



Waterways for Growth Analysis of the German river and ocean cruise market

BIS Bremerhavener Gesellschaft für
Investitionsförderung und Stadtentwicklung mbH
Bremerhaven Tourism

1. Current situation
2. River cruises
 - 2.1. Overview of the market
 - 2.2. Conversations with industry experts
 - 2.3. SWOT: developing potential strategies
 - 2.4. Itineraries
3. Ocean cruise market
 - 3.1. Overview of the market
 - 3.2. Major cruise lines
 - 3.3. Itineraries in Northern and Western Europe
 - 3.4. Calls in Bremerhaven
4. Unique selling points/positioning for Bremerhaven
5. Integrating other interest groups
 - 5.1. Day and overnight visitors
 - 5.2. Retail, restaurants and leisure facilities
6. Bremerhaven's strengths and weaknesses
7. Sales structure recommendation

8. Presentations for acquisition of cruise lines with possible modular programs and shore excursion products
9. Trends
10. Analysis of German competitors
 - 10.1. Terminals
 - 10.2. Comparison of travel times
 - 10.3. Comparison of parking availability and costs
 - 10.4. Comparison of pilotage areas/pilot requirements
 - 10.5. Tourism infrastructure/excursions and destinations
11. Shore excursions

1. CURRENT SITUATION

1. Why does Bremerhaven want cruise passengers?

- Boost economic impact for Bremerhaven and the region through crew, passengers and handling of the ship
- Get new target groups for existing attractions (e.g., Klimahaus, German Emigration Center)
- Win over passengers as ambassadors for Bremerhaven and the region
- Use vessels as a tourist attraction to strengthen the maritime character of the city



2. RIVER CRUISES

River cruises – a potential source of additional customers

Market overview and Weser River's potential as a destination



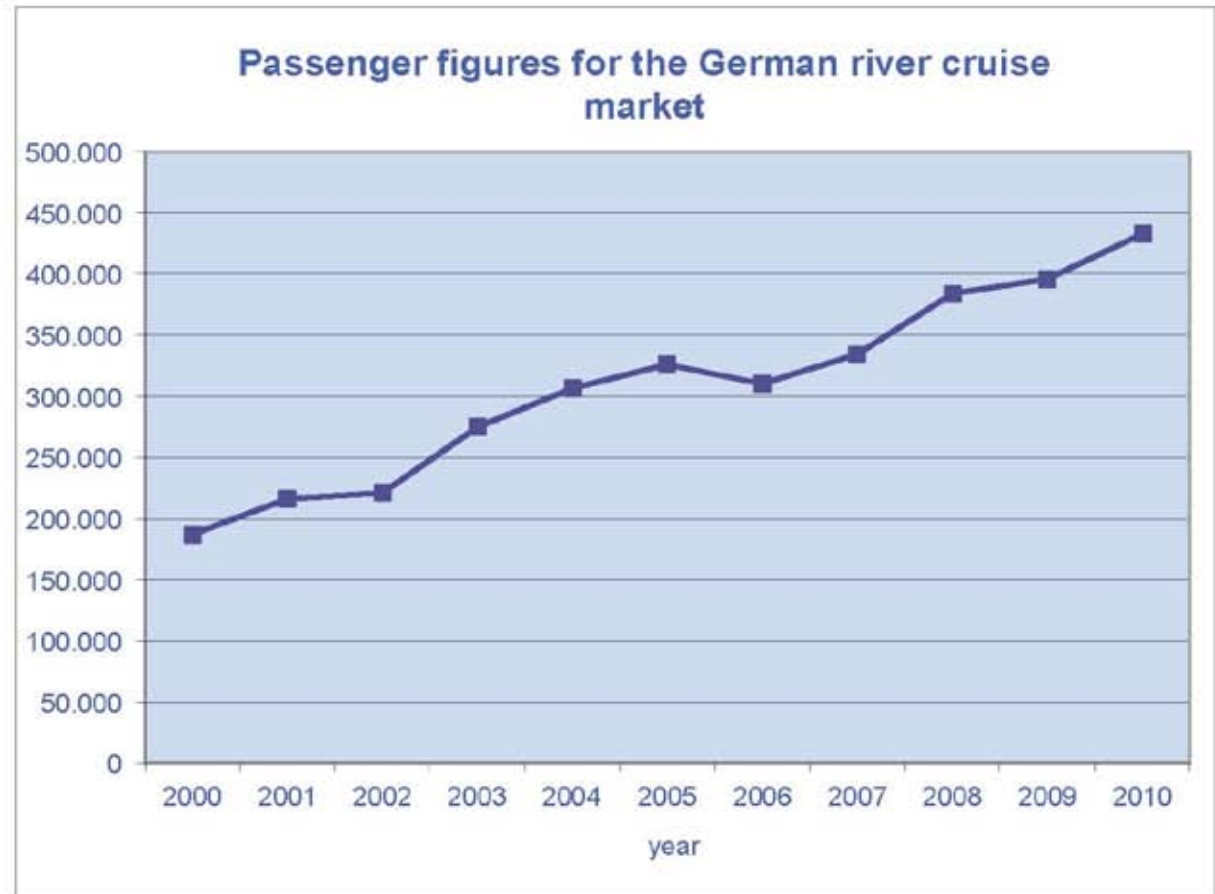
2.1. Passenger spending per day on river cruises

According to a survey conducted by Bonner Tourismus & Congress GmbH, the average river cruise passenger spends approximately €50 per port of call. Unfortunately, there is no specific breakdown of how/where this money is spent. However, it can be assumed that a river cruise passenger does not spend less than the average day visitor in Bremerhaven. On average, river cruise passengers are probably in a somewhat better financial position than day visitors as a whole.



2.1. Bremerhaven does not profit from the boom

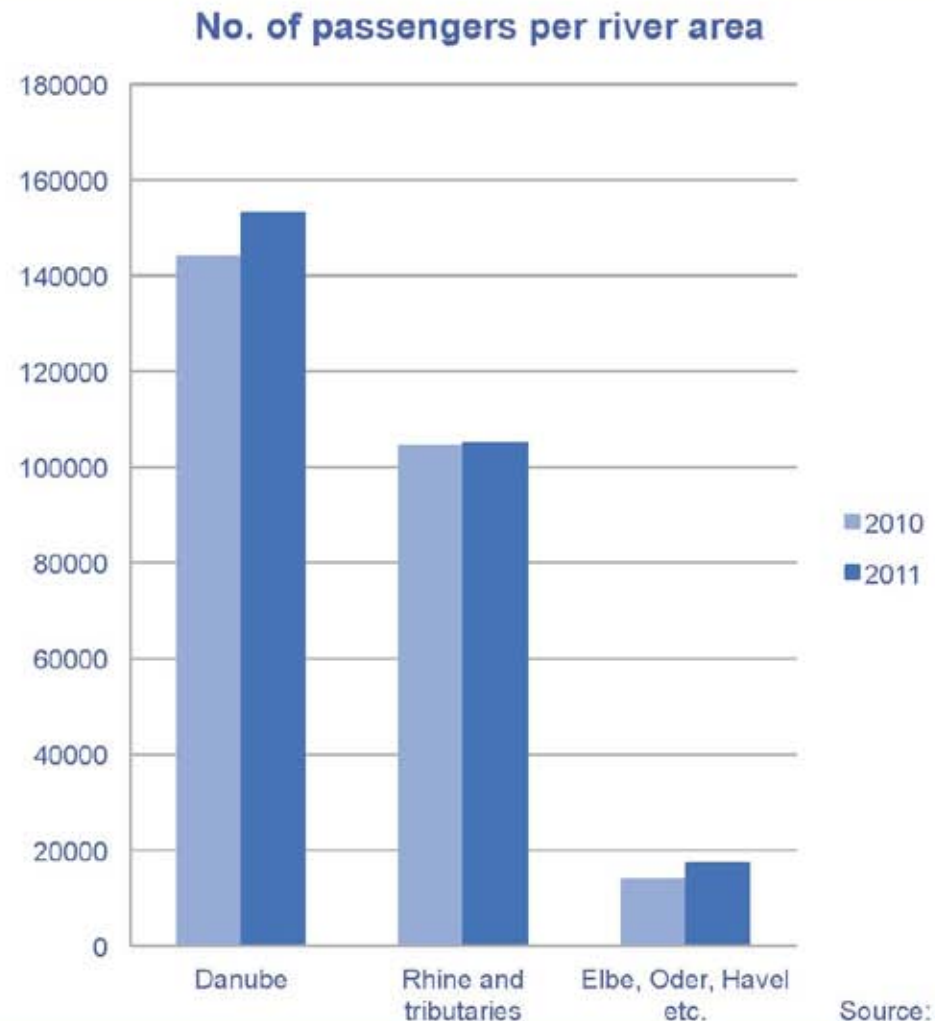
The river cruise market is also a growing market. Although slight stagnation was visible in 2012, the market remains at a high level. However, to date only a few river cruise ships call in Bremerhaven, and thus the city has not yet profited from this booming market.



Source: DRV

2.1. Market overview of river cruises in Germany

- About 30 tour operators
- Differentiation: destination areas, target groups, concept on board, price level, size of the vessels, number of operated vessels
- Destination areas in Germany are mainly: the Danube, the Rhine and its tributaries, and the Elbe and its tributaries
- About 460,000 Germans take a river cruise each year – and this number is growing



Source: DRV

Criterion	Ocean cruise	River cruise
Routing	Flexible, 360°	Follows river
Docked time	Daytime	Overnight
Sailing time	Overnight	Daytime
While sailing	Sea experience	Landscape experience
Age of target group	All age groups	Senior citizens

Table: Differences between ocean and river cruise.

Based on information from Schulz/Auer: *Kreuzfahrten und Schiffsverkehr im Tourismus*, 2010, p. 10, based on Schäfer, 1998

- River cruise ships also spend part of the day in port so guests can make shore excursions, but the sailing experience, with its views of the landscape from on board, is still an important part of the cruise for many passengers. The table above provides a good overview of the main differences between ocean and river cruises.

2.1. River cruise stakeholders

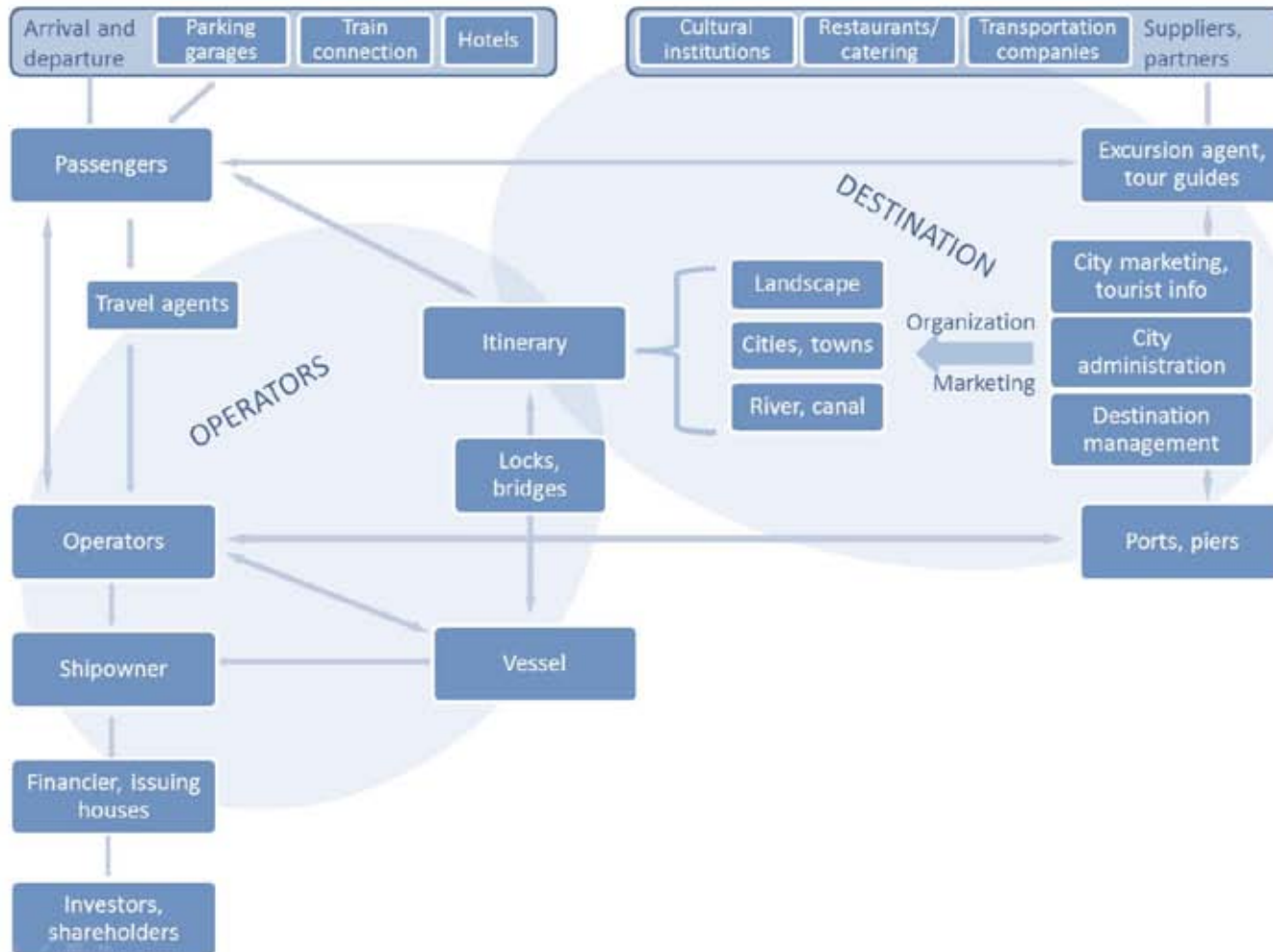


Figure: P&T GmbH

2.1. Stakeholders – river cruises

- In the river cruise market, the ownership, operation and marketing of river cruise vessels may be divided among various parties, which is generally not the case in the ocean cruise market. In the river cruise industry, the key contacts for destinations are tour operators, because they decide on the itineraries and which destinations will be made available.
- A fundamental criterion is the size of the ships and the waterways. Waterways are divided into different classes, each with different restrictions on vessel size. Large stretches of the Weser river are class IV; the Rhine and the Danube are predominantly classes V and VI. The decisive factors for determining navigability are water depth, bridge clearance and lock dimensions.

2.1. Waterways in Northern Germany



Figure: North German Waterways. Excerpt from the Map of Federal Waterways, German Federal Waterways and Shipping Administration.

2.1. Cities on the Weser and main sections of the river

Section	From – to	Length	Draft
Oberweser (upper reaches)	Hann. Münden to Minden	213 km	ca. 1 m
Mittelweser (middle reaches)	Minden to Bremen	153 km	ca. 2.5 m
Unteres Weser (lower reaches)	Bremen to Bremerhaven	85 km	over 2.5 m

Figure: Sections of the Weser River. Based on information from the Waterways and Shipping Administration of the Federal Government (WSV).



Figure: Cities on the Weser.

Source: <http://weser-radweg.de/img/radkarte.png>

2.2. Conversations with industry experts

As part of a Bachelor's thesis, expert interviews on itinerary planning for river cruises were conducted with the following companies:

- 1AVista Reisen GmbH, Product management
- Global Kreuzfahrten, Travel agent specializing in cruises
- KD Bereederung, Product management for TransOcean
- KVS-tours, Authorized signatory/Product management
- Steffen Spiegel, Cruise director and lecturer
- TUI FlussGenuss, Operations management
- Viking, Vice President Nautic & Technic

The interviews identified specific opportunities and risks for destinations in the river cruise market, which will be presented on the following pages. Only a few concrete statements were made about the Weser. None of the interviewees mentioned the Weser, unaided, as a potential sailing area. Upon prompting, they named words such as "vastness," "nature" and "ocean." In this aspect, the Weser is most comparable to the sailing area of the Elbe.

2.3. SWOT: Opportunities and threats for destinations, strengths and weaknesses of the Weser – Overview

	Strengths of the Weser <ul style="list-style-type: none"> - Weser bike path - German Fairy Tale Road - Bremen - Lower Saxony, as THE vacation destination for Germans - New, untouched, not crowded - Hidden champions - Access to the sea 	Weaknesses of the Weser <ul style="list-style-type: none"> - Only for small ships (under 100 passengers) - Fluctuations in water level: sailing times subject to variation - Unknown outside the region - Few major cities - Short (easily navigable only between Minden and Bremerhaven)
Opportunities for destinations in the river cruise market <ul style="list-style-type: none"> - Potential further growth in the market - Increase in regular customers - Market shakeout → stronger differentiation among remaining operators, better/fresher image of the industry - New customer groups - Growing number of short trips - Growing number of themed trips 	SO strategies: <ul style="list-style-type: none"> - Offer something new for regular river cruise passengers - New catchment area closer to point of departure, for short trips - Overlap between target groups, similar requirements → synergies - Service: develop topics - Combination with ocean cruises 	WO strategies: <ul style="list-style-type: none"> - Niche offers tailored to different target groups, on small ships - Short trips - Combination with adjacent waterways - Image campaign to raise awareness
Threats for destinations in the river cruise market <ul style="list-style-type: none"> - Possible stagnation or shrinking of the market - Market shakeout → insolvencies - VAT increase: more itineraries abroad - Price increase: "bed tax," fuel - Some existing destination areas are overcrowded, limited number of berths 	ST strategies: <ul style="list-style-type: none"> - Marketing strategy: alternative to overcrowded destination areas - No "bed tax" on river vessels 	WT strategies: <ul style="list-style-type: none"> - Low/no investments

2.3. Opportunities and threats for destinations in the river cruise market

Opportunities

- 😊 Potential further growth of the market
- 😊 Increase of regular customers → need for new destination areas
- 😊 Market shakeout → stronger differentiation among remaining tour operators, better and more modern image of the industry
- 😊 New customer groups
- 😊 Growing number of short trips
- 😊 Growing number of themed trips

Threats

- 😞 Possible stagnation or shrinking of the market
- 😞 Market shakeout → insolvencies
- 😞 VAT increase in Germany: more itineraries in other countries
- 😞 Price increase: “bed tax”, fuel...
- 😞 Some existing destination areas are overcrowded, limited number of piers

2.3. Strengths and weaknesses of the Weser River as a river cruise destination

Strengths

- ☺ Already used by some tour operators
- ☺ Weser bicycle path → combination with bike cruises
- ☺ German Fairy Tale Road
- ☺ Bremen
- ☺ Lower Saxony is one of THE states where Germans spend their vacations (esp. on the coast)
- ☺ New, untouched, not crowded
- ☺ Hidden champions
- ☺ Access to the sea

Weaknesses

- ☹ Only for small ships (under 100 passengers) → not ideal for big tour operators
- ☹ Fluctuations in water level: sailing times subject to variation
- ☹ Unknown outside the region
- ☹ Few major cities
- ☹ Short (easily navigable only between Minden and Bremerhaven)
- ☹ Landscape not as attractive because there are no mountains

2.3. Possible strategies for the Weser

- Offer something new for regular river cruise customers
- New catchment area closer to point of departure, for short trips
- Target audiences for Bremerhaven and river cruises have similar needs → synergies
- Service: develop themes
- Combination with cruises on the North Sea
- Image campaign, increase publicity
- Low/no investments
- Niche offers, tailored to different target audiences, on small ships
- Short trips
- Combination with nearby waterways (e.g., Coastal Canal, Midland Canal)
- Marketing strategy: alternative to overcrowded destination areas
- No “bed tax” on river cruise vessels

2.4. Current Weser itineraries, 2012/13

Provider	Ship	Theme	Itinerary
Auto Fischer (Reisebüro aus Leer)	Sans Souci	From the Capital to the "Gate to Eastern Friesland" to Leer	Berlin, Potsdam, Magdeburg, Wolfsburg, Hanover, Minden, Bremen, Oldenburg, Leer (7 nights)
CroisiEurope	Mona Lisa	12 Days Along canals and Polders: from Berlin to Amsterdam	Berlin, Potsdam, Magdeburg, Hanover, Nienburg, Bremen, Papenburg, Groningen, Amsterdam (11 nights)
KVS-tours	Gretha van Holland	1,000 Faces of Germany on the Way to the Sea	Berlin, Brandenburg, Burg, Wolfsburg, Hanover, Minden, Nienburg, Bremen, BHV (9 nights)
KVS-tours	Mecklenburg	Shades of Autumn in the North: Magnificent Architecture – Sweeping Landscapes	Schwerin, Neustadt-Glewe, Dömitz, Lauenburg, Hamburg, Uelzen, Wolfsburg, Minden, Rinteln, Hamelin (10 nights)
KVS-tours	Mecklenburg	Golden Autumn Days: The Fabled Weser River from Hamelin to Bremerhaven	Hamelin, Rinteln, Minden, Nienburg, Bremen, BHV (6 nights)
Serenité River Cruising	Serenité	On the Waterways of Holland and Belgium	BHV, Oldenburg, Papenburg, Leer, Groningen, Sneek, Enkhuizen, Hoorn, Amsterdam (7 nights)
Serenité River Cruising	Serenité	Beautiful Germany	Berlin, Potsdam, Genthin, Magdeburg, Wolfsburg, Braunschweig, Minden, Nienburg, Bremen, BHV (8 nights)
TransOcean	Sans Souci	On the Trail of the Hanseatic League	Brussels, Vlissingen, Veere, Rotterdam, Kinderdijk, Amsterdam, Sneek, Groningen, Papenburg, Oldenburg, Bremen (10 nights)
TransOcean	Sans Souci	North to East – Natural Beauty & Technological Wonders	Bremen, Hoya, Minden, Hanover, Braunschweig, Wolfsburg, Tangermünde, Havelberg, Brandenburg, Berlin (7 nights)

Source: Brochures and webpages of operators 2012

2.4. Possible themed itineraries on the Weser

Theme	Stops
Hanseatic Cities	Hamburg, Lüneburg, Bremen
Fairy Tales and Legends	The Klabautermann and sailors' yarns in BHV, Town Musicians of Bremen; more on the Oberweser: the Pied Piper of Hamelin, Baron Münchhausen (Bodenwerder), etc.
"Everything that floats" "Ships, Ships and More Ships"	Papenburg (Meyer Werft shipyard), BHV (port, container terminal), Hamburg, in between tours on peat boats (e.g., Worpswede), sailboats, paddle boats...
Engineering Wonders	VW city Wolfsburg, Minden Aqueduct, Mercedes Bremen with off-road course, wind power industry in BHV

Because developing themed itineraries is time-consuming and complex for operators that are not in the area, it is advisable to offer to this as a service. At the same time, it is possible to influence the image that visitors get of the destination.

- Modular shore excursion programs can be used for both target audiences; seagoing passengers tend to ask for longer excursions, river cruise passengers often prefer to discover the area nearby
- Pier for river cruise vessels directly at the Havenwelten (Seebäderkaje)
- Combination of river and sea cruises from tour operators that offer both
- Broader range, less dependent on specific customers and markets

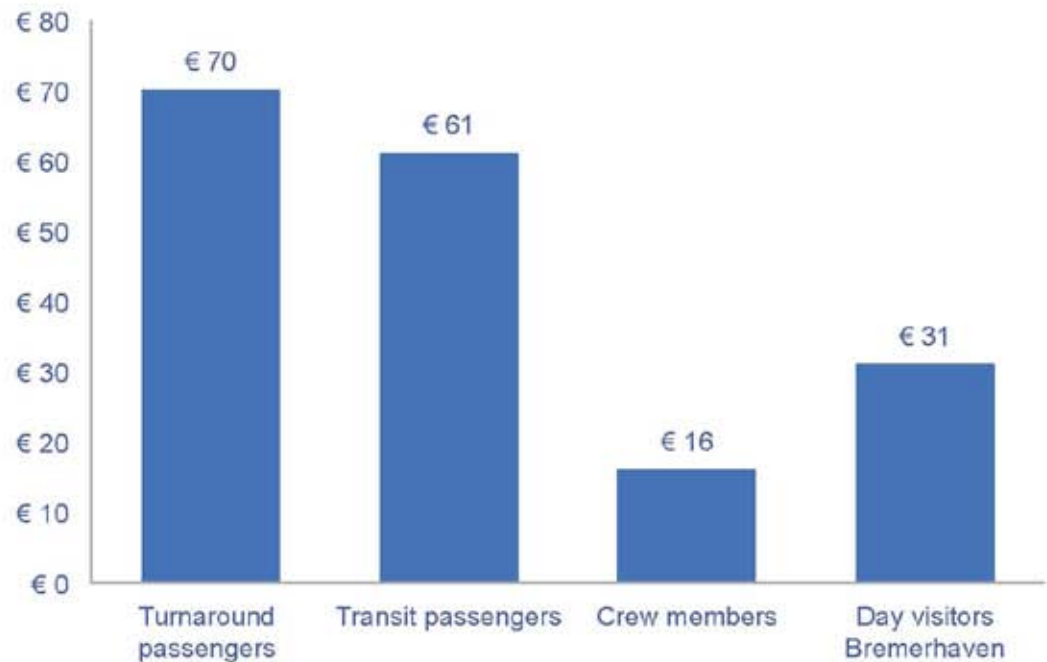


3. OCEAN CRUISE MARKET

3.1. Passenger expenditures per day

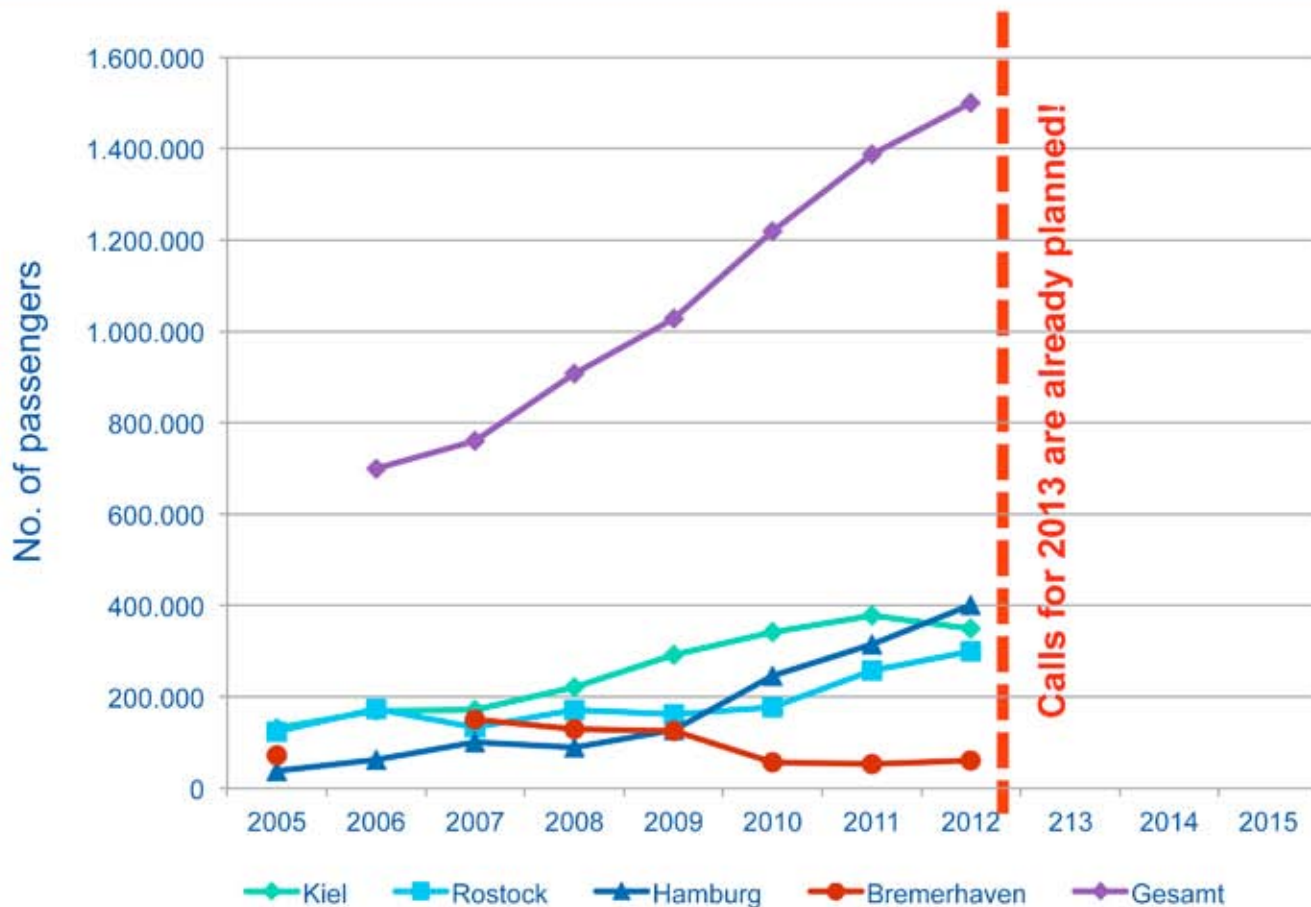
The economic impact generated by cruise ship passenger spending is difficult to measure. However, various questionnaires were used to determine approximate figures for the direct expenditures made by passengers and crew. This figure shows that, on average, cruise ship passengers spend more than day visitors in Bremerhaven.

According to the Hamburg Cruise Center (HCC), in 2009 each turnaround passenger spent €75 (excluding arrival/departure), while each transit passenger spent €22.



Source: European Cruise Council (ECC) 2011/12 Report, S. 22/23

3.1. Bremerhaven does not profit from the boom!

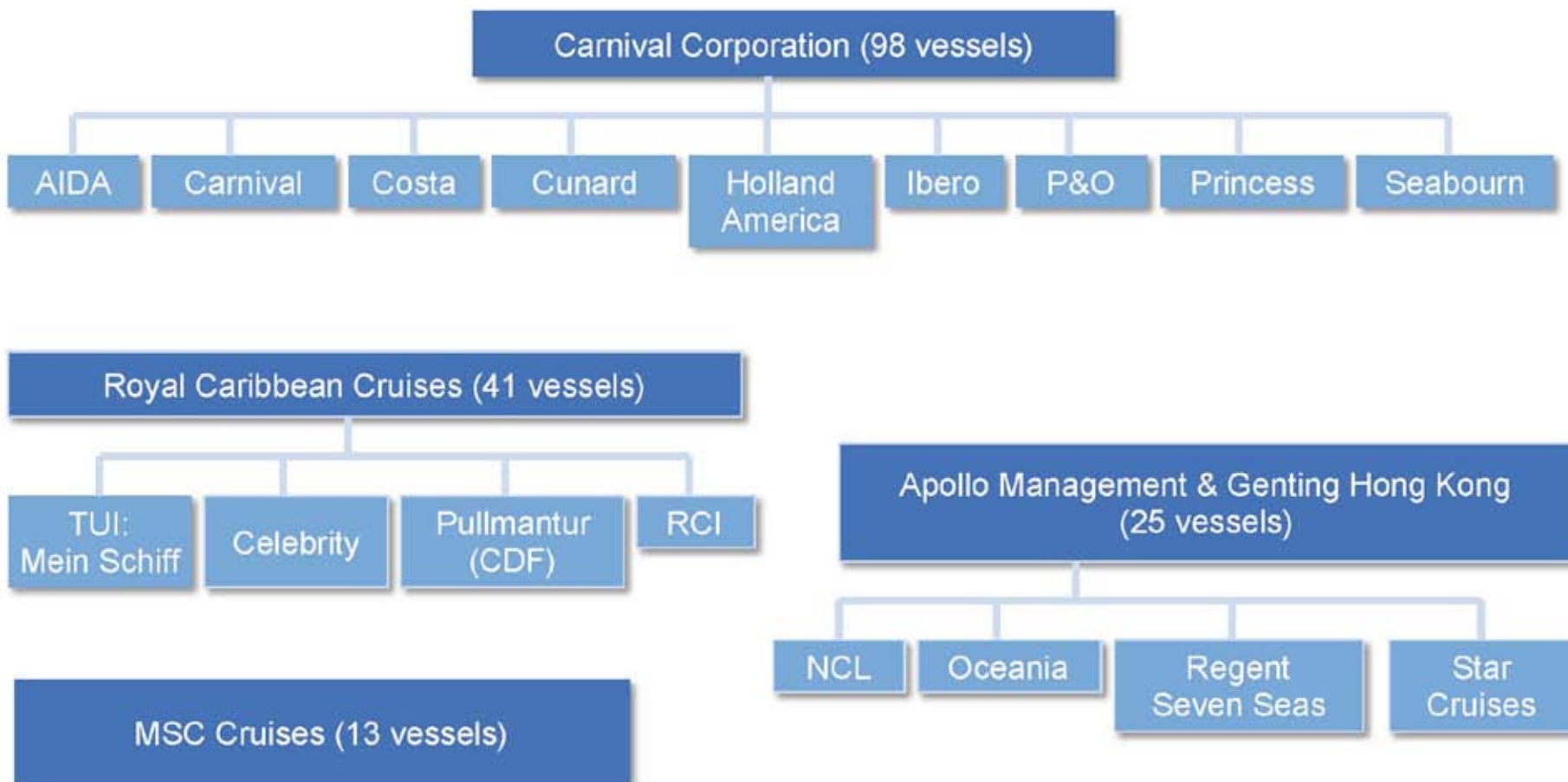


In 2009, the number of passengers visiting Hamburg and Bremerhaven was roughly equal; in previous years, Bremerhaven actually received even more passengers than Hamburg.

However since 2009, the number of passengers has risen steadily in Hamburg and sunk in Bremerhaven, while the cruise market as a whole has grown. This raises the question of why Bremerhaven has not benefited from this growth and how this trend can be reversed.

Sources: Ports. Rostock uses a different method to count passengers, which results in lower figures. Thus the figures for Rostock cannot be directly compared with those for other cities.

3.2. Which cruise companies are driving the boom?



3.2. Which cruise companies are driving the boom?

- The international cruise market is essentially dominated by four major cruise line companies. While consumers are presented with a number of different brands, they are ultimately all owned by just a few large corporations. There are also a number of small cruise lines. Some of these provide specialized niche tours, but many are simply operators with older ships and a somewhat outdated image. The financial situation of these small cruise lines varies enormously; some ships have even been detained on account of unpaid services.

3.2. Where do the “Big 4” dock in Germany in 2012?

Total	Carnival Group	Royal Caribbean	Norwegian Cruise Line	MSC
Bremerhaven 52 calls	-	1 “Visions of the Seas”	-	-
Hamburg 164 calls	84, incl. 48 AIDA Home port Costa	6, incl. 4 TUI	-	25 Home port MSC Lirica
Kiel 139 calls	39, incl. 27 AIDA	11, only TUI	-	37
Warnemünde 181 calls	79, incl. 33 AIDA	25, TUI not	14	-

as of 2012 Source: Ports

The table clearly shows that the major cruise lines do not call at Bremerhaven. The only stop, by Royal Caribbean in 2012, was not even part of the original planning. The three other major German cruise ship ports are in a better position in this aspect; they are all served by three out of the four major cruise lines at various times throughout the year.

3.3. Which itineraries has AIDA planned for Northern Europe in 2013?

AIDA itineraries from Hamburg

Hamburg – Bergen – Ulvik/Eidfjord – Stavanger – Oslo – Hamburg

Hamburg – Paris/Le Havre – London/Dover – Zeebrügge – Amsterdam – Hamburg

Hamburg – Amsterdam – London/Dover – Portland, UK – La Coruna – Santander – Le Verdone Sur Mer – Brest – Paris/Le Havre – Hamburg

Hamburg – Amsterdam – Zeebrügge – Paris/Le Havre – Southampton – Invergordon – Bergen – Eidfjord – Stavanger – Hamburg

AIDA itineraries from Kiel and Warnemünde

Kiel – Bergen – Oslo – Göteborg – Kopenhagen – Kiel

Kiel – Göteborg – Copenhagen – Kiel

Warnemünde – Oslo – Copenhagen – Warnemünde

3.3. Which itineraries has AIDA planned for Northern Europe in 2013?

AIDA itineraries from Hamburg

Hamburg – Amsterdam – Ijmuiden – London / Dover – Hamburg

Hamburg – Bergen – Ulvik / Eidfjord – Eidfjord – Hamburg

Hamburg – Bergen – Hellesylt / Geirangerfjord – Geiranger Fjord – Nordkap / Honningsvag – Nordkap / Honningsvag – Island / Akureyri – Island / Reykjavik – Hamburg

Hamburg – Bergen – Hellesylt / Geirangerfjord – Geiranger Fjord – Andalsnes – Molde – Trondheim – Alesund – Eidfjord – Stavanger / Lysefjord – Hamburg

AIDA itineraries from Kiel and Warnemünde

Kiel – Oslo – Kopenhagen – Kiel

Kiel – Nord-Ostsee-Kanal-Passage – Nord-Ostsee-Kanal-Passage – Bergen – Oslo – Göteborg – Kopenhagen – Kiel

Kiel – Shetland Inseln – Island / Reykjavik – Island / Isafjord – Island / Akureyri – Spitzbergen – Nordkap / Honningsvag – Nordkap / Honningsvag – Hammerfest – Tromsoe – Gravdal/Lofoten – Bergen – Kiel

3.3. Which itineraries has AIDA planned for Northern Europe in 2013?

AIDA itineraries from Hamburg

Hamburg – Eidfjord – Alesund – Andalsnes,
Molde – Trondheim – Hellesylt / Geirangerfjord –
Geiranger Fjord – Bergen – Stavanger / Lysefjord
– Hamburg

Hamburg – Bergen – Andalsnes – Molde –
Nordkap / Honningsvag – Nordkap / Honningsvag
– Island / Akureyri – Island / Reykjavik – Hamburg

AIDA itineraries from Kiel and Warnemünde

Kiel – Nord-Ostsee-Kanal-Passage – Nord-
Ostsee-Kanal-Passage – London / Dover –
Paris / Le Havre – Falmouth – Cobh – Dublin –
Liverpool – Greenock – Oban – Invergordon –
Göteborg – Kiel

Warnemünde – Tallinn – St. Petersburg – Helsinki
– Stockholm – Warnemünde

Warnemünde – Tallinn – St. Petersburg – St.
Petersburg – Helsinki – Stockholm – Stockholm,
Danzig / Gdingen – Kopenhagen – Warnemünde

3.3. Which itineraries have MSC and TUI Cruises planned for Northern Europe in 2013?

MSC itineraries	TUI Cruises itineraries
Hamburg – Bergen – Tromso – Longyearbyen – Magdalenefjord – Honningsvag (North Cape) – Hellesylt – Geiranger – Amsterdam – Hamburg	Kiel – Stockholm – Helsinki – St. Petersburg – Tallinn – Riga – Danzig – Gdingen – Kiel
Hamburg – Alesund - Honningsvag (North Cape) – Tromso – Molde – Andalsnes – Hellesylt – Geiranger – Amsterdam – Hamburg	Kiel – Gdingen – Danzig – Tallin – St. Petersburg – Helsinki – Stockholm – Kiel
Kiel – Flaam – Hellesylt – Geiranger – Bergen – Oslo – Copenhagen – Kiel	Hamburg – Le Havre /Paris – Southampton – Zeebrügge – Amsterdam – Hamburg
Kiel – Copenhagen – Stockholm – Tallinn – St. Petersburg – Kiel	Hamburg – Cruising – Southampton (London) – Le Havre (Paris) – Zeebrügge – Amsterdam – Cruising – Hamburg

3.3. Which itineraries have MSC and TUI Cruises planned for Northern Europe in 2013?

MSC itineraries	TUI Cruises itineraries
Hamburg – Helgoland – Amsterdam – Hamburg	Hamburg – Cruising – Invergordon – Cruising – Greenock – Belfast (Nordirland) – Dublin – Holyhead – Cobh (Irland) – Cruising – St. Peter Port (Guernsey) – Southampton (London) – Cruising – Hamburg
Hamburg – Helgoland – Dover – Amsterdam Hamburg	Kiel – Schiffstagen – Oslo – Aarhus – Kopenhagen – Kiel
	Kiel – Cruising – Bergen – Olden (Innvikfjord) – Cruising – Leknes (Lofoten) – Honningsvåg (Nordkap) – Tromsø – Cruising – Ålesund – Schiffstagen – Kiel
	Kiel – Cruising – Bergen – Olden (Innvikfjord) – Cruising – Leknes (Lofoten) – Schiffstagen, Longyearbyen (Isfjord) – Cruising – Honningsvåg (Nordkap) – Tromsø – Cruising – Ålesund – Cruising – Kiel

3.3. Which itineraries have MSC and TUI Cruises planned for Northern Europe in 2013?

TUI Cruises itineraries

Kiel – Schiffstog – Stockholm – Helsinki – St. Petersburg – Tallinn – Riga – Gdingen (Danzig) – Schiffstog – Kiel

Kiel – Schiffstog – Bergen – Geiranger (Geirangerfjord) – Hellesylt (Sunnylvenfjord) – Flåm (Aurlandsfjord) – Stavanger – Schiffstog – Kopenhagen – Kiel

Kiel – Schiffstog – Bergen – Geiranger (Geirangerfjord) – Hellesylt (Sunnylvenfjord) – Schiffstog – Leknes (Lofoten) – Honningsvåg (Nordkap) – Tromsø – Schiffstog – Ålesund – Schiffstog – Kiel

Kiel – Schiffstog – Gdingen (Danzig) – Schiffstog – St. Petersburg – Helsinki – Tallinn – Stockholm – Schiffstog – Kiel

3.3. Which itineraries have NCL and Costa planned for Northern Europe in 2013?

Costa itineraries	NCL itineraries
Hamburg – Geiranger – Hellesylt – Andalsnes – Honningsvåg – Tromsø – Leknes – Trondheim – Bergen – Hamburg	Copenhagen – Warnemünde – Tallinn – St. Petersburg – Helsinki – Stockholm – Copenhagen
Warnemünde – Kopenhagen – Hellesylt – Geiranger – Bergen – Kristiansand – Oslo – Warnemünde	
Kopenhagen – Stockholm – Tallinn – St. Petersburg – Warnemünde – Kopenhagen	

3.3. Which itineraries has Costa planned for Northern Europe in 2013?

Costa itineraries

Hamburg – Andalsnes – Tromso –
Magdalenenfjord – Ny Alesund – Longyearbyen –
Honningsvag Hammerfest – Hellesylt – Geiranger
– Bergen – Hamburg

Hamburg – Hellesylt – Geiranger – Honningsvag
– Tromso – Leknes – Trondheim – Andalsnes –
Bergen – Hamburg

3.3. Itineraries in Northern und Western Europe

- Various cruise lines are including more itineraries in Northern Europe in their product portfolios. Cruise lines are now offering, in addition to the classic itineraries in the Baltic Sea, more routes in the North Sea and along Europe's Atlantic coast. These itineraries could also easily include Bremerhaven. Ultimately, itinerary planning always lies in the hands of the cruise lines.

3.4. Which lines currently call at Bremerhaven?

Cruise line	Calls in 2012	Situation/Forecast
Transocean	9	Older vessels – forecasts predict a significant reduction in the next 5 years
Phoenix	25	Older vessels – forecasts predict a significant reduction in the next 5 years
Ambiente	3	3 out of 4 vessels are detained
Passat	3	
Hurtigruten	1	On the way to the shipyard
Plantours	2	
Deilmann	2	Just 1 vessel (MS Deutschland)
Royal Caribbean	1	Just as a test
Cap San Diego	2	No cruise, just day trips!

3.4. Which risks does the situation entail?

- The majority of the current customers in Bremerhaven will possibly leave the market during the next years
 - The current customers are predominantly small cruise lines with few vessels, and thus simply cannot generate more calls in Bremerhaven
 - Routing is already planned 1 to 2 years in advance (in this case, till 2014), therefore possible insolvencies of small cruise lines could lead to even lower passenger numbers in Bremerhaven
- ⇒ To maintain or enhance Bremerhaven as a cruise port, the acquisition of the 4 major cruise lines is of vital importance!





Why do the “Big 4” sail past Bremerhaven?



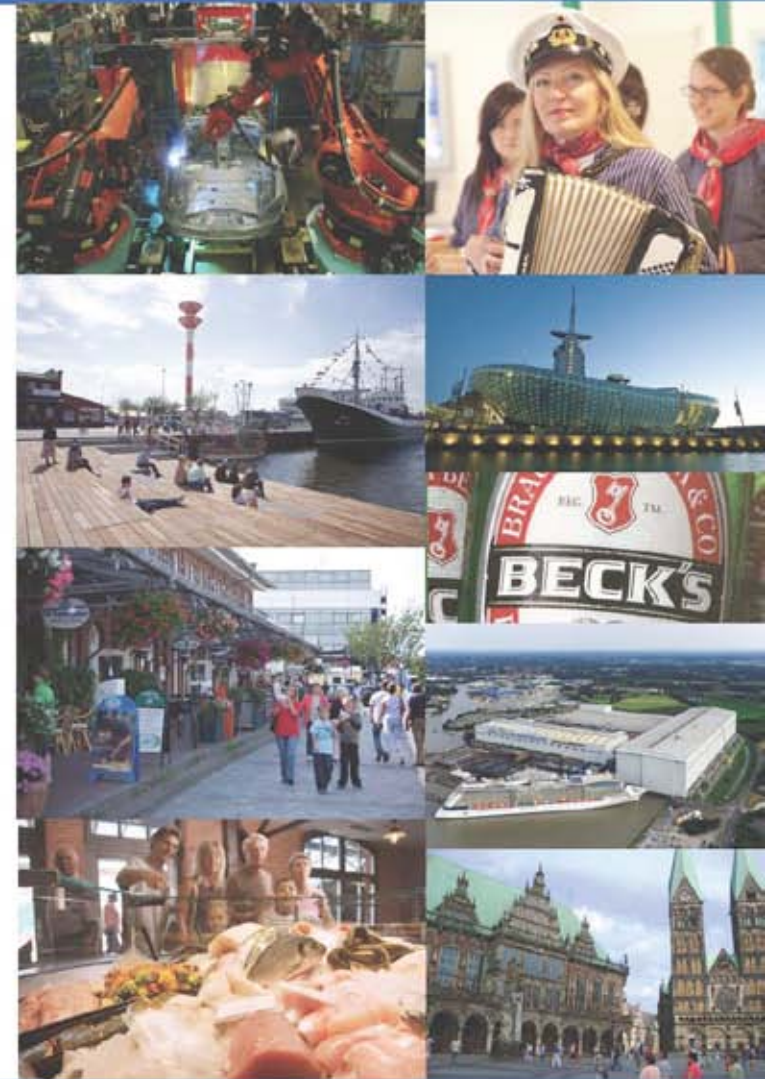
3.4. Which criteria do cruise lines consider?

	Criterion	Fulfilled in BHV?	Comment
1	Low harbor and handling costs	Yes	Comparison of German harbors through CCCB
2	Short pilotage area	Yes	7 hours less than in Hamburg
3	Possibilities for "on-board revenue" (shore excursion)	Yes	Cruise lines still unaware of this
4	Easy to reach for embarkation and disembarkation	no	Poor train and flight connections
5	Infrastructure of the terminal	yes	
6	Attractiveness of terminal surroundings	no	Terminal in the free port, not at Havenwelten/city center
7	Attractive image of the city	no	Bremerhaven does not compare to Hamburg

4. UNIQUE SELLING POINTS/POSITIONING FOR BREMERHAVEN

4. What could the destination stand for?

- Experience Northern Germany!
- All-year destination, even for big crowds (attractions and activities for all weather)
- Experience world brands: Beck's, Mercedes, UNESCO world cultural heritage, AIRBUS, Jacobs, Meyer Werft shipyard, etc.
- Maritime tradition and cruise history (emigrants)
- A place where many Germans spend their vacation
- The latest destination on the North Sea coast



4. Unique selling proposition through innovation and location

- One-stop service for shore excursions (BIS); and modular excursions, including the organization of all relevant infrastructure (busses, guides, etc.)
- Differentiation of shore excursions with respect to spending power
- Chartered trains directly from terminal to Hamburg
- Short pilotage area (cost)
- New, up-and-coming destination



5. INTEGRATING OTHER INTEREST GROUPS

5.1. Day and overnight visitors

- Cruise ships are also of interest for tourists that don't take cruises themselves. Seeing and photographing ships is a big part of visiting port cities such as Bremerhaven. Special events organized in other cruise ports have shown that the arrival of cruise ships can attract a large number of visitors. In Bremerhaven, building stronger links between cruises and existing maritime events could generate synergistic effects.

Bremerhaven already positions itself as a maritime city, so cruises could be relatively easily included and highlighted as part of this image. The cruise ship theme is a good fit for Bremerhaven's positioning and can further strengthen the brand.

5.1. Some ways to include cruise ships:

- Invite cruise ships on dates of existing maritime events (especially attractive for transit passengers) or arrange event dates to coincide with the arrival of major ships, depending on which dates can already be confirmed
- Allow smaller cruise ships making transit calls to dock at the Havenwelten – as a photo op for other visitors to Bremerhaven and publicity for the cruise line/operator. At the same time, cruise passengers will be able to discover many of Bremerhaven's attractions on foot and immediately get a positive impression of the city first-hand.
- Signage or shuttle to visitors' gallery/café at the CCCB, when ships dock, info for Havenwelten and in the city center about ships at the CCCB
- Guided tours/sightseeing tours connected with emigration and cruise history
- All-day program for bus groups, or weekend packages for individuals with visit to cruise ship terminal, Maritime Museum, harbor tour, HavenBus, German Emigration Center

5.1. Some ways to include cruise ships:

- Invite cruise ships on dates of existing maritime events (especially attractive for transit passengers) or arrange event dates to coincide with the arrival of major ships, depending on which dates can already be confirmed
- Allow smaller cruise ships making transit calls to dock at the Havenwelten – as a photo op for other visitors to Bremerhaven and publicity for the cruise line/operator. At the same time, cruise passengers will be able to discover many of Bremerhaven's attractions on foot and immediately get a positive impression of the city first-hand.
- Signage or shuttle to visitors' gallery/café at the CCCB, when ships dock, info for Havenwelten and in the city center about ships at the CCCB
- Guided tours/sightseeing tours connected with emigration and cruise history
- All-day program for bus groups, or weekend packages for individuals with visit to cruise ship terminal, Maritime Museum, harbor tour, HavenBus, German Emigration Center

5.1. Further interest groups

Examples of cruise ship-centered events

Ship's christening in Hamburg, 2012



1.4m spectators

Ship's christening in Kiel, 2011



45,000 spectators

Source of pictures: AIDA Cruises

5.1. Further interest groups

Examples of cruise ship-centered events

Hamburg Cruise Days 2012



over 500,000 visitors

Blue Port illumination of the harbor and parade of ships with fireworks attracted 250,000 visitors alone

Source of picture: Manuel Lebowsky, bcs media, <http://www.hamburgcruisedays.de/en/the-event/impressionen-hamburg-cruise-days-2012/>

Observations, current situation

- Cruise passengers are an additional target group for local merchants
- Cruise passengers have a limited budget, especially during transit calls
- Cruise ships often dock quite early in the morning and depart again in the afternoon
- International cruise passengers have special needs in terms of language and payment options
- BHV may be the only German port on the itinerary, and thus represents the entire country
- Cruise passengers are particularly interested in products and services with a regional flavor

Examples/approaches/ideas from other cities

- Hamburg Card: unlimited travel on public transport and discounts on purchases and admission, may be purchased in advance online
- I amsterdam City Card: examples of discounts online
- Copenhagen: special map for cruise passengers → includes only information they need, but is easy to read/understand; institutions charging admission pay to be included (Bo Larsen, Cruise Gateway Conference)
- Antwerp City Card: list of participating institutions + discounts online
- Lisbon: different cards for admission, restaurants, shopping; taxi voucher
- Kent Greeters → volunteers, also found in Hamburg → little value creation, but positive image

Recommendations 1

- Develop offers that can be used by various target audiences (e.g., City Card) → City Cards are not novel, but are a product that visitors are familiar with; large amount of time and effort to acquire partners, but only needs to be invested once
- Inform retail and hospitality associations + major leisure facilities of transit call dates, and request English-speaking staff for those dates, as necessary
- If necessary, suggest adjusting opening times (e.g., for very early calls) – could individual facilities open one hour earlier? These facilities could then be advertised at the terminal to generate customer flow
- Coupon booklet included in welcome packages: small discounts, extras (samples, pins, stickers, stamped postcards...), offer special menus (or similar) with purchase/orders/visits
- Sponsors for giveaways distributed at the terminal or included in welcome packages (chocolate, tea sachets, blister bandages...), advertising possible on giveaways

Recommendations 2

- Option to include flyers in welcome packages? If so, limit total number! (Maximum of 3–5 per call)
Curate content? (Should suit the target audience and the city's image)
- Offer currency exchange counter at the terminal for calls with many international passengers – partner with Sparkasse or other banks
- Accept dollars and all major credit cards
- Accept dollars in HavenBus
- Offer storage, delivery to vessel, and international shipping for purchases

6. BREMERHAVEN'S STRENGTHS AND WEAKNESSES

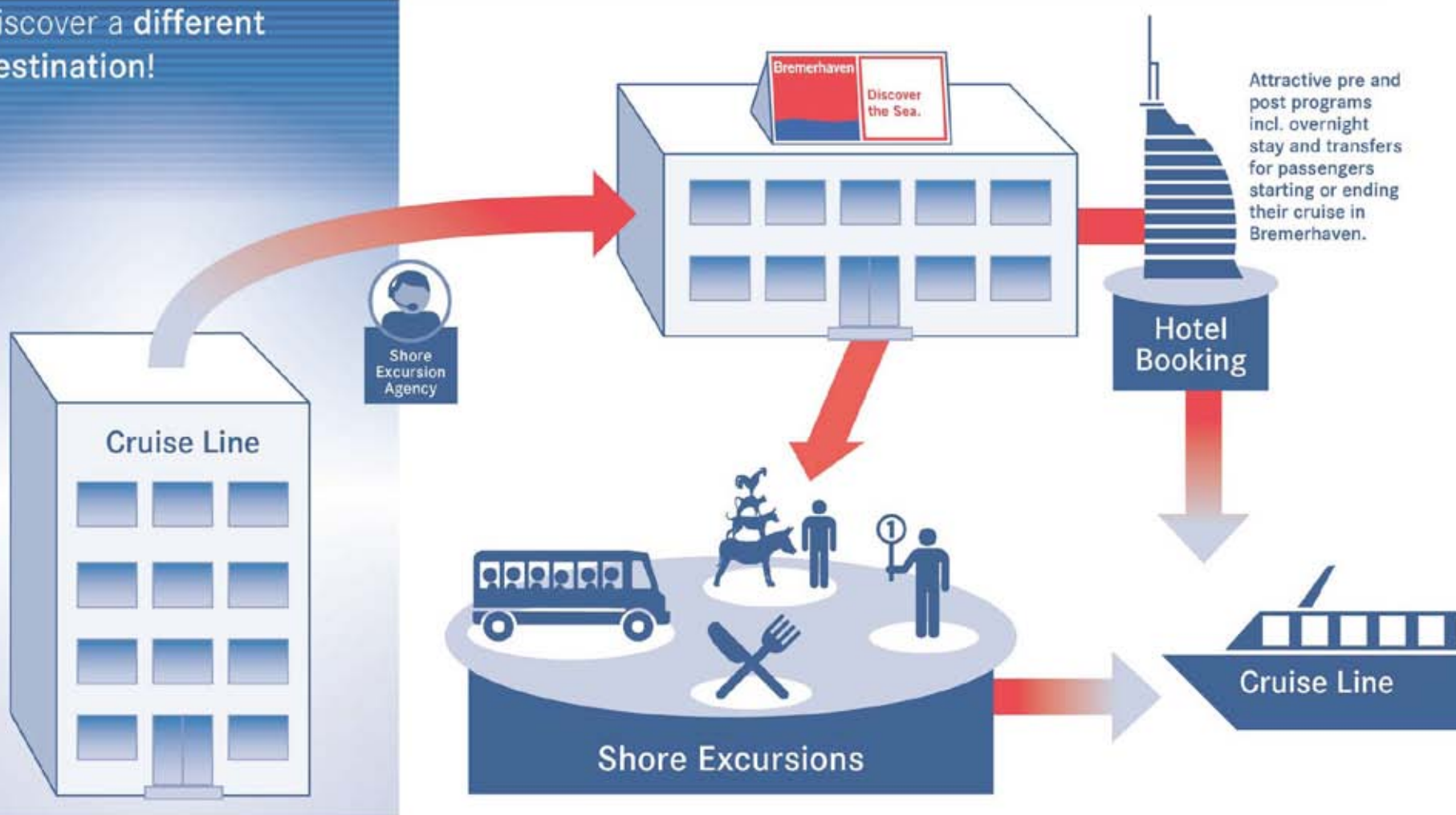
6. Bremerhaven Strengths & Weaknesses

- ☹ Access, particularly flights to/from, USA (but this is generally the case in Northern Germany), regional rail
- ☹ Unknown destination
- ☹ To date few shore excursions, no pre- or post-cruise programs
- ☹ No covered/enclosed parking spaces
- 😊 New, authentic, no mass tourism, e.g., Eastern Friesland
- 😊 Passengers are more dependent on organized shore excursions
- 😊 Modern terminal
- 😊 Very long pier, suitable for very large ships
- 😊 Low-cost parking
- 😊 Opportunity: Connection to certain trains right at the terminal
- 😊 Great port facilities and interior (Disney) → good logistics
- 😊 Opportunity: direct access to the Havenwelten for river boats

7. SALES STRUCTURES RECOMMENDATION

Sales structure recommendation

Discover a different destination!



Sales structure recommendation

Discover a different
destination!

