



An Industry on the Brink:

Creating a Public Relations Strategy for the Cruise Lines International Association (CLIA) to Restore Public Confidence in the Era of COVID-19

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Background



The Cruise Lines Industry Association (CLIA), which was established in 1975 in response to a rapidly expanding cruise industry, describes itself as “the world’s largest cruise industry trade association, providing a unified voice and leading authority of the global cruise community.”¹ CLIA joined with the International Council of Cruise Lines in 2006 and today plays an active role in seven regions around the world.² CLIA now represents over 50 cruise lines, 400+ executive partner members, 53,000 travel agent members, and 30 million passengers.¹

The cruise line industry has a significant economic impact on the U.S. as well as Europe and Australasia. In fact, “cruise activity supports over 1.17 million jobs across a wide cross-section of industries and sectors, from ground and air transportation to food and beverage, lodging, manufacturing, hotels, professional services and a broad range of suppliers and service providers throughout the world.”³ More notably, the demand for cruising near doubled over the past decade with an estimated 30 million passengers being served in 2019. Projections for 2020 were estimating 32 million travelers.⁴ That all came to a halt with the identification of COVID-19, the novel coronavirus that has spread to 188 countries around the world and has accounted for almost 969,000 deaths.⁵

In response to the outbreak of COVID-19 cases building throughout the winter, CLIA made the difficult decision to voluntarily suspend cruising activities as of March 13, 2020.⁶ On March 14, 2020, the Centers for Disease Control and Prevention (CDC)

issued a No Sail Order as there was “reason to believe that cruise ship travel may continue to introduce, transmit, or spread COVID-19”.⁷ The No Sail Order was extended from April 15 to July 24 and, with no end in sight, was extended a second time through September 30, 2020.⁶

Recently, with CDC Director Robert Redfield pushing for an extension through Spring of 2021, the White House Coronavirus Task Force announced on September 28 that the No Sail Order would be extended through October 31, 2020.⁶

The halt in operations in response to the COVID-19 health and safety precautions has had catastrophic effects on the cruise industry. CLIA reports that “from mid-March, when the suspension of cruise operations began, through the end of September, the worldwide impact will be a loss of \$50 billion USD in economic activity, 334,000 jobs and \$15 billion USD in wages.”⁸

CLIA is now trying to balance the resumption of sailing with overcoming public hesitation surrounding safety protocols. A big appeal of cruises is that passengers have nothing to worry about on their trips. Helping tourists “forget about scenes like the grim quarantine on the Diamond Princess” and easing their fears about how easily infectious diseases like COVID-19 can “spread in enclosed spaces” will be challenging.⁹

Publics



Using the Situational Theory of Strategic Constituencies, Zipline Communications has identified and classified every public that has the potential to affect CLIA and the issue at hand. In order to maximize available resources and utilize the most effective

communication tactics, it is important to prioritize publics according to their ability to help or hinder CLIA in solving the identified problem.¹⁰ STSC can guide us in this endeavor. Relevant publics have been designated as *active* or *latent*. An *active* public consists of individuals or entities who perceive that CLIA's actions matter to them (level of involvement), that CLIA's actions affect them (problem recognition), and that they, in turn, can affect CLIA's actions (constraint recognition).¹⁰ A *latent* public has the ability to become an active public under the right conditions, so it is important to consider the impact that CLIA's communications will have upon these publics.¹⁰

Active Publics

1. **CLIA Cruise Line Customers** – Cruise line customers are at the heart of the issue. This public includes both actual and potential customers. They have had and will continue to have a direct impact on the issue.
2. **CLIA Cruise Line Employees** – Cruise line employees are a critical public for CLIA. They are profoundly affected by the crisis and have a direct impact on the ability of cruise lines to resume operations.
3. **CLIA Cruise Lines** – CLIA's membership includes over 50 cruise lines.¹ The cruise lines directly affect the issue at hand based on their response to the current crisis and willingness to cooperate with CLIA in addressing the issue.
4. **Media Outlets** – This public includes news organizations, broadcasting, social media platforms, and advertisers. Media outlets have a direct impact on the issue due to their ability to influence public opinion, awareness, sentiment, and confidence.

5. **Regulators** – This public includes national and local governments, port authorities, and regulatory bodies, such as the CDC. These entities directly affect the issue at hand and play an important role in restoring normal cruise operations.
6. **Ports of Call** – Ports across the globe have a vested interest in the outcome of this crisis. Many are heavily dependent on cruise tourism to support their local economy. Stakeholders within this public include businesses, residents, hospitality providers, health care providers, and local authorities. Their cooperation with CLIA is important to resolving the issue.
7. **Travel Agencies** – This public is heavily impacted by the current crisis and can play an important role in CLIA’s efforts to address the issue at hand.
8. **CLIA Employees** – CLIA has numerous internal stakeholders that all have a vested interest in the cruise industry’s future. CLIA employees are able to indirectly affect the issue based on their representation of the organization and on their cooperation and performance in executing a strategic communication plan.
9. **Labor Unions** – This public includes unions that represent employees and contract labor both within the cruise industry and within its supporting industries (e.g., manufacturing, maintenance, suppliers, entertainment). Unionization varies among groups, countries, and CLIA members. This public has the potential to become more active if CLIA is unable to adequately address the issue at hand.

Latent Publics

1. **Suppliers & Vendors** – This public includes entities that provide material resources or services to the cruise lines. Most of these entities are diversified and therefore not solely dependent on cruise lines for revenue. A prolonged crisis could cause this public to become active, though.
2. **Contract Entertainers** – Some within this public have relied heavily on cruise lines for revenue, but have other venues and revenue streams available to them in the short-term. A prolonged crisis could trigger this public to become active.
3. **Cruise Ship Manufacturers** – Manufacturers do not directly impact the issue at hand; however, a prolonged crisis could force them to become an active public if they perceive that CLIA is not adequately addressing the issue.
4. **Financial Sector** – Shareholders, investors, insurers, banks, and other lenders do not directly affect the issue at hand, but could become a high-priority active public if CLIA cannot adequately manage the issue.
5. **Shipping Industry** – Some entities within the shipping industry have historically relied on cruise lines to transport certain cargo. Although they have other means of transport, a prolonged crisis could impact their operations and spur this public to become active.

Problem Statement

Since March of 2020, the COVID-19 pandemic has caused many businesses to either pause operations for multiple months or shut down completely. This has been

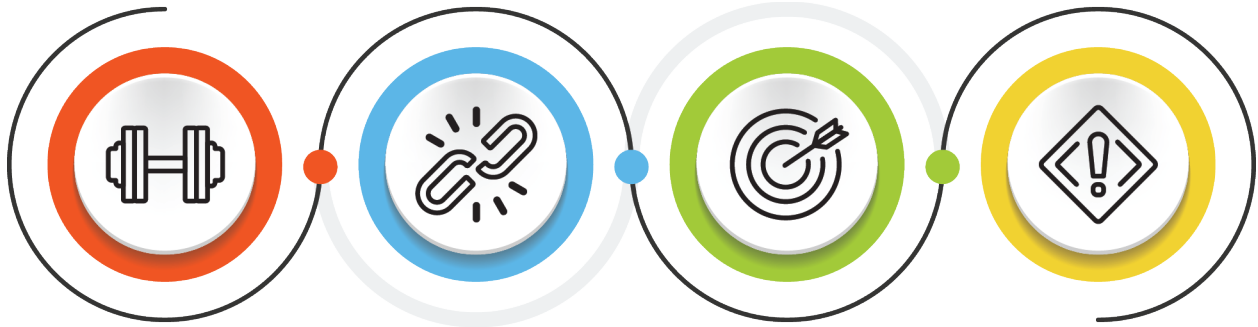
especially true for travel industry business such as cruise lines. One organization that has been particularly impacted by the COVID-19 shutdowns is CLIA. In fact, according to Kim Prunty, who works as the Vice President of Public Affairs for Disney Cruise Lines (a CLIA affiliate), only 30-40% of people are willing to travel on a cruise line for leisurely purposes during the current pandemic.¹¹ This has occurred because COVID-19 has caused many people to perceive cruise lines as being “floating petri dishes” that provide “a fast track to sickness.”¹²

As a result of these factors, most of the companies within the cruise line industry have been losing between \$24 million and \$1 billion per month for the majority of 2020.¹³ Many of CLIA’s 50+ global cruise line partners are also on the verge of bankruptcy due to the significant losses they’ve experienced.^{1,14} If CLIA doesn’t act quickly to resolve its stakeholder’s concerns regarding COVID-19 and convince more people to go on cruises soon, its partners could go out of business and it could lose the financial support it needs to “[promote] the cruise travel experience” to its various customers throughout the world.¹

Situation Analysis



With a diversity of price points, shipboard experiences, home ports and ports of call, cruise lines operate from an already complex business model, with industry challenges further compounded by COVID-19. Zipline Communications has conducted a thorough situation analysis and arrived at the following conclusions regarding CLIA’s strengths, weaknesses, opportunities, and threats.



Strengths

CLIA is “the world’s largest cruise industry trade association.”¹

Has a network of 50+ cruise line companies.¹

Connected to 15,000 global travel agencies and 25,000 Travel Agent Members.¹

Cruise lines have grown customer base per year from under 20 Million to around 32 million in the past 12 years.⁹

340+ Executive Partner Members with connections to “ports & destinations, ship development, suppliers and business services.”¹

Represents 95% of the cruise line industry.¹

Weaknesses

Cruise ships are crowded and have limited space for travelers, which can increase the spread of COVID-19.⁶

Many cruise lines are going bankrupt due to lockdowns.¹⁴

Cruise lines are losing between \$24 million and \$1 billion per month during lockdowns.¹³

Cruise lines losing 2,500 jobs per day.⁸

COVID-19 has impacted 600 crew members on over 100 cruise ships; 23 crew members have died.¹⁵

History of cruise line crises.⁹

Cruise ships viewed as “floating petri dishes” that are “a fast track to sickness.”¹²

Opportunities

Many people want to travel again.⁹

64% of people “said they would cruise as much as they used to” and 10% would cruise more often after the pandemic ends.²⁰

CLIA members introducing new ships by the end of 2020.¹⁶

Some nations are ready to accept cruise lines into their ports again.¹⁷

Leverage support from port communities that depend heavily on cruise lines.

Utilize relationships with major cruise lines.

Threats

Cruise lines under “No Sail Order” from the CDC until Sept 30, 2020 due to COVID-19.⁷

Lockdowns due to COVID-19 = lost revenue.¹³

Many people don’t want to travel again until after there is a cure for COVID-19.¹¹

CDC won’t communicate with cruise lines.¹⁴

Some ports won’t allow ships.¹⁷

Strained relationship with CDC.¹⁴

Some cruise lines could go rogue if proper strategies aren’t used.¹¹

First, CLIA is strong in that it has ***already fostered many genuine, enduring relationships*** with its various publics that provide mutual benefit and value to all parties.^{18,19} As mentioned, some of the groups with whom CLIA has strong relationships include 50+ cruise line companies, 15,000 global travel agencies, 53,000 travel agent members, 400+ executive partners (ports, destinations, ship development, suppliers,

etc.), and a consistent customer base of around 30 million passengers per year.¹

Because of these factors, CLIA has easy access to just about any resources it needs to begin operations again once it is allowed to do so.

Second, the most glaring weakness and single greatest obstacle for cruise lines to overcome is ***the financial health of the industry***. The COVID-19 pandemic has decimated the financial strength of CLIA's membership. In fact, most cruise lines are now "teetering on the edge of bankruptcy."¹⁴ Many of the major cruise lines that CLIA is associated with are losing between \$24 million and \$1 billion per month, resulting in a total loss of 2,500 global job per day as long as the lockdowns persist. Between March and September of 2020 alone, these financial difficulties have already created an overall worldwide loss of "\$50 billion USD in economic activity, 334,000 jobs and \$15 billion USD in wages."¹³ If cruise lines don't begin full operations again soon, some operators may go completely out of businesses and thousands of crew members would permanently lose their jobs.

Third, CLIA's most significant opportunity to capitalize upon is ***the loyalty and enthusiasm of regular cruisers***. As its member cruise lines ramp up to begin operations again, many consumers are eager to travel once more.^{9,20} In fact, according to a poll done on one "review, news and community forum site" called Cruise Critic, 64% of people "said they would cruise as much as they used to" and 10% "said they would go more often" once the current pandemic ends.²⁰ If these percentages are extrapolated to represent all of CLIA's and its partners' base of 32 million customers, this equals about 20.5 million people who would start cruising as much as they used to after the

current pandemic ends and 3.2 million people who would “go more often.”^{9,20}

Additionally, CLIA can leverage its relationships with ports of call eager to welcome tourists back to their destinations, like the Cayman Islands, to run campaigns emphasizing messaging consistent with CLIA’s that gets consumers excited about cruising and visiting tropical ports again.

Fourth, one of the most dangerous threats to the operations of CLIA’s cruise line partners is ***the industry’s rocky relationship with the CDC***. The CDC’s No Sail Order has recently been extended until October 31, 2020.⁷ This policy is a major threat to CLIA and its various partners’ abilities to function because it leads to significant lost revenue for the entire cruise industry. However, the problems between the cruise industry and the CDC do not begin and end with the No Sail Order. The relationship between CLIA’s network and the CDC isn’t a very “mutually beneficial” one.²¹

According to Kim Prunty with Disney Cruise Line, the relationship between CLIA’s network and the CDC is very strained due to the way that cruise lines initially handled the COVID-19 virus when it hit the United States in March of 2020.¹¹ This situation has caused the CDC to make a few “extremely damaging,” unfair, and “one-sided” statements about cruise lines on its website.¹¹ Not only this, but “the CDC has [also] declined to engage in [any] meaningful dialogue about what it will take for cruise lines to resume operations.”¹¹ In short, there is a lack of “trust, openness, [and] involvement” between CLIA and the CDC.²¹ This strained relationship threatens CLIA’s ability to operate because it creates a situation where “there’s really not a great path forward” in solving the problem.¹¹

Finally, while cruise loyalists may be eager to travel again, **many potential customers will not travel again until there is a cure for COVID-19.**^{9,11,20} This threatens the ability of CLIA's membership to operate by shrinking the base of consumers CLIA's network is able to target in its campaigns.

Research



Research Objectives

Research is the foundation of an effective strategy. Proper research will allow us to exert maximum control over the controllable aspects of this issue and achieve maximum understanding of the uncontrollable aspects of rebuilding CLIA's reputation.²² Based on our situational analysis, Zipline Communications has identified the following questions that must be answered through our research:

1. What is the current public perception of cruise line travel?
2. What steps can be taken to alter public perception of cruise line travel?
3. What are the major obstacles to changing public perception of cruise line travel?

CLIA operates in a dynamic global environment with an increasingly fragmented audience. Research is vital in identifying the appropriate campaign targets, probing existing attitudes, and determining the optimal timing and modes of communication.²² Recognizing that CLIA has already undertaken communication initiatives aimed at other key constituencies, Zipline Communications will focus research activities on the public

with the greatest relevance to the issue identified in the situation analysis: cruise line customers.

Research Methods and Sample Description

Both original and secondary research were conducted for this report. During the research phase, we used both qualitative and quantitative methods to gather insight, with information coming from three primary buckets. The methodology, analysis, and results of each are explained below.

Industry Insight

First, leadership at Zipline Communications conducted an in-depth qualitative interview with Kim Prunty, the vice president of public affairs for Disney Cruise Line (DCL). DCL has one of seven seats on the CLIA Global Executive Committee, which leads the strategic direction of the association.⁸ Prunty regularly provides counsel and message approval to the CLIA communications team.

According to Prunty, the most significant issues facing the cruise industry in the era of COVID-19 are rebuilding consumer confidence, the uneven landscape around which ports of call are willing and able to welcome passengers again, the lack of leadership and direction from the CDC, and the perceived inability by the industry to attract crew members to work on ships again.¹¹ Additionally, Prunty shared survey insights that while the percentage of income-qualified vacationers willing to go to a beach or rent an RV is upwards of 70%, that number falls as low as 30% for those willing to take a cruise, putting cruising at the low end of the leisure travel spectrum, below air travel.¹¹

Media Framing

Before launching a communications campaign, CLIA must first understand how the initial COVID-19 outbreaks aboard cruise ships, the drastic halt of all sailing, and the numerous extensions of the voluntary compliance to the CDC's No Sail Order have been framed by the media. This is important to understand as media framing can "occur when (often small) changes in the presentation of an issue or an event produce (sometimes large) changes of opinion."²³

In order to understand the sentiment surrounding CLIA and its partner cruise lines, we searched for online articles that ranked highest on Google and contained the search terms "Cruise Lines International Association" and "COVID." The top 42 articles, from sources that include USA Today, The New York Times, The Wall Street Journal, The Washington Post, CNBC, and CNN, were segmented by time frame, then analyzed and categorized into one of three different sentiments – *positive*, *neutral*, *negative*.

Dennis Chong and James Druckman note that strong negative frames "can be built around exaggerations and outright lies playing on the fears and prejudices of the public."²³ Thus, articles that used strong adjectives in the title or body to overemphasize negative factors of the response to the COVID-19 outbreak, precautionary actions taken by CLIA or its partner cruise lines, or regulatory response were considered *negative*.

Articles that provided factual information in regards to the response to the COVID-19 outbreak, precautionary actions taken by CLIA or its partner cruise lines, or regulatory response were considered *neutral*.

Lastly, articles that used positive language or highlighted the positive attributes of the response to the COVID-19 outbreak, precautionary actions taken by CLIA or its partner cruise lines, or regulatory response were considered *positive*.

Out of 42 articles analyzed between March 1, 2020 and September 29, 2020, 14 were negatively framed accounting for 33% of the media coverage. Common elements used in negatively framed articles included emphasizing the risks of an outbreak aboard a cruise ship, the public's hesitation to sail, and the negative economic impact on the industry. Two noteworthy titles that exemplify these elements are "Luxury Vessels Left to Rot in Cruise Ship 'Graveyard' Amid COVID-19,"²⁴ and "How Many Cruise Ships Are Still Stuck at Sea? Sick Passengers, Closed Ports Leave Boats in Limbo."²⁵

Twenty-one articles, accounting for 50% of the media coverage, were categorized as having a neutral sentiment. These articles provided readers factual data, were informative in nature, and did not use language considered to positively or negatively influence the reader. Titles categorized as neutral include "Sea Changes: A Preview of the New COVID-Related Cruise Restrictions"²⁶ and "These Are the New COVID-Related Cruise Restrictions – And You're Not Going to Like Them."²⁷

Approximately 17% of the media coverage used positive language to describe the actions of CLIA or its affiliate cruise lines. These seven articles covered elements such as preparedness and safety protocols, excitement to resume sailing, innovations among ships and the industry, and even alternative methods the industry has employed to gain or maintain consumer interest.

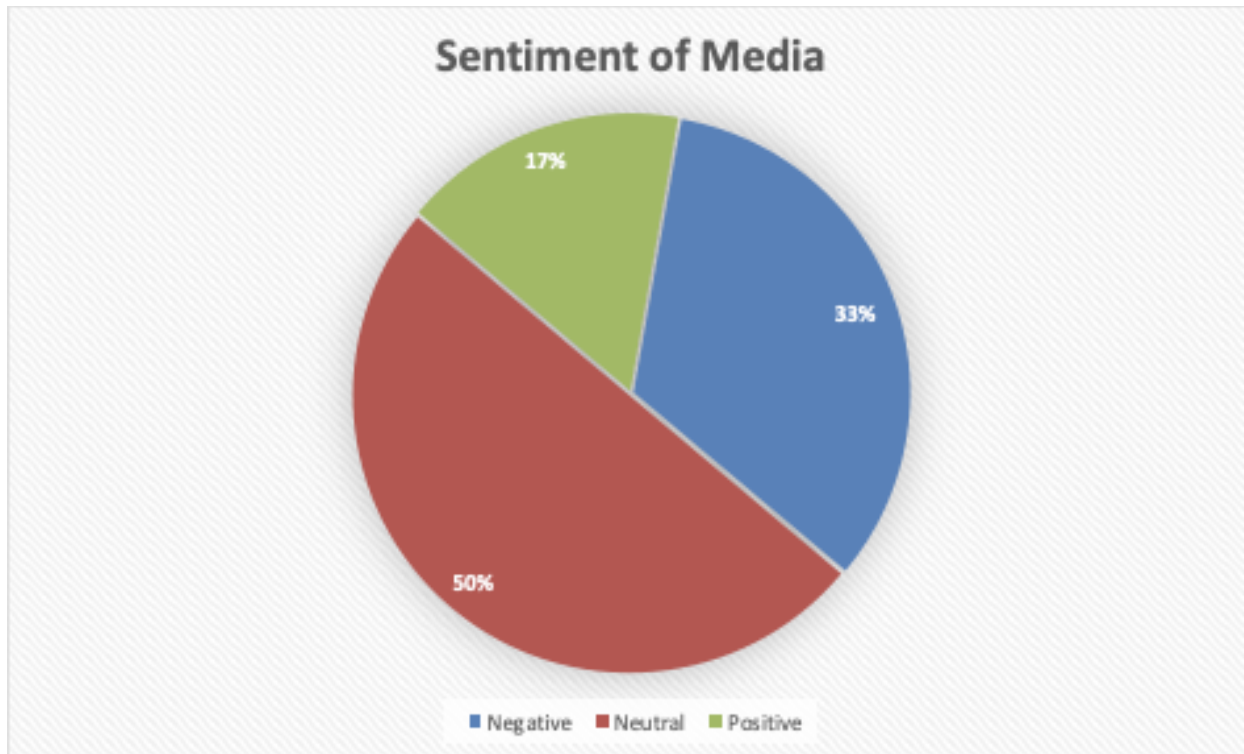


Fig. 1. Media Coverage Categorized by Sentiment

Public Perception

A cornerstone piece of research for a communications plan is understanding how the public views the current situation, processes that information, and how that information is used to guide their behavior. In response to the effects of COVID-19 on the cruise industry, we wanted to determine if publics are aware of the No Sail Order, gauge their desire to cruise in the near future, and if there is a relationship between the concerns keeping consumers from cruising.

The primary piece of our public perception data was collected from 50 randomly selected responses out of 12,110 public comments submitted to the CDC's "Request for Information Related to Cruise Ship Planning and Infrastructure, Resumption of

Passenger Operations, and Summary Questions” that was formally posted in the Federal Register on July 21, 2020.²⁸ Interested people and organizations were invited to share their thoughts on the reopening of the cruise industry. The request generated significant, diverse public interest and comment, and has been viewed almost 100,000 times as of early October 2020.²⁸

Responses were categorized as either *Against Resuming*, *Neutral*, or *For Resuming*. Approximately 28% of our sample responded as *Against Resuming* sailing in 2020. Below is a sample of comments that expressed this attitude:

- “Cruise ships are pretty much synonymous with coronavirus and if family or friends were to book a cruise we would strenuously ask them to please change their minds.”
- “I find it absurd that we are considering renewing cruise ships at this time. We need to get ahead of COVID, not further behind it. Please do not resume cruise operations!”

In order to avoid bias, comments that were nondescript and lacking in clarity on which way the respondent was leaning were categorized as *Neutral*. Of 50 randomly selected responses, only five, accounting for 10% of responses, were categorized as *Neutral*. Overwhelmingly, 62% of the sample responded that cruising should resume sailing in 2020. Many of the responses included language that expressed a strong sentiment and were thus categorized as *For Resuming*. Comments that expressed this attitude include:

- *“We strongly feel at this time that it would be appropriate to allow cruise ships to resume operation and we understand that they will be doing so at a reduced capacity when they restart.”*
- *“It is imperative to get this important sector back up and running.”*
- *“Cruises must resume immediately.”*

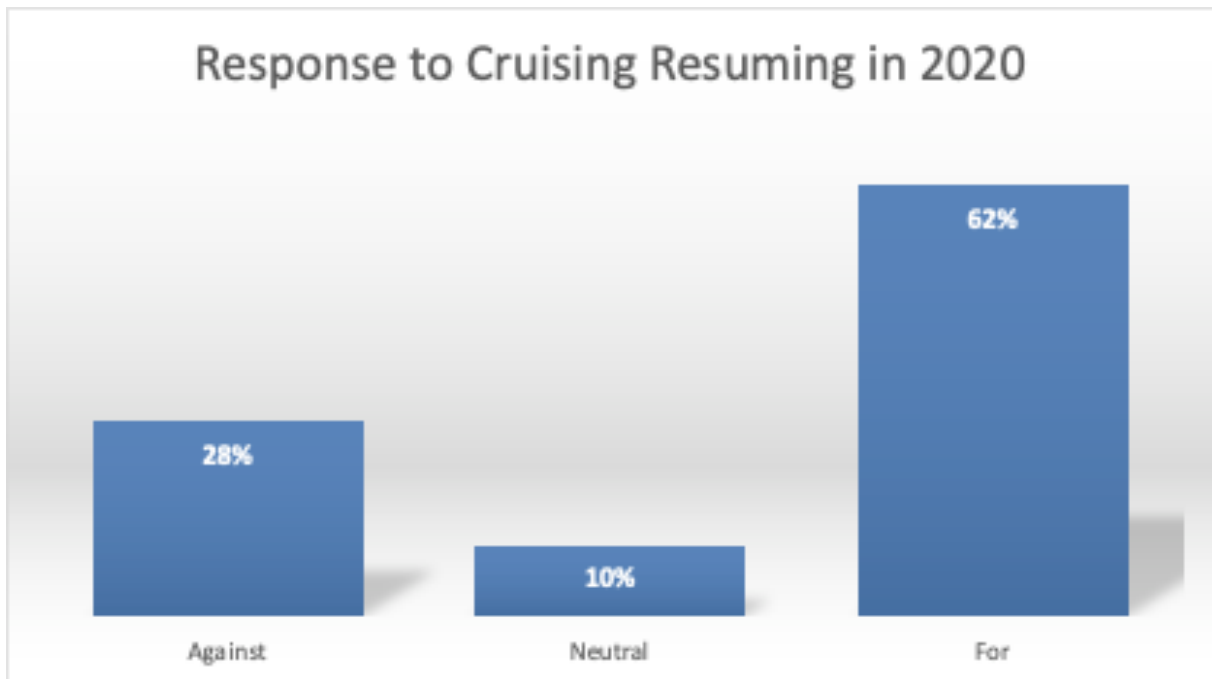


Fig. 2. Federal Register Responses to Resuming Cruising in 2020

Our secondary piece of public perception research included a seven-question survey intended to provide us quantitative data in an attempt to understand the willingness of the public to book a cruise in 2020 or 2021. A seven-question survey distributed via social media included: one yes/no question to determine if the respondent was aware of the No Sail Order extended through Nov. 1; two five-point Likert scale questions to determine the likelihood of booking a cruise in the very short

term and within the next year; and four open-ended response questions intended to determine the respondent's perception of cruising as well as their feedback on anything cruise lines should do or change, both on the ship and during shore excursions, that would reassure consumers.

The invitation to take the Zipline Communications online survey gauging public sentiment toward cruising in the era of COVID-19 was extended to more than 200,000 people via social media channels, divided broadly into two categories of recipients.

First, there was a broad category of survey recipients, with communications being shared through two Facebook groups with members who have an interest in travel: World Travel Addiction and Worldwide Travel both posted the survey on their pages. World Travel Addiction is a private group of over 104k members, while Worldwide Travel is a public forum of over 120k with no need for approval from the page owner to post. Both allowed the survey to be extended to their members on their Facebook pages.

Additionally, a link to the survey was shared with the social media networks of Zipline Communications' leadership. This group of recipients presented a diverse demographic profile, with a variety of ages, ethnic backgrounds, and education levels represented. Geographically, this group of recipients skewed heavily toward residents of Florida, California, and Texas – all states where the cruise industry has ports – as well as Colorado. Most of the survey recipients of this targeted group have the net income necessary to take a cruise vacation.

According to this survey, 80% were *very unlikely* to book a cruise in 2020 and 39% were *very unlikely* to book a cruise in 2021. However, by including a more pointed question in our research, we were given insight into how attitude and behavior may change as approximately 29% of respondents noted they were *somewhat likely* or *very likely* to book a cruise in 2021 versus the 10.5% who noted they were *somewhat likely* or *very likely* to book a cruise in 2020.

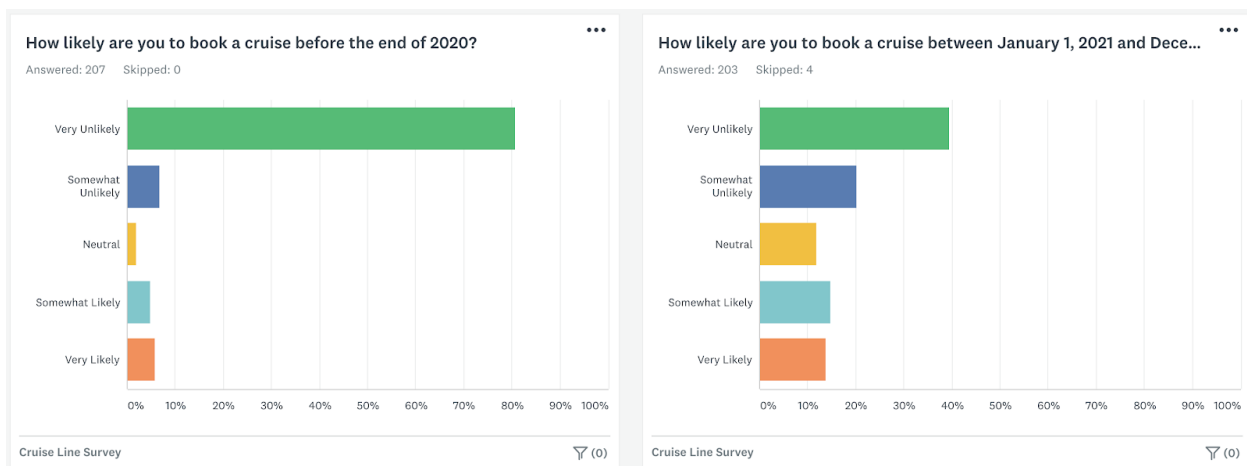


Fig. 3. Social Media Survey Responses - Likelihood of Booking A Cruise.

This survey data is significant to note because it highlights the difference between consumer attitudes and action. A majority of comments submitted to the Federal Register suggested consumers wanted cruise lines to resume sailing, yet there is evidence to suggest many consumers won't actually book a cruise until 2021.

The last key component to our research was the insight as to what steps, if any, respondents felt cruise lines should take to improve public perception. Words like *cleaning, masks, safety, social distancing, and precautions*, were counted in a majority of responses providing us insight into what issues are top of mind for consumers

considering cruising. Knowing which concerns consumers hold in high regard will provide us further guidance on how we can best address those issues, meet consumer's communications needs, and begin improving public perception of the cruise line industry.

Campaign Goal



This campaign's goal is to influence consumer behavior and help convince decision-makers in households with an affinity for cruising that in the era of COVID-19, the industry is ready to safely take guests of all ages on cruise vacations again.

Campaign Objectives



Our objectives for this campaign are as follows:

Objective 1

To improve the percentage of consumers who say they would consider a cruise vacation in 2021 to above 50% within three months of campaign launch.

Objective 2

To increase internet traffic to cruise line booking sites back to year-over-year, pre-COVID-19 traffic levels within six months of campaign launch.

Objective 3

To increase consumer awareness of mandatory COVID-19 testing for cruise passengers by 40%, measured nine months after the start of the campaign.

Conclusion



In summary, CLIA is “the world’s largest cruise industry trade association.”¹ However, thanks to COVID-19, CLIA and its large network of cruise line partners have struggled to get people excited about going on cruises. This has occurred due to two major factors. First, the CDC has established a No Sail Order, which prevents cruise lines from sailing until October 31, 2020.⁷ Second, many people are afraid to go on cruises again because COVID-19 has caused them to perceive cruise lines as being “floating petri dishes” that provide “a fast track to sickness.”¹²

In order to help CLIA and its network of partners begin operations again and rebuild their reputations, Zipline Communications will implement a new public relations campaign. This campaign will portray cruise lines as being a safe and healthy way to travel so that customers will develop positive perceptions and get excited about going on cruises again. Zipline Communications has also designed various objectives to help reach these goals. They include increasing the awareness of mandatory testing requirements by 10% over the next 9 months, improving public sentiment toward cruise line travel by 50% within the next three months, and returning the internet traffic on cruise line booking sites to pre-COVID traffic levels within the next six months.

By implementing this campaign plan, Zipline Communications seeks to support CLIA in fulfilling its organizational mission to “advocate, educate and promote the common interests of the cruise community” and to help expedite a return to pre-pandemic levels of operations for CLIA members.¹

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