‘High Hopes & High Seas’: The Role and Impact of Cruise Tourism in Destination Development
‘HIGH-HOPES’ FOR DESTINATIONS

*Cruise Sector Growth, Cruiser Spending & Economic Impact*
Direct Economic Impact of Cruise Tourism for the Economies of Europe 2015

Cruise Line Purchases 2015 (€ 6,900 Mil)
- Business Services 21%
- Transport 24%
- Manufacturing 20%
- Petrochemicals 11%
- F&B 10%
- Other 14%

Direct Economic Impact of Cruise Tourism for the Economies of Europe 2015 (€16,880 Mil)
- Cruise Line Purchases 41%
- Pax & Crew Purchases 23%
- Shipbuilding 27%
- Cruise Employee Compensation 9%

Passenger & Crew Spending 2015 (€ 3,832 Mil)
- Crew Spending 4%
- Visit Spending (Shopping, F&B, Tours) 50%
- Embarkation Spending (mainly airfares) 46%

Ship-Building 2015 (€ 4,604 Mil)
- Other 22%
- Italy 28%
- Germany 28%
- France 11%
- Finland 11%
- Germany 8%
- UK 37%
- Rest 6%
- Norway 7%
- Spain 3%
- France 2%
- Portugal 2%
- Rest 6%

Cruise Employee Compensation (€ 1,550 Mil)
- Italy 35%
- UK 37%
- Germany 8%
- France 2%
- Spain 3%
- Norway 7%
- Rest 6%

Direct Economic Impact of Cruise Tourism for the Economies of Europe 2011-2015

- **Pax & Crew Purchases**
  - 2011: €3,460
  - 2012: €3,630
  - 2013: €3,860
  - 2014: €3,640
  - 2015: €3,830

- **Shipbuilding**
  - 2011: €3,840
  - 2012: €3,850
  - 2013: €4,030
  - 2014: €4,550
  - 2015: €4,600

- **Cruise Employee Compensation**
  - 2011: €1,320
  - 2012: €1,320
  - 2013: €1,590
  - 2014: €1,480
  - 2015: €1,550

- **Cruise Line Purchases**
  - 2011: €6,360
  - 2012: €6,680
  - 2013: €6,970
  - 2014: €6,970
  - 2015: €6,900

*Data Source: CLIA Europe Economic Impact Reports 2012-2016 – Online: http://www.claeurope.eu/media-room/clia-europe-economic-contribution-report*
Cruise Employment Impact

Cruise-related Jobs / Sector 2015

- Cruise Lines: 18%
- Transportation & Utilities: 13%
- Manufacturing: 24%
- Financial & Business Services: 19%
- Trade: 9%
- Hospitality: 5%
- All Other: 12%

Total 361,571 Jobs


Employment by Country 2015

- Italy: 31%
- UK: 22%
- Germany: 14%
- Greece: 10%
- Portugal: 3%
- Norway: 4%
- Finland: 3%
- Poland: 1%
- Sweden: 1%
- Denmark: 1%
- Netherlands: 2%
- France: 5%
- Spain: 9%

Employment Changes between 2011-2015

- Italy: 2921
- UK: 10085
- Germany: 6435
- Spain: 1139
- France: 546
- Greece: 6033
- Norway: 2379
- Portugal: 1519
- Netherlands: 1840
- Malta: 447
- Poland: 2318
- Sweden: 848
- Denmark: 848

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Cruise Passenger Development

Main European Markets

% Change YoY Passenger Growth

EUROPEAN PAX DEVELOPMENT

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Intl. Cruise Capacity 2015: 
Big 3 = 57% of Vessels / 79% of Pax Capacity

Size Matters!!!

2015 Intl. Capacity (Ships = 298)

- CCL: 36%
- NCL: 7%
- RCL: 14%
- Other: 43%

REVENUE (% OF TOTAL)

- CCL: 42%
- NCL: 13%
- RCL: 22%
- Other: 23%

2015 Intl Passenger Capacity (250,732)

- CCL: 48%
- NCL: 9%
- RCL: 22%
- Other: 21%

AVERAGE PAX / VESSEL

- CCL: 2223
- RCL: 2498
- NCL: 2041
- Other: 788

Total Average, 841

** Data Source: Cruise Market Watch (2016) - http://www.cruisemarketwatch.com/capacity/
Average Cruiser 2015
Financial Breakdown*

Total Revenue = € 1640.68
(2013: € 986)

On Board Revenue
= € 398.68
(2013: €307)

Onboard Revenue =24.2% of Total Revenue
(2013: 23.8%)

Profit Margin = 12.6%
(2013: 10%)

Costs per Cruiser = € 1432.76
(2013: €1160)

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1. **Ticket**
2. **Casino & Bar**
3. **Shorex**
4. **Spa**
5. **Other On Board Spending**
6. **Other operating costs**
7. **Agent commission**
8. **Ship fuel costs**
9. **Corp Operating Costs**
10. **Payroll**
11. **Depreciation**
12. **Virtuality (food)**
13. **Onboard and other**
14. **Other and transportation**
15. **Interest Expense**
16. **Profit before taxes**

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Cruise Guest Spending on Ports
Mainly for Excursions, Food & Beverage

The Cruise Sector reports:

- Cruise Lines International Association Europe (2015):
  - Home = €81 (excl. Airfares)
  - Transit = €62
- Florida-Caribbean Cruise Association (2015)
  - Home / Transit = €93.44 Euro
- Cruise Lines International Association Australasia (2015)
  - Home = Intl Pax €630 (incl. Airfares), Domestic Pax €434.70
  - Transit = Intl. Pax €162.90, Domestic Pax €135.90

The Ports report (examples):

- Portland, Maine (2009)
  - Transit = €72.45
  - F&B = €25.29
  - Apparel items = €19.06
  - Drug & beauty items = €1.80
- Copenhagen, Denmark (2010):
  - Transit = €75.59 (€ EU Average = €63.86)
  - Excursion = €40.94 (EU Average = €32.17)
  - Other goods = €34.65 (EU Average = €31.69)

Sources

“Results indicate that cruise passengers spend significantly less at their destinations than other tourists. In addition, the data indicate that cruise tourists overestimate their expenditure to a higher degree than other tourists” (Larsen, 2013)*

“Camping tourists spend twice as much as cruise tourists”**

“The most obvious question is whether passengers have any money left for spending onshore given the range of spending options onboard” (Klein, 2009)***

An even larger problem...is the uncritical acceptance of the assumption that cruise passengers on average spend US$100 in each and every port of call. (Klein, 2009)***


THE ‘HIGH SEAS’ OF COOPETITION...

Cruise Sector Integration in Overall Tourism Development
## Benefits of Cruise vs. Other Vacations

<table>
<thead>
<tr>
<th>Benefit</th>
<th>% of Cruisers, 2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chance to Visit Several Locations</td>
<td>70%</td>
</tr>
<tr>
<td>Relax/ Get Away From It All</td>
<td>60%</td>
</tr>
<tr>
<td>Being pampered</td>
<td>60%</td>
</tr>
<tr>
<td>Explore Vacation Area/Return Later</td>
<td>59%</td>
</tr>
<tr>
<td>High quality entertainment</td>
<td>59%</td>
</tr>
<tr>
<td>Easy to Plan and Arrange</td>
<td>58%</td>
</tr>
<tr>
<td>Hassle-free</td>
<td>57%</td>
</tr>
<tr>
<td>Variety of activities</td>
<td>56%</td>
</tr>
<tr>
<td>Unique &amp; Different</td>
<td>55%</td>
</tr>
<tr>
<td>Fine dining</td>
<td>55%</td>
</tr>
<tr>
<td>Luxurious</td>
<td>54%</td>
</tr>
<tr>
<td>Offers something for everyone</td>
<td>53%</td>
</tr>
<tr>
<td>Good value for the money</td>
<td>52%</td>
</tr>
<tr>
<td>Exciting and Adventurous</td>
<td>52%</td>
</tr>
<tr>
<td>Fun vacation</td>
<td>51%</td>
</tr>
<tr>
<td>Makes me feel special - rich and famous</td>
<td>49%</td>
</tr>
<tr>
<td>Romantic getaway</td>
<td>48%</td>
</tr>
<tr>
<td>Reliable</td>
<td>46%</td>
</tr>
<tr>
<td>Good vacation for entire family</td>
<td>45%</td>
</tr>
<tr>
<td>Safe</td>
<td>44%</td>
</tr>
<tr>
<td>Cultural Learning Experience</td>
<td>40%</td>
</tr>
<tr>
<td>Comfortable accommodations</td>
<td>39%</td>
</tr>
<tr>
<td>Good Activities for Children</td>
<td>36%</td>
</tr>
<tr>
<td>Participate in Sports You Enjoy</td>
<td>27%</td>
</tr>
</tbody>
</table>

---

## Cruise Guest Motives

### Visitors2Guests

### Cruising as a Source for Future Trips

<table>
<thead>
<tr>
<th>Benefit</th>
<th>% of Cruisers, 2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Good to sample destinations</td>
<td>85%</td>
</tr>
<tr>
<td>Have returned to destination first visited by cruise</td>
<td>42%</td>
</tr>
<tr>
<td>Typically extend vacation in port city</td>
<td>45%</td>
</tr>
</tbody>
</table>

### Cruise Vacation Beliefs

<table>
<thead>
<tr>
<th>Belief</th>
<th>% of Cruisers, 2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>I enjoy cruising often, but prefer to mix cruising with other types of vacations</td>
<td>34%</td>
</tr>
<tr>
<td>I enjoy cruising, but I do it infrequently and instead choose other types of vacations</td>
<td>28%</td>
</tr>
<tr>
<td>I prefer cruising to other types of vacations and cruise as often as possible</td>
<td>18%</td>
</tr>
<tr>
<td>I enjoy cruising, but consider it a vacation I would only take once or twice in my life</td>
<td>11%</td>
</tr>
<tr>
<td>I don't enjoy cruising and prefer other types of vacations instead</td>
<td>9%</td>
</tr>
</tbody>
</table>

---

Cruise Guest Motives*

Challenges for Destinations - Competition

Ranking of Best Vacation Type
% of Cruisers, 2014

- Ocean cruise: 42%
- Land-based vacation: 14%
- All-inclusive resort: 9%
- Resort non-package: 6%
- Visit friends/relatives: 6%
- River cruise: 4%
- Resort package: 4%
- House rental: 4%
- Land-based escorted tour: 2%
- Camping trip: 2%
- Vacation with business trip: 1%

Factors Influencing Cruise Selection
% of Cruisers, 2014

- Destination: 24%
- Overall experience: 20%
- Property/ship: 15%
- Cost: 29%
- Facilities: 13%

Ease of Travel

Value4Money

Cruise Value vs. Land Vacation
% of Cruisers, 2014

THE ‘HIGH SEAS’ OF SUSTAINABILITY...

Cruise Sector Externalities for Destinations
Environmental Sustainability
2016 FoE Scorecard Cruise Operator Results

Total Score (FoE) 2016

<table>
<thead>
<tr>
<th>Cruise Line</th>
<th>FoE Score</th>
<th>Own Points</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>DISNEY CRUISE LINE</td>
<td>11</td>
<td>6</td>
<td>Excellent</td>
</tr>
<tr>
<td>PRINCESS CRUISES</td>
<td>6</td>
<td>13</td>
<td>Excellent</td>
</tr>
<tr>
<td>CUNARD CRUISE LINE</td>
<td>6</td>
<td>12</td>
<td>Excellent</td>
</tr>
<tr>
<td>HOLLAND AMERICA LINE</td>
<td>6</td>
<td>11</td>
<td>Excellent</td>
</tr>
<tr>
<td>NORWEGIAN CRUISE LINE</td>
<td>6</td>
<td>10</td>
<td>Excellent</td>
</tr>
<tr>
<td>CELEBRITY CRUISES</td>
<td>4</td>
<td>8</td>
<td>Excellent</td>
</tr>
<tr>
<td>CARNIVAL CRUISE LINES</td>
<td>3</td>
<td>7</td>
<td>Excellent</td>
</tr>
<tr>
<td>ROYAL CARIBBEAN INT'L</td>
<td>3</td>
<td>6</td>
<td>Excellent</td>
</tr>
<tr>
<td>FATHOM</td>
<td>3</td>
<td>5</td>
<td>Excellent</td>
</tr>
<tr>
<td>SEABOURN CRUISE LINE</td>
<td>3</td>
<td>4</td>
<td>Excellent</td>
</tr>
<tr>
<td>REGENT SEVEN SEAS CRUISES</td>
<td>3</td>
<td>3</td>
<td>Excellent</td>
</tr>
<tr>
<td>OCEANIA CRUISES</td>
<td>3</td>
<td>2</td>
<td>Excellent</td>
</tr>
<tr>
<td>SILVERSEA CRUISES</td>
<td>3</td>
<td>3</td>
<td>Excellent</td>
</tr>
<tr>
<td>P&amp;O CRUISES</td>
<td>3</td>
<td>4</td>
<td>Excellent</td>
</tr>
<tr>
<td>COSTA CRUISES</td>
<td>1</td>
<td>5</td>
<td>Excellent</td>
</tr>
<tr>
<td>MSC CRUISES</td>
<td>1</td>
<td>4</td>
<td>Excellent</td>
</tr>
<tr>
<td>CRYSTAL CRUISES</td>
<td>1</td>
<td>3</td>
<td>Excellent</td>
</tr>
</tbody>
</table>

Mean 3.7


Sewage Treatment Score 2016

<table>
<thead>
<tr>
<th>Cruise Line</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>CELEBRITY CRUISES</td>
<td>12</td>
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<td>CUNARD CRUISE LINE</td>
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<td>10</td>
</tr>
<tr>
<td>MSC CRUISES</td>
<td>9</td>
</tr>
<tr>
<td>P&amp;O CRUISES</td>
<td>3</td>
</tr>
<tr>
<td>SILVERSEA CRUISES</td>
<td>2</td>
</tr>
<tr>
<td>COSTA CRUISES</td>
<td>1</td>
</tr>
<tr>
<td>CRYSTAL CRUISES</td>
<td>1</td>
</tr>
<tr>
<td>TOTAL</td>
<td>Mean 7.3</td>
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</table>

Air Pollution Reduction Score 2016

<table>
<thead>
<tr>
<th>Cruise Line</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>PRINCESS CRUISES</td>
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<td>FATHOM</td>
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<td>NORWEGIAN CRUISE LINE</td>
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<td>MSC CRUISES</td>
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<tr>
<td>SILVERSEA CRUISES</td>
<td>1</td>
</tr>
<tr>
<td>CRYSTAL CRUISES</td>
<td>1</td>
</tr>
<tr>
<td>TOTAL</td>
<td>Mean 3.6</td>
</tr>
</tbody>
</table>

Mean 3.6
### Friends of the Earth Scorecard

**The Smaller the Better?**

#### The higher the Passenger Capacity, the higher the Air Pollution Reduction Score

(i.e. correlation significant at the 0.01 level)

<table>
<thead>
<tr>
<th></th>
<th>Passenger Capacity</th>
<th>Sewage Treatment</th>
<th>Air Pollution</th>
<th>Total FoE Score</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Passenger Capacity</strong></td>
<td>Correlation Coefficient</td>
<td>1,000</td>
<td>.143</td>
<td>.227**</td>
</tr>
<tr>
<td></td>
<td>Sig. (2-tailed)</td>
<td>.</td>
<td>.062</td>
<td>.194*</td>
</tr>
<tr>
<td></td>
<td>N</td>
<td>171</td>
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<td>N</td>
<td>171</td>
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</tr>
</tbody>
</table>

#### The higher the Passenger Capacity, the higher the FoE Total Score

(i.e. correlation significant at the 0.05 level)

<table>
<thead>
<tr>
<th></th>
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<th>Sewage Treatment</th>
<th>Air Pollution</th>
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<tr>
<td></td>
<td>N</td>
<td>171</td>
<td>171</td>
<td>171</td>
</tr>
</tbody>
</table>

#### Tech-advancement vs. life-span of cruise vessels is the key!

Overcrowding... Carrying Capacity Restrictions

Overcrowding is a time- and place-specific phenomenon!
Overcrowding and Implications

- Return on Experience Reduction
- Safety & Security

Cruise Tourists (‘Crowd’)

- Cost-of-Living Increase (Property, Goods & Services)
- ‘Infrastructural-Strain’ (e.g. Public Transport)

Destination’s Carrying Capacity

Overnight Tourists

- Enclave Tourism (Holiday Ghettos)
- Tourism Income Leakages
- Mass Tourism

City Centre

Tourist Attractions

Suburbs / Resorts

Locals

Port

• Hospitality / Antagonism
• Cultural Sustainability
• ‘Beach Disease’ Facilitation

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FROM ‘HIGH HOPES’ TO ‘DREAMS COME TRUE’

Destination Competitiveness and Port-Alliances
Developing Competitive Cruise Destinations

Cluster Theory & the 6As*

Accessibility (Transportation system, Travel infrastructure)
Availability (Marketing the destination supporting domestic demand)
Amenities (Accommodation, Catering, Tourist Info)
Ancillary Services (Telecommunications, Banks, Medical services)
Activities (Special events, festivals, entertainment, shopping)
Attractions (Natural & created)

Core Resources & Attractions

Port / Destination Management

DMOs (Destination Management Organisation – e.g. Atlantic Alliance)

 Demand Conditions

Local Authorities

Educational Organisations (e.g. Universities)

Complementary Conditions

TNCS (Transnational Corporations / Cruise Operators)

Local Tourism Companies & Suppliers

Cruise Destination Positioning and Development Strategy

**PORT-Folio Matrix***

<table>
<thead>
<tr>
<th>Infrastructure Development</th>
<th>Tourism Development</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Access</strong> (Transportation system, Travel infrastructure)</td>
<td><strong>Attractions</strong> (Natural &amp; created)</td>
</tr>
<tr>
<td><strong>Ancillary Services</strong> (Telecommunications, Banks, Medical services)</td>
<td><strong>Activities</strong> (Special events, festivals, entertainment, shopping)</td>
</tr>
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<td><strong>Availability</strong> (Marketing the destination supporting domestic demand)</td>
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</tbody>
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<table>
<thead>
<tr>
<th>Exclusive Cruise Destination</th>
<th>Established Cruise Destination</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Competitive focus</strong>: Differentiation</td>
<td><strong>Competitive focus</strong>: Reputation</td>
</tr>
<tr>
<td><strong>Critical resources</strong>: Unique POIs</td>
<td><strong>Critical resources</strong>: Image / Brand</td>
</tr>
<tr>
<td><strong>Strategic focus</strong>: Market penetration, strategic investment</td>
<td><strong>Strategic focus</strong>: Loyalty &amp; Sustainability (Economic, Social, cultural Environmental)</td>
</tr>
<tr>
<td><strong>Risks</strong>: Antagonism (locals -&gt; guests)</td>
<td><strong>Risks</strong>: Exploitation (locals -&gt; guests), Overcrowding</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Authentic Cruise Destination</th>
<th>Gateway Cruise Destination</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Competitive focus</strong>: Cost leadership</td>
<td><strong>Competitive focus</strong>: Revenue maximisation</td>
</tr>
<tr>
<td><strong>Critical resources</strong>: Gov. funding, Educ. facilities</td>
<td><strong>Critical resources</strong>: Local economy</td>
</tr>
<tr>
<td><strong>Strategic focus</strong>: Innovation, social investment</td>
<td><strong>Strategic focus</strong>: Public Private Partnerships (PPP), network-creation</td>
</tr>
<tr>
<td><strong>Risks</strong>: Guest safety &amp; security</td>
<td><strong>Risks</strong>: Apathy (locals -&gt; guests), Overcrowding</td>
</tr>
</tbody>
</table>

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Implications for Regional DMOs

Destination Awareness & Image Campaigns are the Tip of the Iceberg

Destination Promotion
- End customers (pull) - Web-presence, Media campaigns, Trade fairs
- Tour / Cruise Operators (push) - Key account man/t
- ‘Alternative’ PR initiatives (e.g. destination ‘film’ placement)

Destination Positioning & Image
- Destination branding
- Marketing research & reporting
- Crisis management (Communication / PR level)

Destination Development Strategy
- Life cycle management & regional capacity control
- Pluralistic objective definition (i.e. sustainability, multi-stakeholder interests)
- Neutrality assurance and stakeholder commitment

Co-opetition Infrastructure
- Enable and support PORT-folio balance
- Facilitating PPP (Public Private Partnerships)
- Synergy identification and syndication

Content Development & Management

Data Collection & Research Dissemination

KPI Development & Controlling

Syndication, Political Lobbying & Promotion

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Just like the **open sea**... The potential of **cruise tourism** and its externalities are **not a choice**; But a challenge to be cooperatively managed!
THE PERSON WHO LIVES BY HOPE WILL DIE BY DESPAIR

Proverb
Research Functions:
- Founder & Chairman of the Cruise Research Society (http://www.cruiseresearchsociety.com)
- Co-Director of the Institute for Maritime Tourism (IMT) (http://www.imt.hs-bremerhaven.de/)

Administrative Functions:
- Dean – Faculty of Management and Information Systems
- Member of the Research Committee of the Bremerhaven University of Applied Science
- Chairman of the CTM Examinations Committee
- Member of the CTM Study Affairs Committee