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Customer orientation of cruise destinations in Newfoundland and Labrador, Canada – exploring key issues for ports and the cruise lines

Abstract

This paper evaluates the customer needs of cruise passengers in a context of industry ports in the province of Newfoundland and Labrador, Canada. The study was conducted for the Cruise Association of Newfoundland and Labrador (CANAL) providing primary data as part of their assessment for their Port Readiness Program. The results are generated from a survey of 34 key decision-makers working in 24 ports in the province. Another survey representing the views of 12 cruise lines operating in these ports was also completed. Findings show that the cruise industry needs to adopt closer co-ordination between ports and cruise companies to advance port readiness as well as to protect and facilitate an understanding of the natural and cultural heritage of the destination to meet the needs and expectations of cruise line passengers to the province.

Key words: *cruise lines; port readiness; customer orientation; Canada*

Introduction

Cruising is recognized as the fastest growing sector of the tourism industry at the start of the new millennium (Lueck, Maher & Stewart, 2010; Dowling, 2006; UNWTO, 2003). The popularity of the sector is due to the fact that cruising provides passengers with opportunities to visit a variety of places in a short period of time, the industry claims that travel is considered safe, convenient and self-contained (Klein, 2010), and is characterized by exceptional service and high satisfaction levels at a competitive price (Hull, Parsons, White & Ash, 2005; Davidoff & Davidoff, 1994). Once popular mainly with an older market segment, cruise passengers are increasingly represented by younger travelers with married baby boomers the heart of the cruise market (Lueck, Maher & Stewart, 2010; Dowling, 2006; UNWTO, 2003).

In 2011, the Cruise Line Industry Association reported that 13.5 million people took a cruise vacation in 2010. In North America, an estimated 9.7 million passengers embarked on US cruises in 2009, representing 65% of global market share (CLIA, 2011). The province of Newfoundland and Labrador

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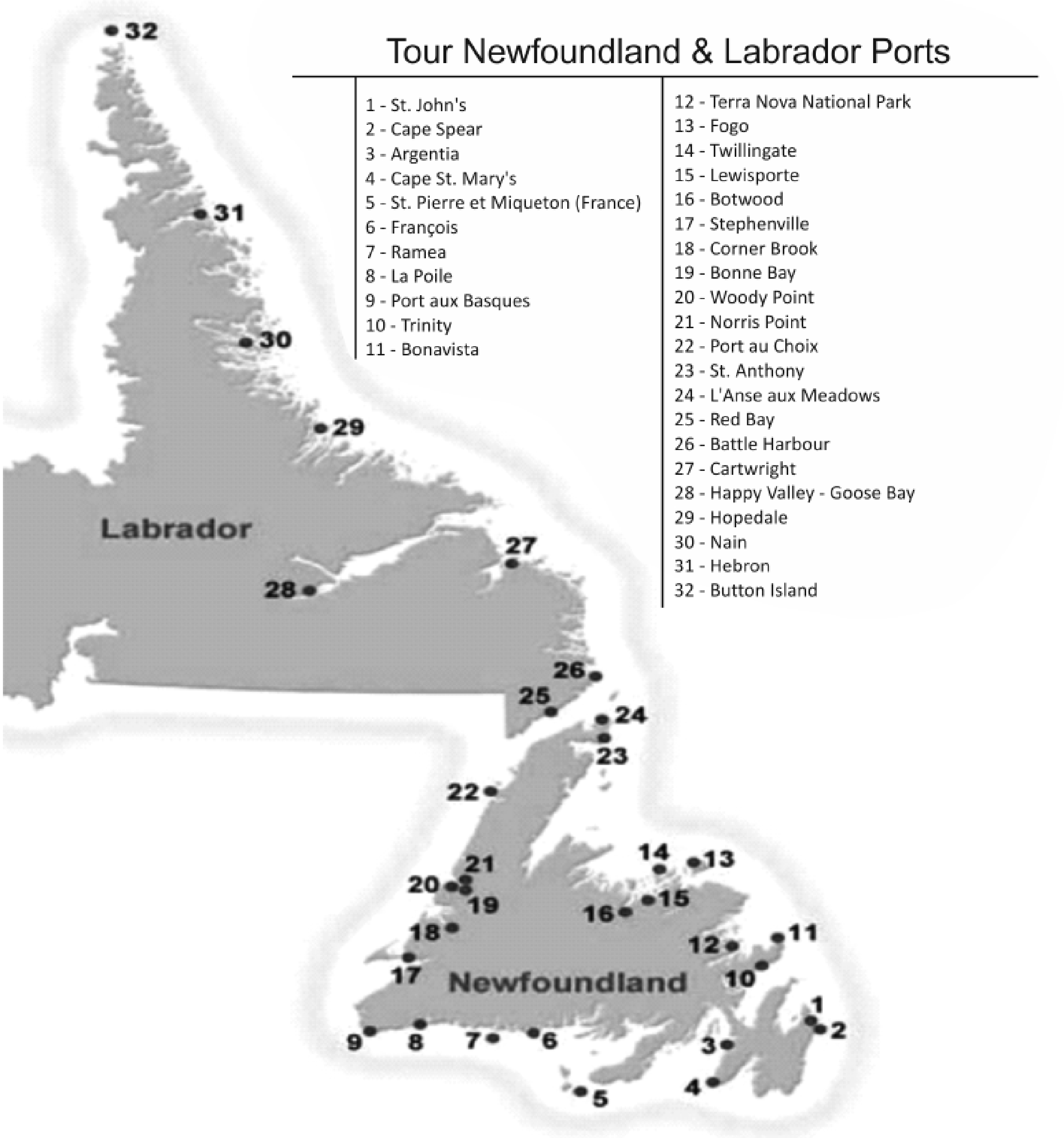
(Figure 1), strategically located on Canada's east coast, is identified as a growth market as part of the industry's diversification and global expansion in the 21st century (CLIA, 2009). From 2001 to 2010 the province experienced an 81% growth rate in cruise activity (Cruise Industry News, 2011). During the 2010 cruise season, 51 thousand passengers and crew visited provincial ports on 22 ships making 133 port calls; an increase of 33% over 2009 (CANAL, 2011). The Cruise Association of Newfoundland and Labrador (CANAL), the lead organization for cruise industry development in the province, estimates that the overall direct and indirect economic impact from the cruise industry has surpassed CAD$ 10.7 million (CANAL, 2009).

Figure 1
Ports of call Newfoundland and Labrador



Historically, the region has been a cruise destination for over two centuries, providing unique travel experiences off the beaten track. In the 19th century, there were a number of coastal steamship companies that "home ported" in the Dominion of Newfoundland, focusing mainly on transport of mail, freight, residents and tourists to regional destinations on the island and north to polar regions along the coast of Labrador (Hull & Milne, 2010). The *Alphabet Fleet* serviced the majority of ports in the late 19th and early 20th centuries as part of the Dominion of Newfoundland's contract with the Reid Newfoundland Company (Hanrahan, 2007). As the demand for transportation increased across continents, in the 1800s P&O Cruises and Cunard initiated a period of cruise ship expansion in the Europe - North America service (Dickinson & Vladimir, 2008). These early transatlantic voyages set the stage for the development of transatlantic cruises that now mainly frequent the provincial ports of St. John's, St. Anthony and Corner Brook. In the 20th century, Clarke Steamship Company, representing business interests from Montreal, entered the expanding North Atlantic cruise market transporting an increasing number of passengers and offering customized theme-based product such as honeymoon, pleasure and rest cruises, linked to the unique scenery, rugged coastlines, abundant wildlife and rich cultural heritage. Even though Clarke Steamship Company halted passenger service in 1967, other cruise lines continue to offer voyages along the Gulf of St. Lawrence, today marketed as part of the Canada - New England itineraries. These itineraries include ports of call in western Newfoundland and along the Labrador coast.

As a result of the growth of cruise tourism in the province, policymakers are developing a diversified cruise sector focused on attracting adventure expedition, transatlantic and Canada - New England markets that reflect the historic development of the industry (Hull & Milne, 2010; CANAL, 2009; Global Destinations Development LLC, 2006). This form of modern cruise tourism is considered different from traditional transatlantic voyages in, both, concept and business type. It now offers a product focused on the floating hotel, resort, or holiday, not as a means of transport as it was initially (Barron & Greenwood, 2006; Klein, 2006; UNWTO, 2003).

According to policymakers, the projected growth of the cruise sector is requiring destinations to address issues of sustainability, safety and product development to manage the rapid changes in the industry (Klein, 2009; Dowling, 2006). The UNWTO (2003, p. 13) acknowledges that, "the role of ports of call in the creation of the cruise product is crucial, with the determining factors being their policy of investments in specific facilities as well as their pricing policies. It is here that …port services and tourism come together and pool their economic resources" to create packages and services to support the cruise lines. In Newfoundland and Labrador, CANAL launched a Port Readiness Program (PRP) in 2005 to provide support to provincial ports in welcoming and managing an increasing number of passengers; to improve the quality of service to the cruise lines; to increase the number of cruise ship calls to provincial ports, and to inform communities of the opportunities for local revenue generation, employment enhancement, and excursion planning (Hull et al., 2005).

The purpose of this article is to report on the findings of the Port Readiness Program, to discuss the impact of those findings for emerging cruise markets in peripheral tourism locations, such as Newfoundland and Labrador, and to make recommendations for further research and actions linked specifically to customer orientation. First, a secondary literature review of cruising will provide an understanding of the gaps in present theory, specifically linked to customer orientation of cruise destinations. The next section presents the methodological approach of the Port Readiness Program's Needs Assessment administered to ports of call and cruise lines involved in the development of the province's cruise industry. The third section summarizes the findings of the primary data analysis before going on to analyze and discuss those findings. The final section outlines a series of recommendations and policies that aimed at ensuring the long-term sustainability of the industry.

Literature review

Academic interest in the cruise industry as a global phenomenon is relatively recent. A number of researchers argue that there are "a paucity of studies and little academic literature on cruise ship tourism" (Robertsen, 2008, p. 1) and that the subject is in its infancy (Dowling, 2006). However, the exponential growth of the industry over the last two decades has resulted in an increasing amount of literature published that: provides an overview of the industry (Mancini, 2000; WTO, 2003; Douglas & Douglas, 2004; Dowling, 2006); addresses marketing issues (de la Vina & Ford, 2001; Petrick & Sirikaya, 2004; Dickinson & Vladimir, 2008; Sheppard & Fennell, 2009); weighs the environmental, economic, and cultural impacts of the industry (Klein, 2002, 2005, 2008; Berger, 2004; Dwyer, Douglas & Livaic, 2004; Garin, 2005); examines passenger behaviour (Enz, 2001; Jaakson, 2004) and argues that there is a need for better planning and management of the sector's growth (Weaver, 2005; Stewart & Draper, 2006; Marquez & Eagles, 2007; Ringer, 2007; Lemmetyinen, 2009; Papthanassis, Breathers, Schoen & Guhr, 2011). The literature review that follows addresses not only a profile of the industry and the cruise product in ports but also how these factors need to be considered in evaluating customer satisfaction and co-creation of the cruise experience.

A profile of the industry

Cruising is the fastest-growing segment of the travel industry and has seen a 2100% growth since 1970. The cruise business is worth $ 40 billion to the US economy, supporting 357, 000 jobs (BREA, 2009; CLIA, 2008). The province of Newfoundland and Labrador is characterized as a small cruising market experiencing rapid growth. It is considered part of the Atlantic Canada North American sub-market that includes the transatlantic (approximately 1.2 million passengers and crew) and the Canada-New England (791,000 passengers and crew) itineraries. These markets represent, respectively, 2.2% and 1.5% of the global annual cruise capacity (CLIA, 2008; ACCA, 2009). Newfoundland and Labrador welcomed just over 50,000 visitors from these markets in 2010 (CANAL, 2011).

There is considerable potential for growth into new markets, as only 20% of the US population, the most developed demand market for cruising, has ever been on a cruise. In the period 2000-2009, 100 new ships were commissioned or launched bringing the global cruise fleet to 298 ships with over 400,000 berths (Cruisecommunity.com). From 2012 to 2016, twenty new ships are forecasted to be launched (Papathanisis, 2011). Papathanisis (2011) cautions, however, that market growth is being driven by the increasing capacity of the industry and incentives (e.g. ticket price reductions) rather than solely by market demand. Many of these new proposed cruise ships are megaships with onboard facilities that include cell phone access, internet cafes, Wi-Fi, rock climbing walls, bowling alleys, surfing pools, multi-room villas, themed restaurants, as well as spa and fitness facilities (CLIA, 2010).

The demand side has also been researched in some detail. CLIA (2008), the cruise industry's main international marketing arm, found that 94.8% cruise passengers express satisfaction with their cruise experience with 44% saying they are extremely satisfied. The average cruise passenger sails for 6.6 days, spends US$ 1,880 per person, has a median age of 46 (dropping from 49 years of age in 2006), an average household income of US$ 93,000, and 25% travel with children. Cruisers are influenced by general travel websites (39%), word-of-mouth (33%), spouses (32%) and cruise websites (28%). They plan trips 5 - 6 months ahead, with 74-90% using travel agents to book their cruise. Over 55% passengers have cruised before, although in some segments, such as luxury cruising, it is as high as 77%. An opportunity to rest, a chance to explore new area, enjoy in variety of activities (something for everyone) have fun in a hassle-free environment, together with the value for money, are considered to be the main benefits of cruising.

The cruise product

Cruises to destinations such as Newfoundland and Labrador are often portrayed by the industry as cruises to 'unspoilt' or 'pristine' natural areas – in some cases the only way to see these places is by ship, such as is Alaska's Inside Passage route from Vancouver to Glacier Bay (Lueck, Maher & Stewart 2010; Ringer, 2010; Munro & Gill, 2006). It would, therefore, be reasonable to assume that cruise passengers visiting these destinations are concerned with the natural environment and would wish cruise ship operators to behave in an ethical and responsible manner, particularly in areas of outstanding natural beauty or where the presence of cruise ships might have a significant impact on the local community or environment.

However, the Friends of the Earth 2010 Cruise Ship Report Card (Friends of the Earth, 2011) shows that the majority of cruise lines are not fully addressing environmental impacts as they relate to sewage, air pollution and water quality compliance. Passengers, too, might have little awareness of the environmental impact of cruises. Sheppard and Fennell (2009, p. 265), for example, found little awareness of ethical issues in a comparative study of ethical standards of cruise passengers seeking a "fun in the sun" cruise in Mexico, versus those seeking a "natural" experience in Alaska. Urry (2001, p. 4), in the context of 'tourist gaze', referred to the 'balcony vantage point' – one that is very applicable to the cruise passenger on one of the modern all-suite cruise ships in which each cabin (or 'stateroom' as they are often referred to) has their own private balcony. This, somewhat paradoxically, also reduces the need to interact with fellow passengers – something that is often quoted as a benefit of cruising. Indeed, Urry talks of travelers being 'in the company of desired strangers' (Urry, 2001, p. 4).

Customer satisfaction in cruising

There is a considerable literature on customer satisfaction, its antecedents, and how it can be measured and managed. Most cruise lines use a range of tools such as interviews, focus groups, questionnaires, and comment cards. Many of these follow the 'perceptions – expectations' rationale of the SERVQUAL and Gaps models (Parasuraman, Zeithaml & Berry 1985, 1988; Zeithaml, Berry & Parasuraman, 1993; Ekinci & Riley, 1999; Getty & Getty, 2003) where a customer's perceptions of their experience are compared with their expectations, or they attempt to identify 'touch points' and 'hot spots' (Testa & Sipe, 2006). Others (Chung & Hoffman, 1998; Pizam & Ellis, 1999) focus on those aspects of a service experience that most affect a customer's perception of quality. This is used when it is considered that an organization is better to provide consistent service rather than attempt to 'wow' or 'delight' the consumer (Walsh, 2000; Torres & Kline, 2006; Gross, 2009), or when the focus should be on building loyalty amongst existing customers (Zemke, 2000). The latter is particularly the case in the cruise industry where satisfied consumers seem to develop a 'habit' for the cruise experience. Perhaps one way forward is not to attempt to find ever more nuanced measures of satisfaction but, instead, to step back and consider the 'bigger picture' by considering the systems that provide 'guests with experiences that are personal, memorable and add value' (Hemmington, 2007, p. 747) or even to go back to the basics of what 'hospitality' means to people (Brotherton, 2005) in order to discover their needs and wants. An increasing amount of literature on this topic is also addressing the differing needs and expectations of diverse nationalities and cultural groups (Hoare & Butcher, 2008; Hsieh & Tsai, 2009) Mohsin and Lockyer, (2010) in their investigation of customer perceptions of service quality in luxury hotels in India, found significant difference between expectations of guests and the actual experience relating to front office, room service and in house café/restaurant. This is an area of the cruise industry where there is a need for more research and understanding as new markets develop.

Co-creation of the cruise experience

In the past decade the discussion about service quality has moved a considerable way from the rather formulaic approach of the 1980s. Since the start of this century the term 'co-creation' has become increasingly common in academic discussions (Prahalad & Ramaswamy, 2004; Vargo & Lusch, 2004, 2008; Grönroos, 2008). This is particularly appropriate for the cruise industry as the core idea underpinning co-creation and service-dominant logic is that the consumer and producer come together to create an experience. Richards and Raymond (2000, p. 18) define creative tourism as offering visitors, "the opportunity to develop their creative potential through active participation in …. learning experiences which are characteristic of the holiday destination where they are undertaken." While it may appear obvious that the cruise passenger affects the experience of other passengers, what is perhaps less obvious is the part the cruise lines and ports play in co-creating experiences for cruise passengers while they are in ports. It is this complex balancing of needs of cruise passengers, cruise lines and cruise ports that this paper now investigates.

Methodology

This study is a part of the research conducted on behalf of the Cruise Association of Newfoundland and Labrador (CANAL) in preparation of the Port Readiness Program from 2005-2007. The research agenda involved a combination of several methods. Firstly, a Needs Assessment was conducted from, both, demand and supply side of the cruise industry. Key representatives of the cruise industry (the market) and key stakeholders in the ports of call and in the province (the product) were involved in the analyses of the present state of affairs of the industry from both perspectives through on-line port and cruise line surveys. The purpose of the two surveys was to provide insights into the needs of the ports and the needs of cruise lines to understand how to best meet the expectations of the cruise passengers. Ninety-seven individuals representing 40 provincial ports were invited to complete the port survey. A total of 34 individuals responded (35%) representing 24 ports (60%). Of the 41 individuals representing 30 cruise lines invited to complete the survey, 12 responded (29.5%), representing 12 cruise lines (40%).

Results of the Need Assessment phase were used as a key input into the second phase of the research with an aim to identify the areas where provincial ports can improve their service. This was conducted as part of an open-question format via stakeholder consultation using a SWOT analysis. In total, over 300 stakeholders participated in 18 workshops conducted in over thirty ports. The workshops provided a forum for key stakeholders and ports to discuss and undergo training on how to be better organize for cruise ship tourism. Workshops resulted in identification of the critical success factors for port management and a 12-items checklist in hosting cruise-ships.

The results in this paper focus on the data generated as part of the tourism products/services and market readiness in ports of call using frequency analysis, followed by a SWOT analysis to evaluate the relationships between the ports, cruise lines and passengers. The data rsults have been sorted by key word and organized into categories for analysis. In addition, a review of literature – historical accounts, government and cruise reports, journals, books and web-based research – provided important contextual information on the history of cruising and on the present impacts and growth of the industry to document the present state of affairs of the industry and recommend future planning and development strategies for advancing the provincial cruise product.

Findings

The first section summarizes the findings from the port and cruise line surveys identifying the key partners, level of community participation, companies offering cruise itineraries, type of cruise product, and ports visited. These data provide an overview of the structure and characteristics of the present state of the industry. The second section then focuses on the strengths, weaknesses, opportunities and challenges facing the industry as identified by ports and the cruise lines to assist in future planning and development.

Cruise stakeholders in Provincial ports

Respondents to the port survey included representatives from the public sector, private sector and the community at large (Table 1). In terms of public sector participation, results revealed that municipalities (71%) and local tourism associations (50%) provide the majority of public sector support to the cruise industry at present (Table 2). Less than 50% of provincial ports were supported by a local harbour authority (47%), cruise committee (32%), port contact (32%) or shipping agent (26%).

Table 1
Respondents to port survey

Representative category	Number of responses	%
Port authority/ Development association/ Waterfront committee	15	44
Municipality	9	26
Federal government/ Public institution	4	12
Community at large	4	12
Private businesses/ Tour operators	2	6
Total	34	100

Table 2
Key partners in Provincial ports hosting cruise ships (N=34)

Key partners	%	
	Yes	No
Port contact	32	68
Shipping agent	26	74
Cruise committee	32	68
Harbour authority	47	53
Municipality	71	29
Chamber of commerce	21	79
Local tourism association	50	50
Protected areas/Historic site	44	56

Most respondents have experience with cruise ships. About 70% are residing in communities where ships dock, while over two-thirds have experienced welcoming cruise ships. However, only fifth of them are aware of the private operators providing support services to the cruise industry.

Of twelve respondents to the cruise line survey, eleven reported to presently offer cruise itineraries that visit provincial ports while the remaining one has done so in the past. In terms of type of experiences offered, seven of them are offering adventure/expedition cruises (i.e. Adventure Canada), while three are offering transatlantic, Atlantic coast or world itineraries (i.e. Holland America) that included Newfoundland and Labrador in their itineraries.

In evaluating the ports visited by cruise lines in the sample, 59% visited ports on the island of Newfoundland, 27% visited ports along the coast of Labrador, 11% percent the port of St. John's, while 3% visited the city of Corner Brook. The adventure/expedition cruises visited multiple 'outports' in the province, while the transatlantic and Canada - New England cruise itineraries include stops at the larger ports of call. St. John's with 192 thousand and Corner Brook with 20 thousand cruise passengers are the two largest ports serving the province, providing a full array of on-shore services for cruise ships and passengers (Statistics Canada, 2011). The outports are small coastal communities outside St. John's, historically settled by families engaged in fishing, that are now popular with adventure expedition cruises (Newfoundland and Labrador Heritage, 2011). These communities tend to have more limited infrastructure and onshore services for cruise ships. Due to their small size, they are often only able to accommodate smaller ships.

Key challenges to the cruise industry development in the Province

Respondents were asked to identify, in an open-question format, the strength, weakness, opportunities and threats to the cruise industry of the Province of Newfounland and Labrador, as a key input into the Port Readiness Program.

As illustrated in Table 3, well-developed local attraction and provision of variety of services, together with the physical ease of access to ports (natural deep-water harbours) are considered by the port respondents to be the major strengths of the ports of Newfoundland and Labrador province. Local attractions that were mentioned included natural, cultural and recreational products. One respondent commented:

We have a vast cultural and geographical product including: hiking trails, unique geological features, mineral and mining history, the French Shore history, Dorset Sites and Beothuk history. (Port respondent 28)

Community attitudes to cruise industry development, in particular overall community support and willingness to work together, are also acknowledged as important forces that the further cruise industry development can capitalize on.

Table 3
The strengths of the Province as a cruise destination identified by port respondents

Resources/capabilities	Frequency	Percent
Well developed attractions/tourism products	12	21.8
Variety of services	11	20
Community interest/organization to meet cruise needs	8	14.5
Natural harbour/easy navigation and access	8	14.5
Scenery	7	12.7
Friendly people	3	5.5
Brings in revenue/employment	2	3.6
Established reputation	2	3.6
Climate for business opportunities	1	1.9
Established marketing program	1	1.9

When the cruise lines were asked to identify the major strengths of the province (Table 4) responses were more concentrated on the attractions, service culture and business environment. The natural beauty/scenery as well as the province's history and culture and friendliness of people received the most mentions. One respondent commented that, in addition to local culture, the province offered:

…stunning natural beauty, incredible array of wildlife, especially marine wildlife and some of the most hospitable people on the planet. (Cruise respondent 10)

Another adventure/expedition company added that, in addition to the scenery, the excellent infrastructure for zodiacs was important. Overall, attractions and services as well as physical infrastructure received the most mentions. The cruise sector also indicated that the local hospitality was an important strength.

Table 4
Strengths of the Province a cruise destination by cruise lines respondents (N=12)

Resources/ Capabilities	Frequency	Percent
Natural beauty/ Scenery	7	46.7
History/ Culture	4	26.7
Friendliness of people	3	20
Willingness of ports to work with cruise ships	1	6.6

In spite of many advantages that the Province has for development of cruise industry, three main weaknesses were identified by port respondents: poor docking facilities, lack of port services and poor infrastructure (Table 5). The poor docking facilities relate not only to them been dated and in a poor state of repair, but also to their limited size and capacity, as illustrated by comments of one port respondent:

The port services are almost non-existent and the docking facilities are in a bad state of repair (Port respondent 1)

Another added:

Larger ships have to anchor at the mouth of the harbour and shuttle their guests. Future harbour improvements will rectify that problem. (Port respondent 24)

A lack of port services was an overriding concern of port respondents. For many, poor infrastructure facilities were linked to weaknesses in port services. A lack of cruise terminals, limited local transport in the community, lack of local attractions/activities and a lack of tour guides were all mentioned as needing to be addressed.

Table 5
The weaknesses of the Province as cruise destination by port respondents (N=21)

Resources/capabilities	Frequency	Percent
Poor docking facilities and physical infrastructure	16	48.4
Lack of proper port services (shopping/ excursions)	12	36.5
No community coordination and cohesion to work with cruise ships	4	12.1
Too much government regulation limiting proper development	1	3

In contrast, the cruise lines focused on marketing and government policies as the main hurdles to development (Table 6). The lack of marketing support and, as a result, the lack of international awareness of Newfoundland and Labrador as a cruise destination was the most frequently mentioned barrier to cruise tourism development, as the following comments illustrates:

The world does not know about Newfoundland and Labrador and therefore [it is] difficult to attract foreign passengers. (Cruise respondent 2)

In addition to marketing, customs regulations were also mentioned as a barrier to future expansion of the cruise industry in the province. One cruise line company expressed concern about government regulations:

The most vital weakness is the customs issue in Labrador. Having to wait to clear customs in Nain, or even Goose Bay or St. Anthony is forcefully eliminating Labrador from our itineraries. (Cruise respondent 5)

Thus, ports and cruise lines representatives differed in identifying the weaknesses of the provincial cruise industry with ports concerned about infrastructure and services, while cruise lines primarily about marketing and government regulations.

Table 6
Weaknesses of the Province as a cruise destination by cruise line respondents (N=15)

Mentions	Number of mentions	Percent
Lack of marketing information about the destination	6	46.7
Weather	3	26.7
Government obstacles to development (ie customs, labour)	2	20.0
Willingness of ports to work with cruise ships	1	6.6

Port respondents identified a number of opportunities and challenges in fostering cruise tourism in the Province (Table 7). The majority of respondents indicated that there is an opportunity for organizations in ports to offer coordinated products and services that will set the province apart as a cruise destination. One respondent commented that they see an opportunity to:

... work with public/private sector partners in introducing more unique tours/products that showcase the culture, history, natural heritage, and environment of the destination. (Port Respondent 32)

Another respondent added that there is:

..tremendous opportunity for touring, restaurants, internet cafes, … transportation, start and finish tours, because it is a known destination as it is a UNESCO World Heritage Site. (Port Respondent 19)

In addition, one respondent stated that taking advantage of these opportunities for coordinated programming will depend upon promoting cooperation between organizations to provide a first class experience in provincial ports.

Table 7
The opportunities of Province as a cruise destination by port respondents (N=22)

Resources/capabilities	Frequency	Percent
To work together with operators/ associations to offer high quality/unique products/services	17	61
To improve revenue generation and employment opportunities in ports	3	11
To actively participate in CANAL and ACCA to bring benefits to our ports	2	7
To develop a strong marketing strategy targeted a travel trade, media relations, and the Internet	2	7
To continue to develop our understanding of the cruise sector that has been realized over the last few years	2	7
To take advantage of the increasing number of cruise visitors to the province	2	7

Cruise line respondents also identified that there were opportunities for better coordination with excursions in ports by providing better itineraries and improving government regulations was also considered as an impetus for the cruise industry development. In terms of better itineraries, they hinted at the possibility to promote small-scale expedition cruises and, as one would expect from the cruise companies, to improve the overall marketing of the province as a cruise destination to assist them in selling their cruises to the Newfoundland and Labrador.

Table 8
Opportunities of the Province as a cruise destination by cruise lines respondents (N=9)

Resources/capabilities	Frequency	Percent
Improving itinerary planning	3	37.5%
Change of government regulations (i.e., customs)	2	25.0%
Nothing wrong with port readiness	2	25.0%
Being proactive about marketing the province	1	12.5%
Promoting small-scale expedition cruising opportunities	1	12.5%

When identifying the threats/challenges to the development of the cruise ship industry in Newfoundland and Labrador, port respondents indicated that the lack of funding for infrastructure and facilities (32.3%) and the lack of support from the community (29%) were key points that needed to be addressed. Respondents emphasized that funding for infrastructure and involvement of the community was critical to assist with infrastructure and greater interest and awareness in ports:

Need more interest by council, need to prioritize waterfront improvement, should consider marina development complete with shore based services. (Port Respondent 19).

Cruise line respondents argued that the biggest challenge was the need for more support for promotion and marketing programs to raise the awareness of Newfoundland and Labrador as a cruise ship destination (55.6%) as well as the need for changes to government regulations (22.2%). Cruise line respondents also indicated that local attractions, community support when in port, and port location were the three most important factors in developing new itineraries in Newfoundland and Labrador.

Discussion

The results of the Needs Assessment and the SWOT analysis identify four important needs for improving port readiness planning in provincial ports: greater collaboration; increased local capacity building; improved community knowledge of cruise tourism; and integrated coastal management strategies which will be discussed in more detail in this section.

Researchers point out that collaboration is essential to minimize the fragmented nature of tourism development (Stewart & Draper, 2006; Jamal & Getz, 1995). It is acknowledged that the cruise ship industry in various regions of Canada suffers from a relative lack of communication and control as a result of the rapid growth of the industry over the last decade (Marquez & Eagles, 2007). There is a need for cruise tourism planning where decisions are made as part of an integrated management strategy involving cruise operators, communities and other key stakeholders (Dawson, Maher & Slocombe, 2007; Stewart & Draper, 2006; Klein, 2003). In order to meet the needs of cruise line passengers in Newfoundland and Labrador there is also a need to build local capacity and adopt closer coordination between ports and cruise lines in order to understand the potential costs and benefits of the cruise industry and to protect the unique natural and cultural heritage of the province.

The results addressing the structure and characteristics of Newfoundland and Labrador's provincial ports illustrate the need for the creation of local institutional organizations in ports to work with and to support CANAL to ensure local benefits from the industry and to better serve the cruise industry and cruise passengers when they are in port. Even though approximately two-thirds of provincial port respondents have experience welcoming cruise ships, less than 50% of provincial ports were supported by a local harbour authority (47%), cruise committee (32%), port contact (32%), or shipping agent (26%). The lack of support from the community (29%) was identified as a challenge to future development and to ensuring a quality customer experience. The participation of these port industry partners is important in coordination, logistical support and communications with the cruise industry (Marquez & Eagles, 2007; Hull et al., 2005).

For example, the cruise lines mainly sell their trips through travel agencies (95%) and through direct sales on the Internet with the opening up of new distribution channels (UNWTO, 2003). When developing itineraries, cruise lines select ports for their attraction appeal (e.g. culture, beach, leisure, fashion, shopping, etc) and, therefore, gather port profiles to gauge whether or not the cruise passenger will like the location. This requires working with local partners (e.g. provincial cruise association or local cruise committee) to finalize an itinerary. In Newfoundland and Labrador, the goal of the Port Readiness Program has been to assist local ports in building their cruise capacity and in encouraging ports to create cruise committees so that they can work with CANAL and the cruise lines to bring about positive growth. The fact that the results indicate that port services and infrastructure are both strengths and weaknesses suggests that there is a not a consistent level of service throughout the province and that there is still a need to address port readiness to meet the expectations of cruise lines and passengers.

A lack of local capacity also can impact the division of economic costs and benefits for local ports and communities. Once an itinerary is finalized, the financing and pricing of packaging is often divided between destinations, port authorities and the cruise lines. Klein's (2009, p. 3) report on *Cruising in the Maritimes* points out that often there is an inequitable accounting and division of economic costs and benefits between the cruise industry and local ports and communities. Data suggests that the industry overstates the benefits of cruising to the local community and underestimates the costs of hosting a cruise ship. There is a need for a more detailed account so that local ports and community groups understand the direct and indirect costs and benefits of the industry to make sure that there is a realistic estimation of the economic value of the industry.

In addition, collaboration with receptive tour operators is critical in offering quality activities and facilities similar to those experienced on board and that also provide a diversity of offerings to new destinations to improve customer orientations and promote demand. Researchers point out that there is increasing recognition by the cruise lines that itinerary planning with ports and local stakeholders is critical to maintaining and developing their brands in the marketplace (Barron & Greenwood, 2006). The biggest challenge mentioned by the cruise lines visiting Newfoundland and Labrador was the need for the development of marketing partnerships with provincial and federal governments, regional cruise associations, and travel trade partners (i.e. Cruise Association of Newfoundland and Labrador, Atlantic Canada Cruise Association, Cruise Islands of the North Atlantic) to raise the awareness of Newfoundland and Labrador as a cruise destination. A regional viability audit of the Newfoundland and Labrador cruise industry in 2006 (Global Destinations Development LLC, 2006) reported that the province had many viable destinations, waiting for larger market forces to drive ship business to the region. There is a need for the cruise lines, industry associations, and ports to work together in building brand awareness. The cruise lines have the financial capability and capacity to access global markets that provincial and local cruise associations often can't. There is a need to identify specific roles and responsibilities for CANAL and local ports to support the cruise lines' efforts (e.g. local port profiles, destination marketing campaigns, cruise itinerary promotion).

Moscardo (2008) points out that in order for tourism sectors, such as the cruise industry, to be successful, there is a need at the community level: to improve knowledge of the impacts of cruise and; to improve community knowledge of cruise tourism. Results from the SWOT analysis reveal that ports and the cruise lines identified attractions, coordinated onshore excursions, community participation, adequate infrastructure, enhanced marketing and custom regulations as necessary considerations in providing positive benefit to communities and the cruise industry in the province. There is no mention of the broader potential negative impacts such as the economic costs (e.g. commission and cruise ship fees charged to passengers that never contribute to local development) or negative environmental impacts (e.g. $ 50 million in fines for environmental pollution over the last decade). Strategic planning recommendations are needed to ensure that the benefits of the cruise industry outweigh the costs to ports and communities with the growth of the industry (Papathanisis, 2011; Klein, 2009).

In addressing community knowledge of cruise tourism, the Port Readiness Program has assisted ports through training workshops over the past five years, providing them with the tools to enhance the quality of their excursions, support services, physical infrastructure and to improve the availability of transportation services as part of an overall sustainable development strategy (Hull et al., 2005). The launch of the *Exceeding Expectations -- Port Readiness Workbook* by CANAL in 2011 is part of CANAL's continuing efforts aimed at educating provincial stakeholders about the workings of the cruise industry in order to assist them with informed decision-making (CANAL, 2011).

Researchers also point out that there is a need for more integrated coastal management strategies that promote collaborative decision-making for sustainable use, development and protection of areas and resources in ports of call (Stewart and Draper, 2006). Gaining political and financial support for cruise ship development from local communities, planning authorities and government agencies is acknowledged as an important strategy as part of responsible, integrated oceans management framework (Stewart & Draper, 2006; Johnson, 2002). The fragility of the northern environment in Newfoundland and Labrador requires a coordinated government and industry-supported strategy to minimize negative environmental impacts from the cruise industry. The Nordic Council's *Towards a Sustainable Arctic Tourism* (2003, p. 27) points out "improved management plans are needed for both protected and unprotected areas of outstanding natural beauty and special scientific interest… to curb environmental degradation." Researchers (Papathanisis 2011; Klein, 2007, 2003) identify that even though the cruise ship industry is devoting considerable resources to environmental responsibility there are constant environmental violations and millions of dollars of fines annually linked to improper discharge of black water, gray water, and sewage sludge. Solid waste disposal and air emissions from engines also pose significant challenges for cruise destinations such as Newfoundland and Labrador that are marketed as at pristine environments at, "The Edge of North America" (CANAL, 2011). The cruise lines visiting Newfoundland and Labrador argue that the province is an attractive destination for cruise passengers, offering stunning natural beauty, an incredible array of marine wildlife, and hospitable residents. With the rapid growth of the cruise industry in the province, there is a need for regulations and guidelines similar to the Association of Arctic Expedition Cruise Operators (AECO) whose members operate twenty vessels in the Arctic. They have agreed that cruises in the Arctic, "must be carried out with the utmost consideration for the vulnerable natural environment, local cultures, and cultural remains, as well as the challenging safety hazards at sea and on land" (AECO, 2011). Their member guidelines provide tools for organizing respectable, environmentally friendly and safe expeditions that provide visitors with memorable and safe experiences that protect the environment and that have respect for and bring benefits to local communities (AECO, 2011).

Conclusions

The rapid growth of the global cruise ship industry over the last forty years has resulted in the need for ports to develop integrated management strategies to handle the increasing number of cruise ships and the corresponding increase in the number of passengers. Cruise ship tourism's growth is a result of the industry's ability to satisfy tourist demand by offering a multi-destination holiday that minimizes level of risk, allows the tourist to accumulate more experiences, satisfy their preferences, and saves time and money (Barron & Greenwood, 2006; Tideswell & Faulkner, 1999). This can only happen in an atmosphere of partnership and co-creation of the tourist experience.

In eastern Canada, Newfoundland and Labrador's Port Readiness Program, initiated in 2005, has the mandate of providing community support and local capacity building to assist provincial ports in improving the quality of service to the cruise lines and passengers; in increasing the number of cruise ship calls to provincial ports; in protecting natural/cultural resources, and in informing communities of the opportunities for local revenue generation, employment enhancement, and excursion planning (Hull et al., 2005).

The results of this research point out that there is a need to build community capacity in ports to provide opportunities for the cruise lines, CANAL, and local communities to work together in the co-creation of personal, memorable tourist experiences that add value for the cruise passenger and also protect local natural and cultural resources of the province.

At present, provincial efforts have been successful in attracting new cruise ships to Newfoundland and Labrador with over 50,000 passengers and crew in 2010. The provincial ports support a diverse industry that are catering to a variety of ships and cruise lines serving different market segments. This is a result of the geographic location of the Newfoundland and Labrador and its positioning as a stopover for larger ships on transatlantic voyages and Canada-New England itineraries at the main ports of St. John's and Corner Brook, as well as its growing popularity for small and medium-sized ships offering more exclusive polar, adventure and expedition cruises to more remote northern ports in Labrador and around the island of Newfoundland (CANAL, 2009). Cruise lines have identified that the province's main attractions for cruise passengers are the scenery, cultural heritage, wildlife and friendliness of residents. CANAL (2011) reports that these visits are generating direct and indirect economic impacts of over CAD$ 10.7 million annually.

Questions remain unanswered as to how the natural and cultural resources of the province will be safeguarded and how local economic benefits can be assured as the industry continues to expand. Marquez and Eagles (2007, p. 86, 88) point out that as cruise ship tourism increases, "it is important that policies and guidelines are in place to meet the growing demands of the industry… ideally policies will crosscut …boundaries, as do ship itineraries." In terms of safeguarding natural and cultural resources, Papathanassis (2011) argues that the industry needs to adopt a "Triple E Approach" of (1) enforcement to penalize environmental violators, (2) engineering to adopt more efficient waste water and energy systems on ships, and (3) education to promote passenger participation and a demand for green shore excursions. The *2002 Cruise ship Marketing Strategy and Destination Analysis* (Bermello & Ajamil, 2002) identified the adventure/expedition market as an important growth market for the province. A number of the ships visiting Newfoundland and Labrador are affiliated with the Association of Arctic Expedition Cruise Operators (AECO), who have committed to adopting environmentally friendly practices for tour operators and tourists. These ships, such as *Cruise North*, are also home porting in the province, generating substantial local economic benefits for communities.

Further research is required to monitor the success of these initiatives, and evaluate benefits of the cruise industry to local communities. A study of customer feedback of passengers from their cruises would add considerably to the body of academic knowledge on how ports and the cruise lines are meeting the expectations of cruise passengers.

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