National Port Strategy Scoping Study

For Cruise New Zealand

July 2019

1. Aim

With the increase in demand for cruising, ports and destinations are facing many challenges and opportunities. Within this context, a preliminary assessment was undertaken to assess how different regions approach port strategies at both national and regional levels, and in particular, how cruise shipping is considered. This aim of this scoping study is to explore how strategic planning is approached to encourage and manage cruise tourism. This study explored the landscape of port strategies and reflects vastly different approaches between markets, and there are some specific regions that offer insight into how they manage cruise tourism in terms of what works well and what New Zealand may wish to avoid. Questions that shaped this exploratory study include

- Within cruise markets, which countries have national port strategies?
- How is cruise tourism considered within national port strategies?
- What are the more successful cruise markets doing well in terms of developing strategic plans?

2. Executive Summary

The aim of this exploratory scoping study is to assess the current approach to strategic port planning, and specifically in relation to cruise tourism. First, data was gathered on the top ten global passenger source markets according to CLIA (2018). The criteria for these markets were by number of passengers who have been on a cruise originating from that country. Second, the most comparable markets to New Zealand were determined. The criteria to be considered to be comparable were by number of passengers cruising, tourists' arrivals for cruise purposes (where possible to be determined) and the similarity in numbers of cruise ports. The most comparable markets to New Zealand were determined to be Australia, Canada, France, Germany, Ireland, Italy, Japan, Spain, and the United Kingdom. This preliminary assessment examined each of these countries by determining if they have a national port strategy, and if so, does it include cruise tourism, and following this, do they also have a national cruise strategy. This study suggests the landscape of port strategies is fragmented and many countries operate in an ad hoc manner with little attention on cruise tourism in any planning or development. However, the countries that have included cruise shipping in their plans are more successful at managing the port as a tourism resource and offers insight for New Zealand to build a more successful and sustainable cruise industry.

3. Background

Cruise tourism is one of the fastest growing sectors of the global tourism industry (Hunter et al, 2015; Jones, 2011; Lebrun, 2015; Sun et al, 2011; Weeden et al 2011). The current cruise market reflects a robust and dynamic component of global tourism. In 2017, 25.8 million passengers took a cruise holiday, compared to 17.8 million in 2009 (CLIA, 2018a). The cruise sector has had sustained growth of 62% for the period of 2005-2015, which is significant as the cruise sector has outpaced global tourism numbers (CLIA, 2016). For example, for the period from 1980 to 2005, global tourist arrivals indicate an annual 6.6% growth, compared with the cruise sector, which for the same time period sustained an annual growth of 13.9% (Perucic, 2007). Indeed, cruise travel outpaced general leisure travel by 22% in the USA between 2008 and 2014 (Dowling & Weeden, 2017). The number of people who took a cruise worldwide increased by 21% between 2011 and 2016 (CLIA, 2017b).

The cruise market has immense financial value, contributing an estimated $126 billion USD to the global economy in 2016 (Business Research & Economic Advisors [BREA], 2016). Cruise tourism contributed an estimated $2.7 AUD billion to the Australian economy in 2017 (CLIA Australia, 2017) and $447 NZD million to the New Zealand economy, making a significant economic contribution to the region (m.e. consulting, 2017). The cruise industry also significantly affects development and the building of infrastructure as well, and is a large contributor to tourism employment.

Strong growth is projected for the global cruise market between 2017 and 2027. Fewer ships are scheduled to be retired and moved out of service, with 80 new cruise ships to be built in the next ten years (CLIA, 2017b; Seatrade, 2018a). CLIA (2018) predicts that by 2027, there will be 472 cruise ships in operation (compared to 264 ships in 2018), which indicates a significant growth of 48% from 2018 (CLIA, 2018a). Indeed, global shipyards have been struggling to meet demand for ship orders. Recent figures indicate the shipyards are operating at full capacity, with construction commencing on a new cruise ship every 47 days (Seatrade, 2018a). Even this remarkable pace is unable to keep up with passenger demand, which highlights the rapid and robust growth of the cruise sector.

The current global cruise market is expanding. There are emerging markets in Europe, Asia, Australia and, of particular relevance for this study, in New Zealand. Historically, the North American market has had the largest share of the global cruise sector as most cruise passengers are from the USA. Cruise itineraries and cruise companies have been and continue to be dominated by a North American-centric perspective. However, recently there has been a significant increase in growth outside the North American market, noting a significant transition towards the Asia Pacific region. From 1990 to 2014, the non-North American passenger market share increased by 16.90% average annual growth (BREA, 2014). Table 1 details the main passenger source markets globally from 2012 to 2018, and reflects the steady and robust growth over time.

Table 1. Main passenger source markets 2012-2018

Originating Market	2012	2013	2014	2015	2016	2017	2018
US	10.89	10.92	11.21	11.28	11.52	11.94	13.09
China	0.679	0.73	0.70	0.99	2.11	2.39	2.35
Germany	1.54	1.69	1.77	1.81	2.02	2.17	2.23
UK *from 2018 combined with Ireland	1.70	1.73	1.61	1.79	1.89	1.93	2.01
Australia	0.69	0.83	1.0	1.06	1.29	1.33	1.34
Canada	0.75	0.77	0.80	0.72	0.75	0.92	0.97
Italy	0.84	0.87	0.84	0.81	0.75	0.77	0.83
France	0.48	0.52	0.59	0.62	0.57	0.50	0.52
Spain	0.58	0.48	0.45	0.47	0.49	0.51	0.53
New Zealand	*	*	*	*	0.086	0.098	0.112
Total global	20.9	21.3	22.04	23.19	24.73	26.72	28.51

Note. Number of passengers, in millions. Asterisk notes data not found during this study.
Source: CLIA, 2016, 2018; CLIA Australasia, 2017

The second largest passenger source is from China, reflecting the rapid growth of this market in the past five years. Recent developments and shipbuilding in Asia illuminates the significant growth potential of this emerging market (Duval & Weaver, 2016; Zou & Petrick, 2017). Indeed, the combined Asian markets of China, Taiwan, Singapore, Japan, Hong Kong, Malaysia and India grew 20.5% in the year from 2016 to 2017 (Seatrade, 2018b). Within the Asian market, China saw a rapid growth in the number of passengers who took a cruise, increasing 79% from 2012 to 2013 (CLIA, 2014). Steighorst (2013) predicts the Asian market will double in size by 2020, with one in five cruisers originating in Asia. Cruise lines have been building ships specifically to cater to this market, and there has been a recent agreement between Carnival and shipyards in China to begin building cruise ships (Maritime Executive, 2017; Carnival, 2018) and to develop cruise ports (Xu, 2016). This is likely to dramatically shift the cruise industry in the coming decade, as if even 1% of the domestic tourist market in China begins to cruise this will more than double the current number of cruise passengers globally (Fan & Hsu, 2014), with an estimated 30 million cruise passengers originating from China alone predicted by 2030 (Xu, 2016).

4. Current positioning of New Zealand as a cruise market

New Zealand is in an enviable position in terms of cruise tourism. There is much potential for further development across the North and South Islands, with the potential for further development of each existing port and developing newer ports to share potential benefits. While the geographical positioning makes access more difficult, New Zealand is competitive with other cruise destinations around the world and has much to offer in terms of what tourists want for attraction, accommodation, experiences and New Zealand's' 'green' perception. Understanding tourists' motivation to visit New Zealand is vast (see Fieger, 2018; McIntosh, 2004; Ryan, 2002), but New Zealand has a particularly strong cultural and environmental tourist product including farm and culinary experiences that positions it uniquely within the cruise products.

Notably, passenger sources from within New Zealand have significantly increased: they have grown by 14.6% between 2017 and 2018, with an average annual increase of 13.5% since 2008 (CLIA, 2019). This highlights the significant growth in demand for cruises for those living in New Zealand. The majority (69.2%) of New Zealanders who cruise are choosing to sail within the region (Australia, South Pacific and NZ). This desire to cruise nearer home is driven by many factors, likely including affordability, transport links and avoid long haul flights. New Zealand is in a position to take advantage of these trends and growth patterns and capitalize on the sting emerging market both domestically and to appeal to more international tourists desiring New Zealand on their cruise itineraries.

The current state of port co-operation in New Zealand appears to be fragmented, competitive and politically motivated. Cruise ports are widely recognized to be highly competitive with each other (see Parola et al, 2018), and this is the case in New Zealand. The national government is looking to expand ports in the North Island and the debate around locations is contested and opinions vary if Tauranga, Auckland, Northport or even Napier should attract the bulk of the lucrative cargo shipping trade (Portstrategy, 2019). Cruise shipping appears not to factor in to these discussions, and indeed, a recent study explored sentiment of Auckland in developing port infrastructure such as cruise terminals and the public debate is contested and highly politicized (see London et al, 2017).

5. Comparative Analysis

A comparative analysis was carried out to see what other countries which have a significant amount of cruise visitors are currently doing in relation to planning for cruise tourism, and what this insight might offer to New Zealand. The countries selected for comparison are based on the number of ports, and size as a passenger source market. Ideally, it would have been very useful to compare number of cruise visitors to each country rather than CLIA's passenger source figures, but it was not feasible to separate cruise tourists from general tourist arrivals. determine with national tourist figures how many within tourist arrivals are going on a cruise. The comparative analysis first considered if a national port strategy was in place, and if so, from when and what are the main components and considerations. The analysis also examined if any national or regional cruise strategies were in place. Overall, the analysis sought to determine if and how cruise tourism is situated within the national tourism market. The analysis overall revealed there is little consensus and each region is operating with often little consideration for cruise tourism. The analysis also notes specific examples worthy of further consideration for applications to New Zealand.

Country	Number of cruise ports	Ports (based on calls in 2019)
New Zealand	11	Akoroa, Auckland, Bay of Islands, Gisborne, Lyttelton, Oban, Picton, Port Chalmers, Tauranga, Napier, Wellington.
Canada	10	Halifax, Montreal, Nanaimo, Prince Rupert, Quebec City, Saint John, St John's, Sydney, Vancouver, Victoria. (*The North not included)
Australia	17	Adelaide, Airlie Beach, Brisbane, Broome, Darwin, Exmouth, Fremantle, Hobart, Kangaroo Island, Melbourne, Newcastle, Phillip Island, Port Arthur, Port Douglas, Port Lincoln, Sydney, Yorkeys Knob
UK	42	Barrow-in-Furness, Belfast, Berwick-upon-Tweed, Bristol, Cardiff, Cowes, Dartmouth, Dover, Dundee, Falmouth, Felixstowe, Fishguard, Fowey, Great Yarmouth, Greenock (Glasgow), Harwich, Holyhead, Hull, Invergordon, Isle of Man, Kirkwall (Orkney Islands), Lerwick (Shetland Islands), London, Liverpool, Milford Haven, Newhaven, Newport, Plymouth, Poole, Portland, Portsmouth, Rosyth (Edinburgh), Scarborough, Southampton, South Queensferry (Edinburgh), St. Helier (Jersey), St. Peter Port (Guernsey), Swansea, Tilbury, Torquay, Tyne (Newcastle), Whitby
Ireland	5	Cork, Dublin, Dun Laoghaire, Londonderry, Waterford
Germany	8	Bremen, Bremerhaven, Flensburg, Kiel, Rostock, Travemunde, Warnemunde, Wismar
Spain	17	Alicante, Almeria, Arricife (Canary Islands), Barcelona, Bilbao, Cadiz, Cartagena, Ibiza, La Coruna, Las Palmas (Canary Islands), Mahon (Menorca), Malaga, Mallorca, Santa cruz de la Palma, Santa cruz de Tenerife, Vigo, Valencia
Italy	23	Agrigento (Sicily), Ancona, Bari, Cagliari (Sardinia), Civatevecchia, Crotone, Gaeta, Genoa, Livorno, Messina (Sicily), Naples, Palermo (Sicily), Portofino, Portovenere, Ravenna, Rimini, Savona, Siracusa, La Spezia, Taormina, Trapani, Trieste, Venice
France	13	Ajaccio (Corsica), Brest, Cannes, La Rochelle, Le Havre, Le Verdone, Marseille, Monaco, Nice, Saint-Tropez, St. Nazaire, Toulon, Villefranche
New Caledonia	4	Isle of Pines, Lifou, Mare, Noumea
French Polynesia	9	Bora Bora, Fakarava, Huahine, Moorea, Nuka Hiva, Papeete, Raiatea, Rangiroa, Tahaa
Japan	24 (107)	Akita, Aomori, Fukuoka, Hakodate, Hiroshima, Ishigaki, Ishinomaki, Kagoshima, Kobe, Kochi, Kumamoto, Kushiro, Miyakojima, Miyazaki, Nagasaki, Naha, Osaka, Otaru, Sakaminato, Shimizu, Tokushima, Tokyo, Yokkaichi, Yokohama

1) Australia

Australia appears to have an excellent approach to cruise tourism and the rapid growth in market share and increase in passenger numbers reflect this. Australia is the fifth largest passenger source market globally. Australia's capacity has increased by 600% from 158,415 passengers in 2004 to 1.34 million passengers in 2018 (CLIA, 2016, 2018). Australia exceeded expectations to achieve one million Australian passengers in 2014, six years before market predictions (CLIA, 2015; Dowling & Weeden, 2017).

The fifth largest source market is Australia. Indeed, Australia's capacity has increased by 600% from 158,415 passengers in 2004 to 1,003,246 passengers in 2014 (CLIA, 2016). Australia exceeded expectations to achieve one million Australian passengers in 2014, six years before market predictions (CLIA, 2015; Dowling & Weeden, 2017). Many major cruise brands are repositioning their fleet and acquiring more ships to meet the increasing demand in the Australia region. The lack of cruise ports in both Australia and New Zealand is limiting this region. Notably, many of the current ports in Australia and New Zealand are unable to support the newer, larger cruise ships because of the lack of infrastructure (MBIE, 2016; London et al, 2017). The lack of infrastructure includes not having the wharf space or ability to receive the size of the ship and the increased number of passengers.

However, direct comparisons between Australia and New Zealand are difficult. It is not accurate to compare New Zealand with Australia as Australia's domestic population and international tourist arrivals are much larger. Additionally, Australia has nearly double the amount of ports able to welcome cruise ships. Australia currently has 18 cruise ports to New Zealand's 11, and are exploring ways to develop other ports to be able to welcome more cruise ships and expand for home porting. However, Australia is very successful at developing strategic plans and cruise tourism is recognized as a central part of both national port and tourism strategies. Australia does an amazing job coordinating and collaborating between ports and building the tourism industry so lessons could be applied to NZ for growth.
Australia has been increasingly privatizing ports through long term leasehold sales using a public/private model (Chen et al, 2016). While generating income for the national governments this has led to competition among ports and prevented infrastructure from being built.
Australia's national port strategy recently was launched in 2011, but lacks clear direction or action for stakeholders. Griffiths (2010), who viewed the draft document, goes as far as to suggest the strategy does not go far enough to actually be useful and focusses on maintaining

the existing status quo of ports, and even specifically prevents smaller ports from developing. Indeed, this is a valid point he makes, and any port planning for New Zealand should take into account both the need to maintain and expand existing major ports, but to also develop smaller ports. Crucially, the Australian strategy misses the opportunity to bring attention to cruise tourism.

Australia also has each region has its own development plan, which includes initiatives and planning for cruise tourism. Australia Tourism has developed an Annual Report specifically focusing on cruise tourism, and within this each region has its own operating plans. This has proven to be very successful for Australia as each region has their own marketing plan and strategic focus for managing and developing cruise tourism and port development. The regions work together collaboratively with the National Transport Commission and Australia Government and the system appears to be working well for the ports, communities managing tourist flows, tour operators and cruise lines.

2) Canada

Canada is similar to New Zealand in terms of number of ports as Canada has 10 cruise ports. Also, proximity to a major market with a much higher population is also similar with Canada/US, and New Zealand/Australia.

Canada however has not taken a very proactive or indeed any coordinated response to cruise tourism. Each port operates independently and is privately run. While the Canada Maritime Act oversees all marine traffic, there is no attention given to cruise tourism in any planning or strategies. The national government of Canada came out with a strategic plan called "Transportation 2030" which focuses resources on where and how marine development should occur as well as developing sustainable management of the ports. Unfortunately, in the plan there is no mention of cruise tourism, which is a critical absence and a missed opportunity. The plan has five themes:

1. The Traveller

2. Safer Transportation

3. Green and Innovative Transportation

4. Waterways, the Coasts and the North

5. Trade Corridors to Global Markets

Within Canada, tourist arrivals for cruise are not separated from general tourist arrivals, but each port does track their own figures. However, this lack of separation from national tourist arrivals makes it difficult to track and assess patterns.

While Canada has very little recognition of cruising as a part of the tourism sector, the exception to this is the Northern regions. The last few years have seen a dramatic increase in research on port development and what the future of cruise tourism may look like in the North. Much of this strategic focus has emerged from within research groups operating out of the University of Ottawa due to the presence of polar research groups. The strategic plans focus on sustainable development, and focuses on educating the cruise tourist about behavior and regulation (see ESPG, 2013), rather than promoting the destination. Canada does have a very comprehensive national tourism development strategy with focus on promoting rural and remote communities, Indigenous tourism, inclusiveness and culinary / farm-to-table experiences. This national focus again misses the opportunity to address cruise tourism.

3) France

In France, ports are state-owned and privately run by local authorities. There are 13 ports currently welcoming cruise ships. France has a national port strategy, created in 2017 by the Ministry of Ecological and Solidarity Transition, “National strategy for the sea and coasts”. Cruises are mentioned as part of developing a sustainable blue economy. However, the strategy is vague at times, although it is set out with four main themes and priority actions. Cruising is integrated throughout the strategy under marine tourism. The four themes are:

1. Relying on knowledge and innovation

   Developing research and knowledge, innovating to protect resources and grow the blue economy

2. Developing sustainable and resilient maritime and coastal territories

   Through strategic planning, protect environments, resources, biological and ecological recourses through strategic planning, adapt coastal management to global change and develop projects to preserve national interest

3. Support and optimize initiatives, remove obstacles

Assist development of both traditional and new activities, improve governance, steer towards harmonious fiscal and funding strategies, and share data and information

4. Promote a French vision at the heart of the European Union and in international negotiations, promoting national issues

France's national tourism plan does not include cruise tourism or ports. This is a critical absence, and surprising given the national strategy which considers marine tourism throughout the document. The only mention in the national tourism plan is to discuss reducing wildlife collisions with ships. There is a second policy document from the (national) Ministry of the Environment, Energy and the Sea, with objectives for the Mediterranean and a major point is reducing maritime pollution and enforcing IMO regulations around emissions. However, the lack of attention to cruise or marine tourism is disappointing and is a missed opportunity for development.

4) Germany

Germany is a very strong growth market within Europe, and has 8 cruise ports. Ports are privately run in Germany. The national government launched a national port strategy in 2015. This document notes 155 measures along with goals including expanding port infrastructure, training and employment, and better coordination of port politics between the EU, national government and regional states. The document will assist in port policy and planning until 2025. Cruise tourism is mentioned only in relation to energy efficiencies such cruise ships using shore power more often and sewage and waste disposal.

Germany has very comprehensive tourism plans created by the German National Tourist Board. The annual reports are structured by focusing on region for domestic and inbound tourism and really is giving attention to marketing Germany as a destination. There is a section on how transport is part of this wider picture of tourism, and unfortunately misses the opportunity to talk about cruise tourism or port development at all. The German Travel Association defers to CLIA Germany for all cruise reports and focuses on Germany as a passenger source market but gives no attention to managing or developing ports. CLIA Germany brings together all the major cruise lines operating with Germany, but no strategy or plan was found to focus on how to manage or develop Germany. The focus for CLIA appears to be on promoting cruises in the Baltic and wider European regions and on increasing the number of Germans taking a cruise.

The Green Cruise Port Action Plan 2030 was created in 2019 and offers an excellent overview of two current challenges facing cruise ports in the German and Baltic region. The plan addresses the need for infrastructure to adapt to the increase in passengers and cruise ships as well as the wider public concern for the environmental challenges the cruise industry is facing in this region. The plan is excellent in terms of structure, content and measurable outcomes and timelines. The goal of the plan is to identify a multidimensional strategy that encourages sustainable future development in this region but also encouraging investment and procedures for cruise ports, transport links and supply systems. The plan identifies five specific key areas:

1. Ports, port authorities and terminal operators shall enhance their knowledge in respect to:

    - Sustainable energy supply and innovative emission reduction
    - Cruise terminal buildings and innovative reception facilities
    - Maritime and landside cruise traffic links

2. Cruise lines will receive important information on how to enhance the level of sustainability in port areas

3. Relevant public authorities shall gain more knowledge about the environmental and transport requirements related to the cruise business

4. Intergovernmental and international institutions that set the environmental and legal requirements as well as branch associations shall be informed about project findings

5. Policy stakeholders will be informed about advisable future adaptions towards an innovative and sustainable cruise port infrastructure

6. Research institutions, technicians and engineering companies shall get inputs in knowhow and expertise.

Germany's approach to cruise tourism through development and addressing challenges is excellent, and offers valuable insight for New Zealand in terms of what is working well while addressing environmental concerns.

5) Ireland

Ireland has 5 ports used for cruise shipping, and these are privately owned and operated with a heavy focus on commercial shipping. No national port strategy was found during this study and each port operates in a competitive manner. Tourism Ireland does not have a cruise strategy, but cruise tourism is included in each region's own marketing plans.

A key example useful for New Zealand is the case of Dublin. Dublin has been very successful as a cruise port, tripling in volume between 2004 and 2014. All was progressing well and the International Transport Forum has developed a strategy specific for Dublin. The strategy specifically evaluates the financial benefits to the region, and highlights the role of cruise shipping within urban ports. The report specifically focuses on how to exploit the benefits to Dublin through increased revenue to local businesses, the need for a dedicated cruise terminal and resolve conflicts with transport links to provide the best passenger experience possible. The report also highlights the need to ensure compliance with environmental regulations and seek out incentives and other measures to reward companies for adapting and improving. This report suggests that it may be useful for specific cities (such as Auckland) to develop their own urban cruise strategies, that can work in tandem with a wider national strategy.

Significantly, the National Tourism Development Authority, Failte Ireland specifically set out objectives to encourage development of ports and cruise tourism in their latest report in 2011. This shift in policy and more attention to cruise shipping assisted in the large increase of cruise ship calls to Ireland. Dublin alone tripled in passenger volume from 2004 to 2014 (OECD, 2016), although there are wider market forces that also encouraged passenger increase such as the increase of cruisers globally. However, Dublin Port decided to implement a major decrease on cruise ships from 2021-2023, which has caused great upset with tourism and local businesses. Dublin Port wants to severely limit the number of cruise ships (151 cruise ship calls in 2018) to focus on freight and commercial shipping, but did so with little to no public consultation. The port is looking to capitalize on the increase in commercial trade due to the Brexit, and has suggesting limiting the number of calls to just 30 calls a year. During 2021-2023, construction will be working on expanding the port area. However, the financial impact on local businesses and tour operator would be massive and would have a wider impact on the whole region as Dublin is a major port of call and is also a home port for several cruises.

6) Italy

Italy has 23 cruise ports, with comprehensive strategic plans for ports nationally and regionally, and also has specific plans for cruise shipping. However, there was no national cruise strategy found, as ports either align within a region or develop their own port strategies and plans. Italy's tourism ministry also does not examine cruise tourism. While Italy is particularly well located geographically and has advantages over perhaps other cruise markets, there are key points that can provide insight and help shape New Zealand's approach.

Italy developed a national strategic plan for ports developed by the Ministry of Infrastructures and Transport. The National Strategic Plan for Ports and Logistics (PSNPL) sets the priorities and activities at a national level, to optimize the added value of the sea, meant as a resource for the marine, port and logistics cluster, and for the entire economy of Italy. The Plan seeks to empower the transport sector and the general Euro-Mediterranean policies, in synergy with the priorities set by the European Union. Highlighting in particular the importance of investing in sustainable transport modes, completing the infrastructure and connecting networks, and the implementation of transport and logistics systems, including the new technologies.

Among the several action lines set by the PSNPL, three can be considered central.

The first concerns the infrastructure works, to be scheduled according to the crucial principles of:

- environmental, economic and social sustainability
- intermodal transport enhancement, by connecting the road, rail, air and water infrastructures
- promotion of the interconnectivity, by creating “last-mile” connections between the TEN-T corridors and the core hubs, as well as towards the Southern Coast Countries
- implementation of the transport network with the telecommunications and energy networks, also through interventions supported by public/private partners

The second fundamental action line set by the PSNPL is the de-bureaucratization of the logistics chain. By simplifying the customs operations and consequently reducing the time needed for administration and operational procedures, Italian ports can become as efficient as those of the other Member States. Finally, the Plan highlights the need to foresee the international market trends, by supporting Italian companies in a stronger, more audacious way, and providing them the integrated, efficient logistics corridors through which dealing with the Countries that have interests in investing in this sector (e.g., Iran, Turkey, Arab Emirates and the States on the Black Sea).

Italy is also involved with ‘Adriatic Sea Forum’ which focuses on marine tourism. The consortium acts as a platform for sharing ideas and developing projects for stakeholders in the ferry, cruise and nautical areas of the Adriatic. The group created an agenda in 2019 and focuses on cruise as a central component. Within the cruise area, key focus is currently on overtourism, tourist flows and increasing economic impacts and benefits to the host communities. They also are examining way to minimize waste and recycling, developing an Adriatic brand, developing a platform for berthing to assist cruise lines and operators to create better itineraries and avoid overcrowding, adding a shore excursion platform to strengthen local tourism operators as a focus on addressing issues in Venice specifically.

There is also an initiative called the Adriatic Multiport Gateway, led by the Venice Port Authority, which addresses developing an integrated and cooperative network and information platform between five key ports (Venice, Trieste, Ravenna, Koper and Rijeka) and specifically focuses on cruises.

ITS Adriatic Multiport Gateway is led by the Venice Port Authority, in partnership with the port authorities of Trieste, Ravenna and Koper, and Rijeka. The group aims at cooperating to:

- develop sea, rail and road interconnections
- favor the incoming flow of cruise passengers
- enhance the environmental safety and IT systems
- create an integrated, efficient network of North Adriatic ports

Italy is encountering challenges with overcrowding, but appears to be moving towards a future with strategic planning to minimize displacement and disruption to local communities, which capitalizing on financial benefits cruise tourism brings.

7) Spain

In Spain, the ports are state-owned but operate at the local level by privately owned local port authorities. There are 28 port authorities which oversee 46 commercial ports, of which there are 17 ports that welcome cruise ships currently. The national government body Puertos del Estado oversees management and develops port policy for all the Spanish ports, and requires each port has their own development plan. There is no national cruise strategy or any planning for cruise shipping. Spain has a national strategic tourism marketing plan, unfortunately it is in Spanish with no English versions available that were available. A word search of port and cruise (translated into Spanish) yielded no results. The lack of planning may be contributing to the overcrowding and difficulties ports such as Barcelona are encountering (see Rosa-Jimenez et al, 2018).

Of interest is the organization MedCruise. MedCruise operates as a group of 73 members representing 100 ports, cruise related shipping companies, and DMO's in 21 countries to promote cruise tourism within the Mediterranean. Objectives of MedCruise are:

- To promote the Mediterranean area as a cruise destination and more specifically the MedCruise members.
- To increase the efficiency of cruise member ports by exchanging information relative to cruise passenger traffic, new tourism developments in geographical areas where cruise ports are located, new techniques or technologies on cruise ports development, organisation, administration and management.

- To increase the efficiency of member ports by providing information on industry developments; statistics; and best practices related to cruise port development and management.
- To formulate common positions, policies or plans on questions of common interest on cruise-related policies to present to policymakers at regional and international fora.
- To develop and foster good relations and collaboration among all cruise ports of the world and the cruise industry.
- To achieve a well-balanced Association serving ports of different sizes, and from diverse regions, countries and cultures.
- To provide its members marketing, networking and professional development tools and forums.

MedCruise assists its members in benefiting from the growth of the cruise industry by providing networking, promotion and professional development opportunities, and collaborates with different associations to better promote cruising and improve cooperation on issues of common interest. The Association is working to increase and strengthen its partnerships with cruise port associations over the coming years to continue to boost cruise traffic. These alliances help to provide a unified voice for sustainable cruise growth when dealing with European Union organisations, national governments, local authorities and other cruise industry stakeholders.

MedCruise also produces an annual "yearbook" with detailed information about each port including tourist attractions, a photo, map, contact, berth dimensions, anchorage, quays, transport links and number of passengers and ship calls annually (see reference list for link to view yearbooks). Perhaps something like this for NZ to share information and to be a tool for marketing New Zealand as a cruise destination at trade events. The yearbooks also have a second section with detailed information port services and cruise-related companies that are members.

8) United Kingdom

Currently, the UK is the fourth largest source market, and while it has not seen the rapid growth of China or Germany, the UK market has continued to grow at a steady pace. The UK cruise market has doubled since 2001, with cruises accounting for 2.0% of foreign holidays in 2001 to 4.2% in 2016 (CLIA, 2017c). The cruise market is becoming significant in terms of UK tourism. More cruise lines are operating out of the UK than previously, as demand increases for cruise departures and visits to British ports (CLIA UK & Ireland, 2015, 2017). Although most cruise departures are from Southampton (80% according to CLIA Europe, 2018), other UK ports including Dover, Hull, Newcastle, Bristol and Liverpool are all increasing in use as embarkation ports. Ports across the UK are seeking to attract the cruise market, with recent examples including Portland, Great Yarmouth and Bristol (Eastern Daily Press, 2018; Seatrade 2018c, 2018d). Significantly, the UK represents 22% of cruising output in Europe, and generated €10.4 billion to the UK economy in 2017 (CLIA Europe, 2018).

There are 29 ports in the UK which currently accept cruise ships, although some ports are underutilized and rarely have cruise ships call in. The UK formulated a National Policy Statement for Ports in 2012. This guides decisions on development and management of existing ports. Cruise tourism is integrated as is tourism throughout the document. Surprisingly, no national cruise strategy was found for the UK. CLIA UK oversees promotion of the cruise industry within the UK.

Of particular note, smaller ports looking to develop fall under the responsibility of the Marine Management Organization. They provide support to ports looking to develop, and this is useful for New Zealand as smaller ports may wish to develop but need help in doing so and a specific organization to assist them may or may not be feasible, but would be ideal. Perhaps even the creation of guidelines on how to create an ideal cruise or leisure tourist experience in terms of minimum visitor requirements would be beneficial to helping these smaller ports develop.

Southampton provides an excellent and specific example relevant to Auckland in particular. Similar to Auckland as a main regional hub, Southampton has a seasonal fluctuation and operates at or near capacity in the summer season. Southampton also must achieve a delicate balance between industry and nature conservation, as the coastal environment is highly regulated, and some spaces occur within national parks. Southampton has created a 'master plan' for 2016-2035 for all marine traffic including cruises. The plan is excellent, describing the position and attributes of Southampton and integrates cruise with cargo and other shipping traffic seamlessly. The plan sets out master objectives:

- Set out a strategy for growth
- Clarify a strategic planning for the medium to long term and thereby assist planning bodies, transport network providers and other stakeholders in preparing their own development strategies and in the carrying out of their functions
- Set out the future development and infrastructure requirements needed to both maintain and enhance the role of the port as a major international deep-sea gateway to meet the needs identified within government policy
- Inform port users, employees and local communities as to how we envisage the Port developing over the coming years

Southampton's master plan is updated and revised every five years in public consultation with key stakeholders and local communities. The plan also discusses access by rail and road, looking for ways to reduce congestion. The plan also addresses land use of the port area, seeking to progressively transition non-port used land to being used for the port. Focus is on specializing the existing available land and acquiring more land for expansions. The plan suggests that before 2035, all land use will be exhausted, and expansion will be necessary to keep growing.

9) Japan

Japan's ports are owned by the national government, with very few operated by private companies. Japan is a strong growth market and has focused on developing cruise tourism across the country. The government has several national development plans, revised every five years. Within these, each port creates their own management and development plan, and follow national policies focusing on improving use, and in 2003 the focus transitioned to developing social infrastructure (MLIT, 2006). This transition notes the growing importance of cruise tourism, although currently cruise passengers only account for approximately 10% of total foreign tourist arrivals (Ministry of Land, Infrastructure, Transport and Tourism, 2019). The Japanese government wants to take advantage of the strong regional growth and demand from China in particular and is particularly keen to develop cruise tourism. The Asia region's rapid growth is reflected in the increase from 1.51 million passengers cruising in the region in 2013 to 4.24 million in 2017 (Jeon et al, 2019).

In 2007, the Japanese government created National Tourism Plans to increase the volume of tourists. This has been successful, and now the focus is transitioning to increasing the amount of money that tourists spend when they do visit. Interestingly, Japan has identified a policy that no cruise ship is turned away, and all cruise visits are accepted. The port infrastructure is often developed on reclaimed land, and there are not enough cruise terminals for the demand. Cruise lines are building their own terminals, and in some cases working with the local community and most cruise lines are not charged harbor fees by the local port authority, and with the success of cruising, makes it more difficult to now begin charging the cruise lines and may lead to conflict and power relations in the near future (Funck, 2017).

10) United States of America

While not a comparable market for NZ in terms of size, examining what the US has developed for cruise strategies provides insight. The US is the largest passenger source market and is a key driver of the majority of cruise industry decision making and marketing. The US has a national port strategy created in 2017, the “National Strategy for the Marine Transportation System”. This plan provides strategic guidance and supports marine users through five key areas:

- **Optimize System Performance:** Measuring the reliability of physical and operational elements of the MTS to inform and support strategies for targeted improvements as trade and supply chain competitiveness increases.
- **Enhance Maritime Safety:** Promoting an MTS free from collisions, allisions, groundings, and injury, death, and damage to property and environment as congestion and maximum vessel size within the MTS increases.
- **Support Maritime Security:** Evaluating the infrastructure and operations of the MTS, taking into account possible threats and vulnerabilities while continually assessing existing protective measures, procedures, and operations, supported by efforts to understand and incorporate maritime domain awareness into shipping activities.
- **Advance Energy Innovation and Development:** Identifying opportunities to utilize all sources of domestic energy and implement new technologies to ensure energy independence and more efficient fuel use.
- **Facilitate Infrastructure Investment:** Using all available resources efficiently and effectively for the improvement of the MTS.

While cruise tourism not specifically elaborated on or developed in the plan, the overarching objective of the plan is to support the movement of passengers by cruise ship and ferries, recognizing the role of cruising as part of the national strategy. Surprisingly, a national cruise strategy was not found during the search for this study, and each region or state has their own plans. Additionally, CLIA and DMO’s also actively plan and develop cruise tourism, more so than in any other market. Also, the number of cruisers originating from the US is still relatively small compared to both domestic and international tourist figures, and this may also reflect the lack of priority nationally for developing cruise within the port strategies.

While procedures and processes used in the US market may not be appropriate for New Zealand, there are a few specific points to offer applications to New Zealand. Icy Strait Point is an excellent example of a new port which was created by the local community, and a fantastic example of limited investment that has provided a significant return on investment with much of the income staying in the community. Importantly, the community is the key stakeholder developing infrastructure and tourism products they want to share with tourists and share their own voices and stories. They also limit the amount of ships in to one a day, thus managing the visitor experience and avoiding crowding and other problems emerging from ‘overtourism’. Much planning has gone into developing Icy Strait Point, and this same model could be applied to new destinations in New Zealand as a way forward to develop unique local communities, particularly those that have Maori importance.

A second example from the US market is the port of San Francisco, which has excellent strategic port planning, and has generally been able to avoid problems with overcrowding and displacement of the local community. San Francisco has developed a strategic plan for 2019-2023, which integrates all marine users (including cruise), and focuses on creating jobs and generating income for the region. The port of SFO is a mixed land use area with 500 tenants and balances conservation of historic sites and buildings as well as an aquatic park. The port generates $106 million USD in revenue, and the plan is particularly useful as an example through its seven key areas: evolution, resiliency, engagement, equity, sustainability, productivity, and stability. Cruise tourism is considered under 'productivity' and the plan seeks to identify ways to evaluate and improve the existing cruise terminal to increase capacity.

The American Association of Port Authorities (AAPA) is of particular interest as an advocacy group for cruise tourism in the US and is composed of ports in Canada, Latin America and the US. The AAPA to identify and address issues currently faced by ports. These issues include developing appropriate infrastructure to match the industry's growth, address policies in relation to harbor tax and concerns about the environment and energy sources for the future.

The AAPA also has an educational component, providing training for port management. The most recent annual report (2016) specifically highlights the advocacy of the AAPA to present to national governments the significance of the economic impacts of ports but does not mention cruise shipping, rather instead focusing on the infrastructure generally. However, the AAPA serves a critical role as advocates for ports and recognizes the need for discussion on issues facing ports. The use of an advocacy group may or may not be useful for New Zealand, as the AAPA assist with a much larger number of ports across a huge geographical region.

6. Recommendations

There are several key points and recommendations to inform any potential strategic cruise tourism plans in New Zealand.

First, this preliminary assessment of port and cruise strategies revealed how fragmented the landscape of port management and development is. Fundamentally, marine tourism, and specifically, cruise shipping needs to be integrated and a part of any port strategies. It is a missed opportunity that cruise tourism, and tourism generally, is rarely discussed within port strategies.   This is a critical absence, as with the future growth of cruising, the time is now to plan for and develop not only the port infrastructure but to develop ways of managing the tourists flows and increasing benefits to the local communities while minimizing displacement. The combination of both private and public ports should not dissuade New Zealand from developing a collaborative strategy, as other regions provide examples that even very competitive ports can work together to develop strategies. This means working together with all cruise ports to discuss and collaborate nationally and regionally. Each port needs to have a voice and have the community's specific challenges, concerns and desires for the future. Determine if the strategy will be part of a larger, national ports strategy, which involves other actors within the port and shipping sector, or keeping a cruise tourism focus, perhaps within a national tourism plan, or on its own as a stand-alone document to guide the cruise industry of New Zealand into the future.

Secondly, the markets that have developed and are following strategic planning for ports which consider cruise tourism are in much better positions than those ports which do not. The planning clearly has assisted in developing marketing and attracting cruise companies and tourist, but also offer a better passenger experience. Additionally, the ports that have national strategies appear to be generating more income and jobs and are developing infrastructure to match demand. The use of strategic plans and collaborative processes also are limiting the challenges associated with cruise ships such as crowding and overtourism.

Third, there are several potential benefits for New Zealand's cruise industry in collaborating with ports and authorities and the wider tourism industry to develop a national strategic cruise strategy. Increasing visitors through cruise tourism has the potential to generate more revenue through increased tourists flows into the country, adding value to the hospitality industry including hotel, transport, restaurants, as well as tour operators and beyond into the communities.

Once a national strategy has been developed, marketing can be achieved much better through shared costs between regions with greater impact and reach to bring in more cruise tourists overall and adding in pre and post stays which will benefit local communities, generating more revenue that can stay within the communities. New Zealand has so much to offer, and the geographical remoteness should be seen as an opportunity to extend more financial benefits to each region by taking advantage of and building more pre and post stays as well as the longer-term effects of generating more income and employment opportunities.

A potential cruise strategy could include the following components:

- overall vision for cruise tourism in New Zealand, what does that look like?

- Needs to be a collaborative and multidimensional approach that gives everyone a voice (if the Baltic states and the Mediterranean can all come together then surely within NZ this is possible?)

- Identify relevant stakeholders: port communities, tour operators, DMO's, cruise lines, port authorities, hospitality associations (ie Auckland - what would help them especially to drive a more positive experience for everyone and drive economic benefits)

- What are the current challenges? Infrastructure/overcrowding/lack of planning for the future/ larger ships unable to dock / need to develop more regional ports like Napier and Gisborne?

- It is critical to develop infrastructure now or be left behind, or run the risk of only being able to take on small ships or tender. By 2020, 50% of ships operating will have more than 3000+ passengers. The infrastructure will significantly impact the selection of ports, and the trend for ships getting larger is not diminishing. Future growth will depend on the ability of ports to welcome large ships not only in terms

- Develop specific goals both nationally and regionally

- Develop port policies to aim for 'best practices' by identifying ideal passenger experience for each port as a way to be more attractive and competitive (ease of access to attractions, reduced costs for shuttles, more vendors, more cultural focus, facilities include Wi-Fi, shopping area, washrooms, cafe featuring local, focus more on showcasing the regional flavour, reduce difficulty in vendors accessing port? what are the barriers at the moment? How do we make every port the best experience possible?

- Plan should include environmental, social and economic dimensions

- Create a timeline that is achievable with measurable targets

In summary, building upon the success of strategic planning for cruise tourism by other major markets, it is suggested that New Zealand develops a national cruise strategy to guide the sector into the increased growth of the next decade. This preliminary assessment suggests regions that have strategic plans in place are more successful at managing the cruise activity and tourist flows in addition to providing benefits to the local communities. As this scoping study offers a starting point for discussions on cruise strategies, more research could be undertaken to more fully explore this area as there is very little written or any critical examinations of cruise and port strategies. Access to port plans and detailed information was more difficult than anticipated, and much more could be done to explore how each of these countries approach cruise tourism.

References

Business Research & Economic Advisors [BREA]. (2014). *The global economic contribution of cruise tourism 2013*. Retrieved from http://cruising.org/docs /default-source/research/global_cruise_impact_analysis_2013.pdf?sfvrsn=2

Business Research & Economic Advisors [BREA]. (2016). *The global contribution of the international cruise industry to the global economy in 2016.* Retrieved from http://cruising.org/docs/defaultsource/research/global_economic_contribution_2016.pdf?sfvrsn=2

Cruise Line Industry Association. (2016). 2015 Year in Review. Exton, PA: Business Research and Economic Advisors.

Cruise Line Industry Association - Australia. (2017). Cruise Tourism's Contribution to the Australian Economy 2016-2017. Retrieved from https://www.cruising.org.au/Tenant/C0000003/5677_CLIA_Economic_Impact_Statement_Web.pdf

Cruise Line Industry Association. (2017b). 2017 State of the Industry. Retrieved from https://www.cruising.org/docs/default-source/research/clia-2017-state-of-the-industry.pdf?sfvrsn=6

Cruise Line Industry Association. (2017c). CLIA United Kingdom & Ireland Cruise Review 2016. Retrieved from https://www.cruising.org/docs/default-source /research/United Kingdom-amp-ireland-cruise-review-2016.pdf?sfvrsn=0

Cruise Line Industry Association. (2018a). 2017 Annual Report. Retrieved https://cruising.org/docs/default-source/annual-reports/clia_2017 _annualreport_9x7-65_final3_singlepages_5-7_web.pdf?sfvrsn=2

Cruise Market Watch (2018). 2018 Worldwide Cruise Line Market share. Retrieved September 10, 2018, from https://www.cruisemarketwatch.com/market-share/

Cruise Line Industry Association. (2019). 2018 Global Passenger Report. Retrieved https://cruising.org/-/media/research-updates/research/clia-global-passenger-report-2018.pdf

Dowling, R., & Weeden, C. (Eds.) (2017). The world of cruising. In *Cruise ship tourism* (2nd ed.) (pp. 1-39). Wallingford, UK: CABI

Duval, D. T., & Weaver, A. (2016). Transport and infrastructure issues in Asian Tourism. In *The Routledge Handbook of Tourism in Asia* (pp. 54-64). Routledge.

Fan, D. X., & Hsu, C. H. (2014). Potential mainland Chinese cruise travelers' expectations, motivations, and intentions. *Journal of Travel & Tourism Marketing*, *31*(4), 522-535.

Fieger, P., Prayag, G., & Bruwer, J. (2019). 'Pull'motivation: an activity-based typology of international visitors to New Zealand. *Current Issues in Tourism*, *22*(2), 173-196.

Funck, C. (2017). Presentation on Japan Cruise Tourism. Delft University, the Netherlands.

Griffiths, R. (2010). The Draft Proposed National Ports Strategy. *Australian Journal of Maritime & Ocean Affairs*, *2*(2), 48-52.

Hunter, E., Martin, A., & Nash, R. (2015). Scottish cruise tourism, the strategic development of the sector and the factors effecting future growth. In A. Tavidze (Series Ed.), *Progress in Economics Research: Vol. 31* (pp. 67-89). New York, NY: Nova Science Publishers.

Jones, R. (2011). Motivations to cruise: An itinerary and cruise experience study. *Journal of Hospitality and Tourism Management, 18*, 30-40.

Lebrun, A. M. (2015). Representation of cruise: Cruisers and noncruisers cross views. *International Journal of Tourism Research*, *17*(5), 511-520.

London, W. R., Moyle, B. D., & Lohmann, G. (2017). Cruise infrastructure development in Auckland, New Zealand: a media discourse analysis (2008–2016). *Asia Pacific Journal of Tourism Research*, *22*(6), 615-633.

Maritime Executive (2017). Chinese yards step further into cruise shipbuilding. Retrieved August 21, 2018 from https://www.maritime-executive.com/ article/chinese-yards-step-further-into-cruise-shipbuilding

MBIE (2016). Ministry of Business, Innovation and Enterprise Tourism Insight Series. Cruise infrastructure, pp. 29-35. Retrieved from https://www.mbie.govt.nz/info-services/sectors-industries/tourism/tourism-research-data/tourism-insight-series/tis-ch4-cruise-infrastructure.pdf

McIntosh, A. J. (2004). Tourists' appreciation of Maori culture in New Zealand. *Tourism Management*, *25*(1), 1-15.

Ryan, C. (2002). Tourism and cultural proximity: Examples from New Zealand. *Annals of tourism research*, *29*(4), 952-971.

Seatrade. (2018a). A golden age for the Med but ports need to prepare for the new generation of large ships. Retrieved May 12, 2018, from http://www.

seatrade-cruise.com/news/news-headlines/a-golden-age-for-the-med-but-ports-need-to-prepare-for-the-new-generation-of-large-ships.html

Seatrade. (2018b). Seven Asian markets feature in the top 20 cruise passenger source markets. Retrieved May 12, 2018 http://www.seatrade-cruise.com/news/news-headlines/seven-asian-countries-feature-in-the-top-20-cruise-passenger-source-markets.html

Seatrade. (2018c). Portland Port expecting to break more records in 2018. Retrieved September 21, 2018, from http://www.seatrade-cruise.com/news/news-headlines/portland-port-expecting-to-break-more-records-in-2018.html

Seatrade. (2018d). A new ship, more homeports and multi-generational sailings shape CMV's year. Retrieved September 10, 2018, from http://www.seatrade-cruise.com/news/news-headlines/a-new-ship-more-homeports-and-multi-generational-sailings-shape-cmv-s-year.html?highlight=ImJyaXN0b2wi

Stieghorst, T. (2013). Asia cruise market prediction: 7M passengers a year by 2020. *Travel Weekly*, *72*(4).

Sun, X., Jiao, Y., & Tian, P. (2011). Marketing research and revenue optimization for the cruise industry: A concise review. *International Journal of Hospitality Management, 30*(3), 746-755.

Xu, K. (2016). China's cruise industry: progress, challenges and outlook. *Maritime Affairs: Journal of the National Maritime Foundation of India*, *12*(1), 38-45.

Weeden, C., Lester, J.-A., & Thyne, M. (2011). Cruise tourism: Emerging issues and implications for a maturing industry. *Journal of Hospitality and Tourism Management, 18*(01), 26-29.

Zou, S. S., & Petrick, J. F. (2017). Tapping the Chinese market: An examination of Chinese tourists' images and constraints towards cruising. *Tourism Review International*, *21*(4), 347-364.

Port Strategy Documents

AUSTRALIA

Annual Report 2016-2017
http://www.tourism.australia.com/content/dam/assets/document/1/6/z/6/s/2005156.pdf

Annual Report 2017-2018
http://www.tourism.australia.com/en/news-and-media/news-stories/tourism-australia-s-annual-report-for-2017-18.html

National Port Strategy
https://www.infrastructureaustralia.gov.au/policy-publications/publications/files/COAG_National_Ports_Strategy.pdf

New South Wales Cruise Development Plan 2018
https://www.industry.nsw.gov.au/development/industry-opportunities/tourism/cruise

Port of Newcastle Development Plan 2015-2020
https://www.portofnewcastle.com.au/News-and-Media/Items/2016/Port-of-Newcastle-Port-Development-Plan-2015-2020.aspx

Western Australia Cruise Shipping Strategic Plan
https://www.tourism.wa.gov.au/Publications%20Library/Industry%20Support%20and%20Opportunities/Tourism%20WA%20Cruise%20Shipping%20Strategic%20Plan%202012-2020.pdf

BARBADOS

Barbados Cruise Tourism Strategy Case Study
http://www.juneau.org/archive/websites/cbjtourism/barbados.pdf

CANADA

Canada Marine Act
https://laws-lois.justice.gc.ca/eng/acts/C-6.7/page-1.html

Cruise Tourism in Arctic Canada: Summary Report of Potential Adaptation Strategies
https://www.espg.ca/wp-content/uploads/2013/04/10-C-TAC_Summary-Report_En.pdf

Nunavut Tourism Strategy 2012
https://www.gov.nu.ca/sites/default/files/tourism-strategy-en-2-aug21-web.pdf

Tourism Industry Association of Canada Annual Report 2016
https://tiac-aitc.ca/_Library/TIAC_Publications/TIAC_Annual_Report_EN_FINAL.pdf

FRANCE

National Strategy for the Sea and Coasts
https://www.ecologique-solidaire.gouv.fr/sites/default/files/SNML%20version%20ENG_MTES.pdf

Tourism Plan (2018)
https://www.gouvernement.fr/en/tourism-plan

What solutions for the Mediterranean? Proposals for joint action for countries around the Mediterranean
https://www.ecologique-solidaire.gouv.fr/sites/default/files/What_solutions_for_the_Mediterranean.pdf

GERMANY

Balance to the cruise market 2018: The final figures
https://www.drv.de/pressecenter/aktuelles/detail/bilanz-zum-kreuzfahrtmarkt-2018-die-finalen-zahlen.html

German National Tourist Board Annual Report 2018
https://www.germany.travel/media/pdf/ueber_uns_2/2018_11/DZT_Jahresbericht2018_EN.pdf

Green Cruise Port Action Plan 2030
http://www.greencruiseport.eu/files/public/download/GCP%20Action%20Plan%202030_Final%20Report%2004Feb2019.pdf

High Seas Cruise Market 2018
https://www.drv.de/pressecenter/presseinformationen/pressemitteilung/detail/hochsee-kreuzfahrtmarkt-2018.html

National Strategy for Sea and Inland Ports 2015
https://www.bmvi.de/SharedDocs/EN/Documents/WS/national-strategy-2015.pdf?__blob=publicationFile

IRELAND

Cruise Shipping and Urban Development: The Case of Dublin
https://www.itf-oecd.org/sites/default/files/cruise-shipping-urban-development-dublin.pdf

Dublin Port Master Plan 2040
https://www.dublinport.ie/wp-content/uploads/2018/04/Dublin-Port-Masterplan-2040_SEA-Environmental-Report.pdf

ITALY

National Strategic Plan for Ports and Logistics
http://www.ramspa.it/en/national-strategic-plan-ports-and-logistics

Adriatic Sea Forum
http://www.adriaticseaforum.com/

NEW ZEALAND

Cruise Tourism's Contribution to the New Zealand Economy 2017
https://www.tourismnewzealand.com/media/3152/cruise-tourism-contribution-to-the-new-zealand-economy-2017.pdf

New Zealand ocean source market 2018
https://cruising.org/-/media/research-updates/research/clia_2019-source-market-reports_new-zealand.pdf

Port Strategy, January 31, 2019
https://www.portstrategy.com/news101/world/australasia/Pulling-New-Zealands-port-family-together

SPAIN

Medcruise (yearbooks)
http://www.medcruise.com/publications

Stratgeic Tourism Marketing Plan 2018-2020
https://www.tourspain.es/en-us/get-to-know-us/strategic-marketing-plan-18-20

UNITED KINGDOM

National Policy Statement for Ports (2012)
https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/3931/national-policy-statement-ports.pdf

Port of Southampton Port Master Plan
http://www.southamptonvts.co.uk/admin/content/files/New%20capital%20projects/Master%20Plan%202016/Master%20Plan%202016%20-%202035%20Consultation%20Document%20Oct%202016.pdf

UNITED STATES of AMERICA

American Association of Port Authorities: Building America's 21st Century Seaport Infrastructure
http://aapa.files.cms-plus.com/Infrastructure2pager.pdf

National Strategy for the Marine Transportation System: Channeling the Maritime Advantage 2017-2022
https://www.cmts.gov/downloads/National_Strategy_for_the_MTS_October_2017.pdf

Port of San Francisco Strategic Plan 2019-2023
https://sfport.com/port-strategic-plan