



Image and Characteristics of the North Sea Region with special emphasis on sustainability

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The Interreg IVB North Sea Region Programme

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Cruise Gateway Online Survey

„Image and Characteristics of the North Sea Region with special emphasis on sustainability“

Results

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1. Background of the survey

CRUISE GATEWAY North Sea – towards sustainable growth of cruise shipping in the North Sea Region

CRUISE GATEWAY North Sea is an EU Interreg IVB North Sea Region project, launched in October 2010. Within three-years the 14 project partners are working together to encourage and promote much more cruise activity in the North Sea Region.

Brand awareness linked to sustainability topics, e.g. environmental awareness, eco-friendly transport structures and avoiding congestion are taking an important step in order to support the North Sea to develop as a cruise destination of its own right.

Within the third work package “Marketing and Branding North Sea Region Cruise” the partners launched an online survey on the project’s website www.cruisegateway.eu in order to find out more about the image and characteristics of the North Sea.

2. Structure of the Online Survey

The CRUISE GATEWAY online survey was launched in July 2011 on the front page of the project’s website www.cruisegateway.eu and closed in December 2011. The link to the survey was promoted via the partners associations’ websites, direct mailing to business partners and friends, via the tourism bodies of some partners’ regions as well as via the projects facebook and twitter account. Furthermore copies of the survey were handed out to the participants of the GreenPort Cruise Conference, held September 13, 2011 in association with Cruise Gateway in Hamburg.

As the project’s own network was used, the survey results are not statistically ascertained. However meaningful statements can be made for the most significant answers and the results are delivering tendencies and ideas.

99 persons answered the questionnaire, consisting of eight parts:

- personal data (gender, age and origin of the participant);
- travel behavior (visited countries and future plans);
- image of the North Sea region (most attractive capitals/cities/landscapes; typical characteristics of the North Sea Region);
- difference between North and Baltic Sea;



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- attractiveness of the North Sea Region as a holiday destination;
- cruise experience and cruise in the North Sea Region;
- cruise and sustainability.

3. Participant structure: gender, age and origin

99 respondents answered the questionnaire, thereof 55 men and 44 women. 76 % of the respondents are between 20-50 years old.¹ The big majority, 65 %, are Germans, 15 % from the UK and 8 % from Belgium. All North Sea Region countries² are represented, except the Netherlands. Online one person comes from outside the EU (cf. figure 1).

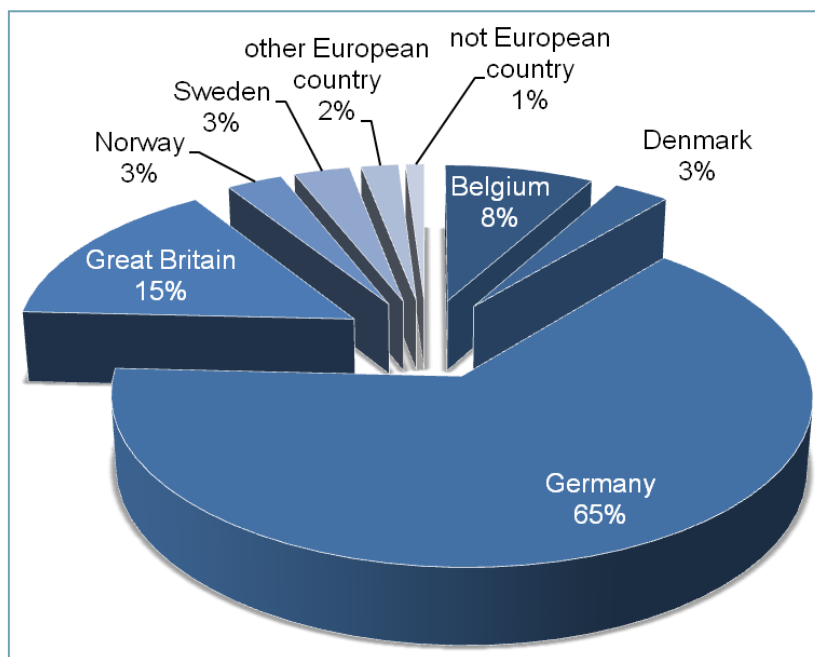


Figure 1: Origin of the participants of the CRUISE GATEWAY online survey

4. Participants' travel behavior: visited countries, planned trips

The participants were asked which North Sea Region countries they already visited and which they were planning to visit within the next three years. All eight North Sea region

¹ All detailed results and tables are listed in the annexes.

² As defined by the Interreg IV B North Sea Region programme, www.northsearegion.eu



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countries were visited by at least half of the respondents (figure 2). Trips to these countries are planned by at least one third of the participants (figure 3).

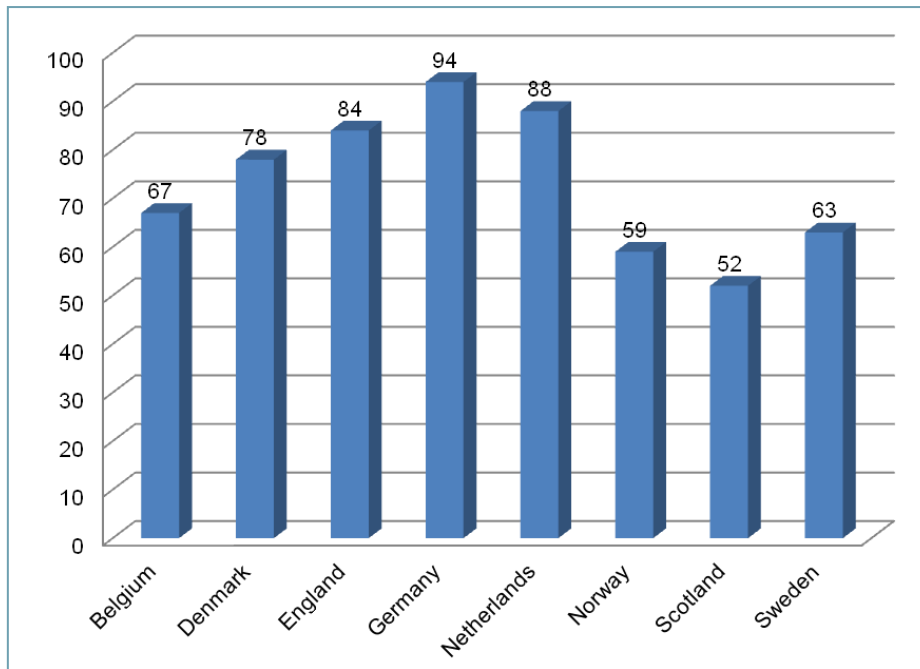


Figure 2: Number of participants visting North Sea region countries

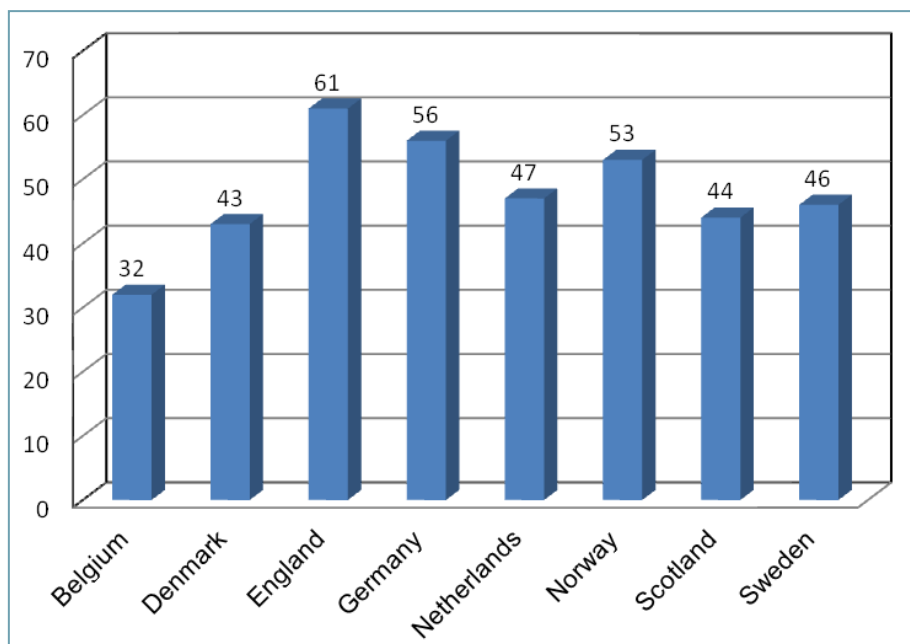


Figure 3: Number of participants planning to visit North Sea Region Countries within the next three years



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5. Image of the North Sea region

5.1 Most attractive capitals/cities/landscapes in the NSR

No.	Answer
1.	Amsterdam, Aberdeen, Göteborg
2.	Copenhagen, Bergen, Edinburgh, Wismar, the cliffs at Ruegen and Møn, the Norwegian fjords, the Scottish coastline
3.	Norway, Scotland
4.	the tideland
5.	copenhagen, amsterdam, norwegian fjords
6.	fjords in Norway, landscape Scotland, Sweden
7.	Oslo, Glasgow, Copenhagen, Stockholm, Ireland
8.	I believe most coastal cities are attractive for its closeness to the ocean.
9.	Norwegian Fjords, Scottish Highlands, London
10.	Edinburgh, Stockholm, Växjö, Oslo, Stavanger, Cornwall, Niederländische Küsten
11.	Bergen, Edinburgh, Hamburg, Amsterdam, Norwegian Fjords
12.	Kopenhagen
13.	Edinburgh, London, Hamburg, Wadden Sea, Helgoland (Germany, North Sea), Scottish Highlands, Netherlands (Nijmegen)
14.	Copenhagen, Edinburgh, Antwerp, Aberdeen, Scotland, Flanders
15.	Edinburgh, Amsterdam, Hamburg, Oslo Bergen, Narvik, Roskilde
16.	Edinburgh, London, Brugge, Bremerhaven, Wadden Sea, Norwegian Fjords
17.	Norway West Coast, Bergen, Stavanger, Sweden Westcoast, Stockholm, North Sea Region of Schleswig-Holstein Hamburg, Wattenmeerregion, die norwegische Fjordküste
18.	Copenhagen, Amsterdam
19.	Bergen, Stavanger, Oslo, Göteborg, Kiel, Hamburg, Bremen, Oldenburg, Emden, Hoorn, Lemmer, Amsterdam, London, Whitby, Staithes, Lerwick, Kirkwall
20.	Scotland (Highlands), Copenhagen, Hamburg,
21.	Edinburgh, Lake District
22.	Cuxhaven
23.	The Wadden Sea, Norwegian Fjords, Stockholm, Copenhagen
24.	Kopenhagen, Hamburg, Kiel, Oslo
25.	Hamburg, Amsterdam, Oslo, Copenhagen, London
26.	Copenhagen, London, Amsterdam, Hamburg, Gothenburg, mudflats and islands in Germany, stormy and beautiful coast of Denmark
27.	London, Oslo, Hamburg, Spitzbergen
28.	norway, edinburgh, amsterdam



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29.	Hamburg, London
30.	Edinburgh, Rotterdam, Hamburg
31.	Kiel, Oslo
32.	Oslo, Copenhagen, Hamburg
33.	Amsterdam, East and north frisian islands, Hamburg, Oslo
34.	London, Scotland, Rotterdam, Oslo, Kopenhagen, Malmö
35.	Bremen, Hamburg, Kopenhagen, Göteborg, Oslo, London
36.	In Sweden: Malmö, In Germany: St. Peter Ording in the north-western region.
37.	Norway, Sweden
38.	Hamburg
39.	Fjords, Edinburgh, Wild nature, Big cities
40.	Stockholm, London, Hamburg, Amsterdam, Oslo, Kopenhagen, kristiansant
41.	Gothenburg, Bohuslän, Northern Jutland
42.	Stockholm, Bergen, Copenhagen
43.	Scottish Highlands and Islands (Orkney etc.), Norwegian Fjords, Swedish West Coast, Danish Beaches, Wadden Sea, Hamburg, Copenhagen, cities in Flandern
44.	Kopenhagen, Scotland Highlands, Landscape Norway Fjords
45.	London, Hamburg, Amsterdam, Copenhagen
46.	Berlin, Oslo, Stockholm, Gent, Brügge, Hamburg, Darß,
47.	Bremen, Brügge, Amsterdam, Kopenhagen, Bergen, Oslo, Göteborg
48.	Copenhagen, Oslo, Newcastle, Amsterdam
49.	Copenhagen, Amsterdam, Stockholm, Oslo, Edinburgh, Highlands, Coastal areas, City centres.
50.	coast and countryside of england and scotland, northern norway, around bergen
51.	Wide nature of scotland, wintery norway climate
52.	copenhagen, london, amsterdam, oslo
53.	Hamburg, London, Amsterdam, Gothenburg, Kopenhagen, Oslo
54.	Antwerp, Copenhagen/Malmö, Edinburgh, Hamburg, Oslo
55.	Berlin, Hamburg, London, Antwerp
56.	Hamburg, Friesland-Küste, Kopenhagen, Kiel
57.	Amsterdam, Bruges, Copenhagen, Norwegian fjords
58.	Norwegian fjords, Belgium Costal dunes, North East Scotland mountans & coastline, Amsterdam
59.	Amsterdam, Copenhagen, Stockholm
60.	Edinburgh, Channel Islands, Norwegian Fjords
61.	The wadden sea, Hamburg, Berlin, London, Edinburgh, Antwerp, Brügge, Gent, Amsterdam, Bremen, all North Sea Islands, rough coasts, Amsterdam, Copenhagen, Berlin
62.	Oslo, London, Amsterdam, Bremerhaven, Tromso, Wadden Sea, Fjords,
63.	york, scottish mountains, bergen,
64.	Hamburg, Jylland



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65.	Norway Telemark Norway Western fjords, Scotland Trossachs, Scotland Highlands, Norway Oslo, Scotland Edinburgh
66.	kiel and rotterdam and gothenburg
67.	London, Copenhagen, North Denmark
68.	Edinburgh is very nice. It's a good place for cyclists, sightseeing etc.
69.	Copenhagen, Stockholm, Norwegian fjords, Scottish highlands
70.	amsterdam, newcastle, gothenburg
71.	Edinburgh, Brussels
72.	Gothenburg, Edinburgh, Bruges,
73.	Oslo, Copenhagen
74.	Copenhagen/Bergen/fjords
75.	bergen, fjords
76.	Copenhagen, Bremen, London, Fjords, Scotland
77.	Brussels, Amsterdam, Berlin
78.	Copenhagen, Berlin, Stockholm, Paris
79.	Zeebrugge, Antwerp, Oostende
80.	Antwerp, Bruges, Stockholm, Oslofjord and environment, London, Amsterdam, Copenhagen
81.	Rotterdam, London (Amsterdam)
82.	Germany, England, Sweden, Copenhagen, Kiel, Göteborg
83.	England, Germany

5.2 Characteristics of the NSR

No.	Answer
1.	fresh air, stiff breeze, wind
2.	open culture, efficient government, infrastructure
3.	rough weather, culture, tides, cities and landscape
4.	Water, shipping, beautiful nature.
5.	Tides
6.	Wind
7.	the diversity: wadden sea, fjords, big cities
8.	cold, stormy, flat land, fishing, lighthouse
9.	Water, Salty breeze, lively cities, green countryside, wide horizon
10.	a large variety of coastlines.
11.	stormy weather, rain, wind, fresh air, beautiful nature, fireplaces
12.	Wasser und Küste
13.	The tides, the waddenzee, the flat coasts of Belgium, Netherlands, Germany and Denmark, the huge amount of ships, the green fields, the milk agriculture, the small fishing



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	ports,
14.	Beautiful landscapes, interesting cities, shared culturell and historical heritage, high developed economy
15.	Rough Wheather, open minded people, maritime background wherever you are
16.	Watt, Wind, Wetter, Seegeruch
17.	beautiful coast landscapes, attractive cities, stormy weather, northsea crabs
18.	water, wind, healthy air, ships, marine nature in the harbours (a lot of fish etc.)
19.	same kind of thinking although with enough differences to make it attractive
20.	Wadden Sea
21.	Sea, tide, wind, salt, dunes, rain, lighthouses, cycling
22.	wattmeer, regen, wind
23.	Fish, beaches, storm and wind, intensive economic use
24.	Fresh air, green landscapes, often bad weather
25.	Wadden Sea
26.	variety of landscapes and cities
27.	North sea, fishing,Nature, Many cultures and Cities near by, ports
28.	Region is very diverse, wonder if there is anything uniting the regions apart from the Sea. Very many things are typical of parts of the region, but not of the whole region.
29.	mild climate, nice landscapes
30.	All areas are close to the sea. Historic cities, Trade, Tchnology and innovation.
31.	stoney landscape of sweden and norway, dunes, small fisher villages, friendly and open minded locals,
32.	Scenery
33.	windy weather, not to much sunshine, many different cultures, places & food + beer!, different country site
34.	cultural diversity, roughness of the weather, beautiful shies (clouds), Northern lights
35.	Green Nature, Wind (Energy), Northern Culture
36.	The coast of North Sea
37.	a unique combination of culture and landscapes
38.	beaches and dunes
39.	grey colour
40.	bad weather in winter, high waves on sea, almost windy
41.	historic arcitecture, rough landscapes, the steady wind, the maritime history and profile
42.	The wind and the fresh and clean air.
43.	Dramatic scenery and landscape. Diversity of nature and wildlife. Diversity of cultures and traditions.
44.	Good employment opportunities, high standards of living.
45.	Cold weather.
46.	Clean, technologically advanced, good service standards, people have a strong connection with the sea
47.	tradition
48.	Wild landscapes, Interesting cultures and food, Unexplored history and heritage



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49.	Top destinations, Great gastronomy, Interesting historical and cultural destinations, Great shopping
50.	cultural cities, nature in Scandinavia
51.	historical cities, ancient culture and inheritance, the North Sea and its beaches
52.	the maritime history, seaside villages and the cold weather!
53.	cold weather, strong wind, fish food
54.	windy and cold

After having answered the open questions, the participants were asked to classify several attributes as not typical at all or very typical (six rating levels) for the NSR. These attributes were ordered in the categories:

- Culture, History, Traditions;
- Nature, Animals, Landscapes;
- Sports;
- Kitchen;
- Society, Economy.

The participants voted as shown in the tables below. In the tables are indicated the number of respondents. The yellow marked fields show the average level voted. The highest and lowest scores of each category are marked in orange.



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5.2.1 Culture, History, Traditions

	not typical at all	not typical	rather not typical	rather typical	typical	very typical
lighthouses	1	3	9	16	26	35
historic buildings	1	0	7	28	30	27
modern cities	2	7	19	34	23	6
small ports	2	3	10	27	36	14
holiday parcs	15	23	28	17	9	1
small towns	2	4	6	28	38	15
fisheries	0	4	5	19	41	25
myths and legends	1	3	16	29	30	13
rich culture	1	1	14	27	29	20
open minded people	0	8	15	35	24	8
rich history	0	0	7	27	31	26
museums and art galleries	1	5	13	33	23	17
relaxing & recreation places	2	5	9	26	30	22
big ports	1	8	13	18	29	23

5.2.2 Nature, Animals, Landscapes

	not typical at all	not typical	rather not typical	rather typical	typical	very typical
high cliffs	3	2	15	32	29	10
fjord scenery	2	2	8	21	40	18
sandy beaches and dunes	2	8	7	14	38	23
storm & floods	1	7	5	16	39	25
rough weather	1	2	5	14	35	34
wide landscapes	1	0	7	17	38	30
national parcs	2	4	21	24	26	15
wadden sea/tideland	1	0	8	17	27	40
tidal flow	1	1	9	13	24	44
small isles	2	1	8	30	33	18
beautiful landscapes	1	1	4	15	38	34
diversity of landscapes	1	3	10	18	35	26
seagulls	2	1	1	13	32	40
seals	3	5	7	25	37	14
diversity of animals	2	6	19	30	26	9



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5.2.3 Sports

	not typical at all	not typical	rather not typical	rather typical	typical	very typical
rugby	24	17	23	19	8	0
hiking	3	7	15	21	26	19
golf	9	8	23	21	20	10
football	6	8	16	16	24	21
leisure sailing	1	1	5	24	30	32
cycling	1	2	11	14	38	25
outdoor sports	2	2	7	22	35	24

5.2.4 Kitchen

	not typical at all	not typical	rather not typical	rather typical	typical	very typical
fish	1	0	1	5	31	53
whiskey	2	7	11	41	16	14
beer	1	1	4	16	36	34
traditional drinks	2	8	10	20	32	19
exiting kitchen	4	12	30	24	11	7



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5.2.5 Society, Economy

	not typical at all	not typical	rather not typical	rather typical	typical	very typical
competitive economy	1	2	16	24	33	15
high living standard	0	4	9	17	38	24
environmental high pollution	5	21	28	19	15	2
piracy	54	19	13	4	2	0
oil rigs	7	17	25	25	13	5
excellent shopping places	3	4	28	33	15	9
rainy weather	0	0	7	30	35	20
high developed infrastructure	0	1	13	28	32	19
high level of public safety	1	0	5	26	32	28
overfished region	1	7	9	31	33	12
high standards concerning environmental protection	1	1	11	25	42	11
politically stable	2	1	4	17	26	43
geographic diversity	2	1	4	24	33	29
region of innovation	2	3	20	27	28	12
industrial excellence	2	7	17	30	24	13

5.3 Difference between North and Baltic Sea

No.	Answer
1.	weather conditions: stiff breeze in the north sea region, less wind (and less waves) in the baltic sea
2.	North Sea: open sea, can be rough Baltic Sea: more like an inland sea, also the Baltic has the historic divide of East and West which makes it more diverse
3.	standard of living
4.	tideland
5.	Baltic Sea is a rather "closed" region. North Sea is more lively.
6.	Weather, Beach
7.	The Baltic States, St Petersburg and other Eastern European destinations are less familiar to me



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	than North Sea destinations. The Baltic Sea region seems to offer more cultural destinations.
8.	the tide
9.	Colder, brown water (due to tights)
10.	Tide (and more salty water), no cultural clash but common (comparable) standards, history, demands
11.	coherent region, better integrated policies
12.	culture and history
13.	Baltic sea region works closer together due to historical bonds and history. North sea region is much more diverse (cultural/living standards) and not used to regard itself as a region of 7 countries.
14.	North Sea: More variety in nature, rougher climate, people are straight
15.	wadden sea, rougher sea, not a "closed" sea surrounded by the mainland
16.	andere Landschaft, milderes Klima
17.	the tide
18.	The tides, the tidelands, the dikes
19.	The Baltic Sea is just bigger and involves more states. There are more unknown tourism destination in the Baltic Sea than in the North Sea.
20.	The NSR has another history, another culture
21.	Der Geruch des Meeres
22.	Rougher weather and sea.
23.	the tide
24.	The economic power of the surrounding states
25.	north sea regions languages are related whereas english is often working language whihc gives easier acces
26.	Diversity of landscape
27.	the tide flow
28.	Baltic Sea have better ports than the North Sea.
29.	Different species due to different salinity.
30.	standard of living
31.	rougher, higher waves
32.	tide
33.	Tidal amplitude
34.	Regarding weather I hardly trust the forecasts which refer to Noth Sea-weather.
35.	less populated
36.	never been to the Baltic Sea. North Sea is more open to the world (also economically). More nature/ green that NSR?
37.	Sea is more salty, weather Not As good As in the baltic sea
38.	The North Sea Region is "rougher" and definitively more rainy!
39.	Leaving Europe



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40.	Tidal difference, the Baltic Sea is a 'lake' with no real waves, Baltic Sea has more cultural and language diversity
41.	rough sea, tide
42.	No Tidal Flow in the Baltic Sea.
43.	wadden sea, tide
44.	level of innovation and higher environmental standards
45.	salty water in North Sea, Baltic Sea has brackish.
46.	Orientation towards Russia in BSR
47.	the landscape and the sea. northsea is rougher and unpredictable. and it's wider, there are not as much small islands
48.	North Sea Region is more rough (weather condition, coast, tide) North Sea Region covers highly developed countries, rich countries, high living standard.
49.	Not so much tidal currents and baltic is better for sports sailing (less wadden sea and tides)
50.	Baltic Sea is a lake, North Sea (part of) an ocean
51.	Baltic Sea not so danger!
52.	landscapes and seascapes, different cultural heritage
53.	North Sea is closer
54.	more culture, more history in the Baltic region
55.	the tides, less clean water in the North Sea, stronger winds in the North Sea, higher distances in the North Sea Region
56.	St Petersburg
57.	The sea itself. The North Sea is quite rough, especially during autumn/ winter, and the air is much better than at the Baltic Sea. The North Sea seems like an oceans, whilst the Baltic Sea seems like a lake.
58.	Higher standard of life in North Sea regions
59.	i dont no
60.	Excellent co-operation within North sea Region.
61.	The Baltic is much shallower, less tidal and therefore more polluted. the surrounding landscape is also less dramatic
62.	weather,
63.	Baltic has a more co-operative structure and aggressive marketing
64.	Stormy weather
65.	fresh, unspoiled nature; north sea pollution, grey cities; baltic
66.	big seas - Northe Sea small seas - the Baltic
67.	Wilder and rougher
68.	I link the North Sea to European lifestyle and culture.
69.	North Sea has besides culture also a lot of nature to offer.
70.	Different culture / North Sea area is less expensive than Baltic Sea.
71.	don't know, not been in the Baltic before
72.	more accessible to more potential cruise users



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73.	The north sea looks more cold and cloudy than the baltic sea. I think if somebody loves fish and strong weather it's perfect to go on holiday at the north sea.
74.	Baltic Sea -better for Beach holiday North Sea: more rough/stormy
75.	I think the weather is better, people are more friendly, more innovation

5.4 Attractiveness of the North Sea Region as a holiday destination

From 99 participants, 84 think that the NSR is an attractive holiday destination, 9 don't and 6 didn't answer this question.

5.4.1 The NSR is an attractive holiday destination because...

No.	Answer
1.	ideal place to relax, do sport (sailing, kiting)
2.	beautiful landscapes and lovely towns/ports
3.	it's "home"
4.	not far away, quiet, many different options for holiday activities
5.	good for recreation and relaxing, beautiful landscapes.
6.	Relatively local (low carbon) holiday with beautiful nature and outdoor activities.
7.	Landscape (Norway, Scotland, Kent, Frisian islands etc.)
8.	tradition, beautiful landscape, nice people, good experiences
9.	Every destination along the North Sea coast has something different to offer.
10.	Living in the north of Germany it is close to my home.
11.	Landscape, whisky, cities, safety
12.	diversity of landscapes, rich culture
13.	wide beaches, rough coastline
14.	great landscape, good infrastructure.
15.	see above
16.	cozy, nature, places to relax,
17.	gesundes Klima
18.	It is a very diverse and therefore interesting geographical region
19.	North Sea offers a good combination between attractive big cities and beautiful rural areas.
20.	Attractive nature
21.	Wind, Wetter, Watt, Geruch des Meeres
22.	I like the landscape and the people!



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23.	I love the sea and the rougher climate.
24.	beautiful Islands, significant landscapes
25.	I like the nature, the attractive cities and the culture of the different nations.
26.	much to without large distances
27.	beautiful beaches
28.	it is nearby and has nice climate
29.	because of the landscape
30.	Because there we can do many things.
31.	I like the coasts and islands
32.	the air, the sea, ...
33.	the sea is always nice, the north sea is closer than the mediteranean
34.	Nice Islands with sandy beaches and no cars, easy to reach from Northern Germany
35.	Beacause it is close to my homeplace. Journeys to North Sea-regions are not of extraordinary circumstances referring travel time.
36.	beauty of nature
37.	There is a large variety of activities and sights. Diverse nature landscapes and nice cities to visit.
38.	Diversion of Nature, Cities, People
39.	Distance and other typ of tourists as well as attractions
40.	It's not too far away (holiday at home), it's not crowded everywhere, lots of water
41.	dramatic weather
42.	See previous page
43.	rough weather, attractive cities
44.	can be for outdoor pursuits but weather can be offputting.
45.	Trekking and walking alternatives
46.	Easy with kids
47.	I dont know much about it and i would really like to visit specific towns like Göteborg and Esbjerg
48.	Nature, very relaxing country side, very big diversity of culture + countries itself + people+ nature.
49.	Nicer beaches than baltic sea (German Coast)
50.	Nature, regional culture
51.	surfing
52.	see Norwegian fjords
53.	The North Sea is an excellent place for recreation (large beaches, landscapes, sea)
54.	not so much travelling to get there
55.	depends of what I expect: looking for beautiful landscape
56.	I simply love this region. This is where I come from. This is what I want to be seen by my kids
57.	beaches, water, Wadden Sea,
58.	It is nearby
59.	Main reason is the healthy climate.



Image and Characteristics of the North Sea Region with special emphasis on sustainability

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60.	I enjoy the outdoor life and beautiful landscapes, wildlife diversity etc. These are the most important aspects of a holiday desination for me.
61.	dont no
62.	Yes if I want to visit friends and enjoy good food and high quality holiday.
63.	Landscape, people, and you can expect a certain standard of services from holiday providers and infrastructure.
64.	good transport links, interesting culture, out door recreation
65.	very attractive nature for hiking, cycling etc
66.	exciting
67.	Undiscovered Interesting landscapes, culture and heritage
68.	Different destinations, Interesting ports
69.	because of the diversity of the cities and the culture
70.	Nice coastel cities, nice beaches, nice restaurants
71.	Much variety, the changing seasons with typical weather, beaches and dunes all year through, culture and leisure, history and tradition, the people.
72.	Bevause I like the North more than east sea. It's something different to other holiday places before.
73.	I love the wild nature.

5.4.2 The NSR isn't an attractive holiday destination because...

No.	Answer
1.	bad weather conditions
2.	No sun, always rain, nothing to see - not tourist attractions.
3.	Expensive, hard to find acceptable offers for families with children on the Islands in the high season
4.	REGEN!!!
5.	the contrasts might be to large. How to compare the Antwerp/Rotterdam region with the Norwegian Westcoast or Scottisch higlands.Can 1 tourist enjoy both?
6.	I prefer mountains over sea
7.	To rainy and muddy, except for the West-Coast of Sweden (Bohuslän, very sunny and mild)
8.	depends of what I expect: expecting good weather
9.	high chance of rain, wind and cold temperatures compared to the mediteranean.
10.	I generally like to get away from the North Sea for my holidays.
11.	Cost
12.	changeable weather and expensive
13.	Often rainy and stormy weather. No beautiful seaside.
14.	Ease of travel to activities?



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- | | |
|-----|---|
| 15. | Everything looks so old and often it isn't uninteresting for younger people. There are a lot of pensioners. |
|-----|---|

6. Cruise experience and cruise in the North Sea Region

In a first step participants were asked whether they were experienced in cruising and whether they already did a cruise in the North Sea Region. In a second step they were asked if they could imagine doing a (further) cruise trip or even already booked one and if they could do/did so in the North Sea Region.

Half of them (54 persons) had never been on a cruise, 20 did a cruise once. 13 participants answered to have done a cruise 2-3 times and 8 persons were very experienced in cruising having been on a cruise 4-6 times or even more often

27 participants had already done a cruise in the North Sea Region.

Four participants already booked a future cruise trip, 62 could imagine doing so. For 26 persons cruise isn't an attractive holiday activity.

All 62 possible cruisers could imagine doing so in the NSR, three of the four booked trips are in the NSR. 30 persons answered they couldn't imagine cruising in the NSR.

7. Cruise and sustainability

The questionnaire defined the word sustainable as environmentally and socially friendly. Well knowing that sustainability means balancing these two as well as the third cornerstone "economically reasonable", this study left out "economically reasonable" as this term is more important for cruise lines than for possible passengers.

The participants were asked how important would be sustainability aspects if they were planning a cruise and had to choose an appropriate cruise line.

In a second step they had to consider how much they would accept to pay more for a cruise trip, if the cruise line and/or the ports along the itinerary chosen would do a lot of efforts and investments in sustainable development.

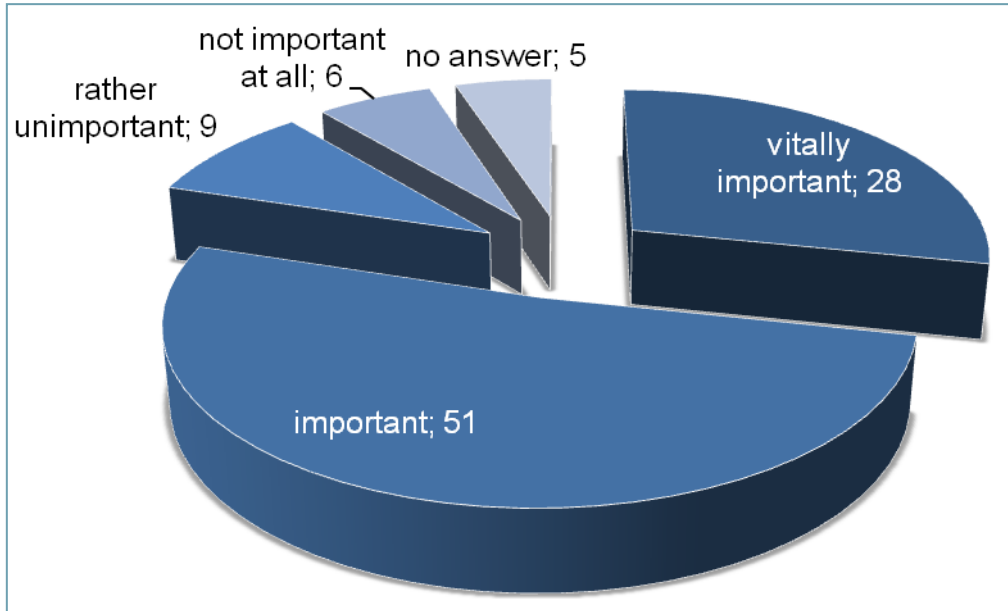


Figure 4: Importance of sustainability aspects for the cruise line decision in the cruise trip planning phase

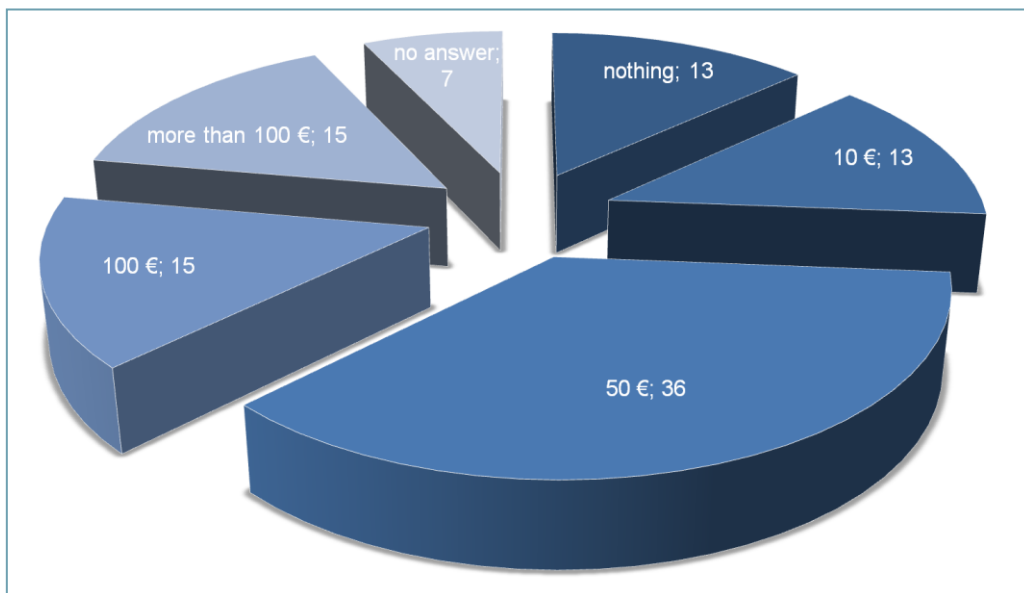


Figure 5: Passenger willingness to pay more for a cruise, supporting sustainability activities and investments of their chosen cruise lines.



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8. Remarks and Outlook

The results shown should serve as input for the future CRUISE GATEWAY activities. As mentioned at the beginning, they are not representative or universally valid, but indicative.

As already identified during the GreenPort Cruise conference, held in association with CRUISE GATEWAY in September 2011 in Hamburg/ Germany, especially the willingness to pay is a crucial topic. Most often the theoretical willingness is much higher than the real willingness when payment is requested. However sustainability is a topic more and more important also for passengers.

The CRUISE GATEWAY partners will have to discuss the further use of the results and link them to the activities of the project's work packages 3 to 5 that are marketing and branding NSR cruise, cruise and accessibility and cruise and sustainability.

CRUISE GATEWAY North Sea

Mission Statement

Cruise Gateway North Sea is working to develop and promote the cruise industry in the North Sea Region. It is a three-year project with 14 cruise-related partners from six countries, co-financed by the EU-Interreg IVB North Sea Region Programme.

Its partners are working together to:

- *Encourage sustainable growth of cruise shipping in the NSR – always considering the environmental issues;*
- *Emphasise the unique attractions offered by the NSR as a cruise destination;*
- *Build up a marketing strategy and create a 'Cruise Destination North Sea' identity;*
- *Establish an integrated approach among all stakeholders, promoting reliable, high-quality services across all NSR cruise ports and ensuring accessibility;*
- *Exchange knowledge and experience between partners through a programme of conferences, workshops, surveys and studies.*