PROSPECT AND CHALLENGES OF CRUISE TOURISM DEVELOPMENT IN SRI LANKA

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Abstract

Cruise tourism is the fastest growing segment of leisure tourism. With its growth has come concern about theimpact of cruise tourism on coastal and marine environments, local economies, and on the socioculturalnature of port communities. These three areas are key elements in analyses focused on responsible tourism, and form a critical base from which to consider strategies to ensure the sustainable development of cruise tourism. The goal of this article is to illustrate how a responsible tourism lens measures the impact of cruise tourism and, with its focus on the perceptions of host communities, more effectively addresses grassroots concerns of cruise tourism development of Sri Lanka. Case examples are used to identify and describe the prospect and challenges faced by governments, communities, and the cruise industry agents. Analysis of these prospects and challenges give a direction for how cruise tourism can grow in ways that are both sustainable and responsible.

Keywords: Responsible tourism, cruise tourism, environmental impacts, sociocultural impacts, economics of cruise tourism

1. Introduction to Cruise Tourism Industry

 "Cruise tourism is a luxurious form of travelling, involving an all-inclusive holiday on a cruise ship of at least 48 hours, according to specific itinerary, in which the cruise ship calls at several ports or cities". (RCCT 2016)

A cruise ship or cruise liner is a passenger ship used for pleasure voyages, where the voyage itself and the ship's amenities are a part of the experience, as well as the different destinations along the way, that is, ports of call. Transportation is not the only purpose of cruising, particularly on cruises that return passengers to their originating port (also known as a *closed-loop cruise*), with the ports of call usually in a specified region of a continent. There are even "*Cruises to nowhere*" or "*Nowhere voyages*" where the ship makes 2–3 night round trips without any ports of call. *(Mayntz and Melissa 2013)*

Cruise tourism is a dynamic, growing segment of tourism that has long ceased to represent a mere niche and is slowly but steadily entering the domain of mainstream tourism. Yet, cruise tourism represents a minor fraction of the global travel and tourism industry.

Reasons for selecting Cruise Tourism
- All facilities are within the accessible distance and easy reach them
- '100% satisfaction guaranteed'
  Cruise voyages are known to deliver unparalleled customer satisfaction. This appliesto frequent as well as first-time cruisers. Every time, the cruise experience exceedsexpectations in a wide range of important holiday features. When compared to othertypes of holidays, cruise holidays receive consistent high scores.
- Very favourable price/quality ratio Cruise holidays are offered in a range of price categories.
- Cruising fulfils important holiday needs to a high degree: service, quality, time for each other, and fun and entertainment.
- Cruise holidays are suited to a wide market rangeMany ships offer facilities for all age categories.

- Due to the increasing growth of supply, there is an ever-greater choice of countless destinations all over the worldCruising is varied. You get to see a lot of different places in one holiday.
- Booking a cruise is easy (as a package holiday), does not require any planning, and makes for a great experience without any inconvenience.A cruise is a tour which does not require its participants to pack and unpack every time.
  The accommodation remains the same, it is only the environment that changes.
  Types, Products and Services offered.

What makes Cruising Unique?

Cruising is a unique tourism product, a blend of the 5A's: attractions,activities, access, accommodation, amenities. The words "luxury" and"pampering" are found in all cruise brochures, and every cruise lineproudly highlights these five aspects to market its product. Cruising is nowwell established as one of the most service-intensive sectors in the world,with ever more incredible state-of-the-art vessels being built each year.
'Pampered in luxury" accurately describes the cruise experience. We capture below what makes a cruise a unique tourism product.

- **Cruising is intensively service-oriented.** Most ships provide a 24-hour Room service.New ships are adding 24-hour pizzerias. Other facilities include casino, pool, jacuzzi, sauna, gym, on-board lectures, card rooms, an unending variety of organized games and contests, supervised children's activities and entertainment including Broadway and Las Vegas-style shows, lounges, nightclubs, movies, dancing and more. Cruise ships are more like mini cities providing most of what such a city has to offer.

- **Cruise ships are destinations in themselves,** with features and amenities comparable or superior to land-based resorts. This can be particularly attractive in destinations that lack high quality hotels or "creature comforts." Onboard facilities such as spas, pool and open deck areas, jacuzzi, lounges, casino, shipboard activities, spacious accommodations and legendary service make the ship a great place to relax, retreat, rejuvenate and play. The Seabourn Pride, Legend and Spirit as well as several Radisson Seven Seas ships haveplatforms that drop off the back to create a private water sports area when the vessels are at anchor.

- **Modern cruise ships have state-of-the-art telecommunications equipment,** including in cabin ship-to-shore phones. Yet they enable the passenger to feel secluded and "out oftime." You have the illusion of getting away from it all.

- **Cruising is remarkably affordable.** The following is typically what is included in the costof the cruise, at a price that is generally lower than a comparable land-based vacation:
  • Round-trip airfare
  • Transfers from airport to ship and from ship to airport.
  • Three main meals per day (breakfast, lunch and dinner). Special children's menusare available if children are present or three buffet meals per day (breakfast, lunchand midnight). Some ships add a fourth buffet for late-nighters at around 1:30a.m. Many ships also have afternoon snacks or traditional high teas.

- **Cruising offers multiple destinations,** without the hassles of packing and unpacking.Itineraries include visits to three or more ports of call (depending on length of cruise).
- **Cruises are floating resorts.** Cruising presents a unique competition feature, with the main competitors of cruise liners being the land resorts rather than the other cruise line companies. Thus a cruise ships are increasingly looked upon as a floating resort than a mere means of transport. The amenities offered on board are a result of popularizing cruising with this concept of a floating resort.

There is an incredible diversity of cruise vacations available, most of them custom designed to suitdifferent interests and personal preferences. Broadly looking the following are the generalcategory/types of cruises that operate.

Ocean Voyages

An ocean voyage is a one-way passage from one point to another over a major body of water. Somevoyages have intermediate ports of call while others do not. Trans-Atlantic or trans-Pacific crossingsare the most common ocean voyages. The ships most used for ocean voyages are cruise ships, yacht style ships, masted sailing ships, and freighters.

Standard Cruises

An open water cruise may be one-way or round-trip with several ports of call. These cruises aretraditionally vessel-oriented trips in which the ship and all the amenities it provides are the main focusof the voyage. The ship is selected based on accommodations, recreation, entertainment and service.The ships most used for open water cruises are cruise ships, yacht-style ships, masted sailing ships, freighters, ferries and private yachts.

Turnaround cruises

If a cruise starts at and returns to the same destination, then this involves a turnaround cruise.The cruise ships moor at ports for the purpose of the embarking and disembarking ofpassengers. For the passengers, these ports may not be their desired destination, but theysometimes make use of the opportunity to make a tourist trip out of it. Turnaround cruises areonly possible if a port is equipped with a terminal.

River/Canal Cruises

River and canal cruises are closely linked to the culture and heritage of the country being toured.Along the journey, the waterway's villages, town and cities offers particular appeal to scenery buffsand those who enjoy ever-changing landscape. Travellers choosing river and canal cruises areinterested in and attracted to the destinations as well as the cruising experience. The ships most usedfor river and canal cruises are yacht-style ships, river ships, barges and private yachts.

Destination / Expedition Cruises

Destination and expedition cruises are selected, just as river cruises, based on the destination to bevisited. Travellers are attracted by the unique, out-of-the-way, remote or exotic ports of call. Thesecruises offer the stimulation of exploring new territories while in the company of like-mindedtravellers. The ships most used for destination and expedition cruises are yacht-style ships, river ships,and private yachts.

Transit cruises

One speaks of a transit cruise, when a destination serves as a stopover. During a transit, thecruise ship moors early in the morning or afternoon, so as to give passengers enough time toexplore the destination. The visit generally lasts one or several days, after which the cruise shipheads for another destination.

Theme cruises

Throughout the year, various cruise companies organize a range of theme cruises.   A few examples are golfing cruises, cookery cruises, music or celebrity cruises (with famous singers orbands), active bicycle cruises, and wine cruises.

Day Cruises

Day cruises are typically a cruise experience of 15 hours or less. Passengers choose this method ofcruising, as a day's outing or combined with a longer vacation. These cruises may be geared togambling, whale watching, dinner, etc. The ships most used for day cruises are cruise ships,steamboats, ferries, river ships, and private yachts.

Contemporary Cruises

These are the most popular and recognized cruise lines, having the following key features:These cruise serves the most popular segment, the mass market or first class cruisersThese cruise lines typically have resort-style facilities with heavy emphasis on shipboardactivities.

- Most of these lines have both shorter itineraries that are closer to home and longerones that may require international travel.
- These cruises tend to have newer and larger cruise ships with lots of amenities including lavish show rooms, extensive spa facilities, expansive children's programs,televisions and in-room movies in all cabins, double/queen beds, etc.
- Often have something for everybody - all age groups. These lines are typically thebest for families and kids of all ages.

The most famous examples of these cruise lines are Carnival Cruises, Celebrity Cruises, Costa, Cruises, Disney Cruises, Holland America Cruises, Norwegian Cruises, Royal Caribbean, International Cruises, Princess Cruises.

Luxury Cruises
These constitute the ultimate cruise experience, taking service to a different level. The followingfeatures define luxury cruise:
- The highest quality of cruises available, offering high style luxury with emphasis ondestinations and ship-board amenities.
- Most sailings tend to be significantly more formal than first class cruise lines.
- Luxury ships tend to be exclusive carrying far fewer passengers. Accommodationsare often more spacious with a very high percentage of ocean-view staterooms andsuites.
- These cruise lines are more itinerary-oriented, often featuring longer cruises and International travel.Luxury cruises cater to the mature, experienced audience with very few first time cruisers. Accordingly the cruise tends to be less "entertainment-oriented" and more"experience-oriented", less suitable for young children or the first choice for families.

Most popular luxury cruises are Cunard Cruises, Oceania Cruises, Crystal Cruises, Radisson SevenSeas, Silver Star Cruises, and Windstar Cruises.

Specialty Cruises
Specialty cruises, as the name implies, are special destination oriented cruises offering uniqueexperiences. The main features include:
- Adventure-style cruising with a heavy emphasis on destination, education, and offship activities, sometimes offering the only way to see a certain area of the world thatthe large first class cruise lines can't visit.
- Quality on these cruises varies from very modest to very deluxe, being more of anexperience than a cruise. Accommodations and amenities vary greatly by cruise lineand product.
- Types of ships vary from Sailing Ships, Paddle Wheelers, Cargo Vessels, River Barges, and Yacht-like Ships.
- Specialty cruises, like luxury cruises, are not a good choice for children or families.
- Pricing is flexible and varies by product.

Cruise Line Anatomy
Every day, more than a century of ships are cruising the world's oceans. The comparison of a cruiseship with a floating resort or city is easily made. There are small sea cruise ships with 'merely'a couple of hundred of passengers on board, but also giant vessels accommodating more thanthree thousand passengers. It is especially these large ships that offer scores of facilities to entertain passengers, including jacuzzi pools, swimming pools, casinos, nightclubs, fitness,sauna and wellness facilities, shops, (4D) cinemas, bars (including karaoke bars) and a varietyof shows.

Over the past few years, the cruise market has seen enormous growth in both passenger numbersand destinations. This growth has given rise to a demand for very large cruise ships. Someshipping companies have eagerly capitalized on this situation and regard it as an opportunityto cope with the fierce competition. Today's cruise ships have been designed for functionality(of the destination), taking into consideration the desired target market. The following diagram illustrates the main parts attached to the cruise line.

Figure :1 Basic Parts of a Cruise Ship

Source :https://punchaos.com/carnival-cruise-ship-diagram
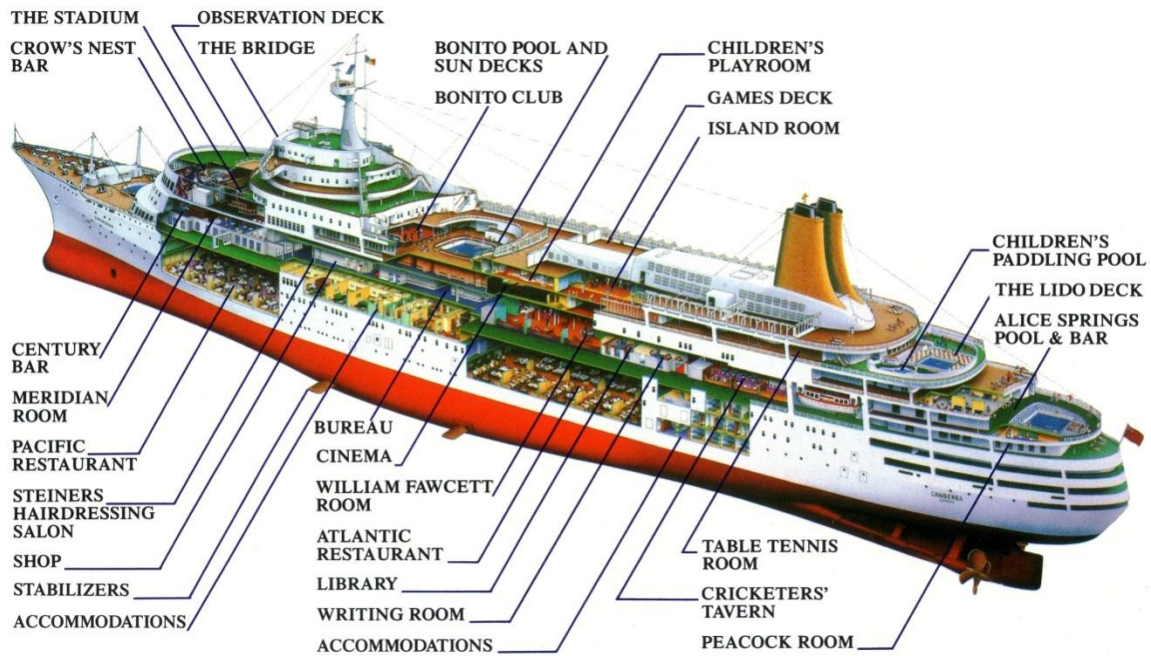
Global overview and conceptual frame work of cruise tourism

The cruise market is one of the fastest growing segments in the travel and tourism industry and canmake a significant contribution to a destination's economy. As cruise lines are increasingly lookingfor new destinations, cruise tourism can offer opportunities to Developing countries with harbor facilities and an interesting hinterland.

Cruise tourism is the fastest growing segment ofleisure tourism, increasing 7.2% annually since 1990, According to the Cruise Lines International Association, it is doubling every decade (CLIA, 2010). While typically greatest inNorth America, growth is in recent years increasingly at aquicker pace elsewhere in the world. Between 2006 and 2009 passenger numbers in North America were virtually unchanged, compared to a 68% increase (an average 17%annually) outside North America (CLIA, 2010). Growth 'down under' has been even greater. Carnival Australiareports a 26% passenger increase between 2008/09 and 2009/10,a level of growth that will continue with the addition of ships to the company's fleet. New Zealand reports a 513% increase between 1996/97 and 2009/10; an average 37% per year (Tourism New Zealand, 2010).This growth is in part a result of redeployment of older ships from North America to other parts of theworld, including Europe, Asia, and Australia (Davies, 2009). The growth also reflects construction ofever-larger ships. Carnival Cruise Lines' and Royal Caribbean's first ships carried 1,024 and 724 respectively.Their newest ships carry 4,000 and 6,000 passengers, respectively (Klein, 2005a).

Cruises represent one of the fastest growing tourism segments. The latest trend of mega-ships (or mega-liners), carrying over 6,000 passengers and crew and containing shopping malls, several restaurants, theatres and various sport facilities, may tempt a casual observer to synonymies "cruise tourism" with "floating resorts". Yet, despite the dominant presence of a "floating hotel", a cruise holiday takes place mostly on land. For the vast majority of offerings, the itinerary (or route) reflects a key component and differentiator of a cruise holiday, particularly for the European source markets. Behind every organized cruise, there is a value chain comprising ports/destinations, transport companies, destination management companies and ship-chandlers/food and beverage suppliers.

Cruise packages typically include transport to/from embarkation/disembarkation ports and various excursion packages at the ports of call. Therefore, before proceeding with providing an overview of the key state-of-the-art issues and challenges surrounding cruise tourism, it is pertinent to provide a working definition of the phenomenon at hand:

At this point, it is important to clarify the aims and scope of this contribution. As the title suggests, this is a "state-of-the-art" type of paper, aiming at:

1. Synthesizing knowledge;
2. Giving readers a comprehensive overview of the topic; and
3. Identifying key areas for future research.

Hence, it is conceptual, using existing literature and the author's expertise to provide a comprehensive and coherent overview of everything relevant to the topic. Meeting this requirement, within the limited scope of a single paper, implies a trade-off between scopewidth and content depth. To enable the reader(s) to navigate through the wide range of issues covered, the paper's structural–logical overview is explicitly described and elaborated (also refer to Figure 2).

The paper consists of three main parts. The first part provides a comprehensive thematic overview of cruise tourism [Figure 2 – Cruise Entities, inter-Relationships and Themes (CruisERT) framework] and proceeds in describing the themes, focusing on the management challenge(s) corresponding to each one. The second part explores current developments, advances and practices in the cruise sector (e.g. smart ships and big data) and examines their potential in relation to the aforementioned challenges. The final part synthesizes the discussion and underlines the need for interdisciplinarily, and more particularly, a wider application of information systems theory and research in the cruise domain (i.e. e-cruising).

Conceptualizing cruise tourism: key prospects and challenges

To conceptualize the cruise tourism system, Papathanassis and Beckmann (2011), proposed a conceptual framework (CruisERT), which is graphically depicted in Figure 2. More specifically, this framework describes:

- Entities: Cruise staff (or crew), cruise passengers, ports/destinations, cruise operators and cruise vessels.
- Interrelationships (e.g. destination–passengers, passengers–staff).
- Themes: "The cruise market", "the cruise society", "cruises and society" and "cruiseadministration".

Figure: 02 Conceptualizing Cruise Tourism (Cruise ERT framework)
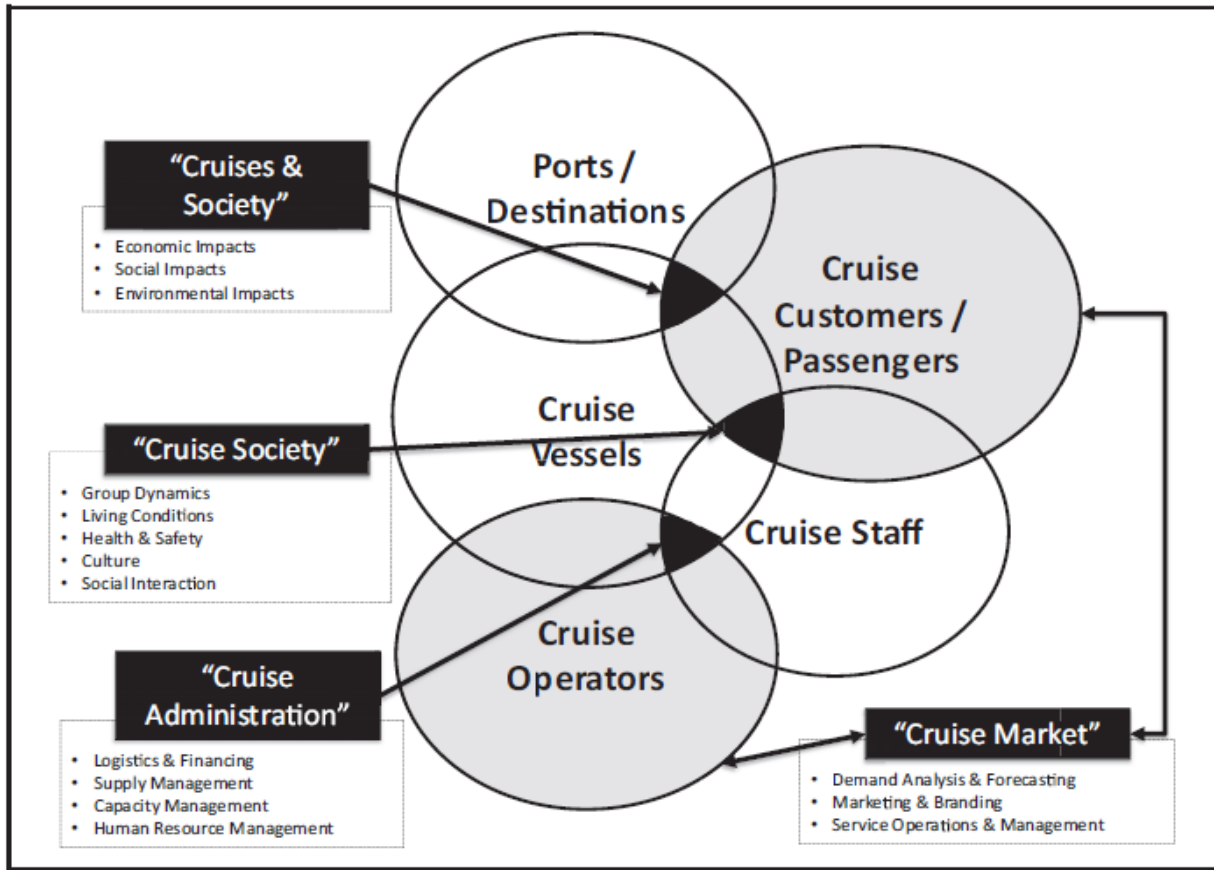
Source : Alexis Papathanassis, (2017) "Cruise tourism management: state of the art", Tourism Review.

Cruise market

The first theme ("Cruise market") focuses on the relationship between cruise operators and their actual or potential passengers. The cruise sectors' profitability is highly dependent on effectively managing capacity-related risk. In the context of cruises, capacity growth (i.e. more lower berths) also means increased financial risk. Thus, understanding, measuring and forecasting market trends, consumption, demand, customer and expectations are a top priority for the sector.

Passenger growth and demand trends

According to the Cruise Lines International Association (CLIA, 2016), worldwide cruise passenger numbers have consistently grown over the past years and will be reaching 25.3 million in 2017. The CLIA represents 60 cruise operators, representing approximately 95 per cent of the global cruise capacity (448 vessels/471,000 beds), sold by 25,000 travel agencies worldwide. According to the CLIA (2016), the North American source market (approximately 45 per cent of global passengers) and the Caribbean cruise region (approximately 35 per cent of cruises) dominate the

cruise sector, followed by European source markets (approximately 23 percent of passengers) and the Mediterranean cruise region (approximately 20 per cent of cruises).

Key Challenges and issues in global tourism industry

Key Challenge 1: **Understanding Source Market Penetration**

Although the US source market is reaching maturity, further growth is expected in Europe and South America. Nonetheless, the largest potential, in growth terms, is expected in the Asian source markets, and the largest cruise operators (Carnival Cruises and Royal Caribbean Cruises) have begun shifting their capacities from Europe and the Caribbean to Asia.

Understanding and catering to emerging source markets as well as adjusting the existing marketing mix to their needs is central for the sustainable growth of the cruise sector.

Segmentation and demographic evolution

The average cruiser is 49 years old and earns US$114,000 p.a. (CLIA, 2015). Moreover, 72 percent of cruise guests are employed, 84 per cent are married and 69 per cent have a university degree (CLIA, 2015). Cruise passengers' motives for choosing this type of holiday correspond to the stereotypical benefit of a cruise: to conveniently visit several destinations during a single trip, whilst enjoying high service standards and an attractive value-for-money proposition.

The average cruise spending per passenger (incl. airfares and spending on land) is $2,200, with the average cruise holiday lasting 7.3 days (CLIA, 2015). This price range is easily comparable to an upscale, packaged, all-inclusive holiday.

Key Challenge 2 : **Hybrid Cruisers and First-time Guests**

The current demographics of cruisingsomewhat conflict with the stereotype of well-off silver agers, repeating the same cruise,seeking routine (e.g. same dining table and same waiter) and valuing a formalized experience.

NCL's "Freestyle" cruising, Celebrity's "modern luxury", Carnival's "fun ships" and Royal

Caribbean's "Wow Factor" all render strict dinner times, formal attire and "ceremonial"

Atmosphere, a relic of the past. Millennials are discovering cruise holidays as a complementary form of holiday, fogging the distinction between "cruisers" and "non-cruisers" (i.e. hybrid cruisers). Because of "hybrid cruisers" and ever-increasing capacities, cruise operators can not solely rely on loyal repeaters as they did in the past. Attracting and winning the loyalty offirst-time cruisers is key to avoid the risk of over-capacities in the medium term. Emergingthematic sub-segments (e.g. heavy metal cruises), land–sea holiday package combinations and media-visible mega events (e.g. concerts new vessel launches) are attempts to attract first-time cruisers and promote cruise holidays to a wider audience.

***Key Challenge 3 :* Cruise Vessels as Flexible Experience Platforms.**

The vessel is the central infrastructural element of the cruise holiday. As the focus shifts towards creating themed,mass-customized experiences for a variety of guest groups, this very infrastructure can be alimiting factor. The size of a cruise vessel may pose a restriction to its itinerary options (i.e. portcapacity limitations), and its inner architecture can limit the customization of activities to different themes. Given the construction costs and long lifespan of cruise ships, market adaptation through new builds is not economically attractive. In this respect, engineering,design and technological innovations could potentially transform (refitted or new)cruise vessels from "floating accommodation and catering infrastructures" to "technologically-enabled multi-experience platforms".

Cruise society

The interaction between cruise staff and passengers determines the quality of experience during a cruise. Health and safety, group dynamics, work–life balance, sense-making and identity within the confined space of a cruise vessel are indeed challenging management issues (Kowollik and Jonas, 2016). The maritime operational realities and the demographic diversity of crew and passengers create a highly complex social environment.

Human resource management and cruise sector realities

Cruise operators have managed to maintain high profitability over the past years, despite rising fuel costs and price competition. Keeping crew-related costs low and the ability to generate on-board revenue both play a crucial role here. Crew is mainly sourced from developing countries (e.g. Philippines, Indonesia, India, Romania and Bulgaria). According to the International Transport Workers Federation (Mather, 2002), over 70 per cent of those working on cruise ships are hotel/catering staff (i.e. cabin stewards, waiters, laundry staff, kitchen crew and clerical staff). Their average working time is between 10 and 12 h per day (seven days a week), and the salaries typically range from US$ 700 to 400/month. For bar waiters and crew entitled to tips, the monthly salary can be as low as US$50/month. Notwithstanding, potential crew members often have to incur various extra costs (estimated between US$ 1,000-1,500) to even get the job (e.g. airfares, health examination, seafarer's book and visas). This, in conjunction with long-working hours and the inherent trials of life at sea, renders cruise ships as rather unattractive workplaces. This contention is supported by the relatively high employee turnover in the sector. The average length of crew employment is approximately nine months (Mather, 2002). Yet, globalization, poverty and international

maritime law. (flags of convenience) still enable these practices.

***Key Challenge 4 :* Crew Sourcing and Turnover**

Setting aside the ethical imperative, theexisting crew management practices and working conditions increasingly pose a business-effectiveness question. The increasing size of ships (i.e. safety challenges and management complexity), technological innovation and the sophistication of on-board services all call for elevated levels of crew professionalism and productivity.

This ranges from extensive language skills to the ability to operate various technologies and systems onboard. Under the current employment terms, working conditions and the resulting crew turnover, qualified crew sourcing is expected

to become increasingly difficult and expensive for cruise operators. Security, health and safety issues a related issue to the human resource practices on board is health and safety. This goes well beyond extensively media-covered incidents such as the Costa Concordia disaster.

Infact, such incidents are sporadic in passenger shipping (Lois et al., 2004). According to Klein's (2014) data, in the period between 1990 and 2013, approximately 48 passengerships have sunk. This may appear significant at first, but is put into perspective when compared to a total of 448 (during the same period) so-called "disabling accidents" resulting from fires, collisions, power-loses, engine-damage and propulsion problems.

A disabling accident leaves passengers and crew stranded for several days at sea, enduring adverse conditions (Papathanassis, 2016a). Moreover, there is an array of daily health and safety issues on board such as theft, assault, illness out breaks and passengers overboard (Klein, 2016; Klein and Poulston, 2011).

Key Challenge 5 : **Crisis Management and Communication Transparency**

The emergence of "floating cities / resorts" challenges the effectiveness and relevance of traditional evacuation protocols and safety regulations (Papathanassis, 2016a), which need to be adjusted and scaled to accommodate a larger and more diverse passenger population on board. Leeet al. (2003) emphasize the importance of understanding human behaviour during such incidents and developing the competencies to manage it under critical situations. Even minor health and safety incidents, with the aid of social media, have a potential to escalate to a full-blown reputation crisis if they are not managed correctly. The maritime credo "what happens at sea, stays at sea" is not relevant anymore. Effective incident reaction and crowd management demand improved communication flows on board. Post-incident crisis management is dependent on communication transparency, information availability and reliability, not just on board but also between land and sea.

Key Challenge 6: **Corporate social responsibility and co-development**
Mere environmental regulation compliance and "green-washing" will not suffice in the long term. According to de Grosbois (2016), cruise companies' corporate social responsibility reporting lacks information source transparency / reliability and third party controls and assurances, specificity in terms of measures / performance. The cruise sector is being increasingly subjected to public scrutiny and criticism by various non-governmental organizations (e.g. Friends of the Earth, International Transport Workers Federation and UN International Labour Organization), academics and the media. Ports are becoming gradually skeptical and rigorous regarding the necessary investments for hosting more and larger cruise vessels.

Cruise region development
Attracting cruise tourism often implies significant investments in port facilities infrastructure, posing a capacity-utilization risk for local authorities and ultimately for the destination's tax payers. A cruise itinerary consists of

numerous ports, often in different countries. Thus, developing a cruise region isbeyond the investment scope and control of an individual port's authorities.

Cruise tourism development can be described as a "multi-cluster portfolio management" challenge. Each individual port contains its own cruise tourism cluster and the region represents a portfolio of different ports, with differing tourism life cycle dynamics, attractionsand infrastructure. Effective cruise tourism development under these premises can be translated to achieve a diversified and balanced itinerary. Papathanassis and Bunda (2016) classify cruise ports as either authentic, exclusive, established or gateway destinations,depending on their degree of tourism and infrastructure development (see Figure 3).

Figure : 3 **"Port-folio matrix" – Strategy development for cruise regions**
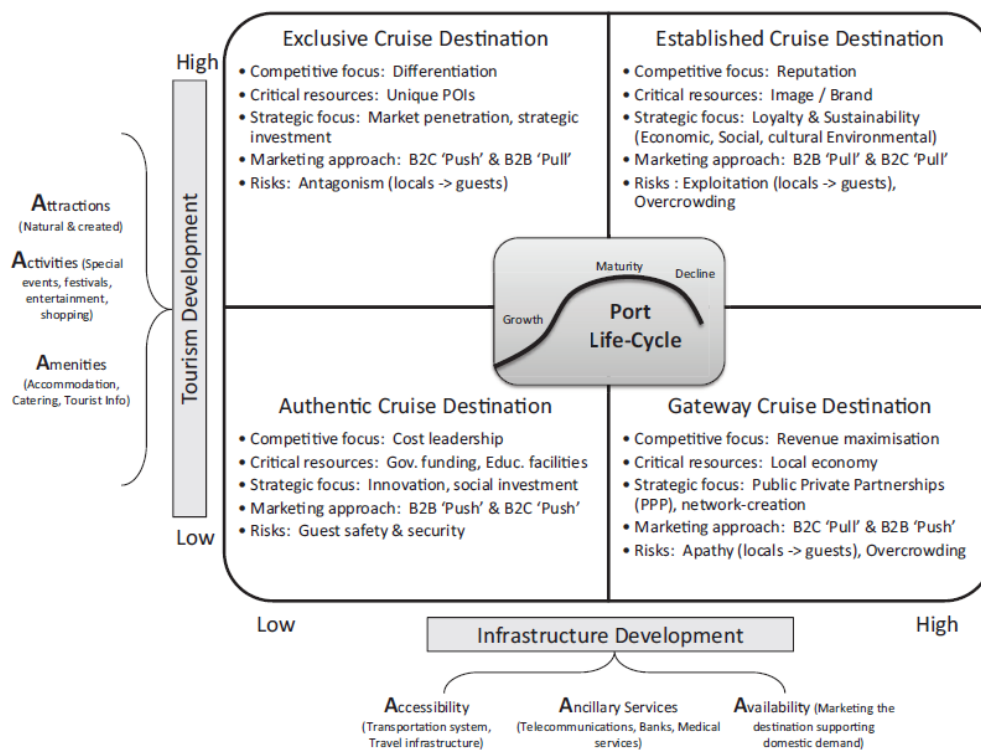
Source : Alexis Papathanassis, (2017) -Cruise tourism management.

Gateway cruise destinations are suitable for home-porting[3], authentic and exclusive ports serve as highlights / differentiators and established ports are the main attractors of the region ("must-sees"). This approach asserts that the optimal mix of ports defines the attractiveness of a cruise region and that a "one-recipe-fits-all-port" is neither effective nor realistic (e.g. all ports in the West Mediterranean region imitating the value proposition of Venice or Dubrovnik).

Key Challenge 7: **Cruise Port Alliances and Development Governance**

Currently, there arevarious cruise port alliances such as American Association of Port Authorities, MedCruise, Atlantic Alliance and Cruise Baltic. Their role to date is mainly focused onpromoting and providing online content for their respective regions, whilst acting ascommunication forums between port authorities. To facilitate and sustainably developregional cruise tourism, those organizational entities (or alternative ones for that matter) will need to shift their focus from port promotion to regional representation and from acoordination of ports to the management of cruise tourism development in their respective ports and regions as a whole (e.g. facilitating public–private partnerships forport and general tourism infrastructure). Establishing such a governance model indeed represents a prisoner's dilemma and leadership challenge, as it would require port / destination stakeholders to sacrifice autonomy for the sake of cooperation. Considering that a number of port/destination entities within a cruise region are owned and managed by public sectors in different countries adds to this governance challenge.

Cruise (business) administration

Another factor that we need to concerned with how cruise operators manage their fleets, ships and staff. The value chain and core processes of cruise operators remain somewhat under-researched (Papathanassis and Beckmann, 2011). Here, it is important to distinguish between ship-based hotel operations and land-based cruise operating. Cruise operating has a wider scope, involving the strategic, tactical and operational management of both land- and ship-based resources. Processes such as itinerary planning, ship financing, chartering and yield management require formalized business education and professional qualification.

2. Global Cruise tourism market trends and its behaviour

Cruise Lines International Association (CLIA) is the world's largest cruise industry trade association, providing a unified voice and leading authority of the global cruise community. According to the annual report of CLIA 2017, following key features identified in the global cruise tourism industry.

- Total of 24.2 million passengers cruised globally during the year 2016.
- The industry estimates that 25.3 million will cruise globally in 2017.
- $117 billion in total economic impact and 956,597 jobs paying $38 billion in wages and salaries were generated by the global cruise industry in 2015.
- The cruise industry is the fastest-growing category in the leisure travel market. Since 1980, the industry has experienced an average annual passenger growth rate of approximately 7% per annum.
- Demand for cruising increased 62% between 2005 and 2015.
- The cruise industry is the fastest-growing category in the leisure travel market. Since 1980, the industry has experienced an average annual passenger growth rate of approximately 7% per annum.
- Throughout its history, the cruise industry has responded to vacation desires of its guests and embraced innovation to develop new destinations, new ship designs, new and diverse on board amenities, facilities and

services, plus wide-ranging shore side activities. Cruise lines have also offered their guests new cruise themes and voyage lengths to meet the changing vacation patterns of today's travelers.

- The cruise industry's establishment of over 30 North American embarkation ports provides consumers with unprecedented convenience, cost savings and value by placing cruise ships within drivingdistance of 75% of North American vacationers. By providing significant cost savings through the convenience of avoiding air travel, the new homeports have introduced leisure cruising to a wider customer base.

- The current cruise ship order book from 2017-2023 includes 42 new ocean-going vessels from FCCA Member Lines, with more than 165,000 lower berths and an investment value of more than $36 billion

- Member Lines, with more than 140,000 berths and an investment value of approximately $31 billion.

Note: Data provided by CLIA. 2017 forecast based upon historical relationship between yearly capacity increase and yearly passengerincrease. New vessels and capacity deployment as identified through September 2016. New ship announcements, vesselretirements and quarterly passenger reporting will affect these figures.

World Cruise Tourism Industry Outlook Global and Regional Summary

Figure: 4 Cruise Passenger Capacity Growth – (2009- 2017) (Millions)
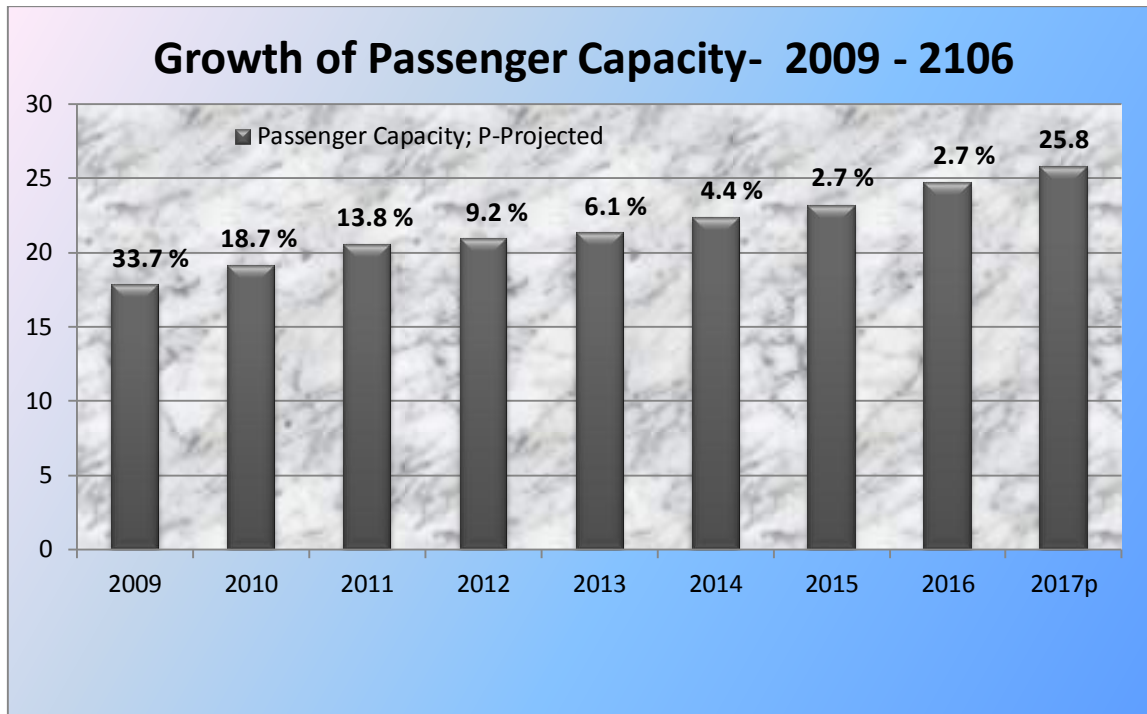
Source : Cruise Line Association; Industry Outlook -2016

Figure 4 represent the total passenger capacity growth of the cruise tourism. Projections of 25.8 million tourists are expected to travel around the world through cruise. Whereas figure 5, depicts the origin of the passengers where they

travel from. USA holds the heights passenger travelling which climbed up to 11.52 millions. Generally there is a 62 % increase in the demand for cruise tourism in the world.

Figure 6 shows, the regional growth of Cruise passengers, (2015-2019) of North America, Europe and Other countries. North America has taken a clear edge on cruise tourism then the rest of the countries. Figure 7 further illustrates the global Cruise Destination share by region in 2016 as a percentage. In that Mediterranean region has taken a greater market share than the other region. Figure 8 shows the World Cruise Passenger - Regional Deployment, Cruise Line Deployment by Region in 2016. According to the figure Caribbean region has shown a growth of 33.7% comparing to the other countries. According to the figure 10, it shows the passenger volume growth in Asia. China has climbed the ladder with 47.4% annual growth. According to the figure 11, it illustrates, Asian Passenger Preference – Accommodation (With reference to the short Sailings 2015), it shows that 80 % of the passengers are prefer to stay beyond 2-3 nights during the cruise travel. The following figure shows the global and market trend of the cruise tourism which has taken a positive note of each sector and expected to widespread around the world forthwith.

Figure : 5 Cruise Passenger Destination – (2005- 2017) (Millions in passengers)
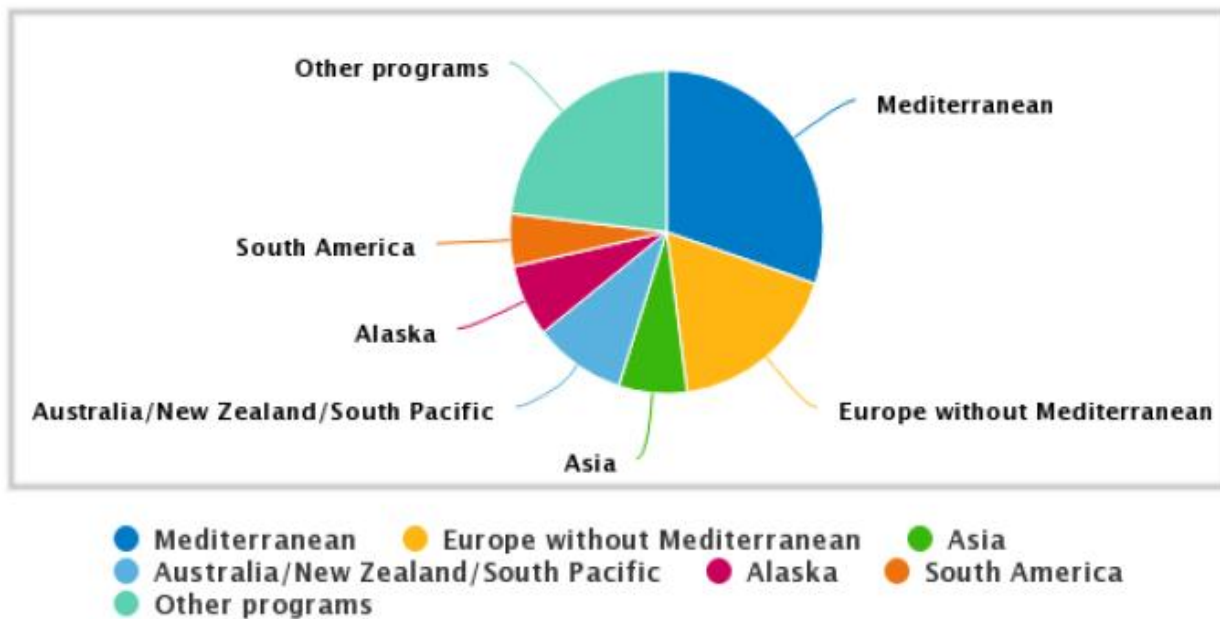

Source : Cruise Line Association; Industry Outlook -2016

Figure: 6 Regional Growth of Cruise passengers (2015-2019), North America, Europe and Other (Millions in Passengers)
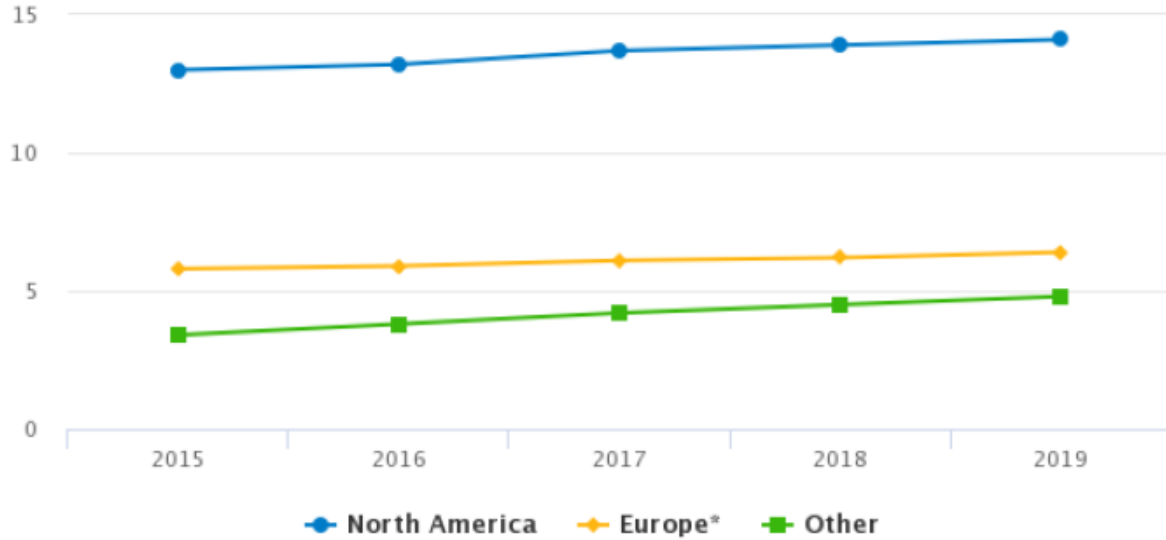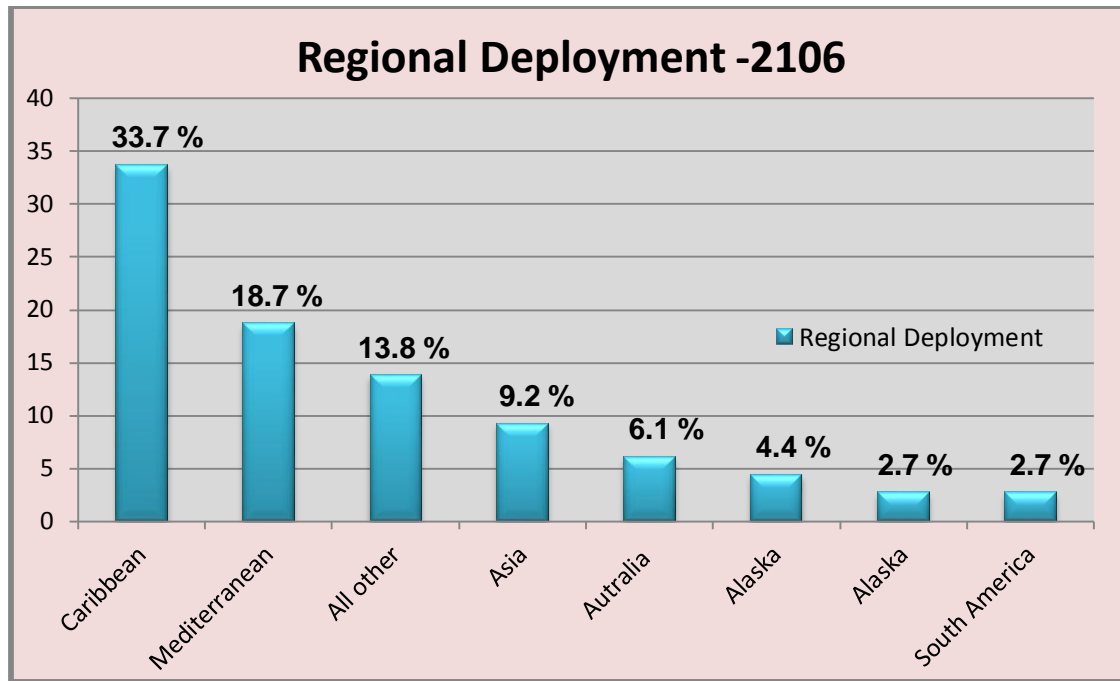

Source : Cruise Market Watch -2016

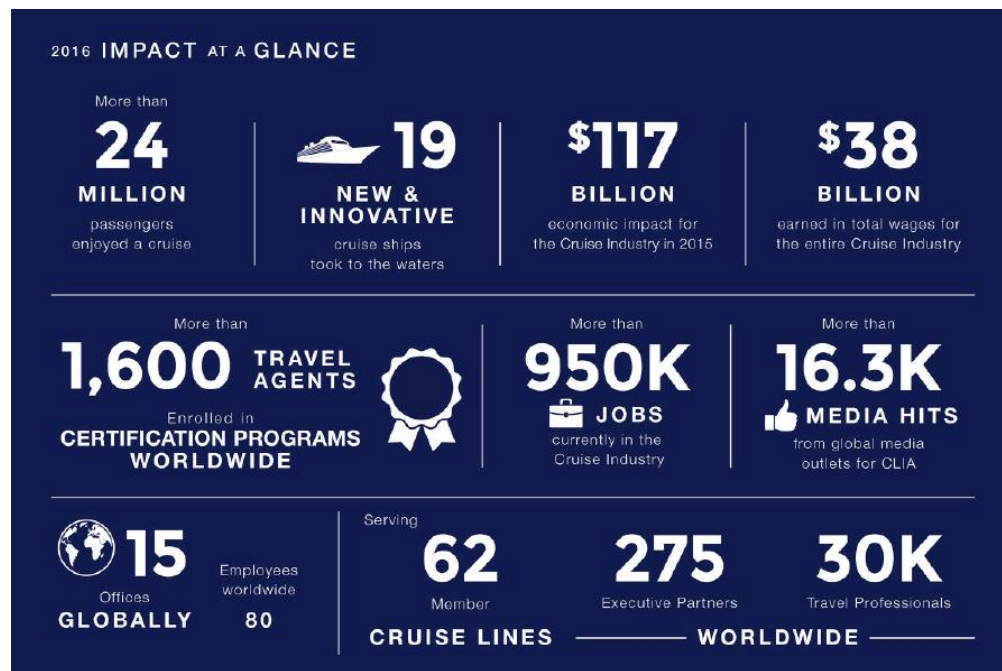**Figure : 7 Global Cruise Destination by Region– 2016 (As a percentage)**

Source :Florida-Caribbean Cruise Association -2016

Figure : 8 World Cruise Passenger - Regional Deployment – (Cruise Line Deployment by Region-2016)

Source : Cruise Line Association; Industry Outlook -2016

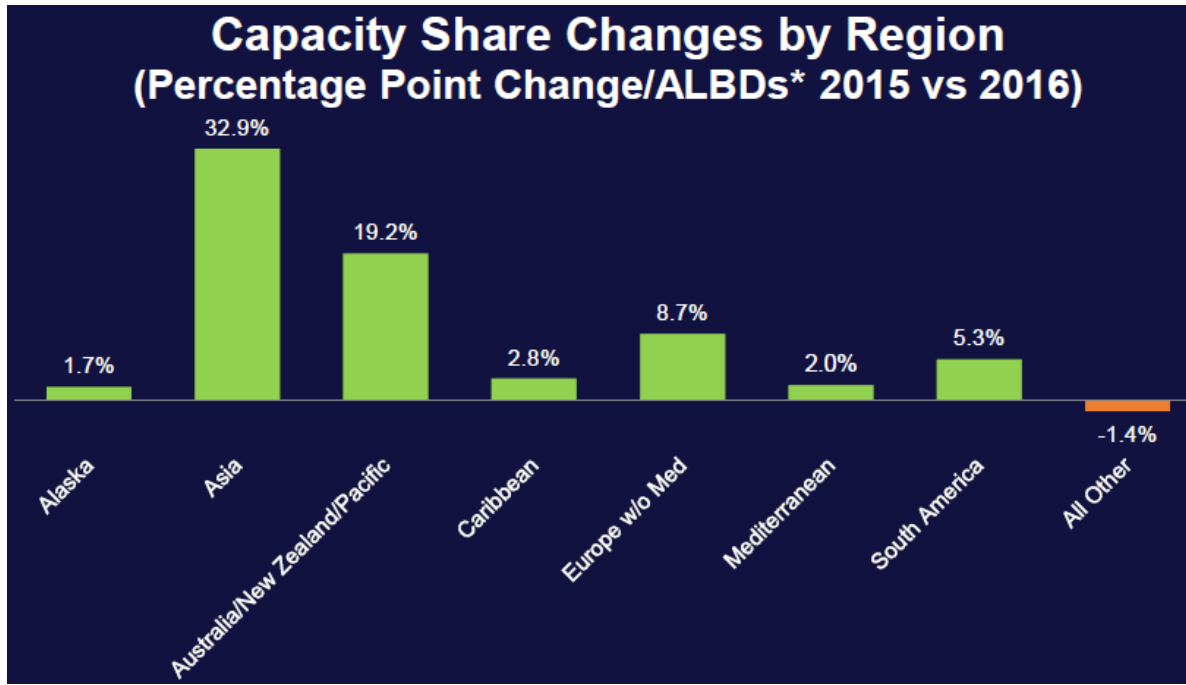**Figure : 8.1 World Cruise Tourism Impact at a glance**

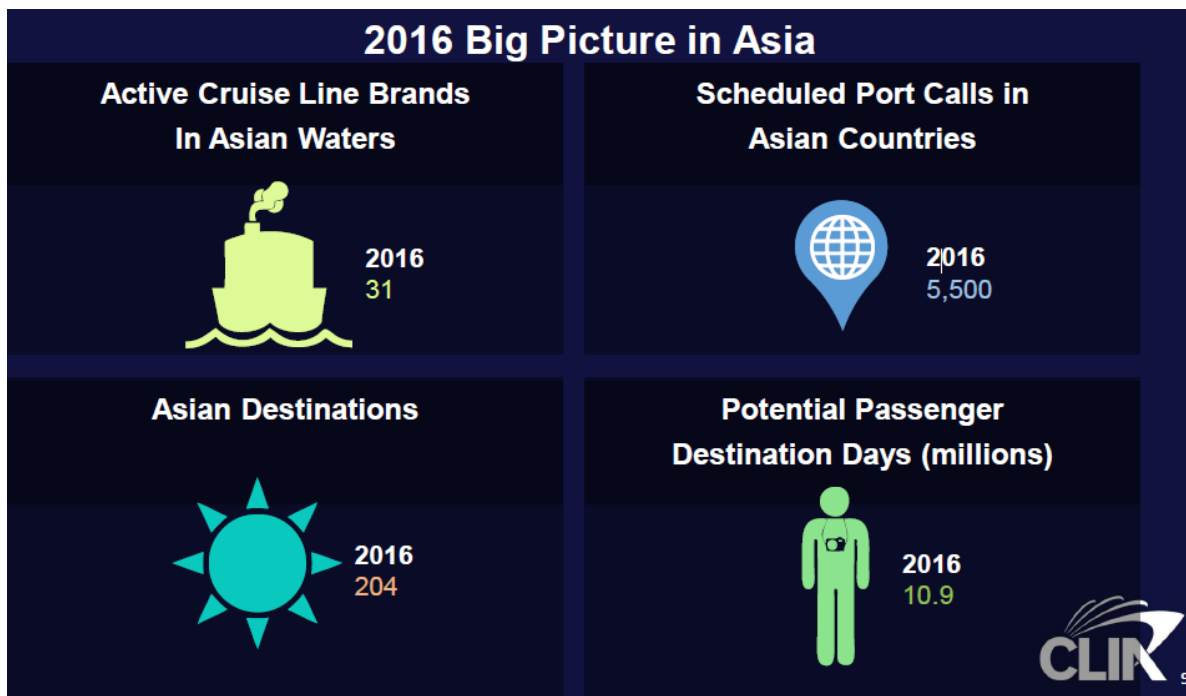Source : Cruise Line Association; Industry Outlook -2016

State of Asian Cruise Industry- Snapshot of Asian Cruise Industry -2016

Capacity share Changes by Region- Comparison of 2015 and 2016

Figure : 9

Source : Cruise Line Association; Asia Cruise IndustryResearch and Findings -2016

Source : Cruise Line Association; Asia Cruise IndustryResearch and Findings -2016

Passenger Volume Growth (Asia) – Country Analysis

Figure : 10
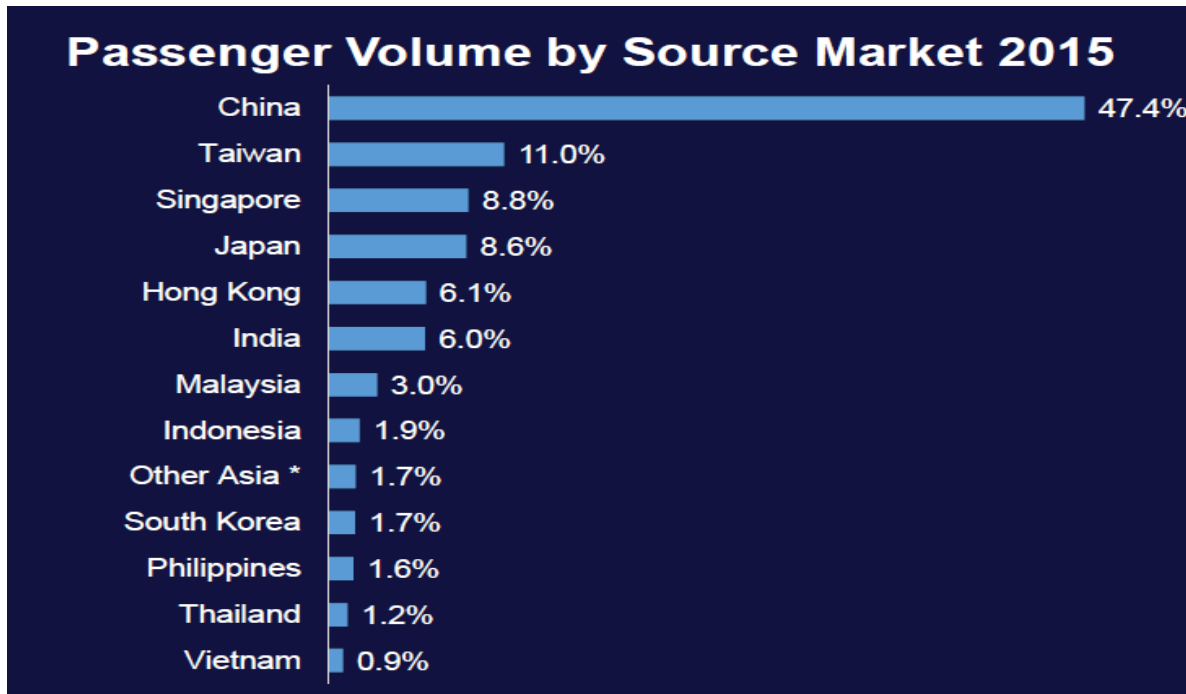
Source : Cruise Line Association; Asia Cruise IndustryResearch and Findings -2016

Asian Passenger Preference – Accommodation (With reference to the short Sailings 2015)

Figure :11

Source : Cruise Line Association; Asia Cruise Industry Research and Findings -2016

3.0 Economic and non-economic impact of the cruise tourism

Ports of call are a focal point of any cruise. They provide value to passengers and economic benefits to local merchantsand tour providers. It appears on surface to be a perfect arrangement — everyone benefits. But on closer inspection there are issues. For example, economic benefits are not always distributed equitably between the cruise ship and the port. The issue is not that ports do not make money; they obviously make money. It is whether the income generated exceeds direct and indirect costs including environmental costs,(Caric,2010; Scarfe,2011) and whether income distribution is responsible and fairly distributed. A second issue of concern is that ports increasingly feel pressure to construct new cruise terminals and often compete with neighbors for business.

Cruise line International Association Inc, recently issued the latest cruise industry outlook 2107, According to the report, it is underscored the following global highlights of cruise tourism industry,

- **24** million passengers have been travelled around the world
- **956597** full time equivalent employees have been deployed
- **38** billion dollars have been paid as wages and salaries
- **117** billion total output (goods and services) have been generated around the world.

Economic impact: cruise tourism can make a significant contribution to a destination's economy,generating revenue and creating jobs. The cruise industry globally represented roughly €119.9billion in economic impact, €39.3 billion in wages and 939,000 jobs in 2014. However, cruise ships often represent all-inclusive holidays. They generally stock up before they leave and purchase little local foods or supplies. Furthermore, cruise tourists generally spend little in the destinations, as all meals are included on board as well as entertainment. Cruise passengers are estimated to spend on average €73 per port of call. In addition, shore excursions are often organized by the cruise ships, which take most of the profit. This means that sometimes fewbenefits actually flow to the local communities. However, cruise tourism remains interesting for smaller local tourism companies due to the high volume of passengers. Furthermore, as thesepassengers are clustered in groups they are easier to handle.

Environmental impact: cruise ships have environmental impacts. They emit for example more carbon per passenger kilometer than flying. Besides CO_2, they also emit airborne particles, which have been linked to premature deaths worldwide. Furthermore, cruise ships can damage coral reefs and ecosystems and produce a large amount of waste water and solid waste which can be a major despoiler of the natural environment. Developing Countries that want to develop cruise tourism should therefore carefully research environmental impacts and develop policies to reduce these impacts as much as possible.

Social impact: cruise tourism can cause changes in value systems and behaviour and there by threaten the indigenous identity. Changes often occur in community structure, family relationships, collective traditional life styles, ceremonies and morality. However, tourism canalso generate positive impacts as it can serve as a supportive force for peace (peace stimulates tourism and tourism generates economic growth), foster pride in cultural traditions and help avoid urban relocation by creating local jobs.

Passenger, Crew and Cruise Line Expenditures the economic benefits of cruise tourism at each destination arise from three principal sources:

- On shore expenditures by passengers which are concentrated in shore excursions and retail purchases of clothing and jewelry;

- Onshore spending by crew which are concentrated in purchases of food and beverages, local transportation and retail purchases of clothing and electronics; and,

- Expenditures by the cruise lines for supplies, such as food and beverages, port services, such as navigation and utility services, and port fees and taxes, such as wharfage and dockage fees.

The cruise line association (CLIA) is one of the largest cruise associations in the world. According to latest research report of Business Research & Economic Advisors of CLIA

"The Economic Contribution of Cruise Tourism to the North Asia Region in 2016" revealed the following important highlights of the cruise tourism industry.

The objective of this research project was to estimate the economic contribution of cruises originating in and visiting cruise ports in three North Asia countries: Japan, South Korea and China (including Hong Kong).

The highlights of cruise tourism in North Asia during 2016 are as follows:

- Direct expenditures generated by cruise lines and their passengers and crew totaled $3.23 billion across all cruise destinations in the three north Asia countries.
- Cruise passengers spent a total of $2.1 billion, 65% of total direct expenditures, at North Asia cruise ports.
- Turnaround passengers spent an estimated $1.24 billion, 38% of the total direct expenditures, and 59% of total passenger expenditure.
- Transit and overnight passengers spent $854 million, or 26% of the total direct expenditures.
- Cruise lines spent just over $1.0 billion in North Asia in 2016, or 32 percent to the total direct expenditures.
- Crew members spent about $109 million in North Asia in 2016, or about 3 percent of the total spends.
- Crew spent an average of $87 per onshore day visit.
- Turnaround passengers spent an average of $556 per visit day1 while transit passengers spent an average of $175 per visit day.

- Three categories, accommodations, shore excursions and food and beverages and accounted for 47% of total passenger onshore expenditures and totaled $989 million.
- Cruise lines spent a total of $1,023 million in North Asia (excluding wages and salaries of resident cruise line employees), 32% of direct cruise tourism expenditures in North Asia.
- Vessel maintenance, food and beverages, other supplies and port charges and fees accounted for 57% of cruise line expenditures.

The $3.23 billion in direct cruise tourism expenditures made a significant contribution to the economies of the North Asia countries during 2016.

- The direct economic contribution of cruise tourism across all of North Asia consisted of the $3.23 billion in direct expenditures, $1.51 billion in value added and 23,697 full- and part-time jobs paying $754.5 million in employee compensation.

- Three sectors of the economies of the North Asia countries, Wholesale & Retail Trade, Other Services & Government and Financial & Business Services were the primary direct beneficiaries of cruise tourism spending. Combined, these three sectors accounted for approximately 72% of the regional direct impacts with $2.34 billion in direct expenditures, $1.18 billion in value-added and 19,252 full- and part-time jobs paying $594.4 million in employee compensation.

- The indirect and induced economic contribution is generated by the spending of the directly impacted businesses and their employees. Thus, these impacts spread throughout the corporate and consumer sectors of the each economy. These impacts totaled $3.98 billion in output, $1.72 billion in value-added and 27,934 full- and part-time jobs paying $749.6 million in employee compensation.

- The indirect and induced economic contribution is more diverse than the direct contribution. The top three sectors consisted of Manufacturing, Financial and Business Services, and Agriculture. These three sectors accounted for approximately 79% of the total indirect and induced impacts with $3.16 billion in output, $1.22 billion in value-added and 19,893 full- and part-time jobs paying $491.1 million in employee compensation.

On a regional basis, the economic contribution of cruise tourism varied across the North Asia economies. These individual country impacts reflected the volume of cruise ship calls, passenger and crew visits and the variation in the average passenger and crew expenditures across countries. The key regional findings are as follows:

➢ China is the principal home (embark/turnaround) port in the region and accounted for approximately 65% of the regional total economic contribution with $4.67 billion in output, $1.88 billion in value-added and 33,770 full- and part-time jobs paying $629.3 million in employee compensation. Key ports in China include Shanghai, Hong Kong and Tianjin.

➢ Japan as the largest transit destination in the region, accounted for about 30% of the regional economic contribution. The economic contribution of Japan totaled $2.16 billion in total output, $1.14 billion in value-added and 14,724 full- and part-time jobs paying $742.5 million in employee compensation. The principal cruise destinations in Japan were Fukuoka, Nagasaki, and Okinawa. In addition, Yokohama is a primary turnaround port.

➢ South Korea benefited from $385 million in total output, $207 million in value-added and 3,137 full- and part-time jobs paying $132 million in employee compensation. These impacts accounted for about 5% of the regional contribution. The principal cruise destinations in South Korea were Jeju, Pusan and Incheon. All ports in South Korea are primarily transit destinations.

Cruise tourism expenditure has direct, indirect and induced effects on the economy and regions within. The direct effect is on suppliers who sell goods and services directly to tourists or cruise operators. Tourist expenditure is received as revenue by food and beverage suppliers, fuel suppliers, hotels, restaurants, tour and transport companies, shops, entertainment venues, etc. In the process of satisfying tourist demand, value added accrues to the employees as wages, to the owners as profits, or to the government as tax revenue (thus constituting a source of development financing). Indirect effects result from 'flow ons' when direct suppliers purchase inputs from other firms which in turn purchase inputs from other firms and so on.   The induced effects arise when the recipients of the direct and indirect expenditure - firms and their employees - spend their increased income which in turn sets off a process of successive rounds of purchases by supplying industries and further induced consumption. These effects are often analyzed using multipliers derived from input-output models, but increasingly, the advantages of using computable general equilibrium models are being recognized (Dwyer & Forsyth, 1993, 1994).

However the main focus will be on environment which is strongly affected by the increase in cruise lines and there is a need to protect the ecosystem.

The issues of cruise tourism pertaining to the environment arises because of three important reasons; lack of proper waste management, selection of improper tourists destinations, and lastly because cruises doesn't restrict to the number of visitor carrying capacity of the tourism destinations, resulting in site congestion, gathering of wastes, deterioration of archaeological and historical sites. Tourist destinations should be national parks, flora and fauna instead of fragile destinations. Due to ocean pollution the company has to pay penalty which raises its expenses, incur losses and also social impact.

Even if cruise tourism is the fastest growing business of the travel industry however if the growth is not planned properly it may cause economic, environment and socio-cultural impacts on tourist destinations. Thus, the need for responsible tourism is highly recommended for the sustainability of the business, which can be achieved by ecotourism. Ecotourism is one form of tourism, which addresses the negative impacts associated with mass tourism through the implementation of sustainable practices. Its impacts and benefits are critically analyzed and it was recommended for the company to implement it.

4. Strategic approach for the cruise tourism development of Sri Lanka

In recent years, the new form of coastal tourism / Cruise tourism has earned a well-deserved reputation in Sri Lanka. The cruise tourism has delivered many economic, social and environmental advantages to the island. Impact of cruise tourism in coastal areas, Tourism has the potential to bring more economic benefits to destination, but it also generates impacts, that can negatively affect the environment and host communities. Tourism's growth into a large-scale, global industry was its overarching success in the 20th century. Controlling demand and mitigating tourism's impacts will be its challenge in the 21st century.

Cruise tourism is characterized by bringing large numbers of people to concentrated areas of destinations for brief periods, thus multiplying and concentrating the impacts. Cruise development may lead to loss of precious biodiversity and destruction of cultural heritage if infrastructure and itinerary development outpace monitoring and evaluation of environmental and cultural resources and fragility. The impact, challenges and implications of cruise tourism development are representative of our planet's overall challenges in approaching economic development.

This paper presents a case for development of an island (Sri Lanka) Cruise Tourism Strategies and seeks to spread awareness of sustainable development in cruise tourism, catalyze collaboration across the region and stimulate the strategic implementation of best practices and innovations.

The premise of sustainable tourism strategy is that the unique natural and cultural heritage offered by a destination is what generates its brand reputation, its value and what drives tourist demand. It is of utmost importance to manage growth to preserve the natural and cultural heritage assets of a destination and to sustain tourism's long-term economic vitality.

The envisaged sustainable tourism strategies that can drive the new paradigm shift are as follows:

- Approach island cruise tourism development by focusing efforts on controlling demand (what customer actually needs), rather than stimulating it.
- Assess the development needs across the entire value chain and develop a mechanism.
- Quantify the value of natural and cultural heritage conservation to cruise tourism.
- Optimize the value of the destination's natural and cultural heritage through appropriate pricing models
- By building a tourism promotion policy which should be linked through the other tourism products.
- Stimulate innovation and island interest in improving quality standards.
- Integrate a peer to conduct training and research development to create data base and monitor their performances for future enhancement.

Expected Outcomes

Various studies at the different level of cruise industry show that the cruise industry is both supply and demand driven. The above mentioned strategies will create a new era and it will be a dynamic approach to the Cruise tourism industry and certainly will lift the industry in to a better position.

This will also create a dialog among the industry and as well as beyond the country which will be eased to setup up a collective marketing plan in the region through Sri Lanka. Not only that, this will outline various valued propositions of different destinations which Sri Lanka could learn a lesson.

Developing cruise tourism in the island, there will be diversification of income of the individuals. The country and especially some rural areas of the country will certainly be developed with the integration of cruise tourism.

Establish partnerships with key global players with different ports and destinations will certainly be added benefit to develop the infrastructure layer of the country.
Understanding the strategic advantage of the location opens the door to create a solid networked cruise tourism service to cruise lines and their passengers are also another outcome which massively be benefited to for the entire industry.

Key stake holders and their responsibilities

Stakeholder is a person, group, or organization that has direct or indirect stake that is Support, in an organisation. They are called Stakeholders because they can affect or also be affected by the organization's actions, policies, and objectives.

Collaborative efforts by stakeholders will ensure that marketing is enhanced because It is key to attracting more cruise passengers and therefore more cruise ships necessary to be attracted to the Colombo port, Galle Port and to the Magampura port which pretty much close to the international maritime route. It is also required to attract the ships to the other sub ports as well, Trincomalee harbor, KKS Port, Oluvil Port are among them.

Figure :12 Relative Importance of Different Carriers - Percentage Distribution of Arrivals 2006 to 2016

Carrier	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
TOTAL AIR	99.9	99.9	99.9	99.9	99.9	99.8	99.7	98.0	98.3	98.6	98.8
Passenger Ships (CBO)	0.1	0.1	0.1	0.1	0.1	0.2	0.3	2.0	1.7	1.4	1.2
TOTAL SEA	0.1	0.1	0.1	0.1	0.1	0.2	0.3	2.0	1.7	1.4	1.2
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100

Source : SLTDA Statistical Report-2016

Despite having much tourist arrival comparing to the previous years, tourist arrivals have been crossed 2.0 million benchmark. Although that there is an upward trend in the tourism market, figure 12 further illustrates that there is a decline in the cruise passenger arrivals from 2012 to 2016. Sri Lanka gets approximately 25000 cruise passengers for a year and last year, 2016 it was recorded as 24609. Entire country handles approximately 35 to 45 cruise ships for a year.

Government of Sri Lanka must take the full responsibility to promote cruise tourism in Sri Lanka. It is revealed that there is no state policy or state promotion plan to promote cruise tourism in Sri Lanka. State intervention is highly required to promote the cruise tourism. Ministry of Tourism should take immediate action to create a cruise tourism promotion strategic plan to put forward the country in to the global heights.

Another main point is infrastructure facilities at the main ports, Sri Lanka Ports authority required to provide the basic infrastructure facilities to promote cruise tourism, such as to provide Infrastructure facilities, ICT facility (Wifi Area), Whisper radio technology, toilet facility, Bath room facility, restaurant facility, Smoking room, Conference room, to bring more ships in to the country.

At the same time ports authority should enhance the peer facilities to berth larger ships in to the country rather than diverting them to container docking peers.

Another main point is tourism education, Sri Lanka are lack of quality tourist guides, quality chauffeurs and skillful forerunners who make business decision on cruise tourism. It also clear that, there is a large knowledge gap between the academic and the industry practitioners. Also there aren't many tourist researchers available in the country to conduct research about cruise tourism. Therefore universities and respective colleges or institutions such as the hotel schools in Sri Lanka should open the doors to promote quality and skillful professional to meet the international requirement.

Another point is ground handling agents in Sri Lanka do not have enough logistics facilities to cater the tourist's demand. Such as they do not have luxurious busses, ICT facility, proper radio facilities, quality tourist guides,

chauffeurs, translators and many more. Therefore entrepreneurs need to take immediate measures to meet the industry requirement by giving them a proper training or providing those required facilities.

5. Conclusion

Cruise tourism is one of the main win-win product solutions for destinations to develop its tourism industry. Today, Sri Lanka is expecting the numbers of tourist arrival to increase up to 4.5 million in 2020 with total revenue of USD 5 billion. It is a debatable question whether they could make it without having a proper connectivity. According to the statistics of SLDTA,2016, Sri Lanka just crossed the bench mark figure of 2.1 million tourist arrival. Therefore it is pretty much evident that island could not reach the target of 4.5 million tourist arrival with an annual growth of 15%. Hence strategic approach is required to reach the target and cruise tourism is one of the main areas where they could develop.

Sri Lanka should and desperately open the doors for the global cruise tourism which could use as a main revenue generating center to develop the nation. Hence key stake holders ought to focus the strategic location where Sri Lanka is located. Policy makers use this advantage to create an open marine policy to attract more cruises to Sri Lanka.

On the other hand tourism education is highly required to be engaged with the industry practitioners. Sri Lanka badly needs quality and skills full professional to drive the tourism industry forward. Professionals creates a dialogue between the stake holders and industry requirements, hence developing tourism education and provide necessary training industrial training will lead the nation in to a better position and recognize in the global cruise market.

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