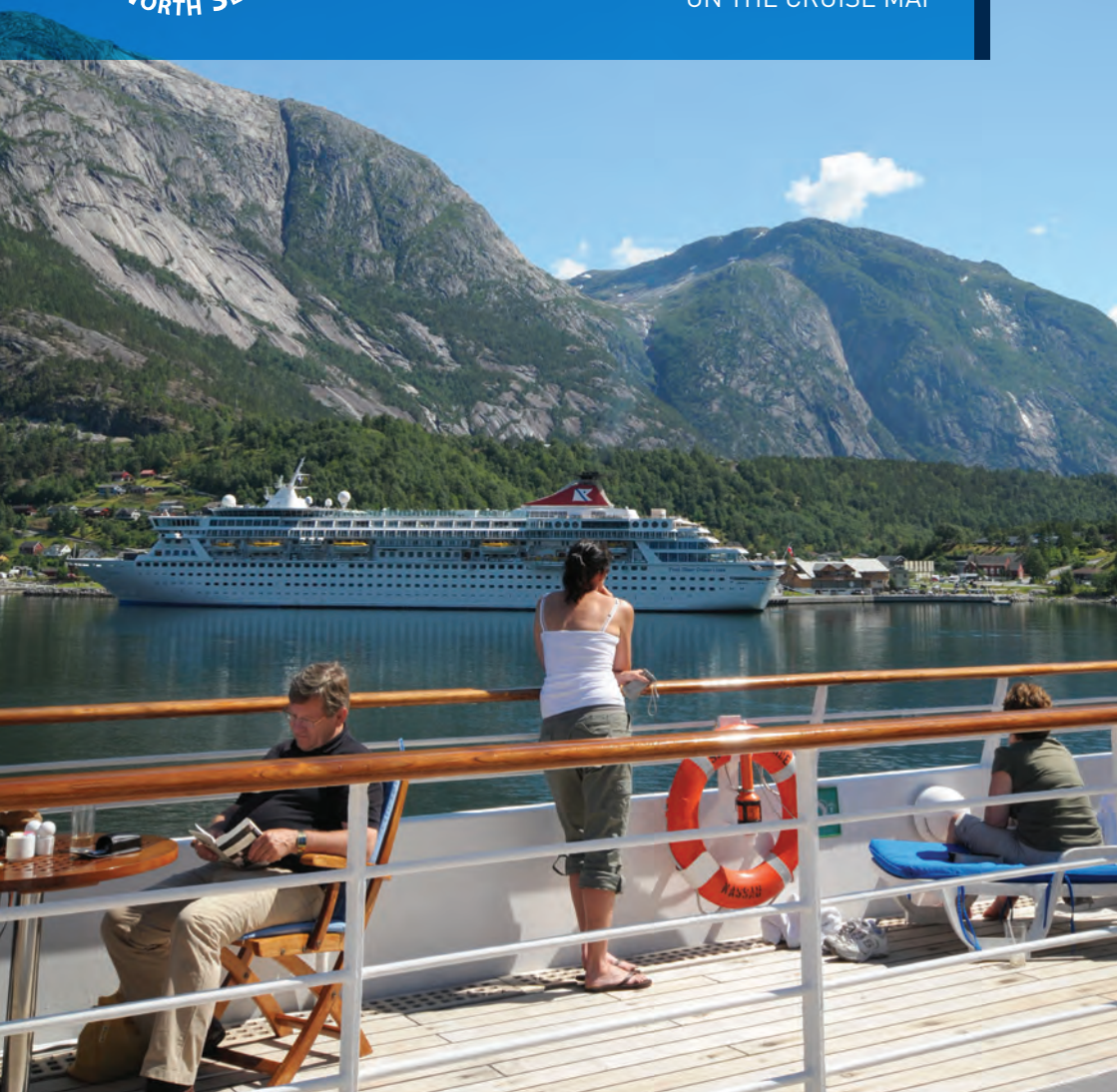




# CRUISE GATEWAY NORTH SEA

→ PUTTING THE NORTH SEA REGION  
ON THE CRUISE MAP



# PUTTING THE NORTH SEA REGION ON THE CRUISE MAP

The North Sea Region offers breathtaking diversity: heritage and culture, dramatic scenery and peaceful landscapes, dynamic cities and peaceful, traditional villages, modern architecture and ancient buildings. In short, it offers an unbeatable and unique mix of destinations and attractions for the cruise industry – with the added advantages of short steaming distances and excellent accessibility.



And yet, while Europe has seen cruise tourism increase rapidly in recent years, the focus has, until now, been far more on the Baltic and Mediterranean Seas. The North Sea Region has not been recognised as a major cruise destination in its own right. Or, put more positively, the North Sea Region is a fantastic destination just waiting to be discovered.

Cruise Gateway North Sea was set up to challenge the status quo and find ways to encourage far more cruise activity – while establishing the North Sea Region as a ‘beacon for sustainable cruise’.

This three-year EU Interreg B North Sea Region project brought together 12 partners from seven countries, representing cruise ports, marketing associations, councils and cities. The partners vary from major, established players in the cruise sector to smaller ports just beginning to test the waters for cruise opportunities.

Each partner has brought their own specific set of experiences and ideas to the discussions, as they have worked together to develop and promote the cruise industry, while taking into account other considerations such as environmental awareness, eco-friendly transport structures, avoiding congestion, and recognising the risk of damage that too many visitors can bring to sensitive sites.



## THE MAIN STRANDS OF CRUISE GATEWAY'S WORK HAVE BEEN FOCUSED THROUGH THREE WORK PACKAGES:

1

### **Marketing & Branding North Sea Region cruise:**

Workshops, conferences and a detailed best practice guide have focused on ways of building a marketing strategy and creating a 'Cruise Destination North Sea' identity, and of establishing an integrated approach amongst all stakeholders, promoting reliable, high quality services across all North Sea Region cruise ports. This Work Package included the production of 'Decision criteria for cruise port selection in the North Sea Region', an in-depth study of the priorities and perceptions of cruise lines and the ports that serve them – a report which touched on aspects relevant to all three Work Packages. In addition, a distinctive image brochure was commissioned and produced to give a broad view of how much the North Sea Region has to offer the cruise industry.

2

### **Cruise & Accessibility:**

Best practice tours and discussions were organised, complemented by the production of 'Decision criteria for cruise port selection in the North Sea Region'.

3

### **Cruise & Sustainability:**

Throughout the project, the emphasis has always been on environmental considerations – in line with the significant fuel savings that a North Sea rotation can offer cruise lines. Discussions have focused on delivering low-carbon and sustainable options, protecting sensitive sites and reducing environmental impact. A best practice guide entitled 'Sustainable cruise tourism in the North Sea Region', commissioned by Cruise Gateway, offers ports a unique framework. Additionally, Cruise Gateway commissioned a major research study into 'Incorporating sustainability in the branding strategy for cruising in the NSR'.

All of the strands of Cruise Gateway's work have been directed through these three main Work Packages, often with some obvious overlap between the three. Collectively the project has delivered material that is both fascinating and informative, providing the foundations for continued work to promote the North Sea Region to the world's cruise lines.

***Reports, workshop summaries and other analysis can be found at:***  
***[www.cruisegateway.eu](http://www.cruisegateway.eu)***



# MARKETING & BRANDING NORTH SEA REGION CRUISE



The opportunities and challenges in marketing the North Sea Region emerged at the very start of the project, with speakers raising relevant issues at Cruise Gateway's opening conference in Hamburg.

The aspect of sustainability has been highlighted again and again as a USP for the NSR, along with the concentration of diversity, cultural visits and attractions, and landscapes. However, from the earliest point of the project participants agreed that there was no clear image or identity for the NSR.

*A SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis of the NSR's situation demonstrated:*

## STRENGTHS

- Sustainability and concentration of diversity as USP
- Ports located quite close together: fuel cost-effective itineraries for cruise lines

## WEAKNESSES

- Cruise Gateway is only a selection of ports in the NSR
- Inconsistent port security standards across Europe and the world

## OPPORTUNITIES

- Citizens as ambassadors of cruise port and city
- Further development to year-round cruise calls in the NSR destinations
- Growing cruise market all over the world

## THREATS

- Lack of maritime identity for the NSR
- Too many cruise networks overlapping

## Bremerhaven conference considers shore excursions

A Cruise Gateway conference entitled 'Shore excursions for passengers – how to develop a successful cruise destination/cruise port' was organised in the Columbus Cruise Center Bremerhaven.

The conference raised questions such as: 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?

Michael Schulze of Phoenix Reisen listed some of the important facts to consider for the cruise line. These included fair and consistent rates; friendliness and welcome of the port; a convenient number and quality of guides and buses; the attractiveness of the port; the distances to sights; easy access to the city and port entrance; and 'authentic tours without mass market character'.

Prof Dr Martin Lohmann, managing director of the Institute of Tourism Research in Northern Europe (Kiel), considered demand dynamics and consumer orientation in cruise holidays. He stated that the basic consumer requirements relating to shore excursions include: transport reliability (get me back to the ship in time); not in too big a crowd and not alone either; not in a rush; efficiency regarding transport and waiting/organisational time; and accessible, including for individual passengers looking to strike out on their own as well as groups and less able people.



## KEY WORK PACKAGE ACTIVITIES:

### **An online survey on the NSR's characteristics, image and sustainability aspects:**

Based on responses, this demonstrated that nature is a very important aspect, with fjord scenery being the most highlighted. However, the weather has an unfavourable image, being perceived as windy and cold. Maritime culture and historical heritage were key attractions. And crucially, the survey showed a willingness to pay more for sustainability.

### **Participation in the GreenPort Cruise Conference:**

This included discussions on environmental certification, sustainable land-based cruise tourism, and the tasks and challenges of cruise ports.

### **An in-depth study into 'Decision criteria for cruise port selection in the North Sea Region':**

This report was commissioned to find out about the USPs of the NSR and the requirements of cruise lines choosing their turnaround ports and ports of call. Some 18 cruise lines were interviewed as well as 14 ports – and the report revealed some telling differences when it comes to the priorities named by cruise lines and the ports that handle cruise business.

The importance of a clean and safe berth, sufficient luggage handling space and parking areas were priorities named by both cruise lines and ports. However, while cruise lines rated factors such as gangways, an efficient cruise terminal and simple port procedures as vital requirements at turnaround ports, the ports questioned rated these far lower in importance.

Ports, meanwhile, rated services such as bunkering facilities, crew areas and tourist information far more importantly than cruise lines did.

A key issue highlighted was the relationship between ports and the cruise lines they serve. "Ports don't treat cruise lines like customers," said Helge Grammerstorf, managing director of SeaConsult, presenting the report at the mid-term conference. "The cruise lines said 'we are not on the same side of the table – we want to be treated like customers'."

Something more difficult to predict is the impact of the 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."

**To read the full report, visit:**  
**[www.cruisegateway.eu](http://www.cruisegateway.eu)**





# CRUISE & ACCESSIBILITY



**Accessibility – to ports, to services and to onshore visitor attractions – is of major importance for cruise lines looking for smooth port calls and easily organised shore excursions.**

Again, some of the key issues were highlighted in cruise lines' responses when interviewed for the Cruise Gateway 'Decision criteria' report outlined in previous pages. Among those listed as most important were safety and security; nautical accessibility; reliable berthing; geographical location; variety and quality of shore excursion options; cleanliness of quayside, port and destination; and proximity of berths to the city centre.

Cruise Gateway's discussions and analysis considered the full range of issues, from the provision of logistics services and supplies to cruise ships to improving service quality in port and avoiding bottlenecks.

## **Best-quality logistics**

Cruise Gateway partners gathered in Kiel for a workshop which discussed the provision of best-quality logistics services to cruise ships and the efficient organisation of embarkation and disembarkation.

The workshop took place as European air travel was disrupted by the Icelandic ash clouds – a situation that led to many people reconsidering their holiday plans and thinking again about the opportunities offered by ferry and cruise travel.



### 'White spots' development

The Port of Esbjerg hosted a workshop entitled 'White Spots Development', which considered strategies that could be adopted by ports and regions looking to break into the highly competitive cruise market.

Speakers emphasised the need for patience, commitment and a strategic approach – as well as the need to identify features and attractions that really differentiate them from the opposition.

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.

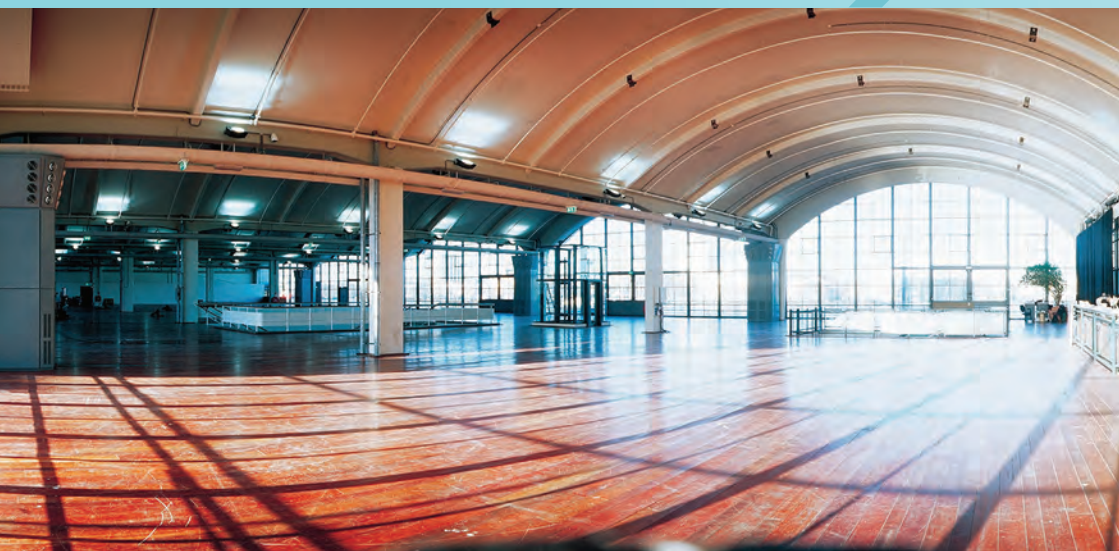
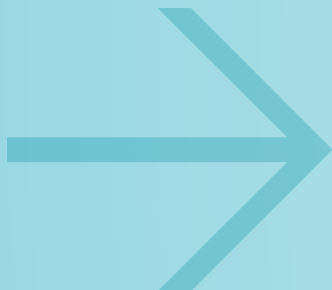
A key message was that if an attraction is interesting enough to the tourist, that tourist is willing to travel quite a distance to get there. Also, different nationalities tend to find different things interesting, so it is important that cruise promotions differentiate and are very targeted.

### BEST PRACTICE TOUR:

- A best practice tour 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.



# CRUISE & SUSTAINABILITY

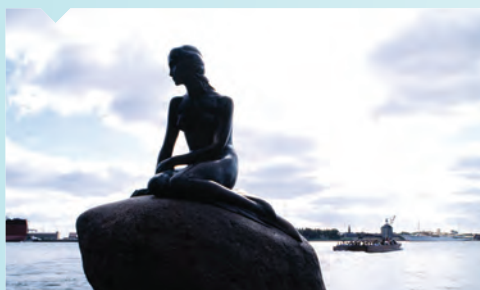


Sustainability has been the common thread throughout Cruise Gateway's projects, workshops, conferences and reports – including the promotion of environmental awareness and eco-friendly transport structures, discussing ways to avoid congestion and analysing the socio-economic impact of cruises.

From the start, the Cruise Gateway partners were clear in their intention to develop and promote the North Sea Region as a 'beacon for sustainable cruise'.

Workshops have centred around the best examples of minimising energy consumption and improving 'green' features in cruise terminals; how to organise passenger excursions without a special destination or beautiful area being damaged by too many visitors; how to seek out and develop shore excursions with a 'green' theme; and how to encourage more use of low-carbon transport options to and from the ship.





## KEY WORK PACKAGE ACTIVITIES:

### **A major report to examine good practices regarding sustainability in the North Sea Region:**

Policy Research provided detailed background information and made a number of key recommendations which can support North Sea Region ports in considering how to use sustainability initiatives and achievements for branding purposes.

This report considered sustainability from three perspectives: environment, society and economy; and it considered the relative importance of sustainability for cruise passengers. It also outlined existing measures for sustainability at European, national and local level.

Specifically, measures such as reducing ship's emissions in port, through a system of tariff discounts for environmentally friendly ships, through the provision of onshore power ('cold ironing') and through the use of cleaner fuels while in the port area, were discussed.

'Greener' operations in cruise terminals were also analysed, including improving energy efficiency, saving water, using renewable energy and installing LED lighting.

### **Sustainable cruise tourism in the North Sea Region, a best practice guide:**

This guide provides a framework and strategy for sustainable cruise tourism, split into four categories: environmental, economic and social, as the cornerstones for any approach to sustainability, and technical, focusing on the process of delivering a high quality sustainable tourism product.

### **Copenhagen-Malmø conference:**

Onshore power and cruise ship fuelling solutions such as LNG, hybrid and low-sulphur fuel were among the issues discussed at an 'Energy Efficient Terminal' conference. 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.

### **Gothenburg conference:**

Doing enough to meet the legal requirements on environmental care is one thing – going further, on a voluntary basis, is quite another. This was the clear message at a best practice tour which included visits to ferry and cruise terminals at the Port of Gothenburg as well as other environmentally friendly facilities.

### **Hardangerfjord conference:**

A 'Sustainable Shore Excursions' conference hosted by Cruise Destination Hardangerfjord considered some tricky questions: How can fragile buildings and sensitive countryside can 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?

**To read the full report, visit:**

**[www.e-magin.se/v5/viewer/files/viewer\\_s.aspx?gKey=ntbsg027&glnitPage=1](http://www.e-magin.se/v5/viewer/files/viewer_s.aspx?gKey=ntbsg027&glnitPage=1)**

# CRUISE GATEWAY CONCLUSIONS



When the partners of Cruise Gateway North Sea first began work together, it was already clear that, despite the ongoing financial crisis in Europe and beyond, the cruise sector remained strong and the number of people 'choosing to cruise' was continuing to rise.

Throughout the project's discussions and conferences, experts from the sector have given their views on the future direction of the cruise market and where the North Sea Region could – and should – fit into this.

There were positive views on the North Sea Region's potential from many speakers at Cruise Gateway's opening conference.

Among them, Chris Hayman, chairman of Seatrade, said the ever-increasing price of fuel could be an important factor. Cruise lines are very conscious of maximising their fuel economy and consequently are tending to favour itineraries which enable them to steam more slowly, he said. That means they are looking for ports that are quite close together – offering a short 'hop' to the next destination. The opportunities presented by the North Sea Region perfectly match this.

Sustainability has been consistently mentioned as the USP of the North Sea Region's cruise offering, as well as the concentration of diversity, cultural visits and attractions, and landscapes.

The length of season is another issue: so far, the cruise market has tended to be a seasonal business in Northern Europe but with Hamburg

and other NSR ports emerging to year-round destinations based on attractions such as the Christmas Markets, this could easily change.

Finally, the fact that the North Sea Region seems a bit of a 'best kept secret' is also one of its strengths. Major players in the cruise market are looking to offer something 'different' to their customers. Therefore, these cruise lines are constantly searching for less penetrated markets and new and unexpected shore excursion ideas. Here, again, the ports of the North Sea Region have a huge amount to offer.

As was pointed out at the Cruise Gateway workshop 'Cruise and Political Perspectives', hosted by the City of Antwerp/Tourism, more than six million Europeans took a cruise in 2011 and the continent has in recent years benefited from a steady growth of 9% annually. The UK, Germany and Italy remain the market share leaders but other countries have been showing remarkable growth: passengers from the Benelux countries taking a cruise increased by 26% in 2011, while cruisers from Switzerland increased by 33%.

Speaking at the Antwerp conference, Peter Mathieu, CEO of Cruise Connection and chairman of Cruise & Ferry World, 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.”

A notable event in the Cruise Gateway calendar was the ‘Sustainable Shore Excursions’ conference hosted by Cruise Destination Hardangerfjord in June 2013, at which the issues of protecting sensitive and beautiful landscapes and destinations were considered in depth by a series of speakers and in panel discussions.

The findings of the ‘Decision criteria for cruise port selection in the NSR’ report commissioned by Cruise Gateway was a massive turning point for the project, laying bare some dramatic differences in perceptions and priorities between cruise lines and the cruise ports that serve them.

Stakeholders will learn from these findings – and also from the results of the project’s online survey, in which 35% of passengers said they would be willing to pay €50 more for their cruise if they knew that the cruise line supported sustainability efforts. That provided further support for promoting sustainability as a USP. For the partners in Cruise Gateway North Sea, there are therefore strong reasons for optimism.



## CONTACT DETAILS:

### LEAD PARTNER:

PORT OF HAMBURG MARKETING

ADINA CAILLIAUX

T: +49 40 37709 172

E: cailliaux@hafen-hamburg.de

### HAMBURG CRUISE CENTER

NADINE PALATZ

T: +49 40 30051393

E: palatz@hamburg-tourism.de

### RICHARD MORTON

COMMUNICATIONS MANAGER

T: +44 7796 334960

E: richard@juraassociates.com

### BUSINESS PARTNER:

UNICONSLT

HANS-ULRICH WOLFF

T: + 49 40 74008 105

E: u.wolff@uniconsult-hamburg.de



[www.cruisegateway.eu](http://www.cruisegateway.eu)

European Union



The European Regional Development Fund

The **Interreg IVB**  
North Sea Region  
Programme



*Investing in the future by working together  
for a sustainable and competitive region*