is also set on improving its cruise terminal facilities by the end of 2020. The Southern Africa cruising region extends along the African coast from Kenya to Namibia and includes Madagascar, the Seychelles and Mauritius. Vessels found within this region offer multiple types of itineraries for up to a period of a few weeks, or are vessels on world cruise deployments and passing through the region (Department of Tourism, 2010). Currently, a number of international cruise liners offer cruises to and from South Africa, which include MSC Cruises, Norwegian Cruise line, Oceania, Holland America, Azamara, Regent Seven Seas, Cunard Lines and Crystal Cruises.

In terms of the economic impacts of cruise tourism in South Africa, the Department of Tourism (2010) estimated the total net spending to be R472.4 million in 2010 with a projected increase to R911.2 million in 2025. The main contributors to the cruise industry's net spending in 2010 were project facilitation (R15 million); net international passenger spending (R297.4 million); net local passenger spending (R7.2 million); international crew spending (R13.6 million); local crew earnings (R5.8 million); shipping operator spending (R112.6 million); and port charges (R20.7 million). The contribution of cruise tourism to the Gross Domestic Product (GDP) of South Africa is expected to increase from R681.8 million in 2010 to R1.33 billion in 2025. Indirect taxes, created through the linkage effect of business throughout the economy, are also projected to increase from R64.9 million in 2010 to R124.5 million in 2025, whilst the cumulative contribution to taxes is expected to be R1.33 billion by 2025. The cruise industry in South Africa is alleged to have created 1 104 direct jobs in 2010, and this is estimated to

increase to a total of 2 153 in job creation by 2025. The contribution to indirect jobs is set to increase from 1 124 in 2010 to 2 205 in 2025. Overall, the total job creation (direct and indirect jobs) is positioned to grow from 2 228 in 2010 to 4 358 in 2025 (Department of Tourism, 2010). According to Majola (2019), Transnet National Port Authority (TNPA) claims that the cruise season figures for the port of Durban were up by 29.4% from 197 382 in 2017/18 to 255 422 in 2018/19. Transnet (2018) further asserts that the South African cruise market has experienced substantial growth, and is aligned to the international cruise market, and has grown from 5 million passengers to over 20 million passengers over the last 17 years. TNPA has positioned Durban and Cape Town as stimulus cruise home ports, whilst Richards Bay, Mossel Bay, Port Elizabeth and East London are ports of call. Parallel to the National Department of Tourism's Cruise Strategy, TNPA's strategy is to initiate new and modern cruise terminals at the ports of Durban and Cape Town in support of the growth of the cruise tourism industry in South Africa (Transnet, 2018). Witthaus (2018) affirms that the long-term plan for the country is to create cruise hub ports on either coast of South Africa (Durban on the east coast and Cape Town on the west coast). These two hub ports will ultimately function as homeports for international cruise vessels, and will be supported by the other cruise ports of call such as Richards Bay, Mossel Bay, East London and Port Elizabeth.

Majola (2019) and Smith (2019) indicate that investments made by MSC Cruises and TNPA have led to the commencement of the development of the R200 million, 4 516 square metre Durban Cruise Terminal in November 2019. The cruise terminal is due to be completed in 2021. This multi-user terminal is envisaged to increase the desirability of Durban as a cruise tourism destination and will substantially increase cruise tourist numbers and create thousands of jobs. MSC has two cruise ships operating in South Africa since December 2019; the MSC Musica, which has a guest capacity of 3 200 and was homeported to Durban, and the MSC Opera with a guest capacity of 2 500 which was homeported to Cape Town. Majola (2019) asserts that the Port of Durban has witnessed a rising interest every year among domestic tourists who take cruises, of which many are sailing on the local cruises provided by MSC Cruises from Durban and Cape Town to various locations including Mauritius, the Reunion Islands, and Mozambique's Pomene Bay and Portuguese Island. According to Stehlik (2009), from October 2019 to April 2020, 23 luxury cruise ships were scheduled to call at the six cruise ports in South Africa and the Port of Durban is believed to receive around 17 of these cruise ships. Global Africa Network (2018) confirms that in 2017, a total of 185 390 cruise passengers were processed through the Port of Durban with more than 56 vessel calls. This represents a 173% increase in passenger numbers at the port over the last 10 years, from only 67 892 passengers and 39 vessel calls in 2007.

Cape Town Tourism estimates their projected value of the cruise tourism industry between 2017 and 2027, to be in the region of R220 billion. A cruise ship carrying about 2 000 passengers results in spending to the value of approximately R2 million (R2 000 per guest) per day. Cape Town has experienced a steady increase in cruise passenger arrivals, with 47 145 passengers during the 2017-2018 cruise season to 52 580 passenger arrivals in the 2018-2019 cruise season. Moreover, Cape Town has confirmed 32 cruise ships and 67 stop-overs for the 2020-2021 cruise season (Smith, 2019). In January 2019, two luxury ships, the MS Queen Elizabeth and the MSC Music, docked at the port of Cape Town which resulted in a profusion of economic opportunities for the city (Chetty, 2019). It is estimated that cruise passenger figures throughout South Africa could increase to one million passengers by 2025. Durban and Cape Town are expected to achieve the highest market share with Durban attracting as many as 470 000 passengers by 2025 (Makwakwa, 2019).

COVID-19 and the cruise industry

Impact on tourism

The novel coronavirus, also known as the COVID-19 pandemic, first broke out in the port city of Wuhan, China, in December 2019. The virus thereafter spread globally, and on 11 March 2020, WHO declared the virus as a pandemic. Subsequently, governments worldwide embarked on numerous strict measures to lockdown their countries to ‘flatten the curve’ of the COVID-19 pandemic. Travel restrictions then ensued, and by 11 March 2020, 85 destinations had travel restrictions in place. Increasingly thereafter, from 24 March to 20 April 2020, all outstanding destinations introduced travel restrictions, bringing the total to 217 destinations, representing 100% of destinations worldwide (South African Maritime Institute - SAMI, 2020). For the first time in history, all worldwide destinations have introduced travel restrictions (since 20 April 2020) in response to the COVID-19 pandemic, either by totally or partially closing their borders to travellers, suspending international flights or closing of borders in a more differentiated manner (UNWTO, 2020).

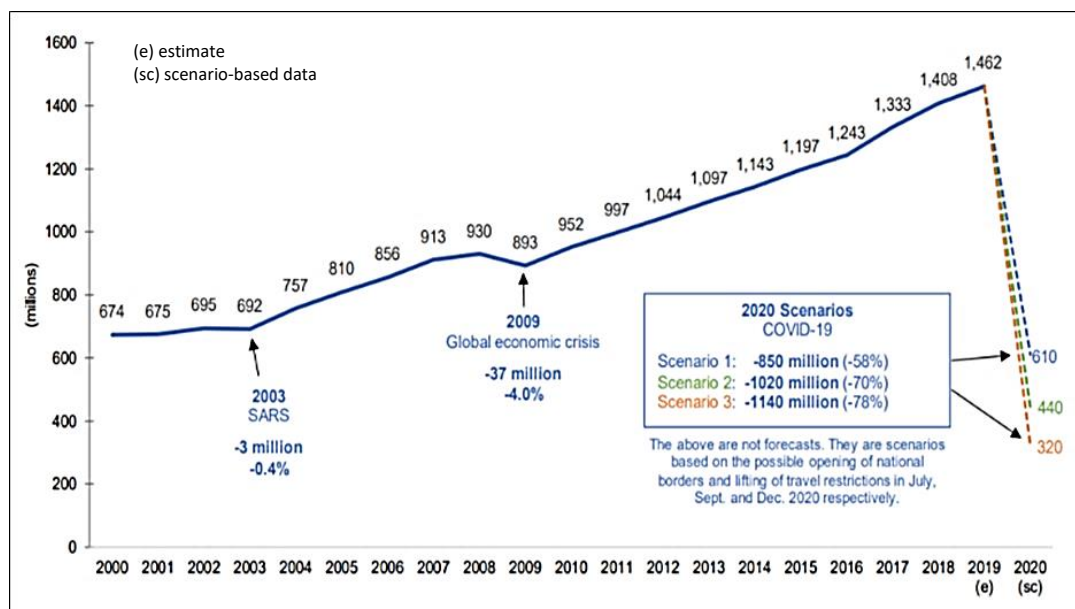


Figure 2: International tourist arrivals, 2000-2019 and scenarios for 2020 (millions)
 Source: UNWTO (2020)

Tourism is considered as one of the sectors to be the hardest hit by the COVID-19 outbreak. As depicted in Figure 2, the UNWTO (2020) predicts that international tourist numbers could fall by 60-80% in 2020. March 2020 recorded a reduction of 67 million international tourists which translates to US\$80 billion loss in receipts (exports from tourism). The UNWTO further predicts three possible scenarios, assuming that travel restrictions start to be lifted and national borders opened in: early July (Scenario 1: -58%, -\$910 billion), in early September (Scenario 2: -70%, -\$1080 billion) or in early December (Scenario 3: -78%, -\$1170 billion). These predictions further translate to the loss of US\$910 billion to US\$1.2 trillion in export revenues from tourism, and the loss of 100 to 120 million direct jobs (UNWTO, 2020). The WTTC (2020) further estimates that, under its worst-case scenario, 197 million global jobs could be lost and \$5.5 trillion reduced from tourism's contribution to world GDP, if the industry is only opened in September. Historically, this scenario is by far the worst for international tourism since 1950, and puts an unforeseen end to a 10-year period of sustained growth since the 2009 economic and financial crisis. Globally, lockdowns in response to the coronavirus pandemic have greatly affected the tourism industry. Of greater concern is that the industry expects

recovery to be slower than many other parts of the economy, not increasing to more than sixty percent of pre-pandemic numbers until the coronavirus is decisively defeated (Christianson, 2020).

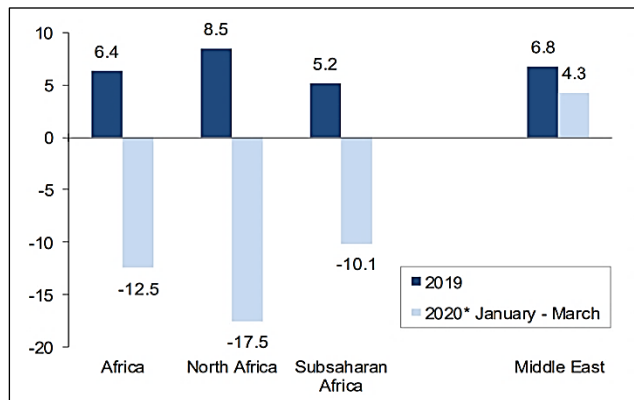


Figure 3: International tourist arrivals, Africa and the Middle East
 Source: UNWTO (2020)

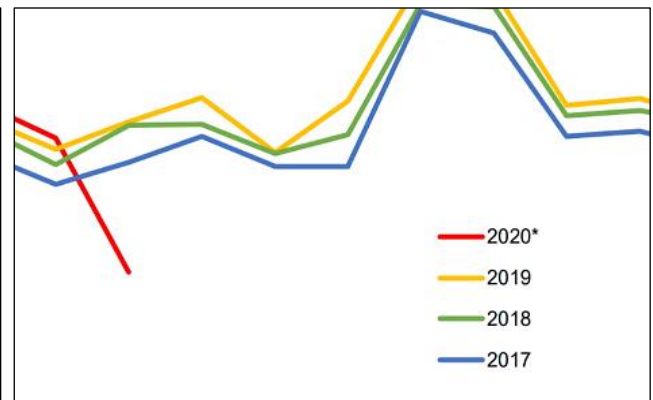


Figure 4: International tourist arrivals to Africa by months (millions)
 Source: UNWTO (2020)

Africa saw international tourist arrivals decline by 13% in the first quarter, with a massive drop of 44% in March 2020. North Africa suffered the biggest impact in the first quarter of 2020, with a drop of 18%, while arrivals in Sub-Saharan Africa declined by an estimated 10% (Figures 3 and 4). South African Tourism (2020) reports a huge decline in international visitor arrivals from 2.7 million for the first quarter in 2019, to 1.89 million in the first quarter of 2020, as indicated in Figure 5. Although data for the second quarter of 2020 is currently unavailable, Phillip (2020) estimates that South Africa’s R270 billion tourism industry has lost an estimated R68 billion in revenue since the outbreak of the coronavirus. The Tourism Business Council of South Africa (TBCSA) forecasts a loss of at least 600 000 direct tourism jobs for 2020. Charles (2020:1) claims that the “South African tourism sector is slowly ‘bleeding to death’ as the lockdown drags on”, with a daily loss of R748 million in tourism expenditure and further losses in permanent jobs. Over and above this, South Africa has lost more than R800 million in COVID-19 government budget cuts.

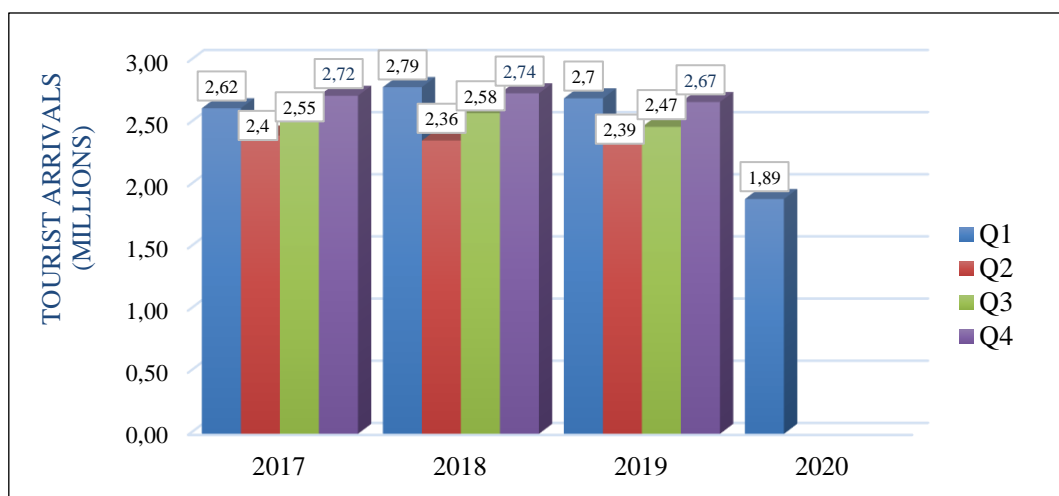


Figure 5: Tourist arrivals to South Africa by Calendar Quarter
 Source: South African Tourism (2020)

Impact on cruise tourism

Evidence that cruise ships are a source of infection has already emerged in early February 2020, with confirmed cases of the virus being linked to at least 26 cruise ships (Ito, Hanaoka and Kawasaki, 2020) (Figure 5). Cruise ship activities can be a major contributor to the outbreak and spread of the coronavirus, as cruise vessels carry large volumes of passengers and a high density of employees, and can easily pass on viruses and bacteria to each other. For example, the Norovirus, the highly contagious virus that causes a stomach bug, is often referred to as the “cruise ship virus” because of how easily it spreads through the tightly packed environment on-board the ships. According to Wetsman (2020:1), cruise ships are associated with communal dining and group activities, which are “notorious for being an incubator of infectious disease”, and have “self-contained environments where this disease can proliferate quickly” (Dolven, Blaskey, Nehamas & Harris, 2020:1). The average cruise lasts between 6-8 days, which is well within the period for incubation and transmission of many infectious diseases (Dowling & Vasudava, 2000). Travellers disperse after the cruise, and may widely spread acquired infections. Additionally, the cruise tourism market comprises of many senior citizens, who are at increased risk for complications of virus infections. These factors can intensify the possibility for the international spread of infectious diseases (Liu & Chang, 2020). Dolven et al. (2020) further add that the diversity of passengers and crew contained on the ship for several days, mixed with limited access to hospitals from remote areas of the ocean, make cruise ships especially vulnerable to infectious diseases.

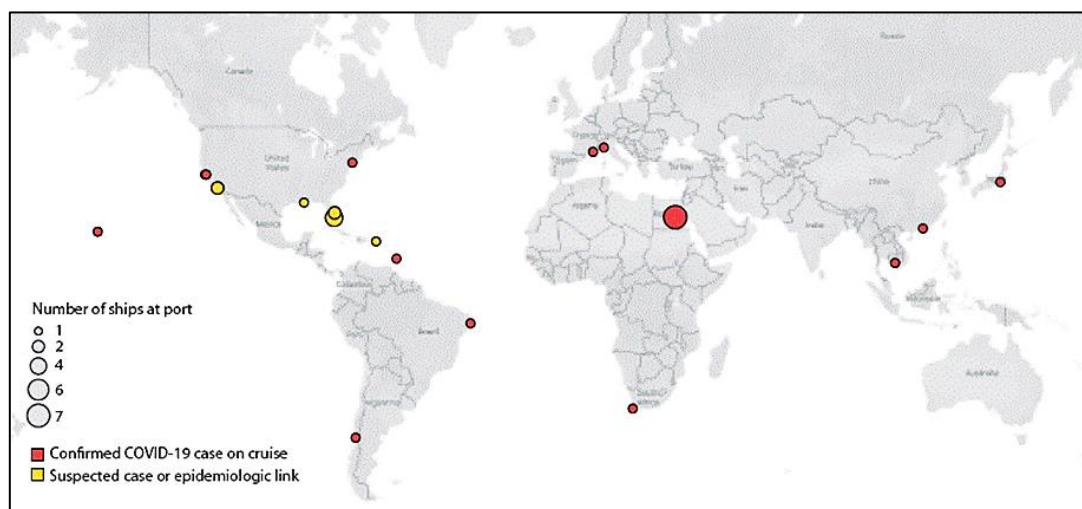


Figure 5: Cruise ships with COVID-19 cases worldwide January–March 2020
Centres for Disease Control and Prevention (2020)

According to Ito et al. (2020), the risk of COVID-19 infection on board a ship increases proportionately as the number of passengers increases. Moreover, cruise ships that replace an unspecified number of cruise passengers within a week may have a higher infection rate than ships that do not replace passengers over a number of weeks. The authors further affirm that countries that have ports of arrival and departure exhibit higher COVID-19 infection rates compared to countries with only ports of call. Figure 5 denotes the number of ships at various ports throughout the world with confirmed COVID-19 cases on-board the cruise, and suspected cases or epidemiologic link to COVID-19 (Centres for Disease Control and Prevention - CDC, 2020).

Dolven et al. (2020) claim that at least 2 592 people have tested positive for COVID-19 during or directly after a cruise and at least 65 people have died. Blaskey, Nehamas and Dolven (2020) nonetheless, argue that data pertaining to cruise ships and the COVID-19

pandemic is limited and unreliable, and that these figures are far more than the industry or public health officials have acknowledged, and may not be the ‘complete picture’. Blaskey et al. (2020) affirm that the cases of COVID-19 linked to cruise ships are not (publicly) being tracked by governments or international regulatory agencies. The authors maintain that the availability of accurate data is critical for passengers, regulators, and the industry to understand and assess the risk of cruising during a pandemic. The Miami Herald has attempted to fill this gap with more accurate data and has developed a comprehensive system for tracking COVID-19 cases linked to the cruise tourism sector. Figure 6 illustrates the total known cases linked to voyages departing on the indicated date or earlier. The shaded area shows the situation after the CDC's March 8, 2020 travel warning. The March 21, 2020 counts can be interpreted as the total known cases linked to cruise ships. As at 17 July 2020, the Miami Herald confirmed that there were 3 646 cases and 96 deaths linked to the coronavirus and ocean cruise ships. A total of 72 ocean cruise ships, which accounts for 28% of the fleet, have revealed positive coronavirus cases (Blaskey et al., 2020).

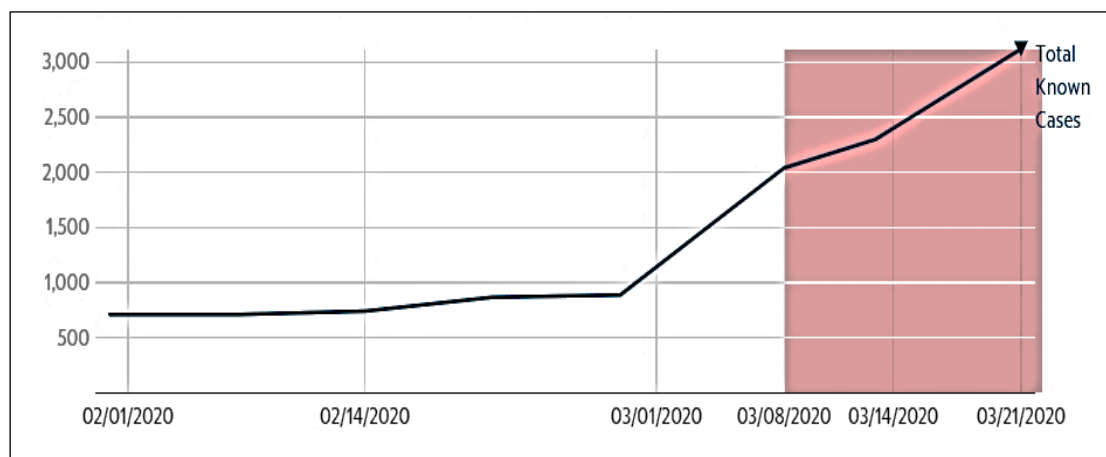


Figure 6: Timeline of COVID-19 cases linked to cruise ships
Blaskey, Nehamas & Dolven (2020)

The South African government announced a 21-day nationwide lockdown that was effective from March 27, 2020. The lockdown was subsequently extended to the end of April 2020, which was followed by a schedule of alert and response levels that were introduced on May 1, 2020. Amongst other restrictions, this lockdown resulted in a ban on cruise ships docking at South African seaports, with the restrictions on cruise shipping having an unfavourable impact on the tourism industry (The Maritime Executive, 2019). On the 18 March, 2020, South Africa’s Transport Minister, Fikile Mbalula declared a total ban on all cruise ships entering South Africa's eight seaports in an effort to contain the spread of the COVID-19 pandemic (African News Agency - ANA - Reporter, 2020).

The cruise sector’s reputational damage

During the coronavirus lockdown, airlines are grounded, hotels empty and tour buses sit unused in their depots. Cruise liners have become notorious infection hotspots and this particular segment of the industry has suffered reputational damage which is likely to afflict it for years. It is not clear who will still be standing when the pandemic has passed (Christianson, 2020:1).

According to Weissmann (2020:1), “in terms of economic and reputational damage, cruise travel was the first industrial sector to fall victim to the coronavirus and is expected to be the last to recover”, as no other tourism sector has been harder hit by reputational damage. The cruise industry is being imputed as being a “breeding ground for infection and failing to

put in place health and safety measures to protect its crew and passengers” (Berti, 2020:1). A prominent case was that of Princess Cruises’ Diamond Princess cruise ship which made headlines after it was put under quarantine by the Japanese Health Authority in early February 2020. At the time, the ship had approximately 3 800 people on board and was not permitted to dock when one of its passengers tested positive for COVID-19. This subsequently led to an almost month-long offshore lockdown for the vessel, during which time more than 700 people were infected and 14 died (Berti, 2020). “Diamond Princess was only one of many ships who found themselves bouncing from port to port, unable to dock and disembark while trapping passengers on a floating hotbed for the virus” (Berti, 2020:2). Evidently, passengers and crew were forced to remain on their ship in "chaotic conditions" after testing positive for coronavirus, and many described their 10-day quarantine like being held “hostage” (Miranda, 2020). The Diamond Princess was quarantined for over two weeks, resulting in more coronavirus infected passengers than if they would have disembarked immediately, rather the opposite to what was intended. The situation on the Diamond Princess became “a metaphor for contagion and fear” as each new and morbid development was broadcast worldwide (Weissmann, 2020:1).

McCormick and Greenfield (2020) gathered data on some of the largest COVID-19 outbreaks on cruise ships and how it affected passengers and crew (Table 2). It is believed that cruise industry officials struggled to repatriate crew members who were no longer required on ships during the shutdown, due to port closures, travel bans and flight restrictions which created huge logistical challenges. Thousands of passengers and crew were sick or exposed to the coronavirus, and although cruise ships had some medical supplies on-board, the ships lacked ventilators and other complex medical equipment needed to treat COVID-19.

Table 2: Outbreak of the Coronavirus on ships

Ship	Location	Covid-19 reported	Scale of outbreak
Diamond Princess	Japan	4 February	700+ passengers and crew infected, nine died
Costa Fascinosa	South America/Brazil	March	Ship's doctor and two crew members died in Brazil; other crew hospitalized
Costa Atlantica	Japan	23 April	148 crew members tested positive, as the ship remained at dock for repairs
Greg Mortimer	Uruguay	27 March	One crew member died, at least 128 passengers and crew infected
Coral Princess	South America/Florida	1 April	Three passengers died. Ship not allowed to dock in South America
Zaandam	South America/Florida	27 March	Four passengers, one crew member died. 100+ became ill. Ports refused to allow the ship to dock
Ruby Princess	Australia	19 March	11 passengers died, at least 662 passengers and crew infected. Ship blamed for 10% of Australia's cases
Grand Princess	San Francisco	9 March	Two passengers, one crew member died. 100+ tested positive during Hawaii cruise
Celebrity Apex	France	March	More than 200 crew infected as ship prepared to launch in Saint-Nazaire, France

Source: The Guardian (2020)

In April 2020, ocean cruising came to a total standstill when the CDC issued a “no sail order”. Cruise lines successfully collaborated with port authorities to allow ships to dock and allow passengers to disembark passengers. However, crew members were compelled to remain on-board the ship until arrangements could be made for transportation back to their home countries (Chin, 2020). As at 30 April 2020, The Guardian (2020) revealed that more than 100 000 crew workers were still trapped on cruise ships, at least 50 of which had COVID-19 infections. By mid-June 2020, it was reported that as many as 42 000 crew members were still

stuck out at sea, awaiting to be repatriated. These crew workers were shut off ports and banned from air travel and were not allowed to return home. A large proportion of these crew members were quarantined in tiny cabins for several weeks. Worldwide, cruises were suspended on 14 March 2020, yet a number of ports denied ships from docking long before that, which resulted in some crew members being stuck at sea for months. Sea ports throughout the world prevented cruise ships from docking and shut down entire cruise terminals in fear of contagion, which in turn resulted in plagued ships sailing from port to port while dealing with new cases unfolding on-board. Ships were just bouncing from port to port, not being able to stop anywhere, and “passengers became prisoners on ships, whilst others were left stranded in foreign countries mid-cruise” (Cartwright, 2020:1). The CLIA reacted to the CDC’s strict conditions for debarking crew by claiming it to be “impractical” (Chin, 2020). Dennis (2020:1) eloquently describes the situation with cruise ships as:

...they've become modern-day Mary Celestes, except now, in the era of pandemic, these effectively port-less and unloved ghost ships are full of hapless abandoned multinational crews and passengers. Safe harbours, that just weeks ago welcomed them and the economic riches each vessel sunnily delivered, are now ruthlessly shunning them. Maritime law and humanitarianism are conspicuously ignored in a ‘every country for itself’ display.

Greenfield and McCormack (2020) claim that a number of deaths, hunger strikes and disturbances on board cruise ships has raised concerns about the deteriorating mental health of staff stranded on cruise ships. The authors claim that in May 2020, 15 Romanian crew, on board the Navigator of the Seas, began a hunger strike in protest at not being able to leave the ship. Later that month, the strike ended when a charter flight was arranged for them to leave. Cruise companies have blamed strict rules from health authorities for not allowing crew to disembark.

According to Robles (2020:1), the CDC blames cruise ships for the widespread transmission of the coronavirus, and stated that “as the coronavirus pandemic raged around the world, cruise ship companies continued to allow their crews to attend social gatherings, work out at gyms and share buffet-style meals, violating basic protocols designed to stop the spread of the highly transmissible virus”. The cruise sector has struggled to manage the spread of the virus, and despite several warnings on the dangers of the virus spread, “passengers kept boarding and ships kept sailing”. ...and as the coronavirus continued to spread across the world in early 2020, millions of people found themselves in what is now understood to be one of the most dangerous places during a pandemic: a cruise ship. Just how many passengers and crew got sick or died is impossible to know. No global health body or regulatory agency is known to be tracking those statistics. And the cruise industry - which downplayed the dangers to consumers and kept sending out ships despite outbreaks on board and warnings from public health officials - has largely stayed silent about the toll. (Dolven et al., 2020:1)

Whilst it is believed that governments have exercised their rights in not allowing ships to dock, they have come under severe criticism for this, as the poor quarantine measures have led to a rise in avoidable cases of COVID-19. The number of cruise ships with passengers quarantined during the early stages of the pandemic has led to considerable negative publicity for the cruise sector, and the “amount of negative publicity the sector has received will take a long time to recover from” (Berti, 2020:4). Bloom (2020) maintains that the bad publicity, of passengers that suffered in quarantine on-board ships within sight of the shore, will be difficult for the industry to rid itself of, and believes that the cruise sector is likely to suffer the most compared to other tourism sectors.

Economic impact

Global cruise operators have now cancelled scheduled trips for the foreseeable future, and are currently faced with booking cancellations, plummeting revenues and a damaged reputation (Berti, 2020). The CLIA (2020) confirms that the suspension of cruise operations due to the COVID-19 pandemic is having a detrimental impact on economies and communities throughout the world. The organisation claims that for each day that cruise operations are suspended, approximately 2 500 jobs are lost, and with every 1% drop in worldwide cruising 9 100 jobs are lost. The CLIA (2020) further predicts that should cruise operations continue to be suspended through to August 2020, the worldwide impact would be US\$64 billion and 428,000 job losses. Added to this, cruise lines are expected to pay out sizeable sums to passengers in refunds, compensation and cancellation fees, which is subject to the relevant ticket terms and conditions. Moreover, cruise lines will have to bear the cost of docking at ports where ships are quarantined. Matousek (2020:1) states that the COVID-19 pandemic is becoming a “financial and public-relations nightmare for the cruise industry, from failed quarantine attempts on ships to passenger lawsuits and a stream of cancellations”.

On 19 June 2020, the CLIA announced that the association’s ocean-going cruise line members will voluntarily extend the suspension of cruise operations from United States ports until 15 September 2020. On 16 July 2020, the CDC announced the extension of a No Sail Order for cruise ships through to 30 September 2020. The CLIA currently estimated that with cruise ships not resuming cruising by the end of July 2020, could have a global impact of 334 000 job losses and a further loss of \$50 billion in economic activity. With the CDC’s No Sail Order until 30 September, the CLIA predicts a mean loss of \$77 billion, more than half of the industry’s \$150 billion in annual global economic activity. The cruise sector “has not just been devastated, it has ceased to function altogether, and the coronavirus has been the perfect storm”. It has shifted from being an industry worth \$46 billion a year, with 26 million passengers per annum, “to an almost total standstill overnight” (Bloom, 2020:1). The CLIA (2020) has further warned that a 90-day suspension of cruises will cost the United Kingdom (UK) economy £888 million, 5,525 job losses and £287 million in wages. For every 1% drop in cruising in the UK, up to 530 jobs can be lost, and each day of the interruption results in the loss of 55 direct jobs. Australia is believed to lose more than \$1.4 billion in economic activity and experience almost 5 000 job losses if cruises are suspended until mid-September.

Royal Caribbean Cruises was compelled to cancel 130 of its cruises during the first quarter of 2020 due to the COVID-19 outbreak. The cruise line has suffered a net loss of \$1.4 billion during this period, compared to a profit of \$249.7 million during the same period in 2019 (Dolven, 2020). Despite the halt in cruise ship sailings, Royal Caribbean Cruises claims that it is “burning through \$250 million to \$275 million per month” through administrative and ship operating expenses as well as the cost of repatriating thousands of crew members who remain stuck on the company’s ships (Dolven. 2020:2). Royal Caribbean, however stated, that in terms of financial performance under the COVID-19 pandemic, “there are still too many variables and uncertainties to make a reasonable forecast for 2020” (Clyde & Co, 2020:1).

Carnival Cruise Line has also become a casualty of the economic cataclysm brought about by the COVID-19 pandemic, and the company will be removing 13 ships from its fleets over the impending months. Carnival Cruises disclosed a \$ 4.4 billion loss in the second quarter of 2020, and their revenues fell 85% to \$700 million from \$4.8 billion for the same quarter last year. The company believes that in order to reduce their ‘cash burn’ they will need to get rid of their less efficient ships. Holland America has put up four of its Canadian-based luxury ships for sale as a result of the financial hardship they are facing due to the COVID-19 pandemic (Stewart, 2020). The British cruise line P&O cruises have confirmed the selling of its popular ship, the Oceania. The ship, which carries 2 000 passengers, has been part of the P&O fleet

since 2002 and has recently undergone £31 million refurbishment and refit in 2017 (Sullivan, 2020). Evidently, by the end of July 2020, it is believed that overall, 23 classic cruise ships “could be laid-up, sold or scrapped” (Sloan, 2020:1), as “the cruise industry is beginning a downsizing the likes of which have never been seen in the modern cruise business” (The Maritime Executive, 2020:1).

In terms of job losses, the CLIA (2020) claims that 2,500 jobs are lost each day that cruises are not operating. Greenfield and McCormick (2020) maintain that a number of crew have had their pay cut off entirely. For example, employees on board several ships run by the MSC cruise line, are no longer receiving a salary as their contracts either ran out, or were terminated early by the company due to the COVID-19 pandemic. In April 2020, Royal Caribbean announced the axing of 5000 jobs in the US, which accounts for 26% of its US workforce (Ovcina, 2020), and Norwegian Cruise Line Holdings announced that it was laying off 20% of its staff.

Although the cruise industry has demonstrated notable resilience in the face of economic, social political, and other crises, “the impact of COVID-19 on the cruise industry will be much stronger than any of the past difficulties” (Ito et al., 2020:7). It is believed that the recovery will be even more difficult in South Africa, “because stimulus measures to protect livelihoods are unlikely to address the deep structural problems which were weighing on the industry even before the crisis” (Christianson, 2020:1). Bagis and Dooms (2014) affirm that the purpose of the cruise business is to maximize profits as cruise ships are a huge investment. The suspension or interruption of cruise ship movements will undoubtedly result in greatly reduced profits and in some cases, bankruptcy. The cruise sector is currently struggling to improve their liquidity and reduce their monthly cash burn, as it is faced with an indefinite timeline for a return to operations, and uncertainty over the rate at which travellers will return to cruising (Maritime Executive, 2020).

Conclusion

Before the coronavirus pandemic brought the cruise industry to a complete standstill, 2020 was prepared to be a record-breaking year for the cruise sector globally. The cruise industry was anticipating to carry more than 32 million passengers, almost twice as many as in 2009. With global cruise operations indefinitely halted, revenue forecasts for the entire cruise industry appear very bleak. Staying afloat, until normal operations resume, would be of precedence for the cruise industry, and attracting customers to confidently board ships would be equally vital. Although, cruising is regarded as a luxurious vacation that assures passenger safety while at sea, the sector has suffered mammoth reputational damage. Investors may want to contemplate factors such as current operational impacts and reputational risks for these cruise companies in their investment decisions. Future passengers would want to see stricter health and safety protocols, enhanced sanitation measures and procedures aboard the ships, as well as an emergency response plan, should similar situations arise in the future. Given the current impacts that the pandemic has on cruising, it may take some time before the industry recovers and returns to a post-COVID-19 normal. COVID-19 has arguably given the cruise sector its greatest day of reckoning, and whether it can regain the goodwill and trust of the travelling public remains in question.

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