

Chapter 11

Challenges for Interregional Place Branding for Cruise Tourism in the Black Sea Region

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Abstract In terms of dealing with the appeal of a group of areas to visitors, destination branding involves spatial-dynamic processes which transform perceptions of partnership and the practice of tourism policy across different scales. At each place, reputation management for tourism purposes depends on the awareness of benefits associated with mutual actions and knowledge exchange by stakeholders from the public and the private sectors. However, the institutional and operational implications of collaborative brand building among traditional or emerging destinations transcend both the borders of a single locality or region and the thematic scope of tourism marketing. They actually pose challenges which require solid understanding of common aspirations in relation to reputation management at a large geographical scale. In this respect, the development of an interregional destination brand aimed at systematic tourism planning and market share gains becomes an integral aspect of interregional place branding based on consensus building among actors from various sectors and locations.

This chapter explores how the development of a brand for cruise tourism in the Black Sea Region is incorporated into a wider context of conditions and factors that shape interregional place branding in the same area. The discussion is informed by the experience of similar initiatives in the Baltic Sea Region and the Mediterranean. Without ignoring how the overall approach to cruise tourism is affected by geopolitical conditions, a key element of the analysis is the value of transnational partnerships including public authorities and organized interest groups. Particular emphasis is given to how brand building for cruise tourism emerges through processes that fall within and outside the geographical area in question. In the first case, the establishment of a unified brand identity is seen as a matter of embracing multiculturalism and integrating historical aspects of the Black Sea Region into a network of attractive destinations for cruise passengers. In the second case, the recent appearance of the Black Sea Region in the geography of cruise industry entails that the promotion of a unique identity does not occur in a vacuum, but is closely related to developments elsewhere in the major Mediterranean market. While the chapter attempts to shed light on the interrelationship of a place and a

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destination brand, empirical evidence from secondary and primary sources is used to show the dynamic nature of brand-building processes in a rather complex segment of the tourism market with various interactions taking place among areas, interests, and policies.

Keywords Black Sea Region • Cruise tourism • Interregional destination branding

Introduction

In an attempt to explore the emergence of the Black Sea Region (BSR) as a geographical zone of attractive cruise destinations, interregional place branding is seen in this chapter through the prism of transnational partnerships in which relationships of cooperation are being built inside and outside large and loosely defined areas. A conceptual basis is provided by the theme of regionalization, which reflects the intention of interest groups from cities and regions between adjacent countries to enhance the competitiveness of their localities and set a strategic agenda based on shared values and objectives. The tourism sector has a significant bearing on this subject. The growing awareness of opportunities that arise through the integration of tourism products and services among various destinations has a notable influence on the association of destination branding and place branding, where the former is regularly seen as an integral aspect of the latter. In the words of Govers and Go (2009, p. 14):

Where branding using the term “destination” implies a tourism perspective, place branding provides an even wider perspective that would include all interactions of a place with its environment, including political, outside investment, trade, immigration and media issues.

On these grounds, the chapter focuses on cruise tourism as a highly competitive market in which the gradual establishment of emergent destinations and zones of activity presupposes understanding and coordination of all the factors shaping the perception of prospective visitors and industry partners. Recent experience suggests such sector-specific processes are often part of wider strategic plans and initiatives that occur at a supranational level. The chapter draws attention to the cases of the Baltic Sea Region and the Mediterranean. In these areas, cruise tourism development and destination branding through partnership practices among port authorities, local governments, and private sector associations have been triggered or strengthened by the institutional framework of the European Union. In considering these practices of interregional cooperation and economic development as elements of an increasingly popular agenda on the importance of reputation management within and across areas, the chapter provides a framework for the analysis of similar issues in the BSR.

A key aim of the chapter is to argue that enhancing the attractiveness of the BSR for cruises involves processes that transcend the realm of destination brand building. In order to lure cruise passengers, destinations along the Black Sea coast

have first to convince international cruise lines that they are physically coupled in a zone where political tension belongs to the past and the objective of business growth guides investment decisions. Thus, the chapter embodies a broad set of issues which are associated with cruise tourism in the BSR and shed light on the multi-scalar and evolving nature of interactions among interest groups and policies related to interregional place brand building. The analysis is grounded on evidence from secondary sources and data collected through a semi-structured questionnaire as part of a research project conducted on behalf of the United Nations Development Programme – Black Sea Trade and Investment Promotion Programme.

The Ascent of Interregional Place Branding

In this chapter, the ongoing debate between academics and practitioners about the practices of interregional place branding worldwide is seen as a direct consequence of the movement of regionalization as described in the literature of international relations and globalization studies. For Hanggi et al. (2006), regionalization stems from cross-border integration of localities and communities at the regional level. The central idea is that these localities and communities belong to independent states, yet they share common aspirations whose pursuit leads to growing social exchanges, economic transactions, and institutional interdependencies.

Insofar as the particular movement can contribute to bridging cultural divisions, overcoming traumatic memories, and fostering respect and understanding between communities, it does also trigger the construction of territorial identities across respective spatial units. These identities do not necessarily correspond to the formal (supra- or subnational) entities of the geographical hierarchy of territorial administration. Instead, they often tend to “overlap, contradict or complement each other, both in terms of the space these ‘places’ occupy and the context in which they are deemed relevant by their audiences” (Boisen et al. 2011, p. 3). Pragmatism and a balanced approach to cultural bonds, rather than adherence to tradition and history, are the driving forces behind these territorial identities, whose collective basis at the regional level is mainly dedicated to functional purposes such as economic growth, infrastructure projects, and heritage protection.

Although the movement of regionalization is often linked with debates on the changing sovereignty of national states because of the bottom-up political processes that stimulate it (Hanggi et al. 2006), the current chapter is concerned with the governance of collective-identity building at an interregional level. These newly formed identities are both sources of cross-border stability and resources for strategic interventions on behalf of various interest groups at different scales. The European Union, in many respects, has enabled throughout the stages of structural funds distribution the systematic treatment of these identities as a key aspect of the whole integration process. More specifically, the legacy of INTER-REG programs from 1989 onward is responsible for the involvement of diverse actors in numerous projects aimed at cross-border cooperation between adjacent

regions, territorial cooperation among greater European regions, and interregional cooperation between local and regional actors across Europe (INTERACT 2013). Nilsson et al. (2010) note that INTERREG programs have put the foundations for the institutionalization of regionalization through the communication of territorial identities to different audiences.

While communication within territorial boundaries is essential initially in conveying information and raising the population's awareness of the functional role of the new unit, much depends in the long term on external communication as a means of ensuring the existence and reproduction of the unit itself (Nilsson et al. 2010). In other words, regionalization and coherence in external communication lie in integrating local identities without ignoring their embeddedness in the ongoing historical record of other territorial administrations with their own identities. Equally important is to address the expectations of each locality in terms of targeting entrepreneurs and investors, potential new residents or students, and visitors or tourists. At this moment, however, the more decision makers at the local level confine their preferences to specific target groups, based on what they deem as more beneficial for their localities, the more professionals of interregional place marketing need to diversify the new unit's preferences while bringing a balance between market segmentation overlaps and engaging in techniques of promoting the territorial identity to the outside world (Boisen et al. 2011; Kauffman and Durst 2008).

In practice, interregional place branding is about dealing with differences as a starting point before shaping the particular design of a new territorial identity and informing key target groups about it. To paraphrase Karavatzis and Ashworth (2010, p. 4), interregional place branding can be defined as a deliberate process of providing a meaningful conceptualization of a hybrid unit in terms of its spatial boundaries by selecting and associating a series of physical and social attributes and beliefs, which are associated with individual localities, yet they are also assumed to add value to the essence of the hybrid unit. What matters thus in interregional place branding is how to establish a representative and appealing reputation through adequate planning and marketing; that is how to attach to the hybrid unit a unique identity that will help it stand out from the crowd of its perceived competitors (Morgan et al. 2011; United Nations World Tourism Organization and European Travel Commission 2009). In the words of Moilanen and Rainisto (2009, p. 19):

(An inter-regional) place defines its desired situation, its target identity, based on its core values. This is the active stage of the image process where the owner of the brand (message sender) can influence the outcome. The building of an image of a place in the receiver's mind is a passive stage of the process.

As in the case of individual countries and nations, interregional place branding goes well beyond the application of communication skills and advertising techniques (Anholt 2011). Following the observations of a long list of scholars (Andersson 2010; Kauffman and Durst 2008; Govers and Go 2009; Moilanen and Rainisto 2009; Morgan 2011; Nicolaisen and Blichfeldt 2012; Pasquinelli 2012), this task is understood to include a variety of behaviors and synergies among

competent public authorities and interest groups from the private and voluntary sectors. This kind of interaction constitutes a vivid social process aimed at managing the constructed territorial identity and using it as a means of building favorable perceptions of the hybrid unit by desired market segments.

Crucially, Psarros (2010) has noted the particularity of tourism as a sector in which, although branding seems to be working, destinations must be aware of the price associated with a passive approach in brand building. That is a significant point for interregional place branding as well. Actually, it highlights the fact that the consumers and the industry actors of international tourism market can be very active in developing their own perceptions of interregional destination zones while being influenced by issues that extend the thematic scope of destination brand building or the range of initiatives undertaken by destination stakeholders.

The Tourism Dimension of Interregional Place Branding

What illustrates the interrelationship of a place and a destination brand is the fact that they result from separate interactive processes, which do not occur, however, either independently of a common agenda for reputation management at specific areas and scales or independently of international competition among places and destinations. The United Nations World Tourism Organization and the European Travel Commission (2009, p. 15) are explicit in stating that “a place brand is not a substitute for a destination brand.” While the purpose of the latter is to appeal to a tourism-specific market, the purpose of the former is to embrace the feel of a place in order to target audiences from several sectors, inspire a shared vision for the place’s future, and drive investment decisions on behalf of the public and the private sector according to the vision at hand. In this respect, this section examines how interregional place branding and interregional destination branding coevolve and shape each other, before the discussion turns to the implications of similar processes in what concerns the sector of cruise tourism.

A destination brand is the outcome of a long strategic process with a clear focus on both functional and emotional aspects according to the expectations of tourism market segments (Morgan 2011; Nicolaisen and Blichfeldt 2012). “A destination brand is thus what signifies a destination in the eyes of the visitor” (Nilsson et al. 2010, p. 159), while destination branding is about identifying and building consensus on the tangible and intangible elements which endow a particular destination with a competitive edge in relation to other destinations, before a series of agencies such as tourism ministries and national tourism organizations, local authorities, destination management organizations, and tourism associations engage together and devote resources to the systematic organization and coordination of the same qualities (Andersson 2010; Moilanen and Rainisto 2009). Given that none of these stakeholders has full control of the substantial brand variables, the integration of communication and management efforts is essential as a means of ensuring consistency between service delivery and expectations related to the

destination brand. That is a critical point, because poor services can damage the destination brand that lies at the core of tourism marketing activities the same way a pleasant holiday experience can boost a destination brand narrative, which is subsequently “passed on by satisfied visitors to other prospects, and eventually becomes a powerful agent for widespread social marketing effects” (United Nations World Tourism Organization and the European Travel Commission 2009, p. xii).

Nevertheless, it is doubtful whether tourism stakeholders have the authority or the flexibility to influence the total of tangible and intangible elements that comprise a destination brand. Tourist experience can have a positive or a negative effect on the way places are perceived by the outside world, but it is only one source of information about a particular place among its residents, students, employees, entrepreneurs, and visitors. For the United Nations World Tourism Organization and the European Travel Commission (2009), the statement that destinations are turning into places is consistent with a holistic perspective on reputation management, where enhanced perceptions of individual sectors are believed to contribute cumulatively to the recognition and competitive position of a particular place – thereby also reinforcing the perceived value of other sectors. Without ignoring the seductive character of tourism marketing and the international spread of its activities, the question for destination branding is arguably whether or not tourism stakeholders can seek synergy with partners from other sectors, make a strong case for the harmonious incorporation of tourism issues into processes of place brand building, and maintain a similarly energetic approach during times of reduced resources.

In a world of increasing mobility and economic integration, patterns of cross-border and interregional cooperation capture the attention of researchers interested in the processes that define the interrelationship of a place and a destination brand. This is more than evident in the case of INTERREG and other projects funded by the EU, where tourism is highly regarded as a driving force for regional economic development and the construction of new territorial identities. For Nilsson et al. (2010), this debate has been an integral element of the regionalization movement, because the chain of attractive images associated with tourism activities comprises an unproblematic substitute for historical animosities, thus encouraging reconciliations between previously conflicting identities and contributing to cohesion between adjacent regions. Likewise, Pasquinelli (2012, p. 53) regards how “frequently tourism promotion capitalizes on imagined geographies crossing administrative boundaries because of identity elements that, inherited from history and cultural heritage, build a shared imaginary for a variety of towns and cities.” The only prerequisite is the implementation of appropriate brand management at an interterritorial (or interregional) level as the output of an intention “to exploit an already existing opportunity in the tourism market rather than being a priori chosen and designed as a collaborative strategy” (Pasquinelli 2012, p. 53). That is a crucial observation, because it remains unclear whether or not place branding is necessary to precede destination branding.

Empirical evidence from the framework of European Union-funded projects suggests interregional destination brand building can go along with interregional

place brand building; when the strategic vision of the latter has a clear idea of the role, tourism can play as a factor for progress and innovation. This is the aftermath of the “BaltMet Promo” project that was initiated in 2010 for the joint promotion of 11 capital cities and metropolises across the Baltic Sea Region. In order to enhance the competitive position of the area in the global marketplace through the presentation of a representative and familiar brand, the “BaltMet Promo” project saw from the beginning the tourism agenda as equally important to the mobility of talented workforce and investment funds.

Additionally, the “BaltMet Promo” project has built on the legacy and reinforced the scope of other European Union initiatives related to interregional destination branding such as the Cruise Baltic (see next section) and Agora 2.0; a project aimed at promoting the usage of heritage assets for tourism purposes as a means of improving the common identity of the region (Andersson 2010).

The interplay of tourism and culture as a component of the interrelationship of a place and a destination brand is also evident in the case of another INTERREG project. Indeed, the success of the CrossCulTour in the development of thematic routes for tourists across nine countries in Central Europe has paved the way in the forthcoming multiannual financial framework 2014–2020 for a more strategic approach to dealing with natural and cultural heritage as a resource for transnational cooperation and sustainable development (Boros 2013; CrossCulTour 2011). Moreover, similar concerns of the impact of destination brand building on the overall competitive identity of cross-border areas are identified nowadays in flagship projects including partners from both within and outside the core of the European Union (DATOURWAY 2011; Lapland University Consortium 2013).

Whereas these examples illustrate the importance of destination brand building in the framework of strategic initiatives for reputation management between adjacent regions, tourism stakeholders must be also aware of a questionable side of interregional place branding. According to Boisen et al. (2011), the theme-specific agendas and the business purposes that often underlie the emergence of new territorial identities increase the vulnerability of hybrid spatial units to controversial brand overlaps and external threats, compared to their formal counterparts of territorial administration. In relation to interregional place branding in the Baltic Sea Region, Andersson (2010, p. 61) also refers to “a fragmentation and lack of long-term perspective” in the absence of coordination and regular allocation of resources on behalf of project partners. Therefore, tourism stakeholders involved in interregional destination brand building need to coordinate their own efforts not only without ignoring developments in other sectors but also without relying excessively on inter-sectoral collaboration for the branding of places which, among other things, form territorial networks of interconnected destinations. Such an approach is vital in the case of cruise tourism, which is by nature an industry that brings together destinations physically coupled in a large geographical zone and reflects the variety of challenges associated with the management of pragmatic and political forces in interregional branding (Kauffman and Durst 2008; Pasquinelli 2012).

The Case of Cruise Tourism

The key idea for the analysis of cruise tourism in this chapter is that the selection of destinations on behalf of cruise lines consists in evaluating factors which transcend the control of tourism stakeholders. Another critical point is the geographical spread of the cruise industry, with the United Nations World Tourism Organization (2010, p. xiv) pointing out that “the tourist destinations visited by cruise ships are closely linked with the zones in which cruise lines operate.” Building a destination portfolio, cruise lines do not examine only the local availability of adequate infrastructure, low tariffs, and of a plethora of on-shore activities for their clients. Much depends as well on favorable climatic conditions, security terms, reinforcement facilities, and the combination of different types of attractions. The latter factors are assessed by cruise lines at an interregional level, which explains why the cruise industry is usually divided into large zones, among which the Caribbean and the Mediterranean have traditionally had the lion’s share in fleet capacity, port calls, and cruise passengers (Cruise Lines International Association 2012; United Nations World Tourism Organization 2010). On these grounds, the following summaries of partnership practices from the Baltic Sea Region and the Mediterranean provide useful insight into the challenges of reputation management in cruise tourism.

Cruise Baltic

What the case of the Baltic Sea Region indicates is the dynamic nature of cruise deployment trends and the value of interregional cooperation in product development and destination branding. One way to describe the situation is that in recent years, Northern Europe has become the third most popular market for cruises worldwide because of the gradual empowerment of a best practice partnership among port authorities, local governments, and tourism associations from the ten countries surrounding the Baltic Sea (Cruise Lines International Association 2012; Cruise Baltic 2013a). Conversely, it can also be said that under the slogan “10 Countries on a String” “Cruise Baltic” has achieved since 2004 to transform the respective region into the largest segment of the Northern European market (European Cruise Council 2012a).

The main goal of the partnership, which was established in 2004 by the two rival cities of Copenhagen and Stockholm with 26 partners from 12 destinations and the substantial support of European Union funding via INTERREG III B, was to increase the number of cruise passengers in the Baltic Sea by 20 % over 3 years (Andersson 2010; Cruise Baltic 2013b). A status report of the early period points out that standards were raised quickly due to fast and unprecedented growth (Cruise Baltic 2007). Since 2007, the initiative has continued operating without being reliant on European Union funds because of widespread appreciation among partners of the benefits that come with being a member of an influential brand, which is based

on historical roots, multistaged strategic processes, and strong management and leadership (Lemmetyinen 2011). In fact, Cruise Baltic has evolved to become within less than a decade a complex network of 27 destinations and almost 50 partners committed to brand equity. Moreover, Cruise Baltic has joined the most important international institutional bodies and associations of cruise industry and maintains two strategic business partnerships with Scandinavian Airlines and Scandic Hotels (Andersson 2010; Cruise Baltic 2013b).

In terms of performance, 4.2 million cruise passengers visited the Baltic Sea in 2012 against 1.1 million in 2000. That is equal to average annual growth of 11 % per year, while port calls in Cruise Baltic destinations during the same period grew at an average annual rate of 4.3 % per year (Cruise Baltic 2013c). As a result of continuing growth, Copenhagen, Stockholm, St. Petersburg, Tallinn, Helsinki, and Oslo have secured since 2009 positions in the top eight of destinations along the Atlantic coast of Europe. It is also anticipated that future growth in the region will be driven by the stronger performance of destinations with less than 200 port calls currently (Cruise Baltic 2013b; Cruise Europe 2013). Future growth will also be dependent to changing perceptions of the area due to climate change conditions. Although more than 75 % of cruises in Northern Europe used to be concentrated in summer months (European Commission 2009), it is believed that the emerging market of the Baltic Sea will be benefited in the long term from seasonal adjustments: “as the season lengthens in the Baltic, this destination could see a significant increase in visits. The summer season will be longer, and the spring and autumn shorter, with ever warmer temperatures” (WTO 2010, p. 237).

Such issues are within the scope of a multi-destination brand being developed by a technocratic network whose response to growing competition comes from an intrinsic belief that the integrated “destination” is the most important factor influencing cruise selection among all classifications of cruise tourists. In short, the aftermath of early efforts is that nowadays mutual commitment to the thematic identity along with voluntary compliance to the principles of sharing knowledge and capitalizing on opportunities in a collective manner are essential qualities of the network. More importantly, these qualities are preserved through the systematic participation of partners in collaborative processes of strategy development and monitoring based on performance indicators and information intelligence (Cruise Baltic 2013a). The outcome is that Cruise Baltic remains active in various fields such as the implementation of commonly agreed service standards, the development of products and new itineraries, the provision of logistical support to cruise lines at each destination, and the strengthening of relations with external groups, which extend the effects of destination brand building for cruise tourism to further areas and sectors. This is also the implicit message of the network’s objective as recently summarized by the partnership director (Cruise Baltic 2013d):

To ensure that we continue to motivate and educate our partners and provide them with the right knowledge and access to information enabling them to work together as a unified and collective force in the Baltic Sea region. This will result in increasing revenue from our existing, loyal cruise passenger base and hopefully attract more.

MedCruise

Rather than an emerging partnership primarily aimed at boosting the sector's economic performance, the establishment of MedCruise in 1996 as an association of 16 port authorities representing seven countries set the ambitious target of building a safe and attractive environment for cruise industry throughout the year along the Mediterranean coast. Given that the cruise industry in the Mediterranean had to learn at its infancy the significance of the term crisis management, MedCruise initially sought to lessen the negative effects of instability in the Eastern Mediterranean and minimize damaging sources of reputation in the long term. Since then, MedCruise has focused on bringing together port authorities from every corner of the Mediterranean and motivating them to put aside any rivalries or antagonistic relationships from the past (MedCruise 2011a), a strategic priority which is fully consistent with the European Union guidelines and funded projects for cross-border cooperation and sustainable development in the area (ENPI CBCMED 2013). Today MedCruise membership consists of more than 100 port authorities as regular members together with 30 associate partners including tourism boards and associations, cruise lines, port agents, and terminal operators (Hatzakos 2013; Salvado 2013).

As a result, the geographical coverage of MedCruise extends across the whole Mediterranean as well as adjoining seas such as the near Atlantic, the Red Sea, and the Black Sea. In the case of the latter, representatives from Istanbul along with ten other ports and six associate members inside the Black Sea Region are currently flying the MedCruise banner, while more ports and associated companies have been invited to join the association in the future (Hatzakos 2012a). This growing involvement of MedCruise in the Black Sea reflects new opportunities for the member destinations of Burgas, Constantza, Odessa, Sevastopol, Yalta, Theodosia, Sochi, Batumi, Rize, and Sinop. To develop quality passenger experiences and make the most of their natural and cultural heritage, member destinations can access services provided by MedCruise in networking, professional development, and market research (Hatzakos 2012a). Recently, the director of MedCruise highlighted the influential role that ports and their authorities play in between the maritime side of cruise lines and the shore side of tourism boards, local governments, chambers of commerce, and other actors (Salvado 2013). A better understanding of this link is crucial from the perspective of the interregional thematic brand, because policy issues such as the development of new itineraries, investments in port facilities, and the impact assessment of visitors to a locality are part of an agenda that transcends several sectors and partners outside the core of destination stakeholders.

The response of MedCruise to such complexity is to build stakeholder consensus as a means of planning and implementing innovative approaches of interregional cooperation, which improve reputation and the capacity both of individual destinations and the network itself to engage in negotiations with the cruise industry and gain mutual benefits. That is the case of the "Unified Mediterranean Cruise Ship Berth Booking and Confirmation Process" that was the subject of consultation with cruise lines after its approval by the MedCruise General Assembly in June 2011

(European Cruise Council 2012b; Hatzakos 2012b). The idea came from the cruise industry's perception of the Mediterranean as a lucrative region due to the coexistence of numerous destinations at small distances. On the one hand, this means lower speeds and lower fuel consumption for cruise lines. On the other hand, it also entails fierce competition over the inclusion of ports and the operation of cruise lines in the most popular and profitable itineraries. As a response, MedCruise introduced the particular process as a mechanism to reduce cases of port congestion and simultaneous cruise ship calls as a consequence of uncompromising attitudes and irresponsible practices. In short, proactive attitude and commitment to berth availability are encouraged as qualities of a process in which cruise lines and port authorities exchange booking requests and confirmation responses within specific time limits and according to commonly agreed routines (European Cruise Council 2012b; Hatzakos 2012b).

This kind of mentality has contributed to strong growth. According to the European Cruise Council (2010), 171 cruise ships were active in 2011 in Mediterranean waters, with a capacity of 221,419 lower berths as opposed to 152 cruise ships in 2009 with a capacity of 176,1019 lower berths. In the context of a steadily growing global market, the Mediterranean has also maintained an average market share of 20.5 % from the beginning of economic crisis in 2007 (Republic of Turkey Prime Ministry Privatization Administration 2013) and remains the number one choice for passengers from the biggest European source market of the UK (Passenger Shipping Association 2013). Despite these trends, the Black Sea Region has not yet capitalized on its proximity and close relationships with Mediterranean destinations. The cruise tourism market share of the area within the Mediterranean has always been less than 1 % (GP Wild International 2012), while a notable indicator is that in 2010, the total cruise traffic of the top five Black Sea ports being members of MedCruise was equal to 0.15 % of the respective total traffic taking place in the top five MedCruise ports of Barcelona, Civitavecchia, Venice, Balearics, and Piraeus (MedCruise 2011b). Further evidence suggests, however, there is much more nowadays in cruise tourism along the Black Sea shore than what individual indicators may suggest in terms of interregional cooperation for product development and destination branding.

The Case of Cruise Tourism in the Black Sea Region

This chapter aims to show what challenges shape interregional brand building for cruise tourism in the Black Sea Region (BSR), a large area integrating various cultural traditions with attractions of historical importance and unique landscapes. Given the late appearance of the BSR in the geography of cruise industry, the analysis is stimulated by the fact that references to the term "Black Sea" can be found only eight times in total in the two studies of international cruise tourism made in the recent past by the United Nations World Tourism Organization (2003, 2010), while a few of these references treat the BSR solely as a latent segment of

the Mediterranean market, without a strong identity of its own. Emphasis is given to transnational partnership practices as a consequence of the idea that common issues may remain unless they are addressed jointly, especially in relation to well-established competition from the rest of Eastern Mediterranean destinations. Being part of an interregional agenda about the impact of tourism industry, the debate of cruise tourism is not irrelevant to concerns of other sectors with respect to reputation management for the whole area as a zone of international trade and investments (Kereselidje 2013).

The analysis is informed from secondary sources together with data collected through a semi-structured questionnaire that was sent by e-mail to destination stakeholders involved in cruise tourism in the BSR. Responses were provided by officials from the port authorities of Batumi, Burgas, Constantza, Odessa, Sinop, and Sochi as well as by tour operators from Constantza and Istanbul and the Deputy Minister of Tourism and Resorts of the Autonomous Republic of Crimea. As part of a study conducted in May 2013 on behalf of the United Nations Development Programme – Black Sea Trade and Investment Promotion Programme – this small-scale research was designed to explore the prospects of cruise tourism at both an interregional and a destination level. Furthermore, the analysis is guided by certain morphological and institutional elements, which are identified by Kauffman and Durst (2008) as key factors that shape the emergence and evolution of an interregional brand. Interestingly, there seems to be a proportional relationship between the level of integration required among involved stakeholders and the variety of intangible elements such as interests, languages, and cultural identities that influence partnership building and communication styles.

Trends of Tourism Demand

Valid conclusions on the evolution of tourism traffic along the coastal areas of the Black Sea Region (BSR) cannot be drawn aggregately from the summation of national trends due to the geographical spread of tourism destinations in the Russian Federation and Turkey. It is a fact, however, that the countries that surround the BSR have experienced substantial, if not drastic in some cases, increases of international tourist arrivals over the last decade. This growth is responsible for the contribution of tourism to gross domestic product which varies among countries from 4.5 % (Romania) and 10.9 % (Turkey) to 12.9 % (Bulgaria) and 22.3 % (Georgia) (World Travel and Tourism Council 2012; from Kereselidje 2013, p. 19). In particular, destinations along the Black Sea coast offer a rich portfolio of attractions and products related to mass and alternative forms of tourism. Suggestive examples of this attractiveness are the cases of Bulgaria in which 87 % of international tourists in 2010 (URBACT 2011) visited coastal resorts and the Romanian city of Constantza which in high season attracts 120,000 tourists per day (GP Wild International 2012).

With respect to cruise tourism, a recent study made by GP Wild International (2012) suggests the BSR deserves to be seen as a distinct, yet still underdeveloped, segment of the wider Mediterranean market. On the one hand, there is great potential

Table 11.1 Trends of growth for cruise passengers in the Baltic and the Black Sea

Rank 2012	Baltic Sea destinations	Change 2012 vs 2011 (%)	Black Sea destinations	Change 2012 vs 2011 (%)
1	Copenhagen	23.7	Istanbul	23.5
2	Stockholm	4.0	Odessa	8.6
3	St. Petersburg	-4.2	Yalta	10.5
4	Tallinn	=	Constantza	40.7
5	Rostock	50.0	Sochi	16.3
6	Helsinki	-0.44	Nessebar	29.2
7	Kiel	-7.9	Sevastopol	24.7
8	Oslo	-0.29	Varna	-11.9
9	Gdynia	38.5	Trabzon	21.6
10	Gothenburg	33.8	Sinop	-4.7

Sources: Cruise Baltic (2013e) and GP Wild International (2012)

for the development of 17 seaports and their wider areas across the 6 countries that surround the inland sea. On the other hand, the rivers Dnieper, Dniester, and Danube have become within the last decade popular routes for cruise vessels, with the latter being in 2012 a key source for tourists in Serbia as well as the visiting site for more than 20,000 passengers from the UK river cruise market (Dragin et al. 2010; Passenger Shipping Association 2013). Much of the attractiveness of the BSR for cruise lines depends on ongoing infrastructure improvements and the relatively short sailing distances among cruise ports. Although other evidence refers to a marked seasonal pattern, with cruise traffic being concentrated in autumn months with a high peak in October (MedCruise 2011b), the observations included in the report of GP Wild International mark the appearance of a new kid on the block. A similar conclusion can be drawn while comparing recent growth between the markets of the Baltic Sea and the BSR in terms of cruise passengers. Although there is little point in undertaking a comparison of absolute numbers, because of the much bigger size of the Baltic Sea market, Table 11.1 provides substantial evidence of growing trends in the BSR. It must be noted that due to the lack of data for Istanbul in 2012, the comparison between Istanbul and Copenhagen reflects change between 2010 and 2011. From 2011 to 2012, Copenhagen had weaker growth of 2.6 % in cruise passenger numbers (Cruise Baltic 2013e).

Geopolitical Conditions and Interregional Partnership Practices

To argue that a network of destinations is not going to benefit from cruise passengers unless the various stakeholders set common targets and coordinate their initiatives is the first step in recognizing the interregional dynamics of thematic destination branding. A second step is to assess the influence of geopolitical conditions and available institutional frameworks, thereby placing the debate of interregional cooperation in cruise tourism into a wider context of actors, interests, policies,

and multi-scalar interactions. From this perspective, the BSR seems to bear a heavy burden. According to Kereselidje (2013, p. 14), “economic and political projects that could contribute to the growth of international tourism in the Black Sea area have either been cancelled or delayed” as a consequence of memories of historical rivalries and individualistic practices on behalf of different states at different moments. In considering that bilateral disputes may still derive from ethnic tensions and competition over natural resources (Onetiu 2012), the position of tourism as an economic activity is likely to be uncertain, because prosperity is dependent on political stability together with the prospect of developing a positive reputation for the whole area.

Nevertheless, there have also been balancing forces. The “Working Group on Cooperation in Tourism” has incorporated debates under the thematic umbrella of sustainable tourism development through transnational cooperation since the establishment of the “Organization of the Black Sea Economic Organization” (BSEC) in 1994. Ministers, Deputy ministers, general secretaries of tourism, and other officials have gradually contributed to the emergence of a commonly agreed agenda through their participation in 24 meetings of the working group, 3 ministerial gatherings, and international forums under the aegis of the BSEC (Kereselidje 2013). For instance, the recently approved by member states “Memorandum on Multiculturalism of the Black Sea Cities” is seen as a valuable resource that will help the BSEC to “increase the support of the projects toward cocreation and promotion of common tourist products” in the international tourism market (Dordevic 2013). In terms of extroversion, the United Nations Development Programme (UNDP), Black Sea Trade and Investment Programme (BSTIP), funded by Greece and Turkey, also dedicated resources to the development of networking arrangements. In fact, enhancing tourism business partnerships and adopting contemporary approaches to thematic brand building were two key aims of the “Black Sea Discovery: Exciting Cruise Destinations on the Black Sea” event in the framework of the Posidonia Sea Tourism Forum that took place in Athens in May 2013.

Interestingly, the study undertaken before this event identified ongoing deliberation among the Black Sea port authorities and other stakeholders. Responses to the questionnaire indicated strong consensus on the value of partnerships between destinations and the positive influence of international associations such as MedCruise, Cruise Europe, and the Black and Azov Seas Ports Association (BASPA) under the flag of the BSEC, all of which unite ports from various countries. More importantly, however, there were several references to opportunities arising from a recently established project under the brand name “Cruise Black Sea” (CBS). According to the Head of Development and External Relations at the port of Odessa, discussions that lasted for 3 years led in 2011 to the formation of CBS during the Cruise Shipping Miami Convention: “At the united booth of the Black Sea ports, the Memorandum of Understanding between regional ports and tourism authorities was signed, aiming at developing and strengthening the cooperation between the participants in the field of cruises development in the Black Sea region and at promoting the regional ports on the international cruise market as a united cruise destination”.

A couple of comments can be made on the CBS project. First, it appears to provide an adequate framework for conducting interregional market research projects, and increasing awareness of cruise tourism issues in the BSR both within and outside the cruise industry, both within and beyond the BSR itself. Thus, it is worth to mention the International Conference Black Sea Cruise, held every 2 years since 2008 by the port of Odessa in cooperation with MedCruise and BASPA, as an event where professionals can exchange views, more recently develop B2B contacts, and play an industry-specific yet by no means negligible role in cultivating or stabilizing bilateral relationships (CBS 2013). Second, the CBS project mission is consistent with practices on developing a thematic brand for the whole area rather than focusing on the promotion of individual destinations. This is by no means an easy task, however, because the member ports and other stakeholders come from countries “with a varying degree of infrastructure developments” and different traditions and approaches to issues such as the management of human resources, the monitoring of quality standards, the legislative framework for private sector investments, visa arrangements, and the integration of tourism activities in the framework of urban generation plans (representatives of port authorities). Therefore, brand building for cruise tourism in the BSR is about processes that transcend sectors and institutions and require coordination across scales with respect to place reputation management at an interregional level.

Core Identity and Tourism Attractiveness

As identified in the recently approved memorandum of the BSEC (Dordevic 2013), the term multiculturalism captures conceptually both the essence of the area’s history and the major source of attractiveness for cruise passengers. What can be seen as an advantage in relation to other zones of cruise destinations is that “the Black Sea is one of the newest and underexplored destinations that can offer such a diverse mosaic of experiences” (National Cruise Manager of Inter cruises), which are a direct consequence of “the very interesting mix of completely different cultures and countries” (Assistant to Managing Director of Batumi Sea Port). Table 11.2 summarizes some of the key characteristics of major cruise destinations in the BSR, but the chapter echoes the point that the actual quality and authenticity of shore excursions shape the appeal of cruise destinations rather than individual attractions (Adams 2012; Young 2012).

Targeting Markets

Through the wealth of destinations and attractions, the BSR is expected to expand the market share of cruise tourism in the near future. From one perspective this may be inevitable, because “the cruise industry is growing and they are continuously

Table 11.2 Overview of Black Sea cruise destinations

City	Availability of airport	Important characteristics	Landmarks	Indicative shore excursions
Istanbul	×	Contemporary metropolis with a glorious past as the capital city and cultural center of two great empires	Hagia Sophia; Topkapi Palace; Blue Mosque; Basilica Cistern	Byzantine/Ottoman Empires; Istanbul by night; Bosphorus cruise
Burgas	×	City with the largest Bulgarian port and significant heritage from the ancient Greek and Roman times	Pyrgos Fortress; Roman Baths; Sea garden and zoo	The Great Ancient Apollonia Tour
Nesebar		An ancient Thracian city being the only UNESCO (cultural) heritage site close to the Black Sea coast	Ancient city of Menebria; many Byzantine churches	Magic of Nessebar and local folklore; wine tasting
Varna	×	Another ancient Thracian city which has become a popular tourist resort	Oldest gold artifacts; Orthodox cathedral	The pearl of the Bulgarian Black Sea
Constantza	×	Second largest city in Romania combining old and multicultural architecture with a modern feel	Ovid's Square; Roman mosaics; casino; cathedrals	1–2 day tours to Bucharest, Bran Castle; Histria
Sulina		Small port situated at Romania's easternmost point and close to the Danube Delta that is the only UNESCO world (natural) heritage site close to the Black Sea Coast		Visits to the Danube Delta
Odessa	×	City boasting with Baroque architecture, cozy squares, and wide boulevards which still retain the old-fashioned charm	Potemkin Stairs; catacombs; opera house; palaces and memorials	Odessa highlights; military past and catacombs; Jewish heritage; sparkling wines
Yalta	Simferopol airport is Crimea's international airport	Most popular seaside resort in Ukraine spread over a vast area suited for walking tours	Swallow's Nest; Livadia Palace; Chekhov's mansion; sea promenade	Royal/historic/aristocratic Yalta; Romanovs and the Crimea

Sevastopol		A strategically important naval point, a key site of the Crimean War, and a popular tourist resort	Panorama museum; Former submarine base; Crimean battlefields; St. Vladimir Cathedral	Sevastopol through the ages with a visit to the Chersonesus archeological reserve
Theodosia		Gate to Crimean mountains and home of the landscape painter Ivan Aivazovsky	Aivazovsky's house museum; Genoese fortress Caffa	Along with landmarks walking tours include visits to various churches
Kerch		A member of UNESCO's list of Eternal Cities of the world and a popular tourist resort	Pantikapaion; Mithridatis hill; Yenikale fortress	Walking tours include visits to cultural sites and lunches in local restaurants
Sochi	×	Sprawling spa town that will host the 2014 Winter Olympics and in the same year will start hosting annually the Russian formula 1	Stalin's Dachau; Winter theater; Spa resort Matsesta; tea plantations	South capital of Russia; famous Russian resort; height of a bird's flight; tea-tasting ceremony
Novorossiysk		An ancient Greek colony and a modern industrial city, which is honored with the title Hero city	Battleship Mikhail Kutuzov; Valley of Death; memorial	Half-day walking tours
Batumi	×	City under continuous redevelopment since 2008, with the longest boulevard in Europe	Botanical gardens; alley of new berth; holographic show	Myth of Argonauts and the golden fleece
Rize		Small provincial town located near to the border with Georgia and well known for its tea gardens	Tea gardens; thermal springs; Kalesi (castle)	Tea-tasting ceremony; trekking
Trabzon	×	City located on the historical Silk Road with great heritage from major civilizations and empires	Hagia Sophia; Trabzon castle; Ataturk mansion	Trabzon full/half day; Mountainside Sumela monastery
Samsun	×	A major port whose city marks the beginning of the Turkish War of Independence by Kemal Ataturk	Bati Park; Palace of Culture; Ataturk Museum	Samsun full/half day; horse-riding tour
Sinop		City founded by the Amazons and named after their queen, also country of philosopher Diogenes	City walls; Pervane Medresseh; fjord; Byzantine castle	Trabzon full/half day
Amasra		Small port much valued for its natural setting	Castle; church mosque; Bird's rock road monument; walking tours	

Sources: Compiled with data from CBS (2013), GP Wild International (2012), MedCruise (2013), and various websites

looking for new regions to decongest other saturated ports” (representative of a port authority). Destinations are obliged, however, to make their future the same way cruise lines make their own. In anticipation of a better share from the source markets visiting with cruise ships the Mediterranean for decades, the BSR has to take into account how important is for cruise lines and destinations to continue approaching and attracting visitors from emerging economies worldwide (Tercek 2012a). Indeed, there seems to be plenty of space for cruise destinations in the BSR to kick off their targeted marketing efforts in considering:

- The total number of Russian outbound tourists reached 40.8 million in 2011, being increased by 16 % in 2010 and 11 % in 2011, with almost 30 % of tourists traveling to Ukraine and Turkey (Hilton Worldwide 2012).
- The respective market of Turkish outbound tourists has demonstrated a pattern of steady growth since 2006, reaching almost 6.3 million in 2011 (Organization for Economic Development and Cooperation 2012).

On these grounds, the key issue is whether or not the CBS project will continue representing the interregional interests of the network of destinations with a clear agenda and a visionary mission founded on shared values, against an industry with a rather consolidated structure in which four companies account for 86 % of the global market (latest annual figures available at Cruisemarketwatch.com). Thus, the incorporation of the BSR in future deployment trends depends both on private sector strategy and the effectiveness of authorities and stakeholders at a destination and interregional level to upgrade their localities, promote the whole territory in a consistent manner, and negotiate partnership terms with cruise lines. Destination stakeholders across the BSR are already aware of the added value provided by a strong thematic brand in this context. Nevertheless, they have also addressed a series of issues that influence thematic brand building, yet they do not fall exclusively within the scope of a destination brand. In this respect, they have confirmed evidence from other interregional partnership practices discussed in this chapter on the usefulness of initiatives on behalf of supranational bodies or international associations in terms of dealing with growing competition and communicating the agenda of cruise tourism to external audiences.

Conclusion

The chapter has shed light on the challenges associated with building a thematic brand representing several destinations. The overall tourism sector and particularly cruise tourism have shown late signs of growth in the BSR. The chapter suggests their further development is part of a process in which the BSR has to be branded as a unified area where stakeholders from different countries and places are prepared to commit themselves common targets. Multiculturalism is not, however, merely a concept that summarizes what makes the BSR a composition of attractive tourist destinations. People in cruise industry need to deal with this condition

in daily routine, because doing interregional business means doing interregional partnerships. Port authorities are right to believe that a unified thematic brand will help both individual destination and the whole area as well, but this can be part of a greater strategy incorporating the concerns and interests of various localities and stakeholders in a systematic manner.

A promising approach for both individual destinations and potential partners is to view brand building for cruise tourism as an evolving process, which is necessarily integrated into wider aspects of place brand building. Although this poses risks as a reflection of the dependence of cruise tourism stakeholders on external actors, experience suggests both traditional and emergent destinations face the same challenge. For instance, the rules of the game for respective destinations and their port authorities in Greece were less than favorable before cabotage restrictions were lifted in 2012, providing the opportunity to international cruise vessels to homeport in the country and changing negative perceptions of business constraints in the whole shipping industry (National Bank of Greece 2012). Likewise, the scale of infrastructure investments differs among the ports along the Black Sea coast, a direct consequence of varying reforms in the legislative framework of public-private partnerships and concessions in each country. According to the vice president of Commercial Development of Royal Caribbean International, the particular issue has a significant bearing on cruise industry perceptions of future business prospects in the whole area compared to other segments of the Mediterranean market, where the involvement of the private sector in flagship projects is rather more conspicuous (Tercek 2012b). Thus, there is much more to be said and done about destination branding for cruise tourism in the Black Sea insofar as destination stakeholders make sense of the ways in which their own concerns coincide in a dynamic manner with the more inclusive agenda of interregional place branding.

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