



CRUISE GATEWAY NORTH SEA

→ WORKSHOP AND CONFERENCE REPORT



VARIED, VIBRANT, ACCESSIBLE AND SUSTAINABLE:

CRUISING IN THE NORTH SEA REGION

The North Sea connects great cities, great nations, great cruise destinations. It offers an incredible variety of history, heritage and culture, harmonious and dramatic landscapes, beautiful coast and countryside, traditional and modern architecture, vibrant cities and cosy towns and villages, with the added advantage of short steaming distances and excellent accessibility.



However, in the rapid development and significant growth of cruise tourism in Europe, the emphasis has been far more on the Baltic and Mediterranean Seas. The North Sea Region has, until now, not been recognised as a major cruise destination in its own right.

Cruise Gateway North Sea, an EU Interreg IVB North Sea Region programme, set out to find ways of challenging the status quo. The project brought together 12 partners from seven countries, representing cruise ports, marketing associations, councils and cities. The partners include heavy-hitting players in the cruise sector and smaller ports just beginning to develop their cruise potential.



That diversity, in terms of geography and experience, has proved vital in the exchange of information and, ultimately, the project's success.

For three years, the partners have worked together to develop and promote the cruise industry in the North Sea Region, with a particular emphasis on sustainability.

In an increasing environmentally aware world, that 'green' emphasis is a unique selling point for the North Sea Region's ports and its world-class visitor destinations.



THE KEY TARGETS OF THE CRUISE GATEWAY NORTH SEA PROJECT HAVE INCLUDED:

- Encouraging sustainable growth of cruise shipping in the North Sea Region, while always considering the environmental issues;
- Emphasising the unique attractions offered by the North Sea Region as a cruise destination;
- Building a marketing strategy and creating a 'Cruise Destination North Sea' identity;
- Establishing an integrated approach amongst all stakeholders, promoting reliable, high-quality services across all North Sea Region cruise ports and ensuring accessibility;
- Exchanging knowledge and experience between partners through a programme of conferences, workshops, surveys and studies.

THE PROJECT HAS BEEN STRUCTURED IN FIVE WORK PACKAGES:

Two relate to Management and Coordination, and Communication and Dissemination. The remaining three Work Packages have provided the direction for Cruise Gateway's extensive programme of events and analysis:

- Marketing and Branding North Sea Region Cruise
- Cruise and Accessibility
- Cruise and Sustainability

The following pages give a brief summary of the workshops, discussions and best practice tours that have taken the Cruise Gateway partners forward to the project's conclusion – and the Closing Conference to be held in Rotterdam in September 2013.



FEBRUARY 2011: HAMBURG

OPENING CONFERENCE: THE OPPORTUNITIES

More than 120 delegates from the cruise, ports, tourism and government sectors across Europe gathered at Cruise Gateway's opening conference, hosted by Port of Hamburg Marketing and Hamburg Cruise Center, to hear key speakers and take part in discussions about developing and promoting much more cruise activity – on a sustainable basis – in the North Sea Region.

"Clearly the opportunity is there for the development of the North Sea as a cruise destination. The North Sea Region hasn't achieved its full potential and there was a lot of discussion about how that potential could and should be achieved," said Chris Hayman, chairman of Seatrade and moderator for the conference discussions. "Some very good ideas emerged from the conference and clearly there is a great deal to discuss."

He dismissed any ideas that the weather could reduce the North Sea's appeal to cruise lines. "There are many cruise customers who are not looking for brilliant sunshine but are interested in cultural visits and attractions," he said. "I think it is a question of identifying opportunities and engaging in discussion with the cruise lines about increasing their itineraries in the region. An awful lot of factors go into the itinerary planning process and it is very important for regions to address all these considerations."

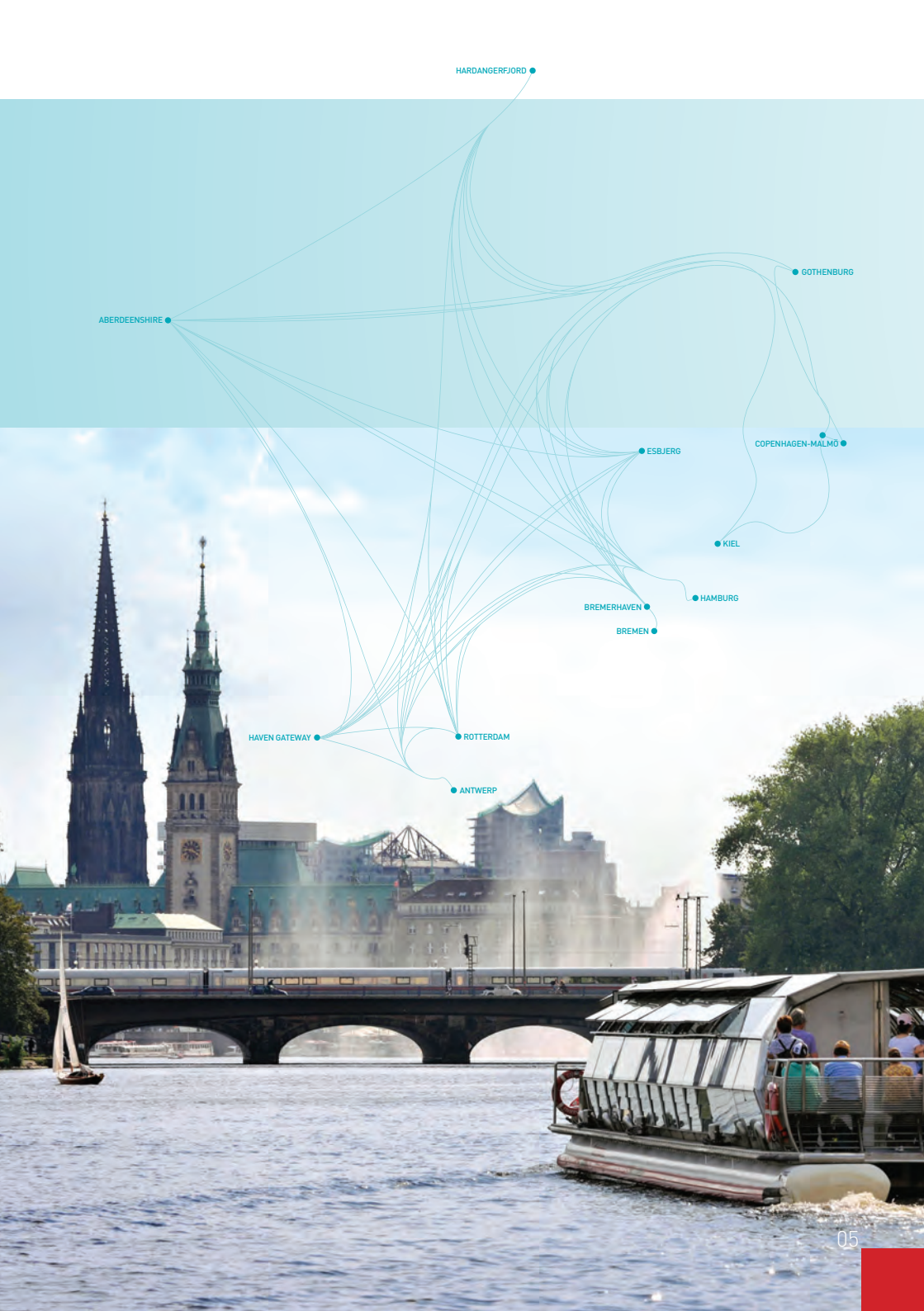
One conclusion from the discussions was that the rising price of fuel could prove a major advantage

to ports in the North Sea Region. "Cruise lines are very conscious of maximising their fuel economy and are tending to favour itineraries which enable them to steam more slowly in order. That means they are looking for ports which are quite close together – offering a short hop to the next destination," said Chris Hayman.

Cruise Gateway delegates returned to Hamburg in September 2011 to co-host the GreenPort Cruise Conference. Key points raised at this event included: environmental concerns pose the biggest challenge for the cruise sector; popular cities face the risk of being swamped by thousands of cruise passengers; everyone wants to be green – but not many want to pay the price; and ports looking to serve the cruise sector need to ensure that the required waste water, garbage and recycling facilities are in place.

The conference was opened by Dr Bernd Egert, state secretary of the Hamburg Ministry of Economy, Transport and Innovation, and the moderator was cruise specialist Tony Peisley.

Among the speakers, Robert Ashdown, technical, environmental and operational director at the European Cruise Council, emphasised that environmental issues have risen dramatically on the cruise lines' agenda – and not only because of regulation. "It is really important to be doing the right thing and demonstrate to our guests that our ships are as environmentally friendly as they can be," he said.



HARDANGERFJORD

GOTHENBURG

ABERDEENSHIRE

COPENHAGEN-MALMÖ

ESBJERG

KIEL

BREMERHAVEN

HAMBURG

BREMEN

HAVEN GATEWAY

ROTTERDAM

ANTWERP



MAY 2011: KIEL

PROVIDING BEST-QUALITY LOGISTICS



Icelandic ash clouds, with their tendency to throw air travel plans into confusion, certainly refocused attention on the virtues of sea travel in 2011.

That message was particularly relevant for the Cruise Gateway workshop held in Kiel. Despite some flight cancellations and the closing of air space over parts of Europe, partners made their way to Kiel for discussions on providing best-quality logistics services to cruise ships.

The workshop was hosted by the Port of Kiel where, before the discussions opened, participants

were able to walk to the Cruise Terminal Ostseekai to view the disembarkation, supply and provisioning, and later embarkation of the *AIDAcara*.

The practical organisation of the embarkation and disembarkation of cruise ships was discussed, to tie in with the terminal tour.

Participants also heard about proposals at the Port of Gothenburg related to innovative water waste handling for cruise ships in ports.

SEPTEMBER 2011: GOTHENBURG

ENVIRONMENTAL COMMITMENT IN PRACTICE

Gothenburg hosted a workshop on environmental certification, during which Peer-Erik Carlsson, representing the City of Gothenburg, outlined a Diploma scheme which gives companies, institutions and also events official recognition for their environmental management systems.

The scheme, created in the mid-1990s by the City of Gothenburg and the wider region, was initially mainly aimed at SMEs but has since been developed for municipal offices and many other organisations.

Those meeting all the criteria – including compliance with environmental regulations and a checklist of ‘green’ requirements – can use the Diploma scheme logo for a year before re-auditing is required.

Cruise Gateway delegates returned to Gothenburg in September 2012 for a ‘sustainability’ best practice tour. Here, the clear message was that doing enough to meet the legal requirements on environmental care is one thing, but going further, on a voluntary basis, is quite another.

The port and city of Gothenburg provided a green agenda and green inspiration; the event included visits to ferry and cruise terminals at the port, as well as other environmentally friendly facilities.

Delegates visited the West Sweden Tourist Board, to hear about its integrated quality scheme with its holistic sustainable approach for the whole nation; the energy-efficient Gothia Tower, a hotel, exhibition and conference facility now being extended, with the whole building to be certified in accordance




with the international environmental standard, BREEAM; and the ‘climate smart’ Gothenburg Landvetter Airport.

The lessons learned from the event were taken forward in the Cruise Gateway project, tying in with further work on sustainability which brought together best practice examples and considered their application across the North Sea Region.



FEBRUARY 2012: COPENHAGEN-MALMØ

STRIVING FOR ENERGY EFFICIENCY



Onshore power (cold ironing) and cruise ship fuelling solutions such as LNG, hybrid and low-sulphur fuel were discussed at an 'Energy Efficient Terminal' workshop hosted by Copenhagen-Malmö Port (CMP).

Among the speakers was naval architect Robert Segercrantz, of Deltamarin, who told delegates that investments in providing onshore power for cruise ships are huge compared with the results. Efforts to reduce emissions from cruise ships should have a much broader focus, he said.

He identified a series of 'threats' to cold ironing operations: too loose standardisation of port equipment; high investment costs at the port; too few ports joining the 'pool'; commercial uncertainties; high investment costs on existing ships; alternative environmentally friendly technologies; and the fact that even on newbuildings, the provision of cold ironing capability is sometimes only ranked 'nice to have'.

Also at the workshop, CMP's head of construction, Peter Landgren, outlined details of Copenhagen's new cruise terminal, which has been designed with a special focus on energy efficiency and environmental solutions, including green roofs for insulation from cold and heat, solar energy panels, and a sustainable indoor climate solution, as well as elaborate systems for waste water reception to prevent smells.

JUNE 2012: BREMERHAVEN

FOCUS ON SHORE EXCURSIONS



What do cruise passengers want from a shore excursion? What do the cruise lines expect? And what can excursion organisers and cruise destinations do to ensure they provide attractive options and make the most of the economic opportunities from serving the cruise sector?

These were some of the questions tackled at a conference entitled 'Shore excursions for transit passengers: how to develop a successful cruise destination/cruise port', organised in the Columbus Cruise Center Bremerhaven.

The conference programme included a presentation by Prof Dr Martin Lohmann, managing director of the Institute of Tourism Research in Northern Europe (Kiel), who considered demand dynamics and consumer orientation in cruise holidays, including an analysis of long-term market research data for Germany as a source market for the cruise industry.

Helge Grammerstorf, of SeaConsult HAM, presented the early findings of a Cruise Gateway study into the decision criteria for cruise port selection in the North Sea Region.

Discussions focused on the success criteria for transit calls and the practical aspects of choosing a transit port of call. Delegates boarded the *MS Oceana* to travel from Bremerhaven to Bremen.

Speakers included Thomas Gleiss, cruise director *MS Albatros*, Phoenix Reisen, who explained what made shore excursions suitable for his cruise passengers. Bernd Brümmer, cruise tourism manager of the Reisebüro Koch, talked about shore excursions from the perspective of the passenger, and Jochem Schöttler, of Bremerhaven Tourist Board, outlined the expectations from a cruise destination's point of view.





SEPTEMBER 2012: HAVEN GATEWAY

MID-TERM CONFERENCE: PROGRESS SO FAR

Halfway through the busy Cruise Gateway programme, partners travelled to the Haven Gateway, where a mid-term conference was held in Colchester and Harwich.

At this event, SeaConsult presented the full report and findings of its study into 'Decision Criteria for Cruise Port Selection in the North Sea Region'. As Helge Grammerstorf, managing director of SeaConsult, pointed out, the analysis highlighted a significant difference between the priorities and perceptions of cruise lines and the ports that serve them.

In addition, he said: "Ports don't treat cruise lines like customers. The cruise lines said 'we are not on the same side of the table – we want to be treated like customers'."

The report highlighted the lack of a clear identity for the North Sea Region but, he said: "This identity could be built up in the future."

Something more difficult to tackle will be the impact of the new Emission Control Area (ECA) regulations which will force ships in the North Sea Region to use low-sulphur fuel from 2015. Cruise lines faced with higher fuel costs are likely to put pressure on ports to reduce their rates, warned Helge Grammerstorf. "Remote ports may have to reduce their port costs to compensate for rising fuel costs, if they are to stay attractive."

However, Sebastian Doderer, representing the Cruise Gateway project's lead partner, Port of Hamburg Marketing, reported that research revealed that many passengers would be prepared to pay a little more for a cruise if they knew the cruise line supported sustainability efforts. Some 35% of those questioned said they would pay €50 more; 15% said they would pay €100, and 15% said they would pay more than €100, he said. "What was surprising for us was that they were willing to pay at all."

Other speakers at the mid-term conference included Nathan Philpot, sales and marketing director of Fred. Olsen Cruise Lines, and James Berresford, chief executive of VisitEngland.



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THEIR PORT COSTS TO COMPENSATE
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TO STAY ATTRACTIVE.”





MARCH 2013: ANTWERP STRATEGIES AND POLICIES

Innovative ways in which ports and cities can attract more cruise vessel calls were discussed at a 'Cruise and Political Perspectives' workshop, hosted by the City of Antwerp/Tourism.

A particular focus was on the successful strategy and policies adopted by Antwerp, which has delivered successful growth in cruise business for the city.

In the 1980s, Antwerp had no policy at all – cruise was a matter of individual approach by city, port authority and partners, with no coherent or consistent message and no collective marketing.

A Cruise Policy established in 1990 brought together city and port with the ambition to develop Antwerp as a cruise destination, define a marketing vision, establish clear procedures regarding the marine approach, create a 'task force' for recommendations and consider possible investments.

However, the creation in 2008 of Antwerp Cruise Port was the turning point. This formal cooperation between the city and the port authority has benefited from joint efforts to strengthen cruise tourism, providing a one-stop-shop for all cruise-related matters.

"This is a combination of marketing and marine expertise," said Kattina Glasinovich, cruise manager of Antwerp Cruise Port. "Antwerp Cruise Port is a partner for all cruise-related matters, sending out one message to the industry and partners, paying full attention to safety and security, and working as one on the needs of passengers, cruise line and

ship's staff and crew. As a result, Antwerp has developed as a cruise destination and seen a strong increase in the number of cruise calls and passengers."

During the workshop, Peter Mathieu, CEO of Cruise Connection and chairman of Cruise & Ferry World, gave an outline of the Belgian and world cruise market. More than 6 million Europeans took a cruise in 2011, he said. "With a steady growth of 9%, cruise vacations are continuing to race ahead in popularity in Europe."

However, he added, the aftermath of the *Costa Concordia* tragedy, combined with the economic downturn, had seen a drop in cruise passengers from some countries.

"After years of continuous growth, 2012 has not been the brightest year in our history. Nevertheless, the potential is here and we're more than ever motivated to focus on gaining our rightful part of the market."



APRIL 2013: ESBJERG

‘WHITE SPOTS’ DEVELOPMENT

Ports and regions looking to break into the highly competitive cruise market need patience, commitment and a strategic approach – and it is vital that they identify the features and attractions that really differentiate them from the opposition.

That was the conclusion from a workshop entitled ‘White Spots Development’, hosted by the Port of Esbjerg.

“We are an offshore port – definitely a ‘white spot’ for cruising,” said Karin Rix Holländer, representing the Port of Esbjerg. “At present, offshore energy, including oil & gas and wind power, dominates our port – but that doesn’t mean we should not explore new opportunities for the future.”

The workshop discussed the possibility of using the wind and energy industry as a tourist attraction – for example, with boat trips to see the Horns Rev I and II offshore wind farms, which are very popular and often fully booked.

A focal point of the meeting was a presentation by two experts from Norway – Irene Siljan Vestby, manager at Telemarkreiser, and Jan Einar Skarding, marketing and logistics manager at the Port of Grenland. They gave a detailed explanation of their own project to attract cruise ship calls, giving advice based on their own experience.

A key message was that if an attraction is interesting enough to the tourist, that tourist is willing to travel quite a distance to get there. Also, different nationalities tend to find different things interesting, so it is important that cruise promotions differentiate and are very targeted.

“THE WORKSHOP DISCUSSED THE POSSIBILITY OF USING THE WIND AND ENERGY INDUSTRY AS A TOURIST ATTRACTION.”





MAY 2013: ABERDEENSHIRE

ACCESSING, AND PROTECTING, ICONIC ATTRACTIONS



A best practice tour and conference entitled ‘Cruise and Accessibility’ was hosted by Aberdeenshire, where top attractions include the Royal residence of Balmoral, the clifftop fortress of Dunnottar and numerous other castles.

The event picked up on Cruise Gateway’s central themes – of encouraging and promoting much more cruise activity in the North Sea Region, while also focusing on accessibility and sustainability, including the promotion of environmental awareness and eco-friendly transport structures.

The Aberdeenshire Northern Coastline was recently listed in National Geographic’s top 12 worldwide coastal destinations, chosen by a panel of 340 experts in sustainable tourism and destination stewardship.

Speakers at the conference included Andrea Nicholas, managing director of Green Business UK, which runs the national sustainable tourism certification scheme for the UK.

Delegates learned about the accessibility of the Aberdeenshire landscape and attractions through the ports of both Peterhead and Aberdeen.

Sebastian Doderer, representing Cruise Gateway’s lead partner, Port of Hamburg Marketing, said: “We chose Aberdeenshire for our best practice tour for the twin factors of the quality of the attractions on offer and the certification of attractions for Green Tourism, in which Scotland is a world leader. We could see first-hand what makes this such an attractive yet sustainable destination, with many iconic attractions on which to build a North Sea cruising package.”

JUNE 2013: HARDANGERFJORD

PRESERVING THE HARMONY

Quiet and harmonious landscapes, remote beauty spots, cultural cities and towns, traditional buildings and historic sites... all are much sought after by the world's cruise lines, seeking unique experiences for their passengers.

But this raises a dilemma, as delegates heard at a 'Sustainable Shore Excursions' conference hosted by Cruise Destination Hardangerfjord: how can those sites, whether fragile buildings or sensitive countryside, be protected from the damage that can be caused by too many visitors? And how can a beautiful, peaceful landscape (and its residents) cope with the influx of thousands of visitors and still retain its character and special qualities, for now and for the future?

The issues were considered in depth by a series of speakers from both cruise lines and cruise destinations.

Hardangerfjord's five small ports will receive more than 120 cruise calls in 2012. In a move to protect the sensitive environment, a limit has been imposed of no more than 4,000 passengers in one day.

"Our profile is harmony in association with great nature – no congestion or mass tourism," said Anved Johan Tveit, mayor of Eidfjord. "Our nature and cultural heritage are too valuable to be spoiled by a large number of tourists every day. But, at the same time, we are proud of our attractions – so our aim is a balance between use and protection."

If Hardangerfjord is to remain a tourism destination for the future, he added: "We have to find a way



to preserve the landscape and culture, the main reasons for visiting us."

Other speakers included Ingunn Sørnes, of Innovation Norway, who described the country's strategy of sustainability as a baseline for all tourism development; Cruise Norway managing director Wenche Eeg Nygård, who talked about the importance of protecting Norway as the world's best nature-based cruise destination; and Gela Gudlat of AIDA Cruises and Samantha Richardson of Carnival UK, who each gave their views on how the cruise industry was working to achieve environmental protection and balance.

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