

# Passenger surveys on the ships “Fair Lady” and “Oceana”

Summary report and rec-  
ommendations for action



The Interreg IVB  
North Sea Region  
Programme

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



**dwif**  
consulting

Bad Zwischenahn, Munich,  
December 2012

# Passenger surveys on the ships “Fair Lady” and “Oceana”

## Summary report and recommendations for action

### Contents

I.	Starting situation .....	- 2 -
1.	Task.....	- 2 -
2.	Procedure and methodology.....	- 2 -
3.	Starting situation for the passenger ships .....	- 3 -
II.	Results of analyses and primary data collection.....	- 5 -
1.	Surveys on board the Fair Lady.....	- 5 -
2.	Surveys on board the Oceana.....	- 9 -
3.	Online survey.....	- 13 -
4.	Summary of important aspects of the surveys.....	- 15 -
5.	Social media analysis .....	- 17 -
6.	Observations at selected touchpoints.....	- 19 -
III.	Further recommendations for product improvements and marketing .....	- 22 -
1.	Enhancing the ticket and service range.....	- 22 -
2.	Improving online services.....	- 23 -
3.	Product and sales improvements.....	- 23 -

#### **Project management:**

Matthias Hollmann

Wiebke Leverenz

Saskia Weis

Dr. Manfred Zeiner

Munich/Bad Zwischenahn, December 2012

## I. Starting situation

### 1. Task

The investigation was prompted by the intention of obtaining information on the attitudes and satisfaction of passengers with their ferry journey aboard the Oceana and Fair Lady. The journey as a whole including the local stay was not at the forefront, rather the investigation concerned the evaluation of services directly associated with the ferry journey. This includes journey preparation (available supply of information, ability to book the ferry, etc.) and the infrastructure on board the ship (furnishings, comfort, service features and catering services). The aim of this investigation was to specify and pool passengers' expectations for a future passenger ship offer in order to outline a range of realistic demands from it and to derive appropriate optimisation solutions and recommendations for action with regard to a future ship's range and infrastructure and for marketing.

#### **Note on summary**

The summary report sums up the most important results and recommendations for action from the investigation. The results documentation with commentary and recommendations for action contains a detailed overview of all the results from the individual analysis steps. The focus of the summary is the satisfaction of passengers with the resulting consequences for the design of future ferry offers, as well as statements on the requirements for a future passenger ship from the perspective of existing and potential passengers.

### 2. Procedure and methodology

As part of the investigation, the following analysis tools were used in accordance with the tendering:

- **Desk research**  
Studies and investigations provided by project participants were analysed with regard to the objectives tendered.
- **Expert discussions**  
Accompanying expert discussions with representatives from the shipping companies and tourism organisations concerned supported the discovery of knowledge.
- **Social media analysis**  
An analysis of social media services provides information on passengers' experiences and evaluations of the services concerned on web 2.0. Essentially it was to determine to what extent optimisation requirements can be derived from these comments and evaluations.
- **Online survey of potential passengers**  
In order to determine the requirements and requests of potential passengers for future passenger ship services who as yet have had little or no experience in this service segment, an anonymous, non-personalised online survey was carried out. A total of almost 900 participants were involved in the survey.

- **Passenger surveys on board the MS Oceana and MS Fair Lady**

The passenger surveys constituted the focus of the investigation in accordance with the aforementioned objectives. In August and September 2012, a total of 522 passengers took part in the survey on the Fair Lady, 502 participants on board the Oceana.

### 3. Starting situation for the passenger ships

#### **Different basic conditions!**

In addition to general developments and basic conditions which concern both ships equally, there are also ship-specific differences due to the different types of services which should be taken into account when evaluating the results.

#### **General basic conditions:**

- Rising fuel prices
- A lack of specialised personnel and junior staff
- Environmental aspects are increasing in significance
- Demographic change requires consideration for the infrastructure: barrier-free services are gaining in importance
- Modified passenger behaviour: increasing demands in terms of service, quality, comfort and entertainment on board
- For both ships, the focus is on seasonal traffic, no all-year connections

#### **Specific aspects of Fair-Lady:**

- The transfer services to Heligoland are suffering from the severely reduced numbers of day visitors over the last few years. This has led to a considerable reduction in the ship's capacities. All large tourist steamers with capacities over 1,500 passengers were replaced with smaller ships
- Following the suspension of the ferry service to Heligoland from Bremerhaven in 2008 due to technical reasons, from 2011 ferry services first have to be re-established.
- The connection with the "Fair Lady" from Bremerhaven is in competition with several other ports of departure
- The strong influence of weather conditions on the feasibility of journeys. As soon as it has to be assumed that the sea disturbance would impair passengers' wellbeing to strongly, the journeys are cancelled (this affects all competitors, however)
- Outdated ship material causes technical failures
- Relatively long crossing time in relation to a day visit
- Awkward and time-consuming landing at Heligoland due to disembarking. For many passengers, however, disembarking is also an experience factor with a unique selling point
- Good connection to regional source areas via the motorway and Weser tunnel,
- Bremerhaven is called an important departure location by actors involved.

**Specific aspects of Oceana:**

- Monopolist on the Bremen-Bremerhaven route
- Traditional ship with an overall positive image for the population
- The connection is benefitting from the trend towards more short trips
- Central location in Bremen, good connection to the public transport network
- Good cross-marketing cooperation with local radio broadcaster
- Attractive "Havenwelten" have a positive effect on the service

**Conclusion:**

In particular, the cost pressure due to sharply rising fuel and energy prices combined with a low tolerance of passengers to bear these cost increases puts the services under pressure. Difficulties also result from the age of the ships with few modern cost-saving and environmentally friendly drive technologies. To some extent, high costs for maintenance and repair are required. Though both services are affected by the same general basic conditions, the individual competitive situations are very different. As monopolist and traditional ship, Oceana enjoys a high level of popularity among the population and its passengers. The Fair Lady, on the other hand, is in competition with several services and is confronted by a heavily reduced demand for day trips to Heligoland. The welcome increase in overnight guests is not able to pick this up. It is not just the attractiveness of the ships that is crucial for a stabilisation and growth of the passenger numbers by holiday and day guests. Rather, an attractive offer needs to be provided on Heligoland so that interest in journeys to Germany's only open-sea island increases again. REK (regional development concept) Heligoland highlights this as well for 2010-2025.

The reorientation also requires a clear improvement in the quality of accessibility. The key for such an improvement is on Heligoland itself: only a significant increase in the attractiveness can "change course". New attractions, services and products which are able to attract new target groups have to be established."

Source: REK Heligoland 2010 - 2025

## II. Results of analyses and primary data collection

### 1. Surveys on board the Fair Lady

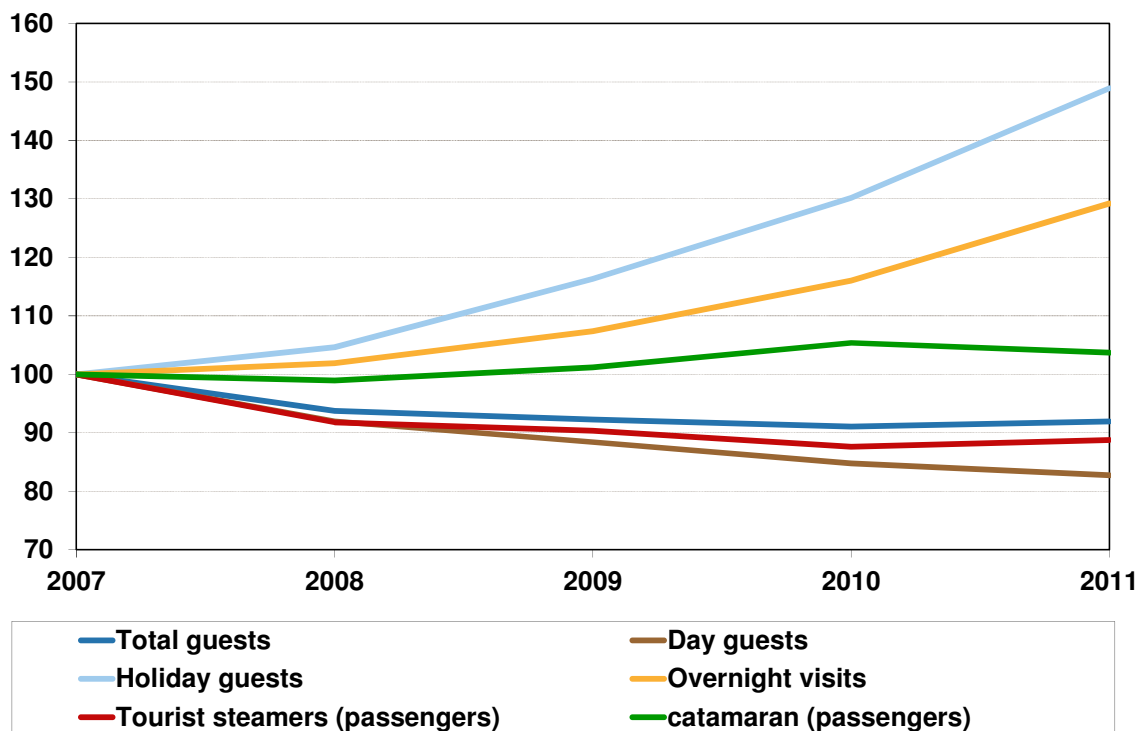
**Journey route:** Bremerhaven - Heligoland - Bremerhaven

**Description:**

- Year of construction: 1970 (renovation in 2011)
- Length: 68.57 m
- Width: 10 m
- Speed: 19 knots
- Passengers: 800
- Operating period: end of April until end of September

### Passenger and guest trends in Heligoland transport

Fig. 1: Trend in guest numbers since 2007



Source: Kurverwaltung Heligoland (tourist authority), dwif 2012

- Continuously declining volume in day trip traffic
- Increasing number of overnight guests and overnight stays on Heligoland
- Tourist steamer traffic: the continuation of operations from Bremerhaven in 2011 led to a slight increase in passenger numbers on tourist steamers as a whole. A majority of the growth through Bremerhaven was drained by decreases at the other locations. Whether this is a cannibalisation effect or whether these are weather-related decreases cannot be said for certain. As a result, it is necessary to observe future trends

- Passenger numbers on the catamaran are relatively stable
- In 2012 there was a slight increase in the number of passengers in Bremerhaven when compared to 2011 (as at the beginning of September). The season ended early on 19<sup>th</sup> September due to a technical fault

### Reason for journey

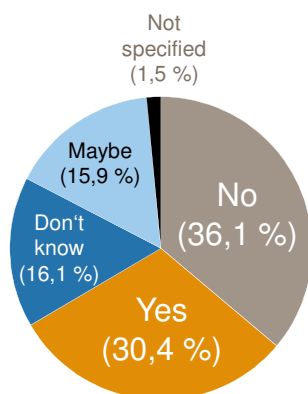
- 98.3 % of the surveyed passengers were travelling for leisure and holiday
- Business trips play an inferior role on the Fair Lady
- Around 80% of the passengers surveyed were on a day trip
- ➔ Day guests are by far the most significant passenger group

### Sociodemographic features

- The overall average age of surveyed passengers on the Fair Lady is 44 years old (day guests: 44.2, overnight guests: 41.5)
- With an 18.4% share, the 45 to 54 age range was the most strongly represented

### Evaluation of disembarkment

**Fig. 2: Disembarking: would you rather go to Heligoland without disembarking?**



Source: Passenger survey Fair Lady, dwif 2012

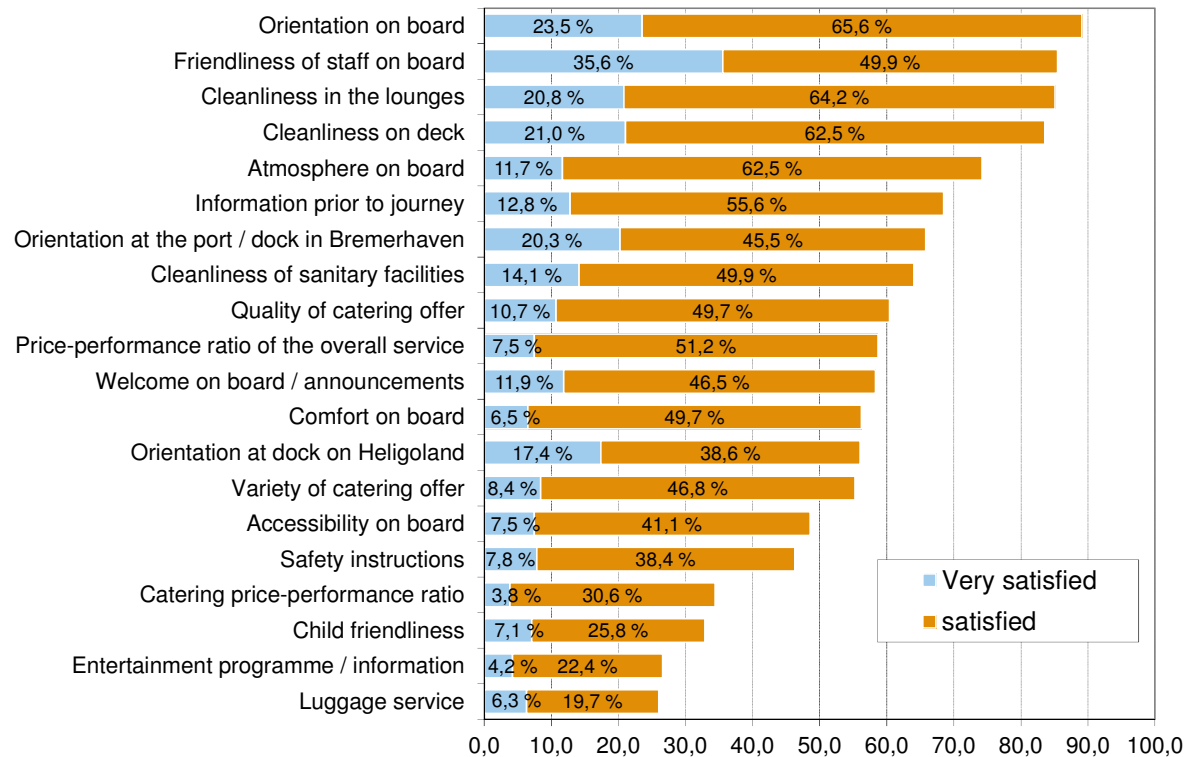
Disembarking on Heligoland is not everybody's thing. For some it is an experience, for others it is an uncomfortable procedure. Passengers appear to be more strongly against disembarking as age increases.

### Overall satisfaction with the connection

- Overall, 88.6% of passengers surveyed declared themselves to be very satisfied / satisfied with the connection from Bremerhaven to Heligoland
- Reasons for satisfaction: often the connection itself: good connections, accessibility, weather, joy of the maritime experience
- The furnishings and the infrastructure of the ship itself are rarely given as a reason for passengers' satisfaction
- The short stay time, the length of the crossing, the price and disembarking cause dissatisfaction

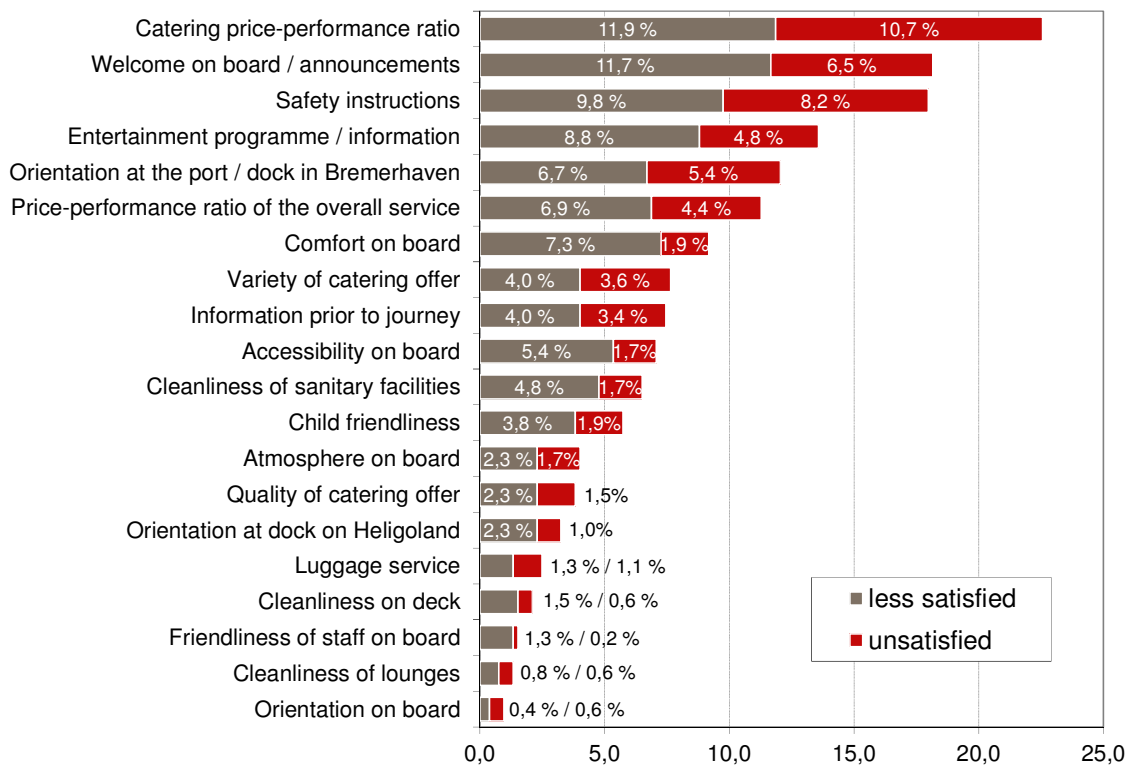
### Satisfaction with selected aspects

**Fig. 3: Satisfaction with certain aspects**



Source: Passenger survey Fair Lady, dwif 2012

**Fig. 4: Dissatisfaction with certain aspects (holidaymakers and day guests)**



Source: Passenger survey Fair Lady, dwif 2012



The aspects at the top of the scale require attention in particular. The lower area is concerned with single references. There are to some extent significant differences between day guests and holidaymakers in the weighting of individual aspects. The following aspects were particularly pronounced among the holidaymakers:

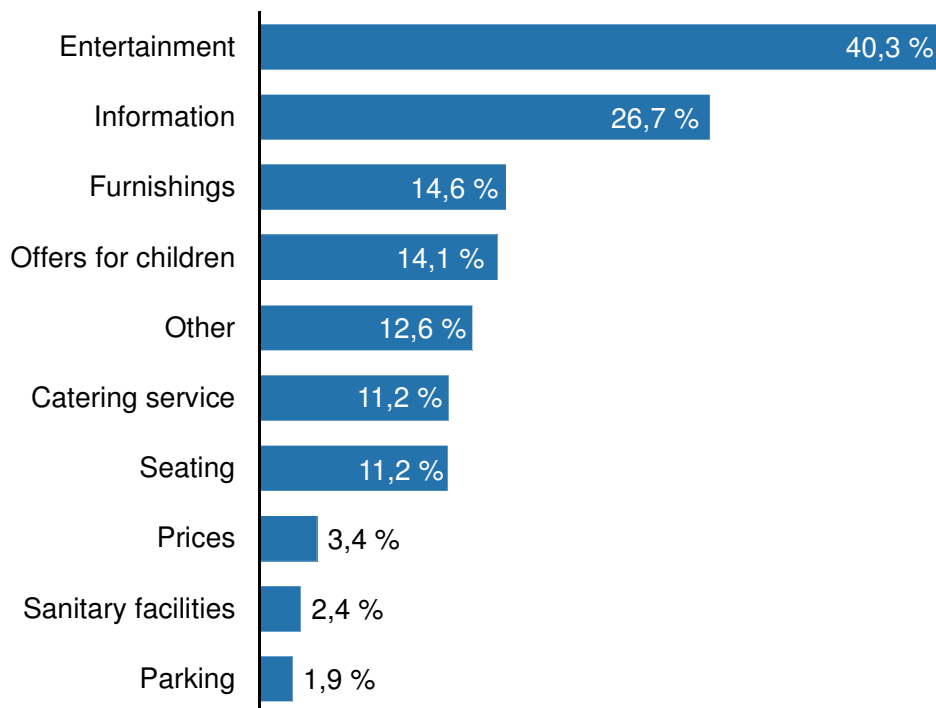
- The point of criticism most frequently mentioned by holidaymakers is the safety instructions. Almost 26% (highest value!) of holidaymakers surveyed stated themselves as less satisfied or unsatisfied with them
- Holidaymakers are significantly more critical of the price-performance ratio of the entire service compared to day guests (thus holidaymakers pay a comparatively higher transfer price as overnight guests)
- There are more frequent expressions of displeasure among holidaymakers with regards to the aspects of “accessibility on board” and “child friendliness”

The following aspects were evaluated similarly by holidaymakers and day guests:

- Almost 23 % of passengers evaluated the price-performance ratio of the catering service with less satisfied or unsatisfied. This may have an effect on the image of the journey
- The aspect “welcome / announcements on board” received an equally high proportion in terms of dissatisfaction. Many expressed that the announcements were sometimes difficult to understand depending on the lounge area on the ship. Oral safety instructions were also missed by the guests alongside information on the ferry journey and on the island of Heligoland  
Comment: In principle, there are numerous safety instructions on board for how to act in emergency situations. However, clearly oral instructions or even short demonstrations are desired by passengers, even on relatively short journeys
- More frequently, the entertainment programme and the information on board was also criticised. In addition to a more extensive entertainment programme, passengers also wanted more information on Heligoland and what is on offer on the island

### **Suggestions for improvements**

34.9% of passengers took the opportunity to provide numerous suggestions for improvement. The most frequent suggestions concerned the areas of entertainment, information and furnishings.

**Fig. 5: Suggestions for improvement**

Source: Passenger survey Fair Lady, dwif 2012

## 2. Surveys on board the Oceana

**Journey route:** Bremen - Bremerhaven - Bremen

### Description:

- Year of construction: 1937 (renovation: 2002)
- Length: 55.2 m
- Width: 9.8 m
- Capacity: 700 passengers
- Season: 01.05 until 30.09, at weekends and various weekdays
- Passengers: 20 to 30 thousand per season

### Ticket type

- 45.1% of the passengers booked a return ticket from their respective departure location
- 38.1% are only travelling in one direction (often combined with bicycle)

### Socio-demographic features of surveyed passengers

- The age range from 45 and above is heavily represented among the passengers surveyed. They make up almost two thirds of the passengers
- The average age of the surveyed passengers on the Oceana is around 50 years old.

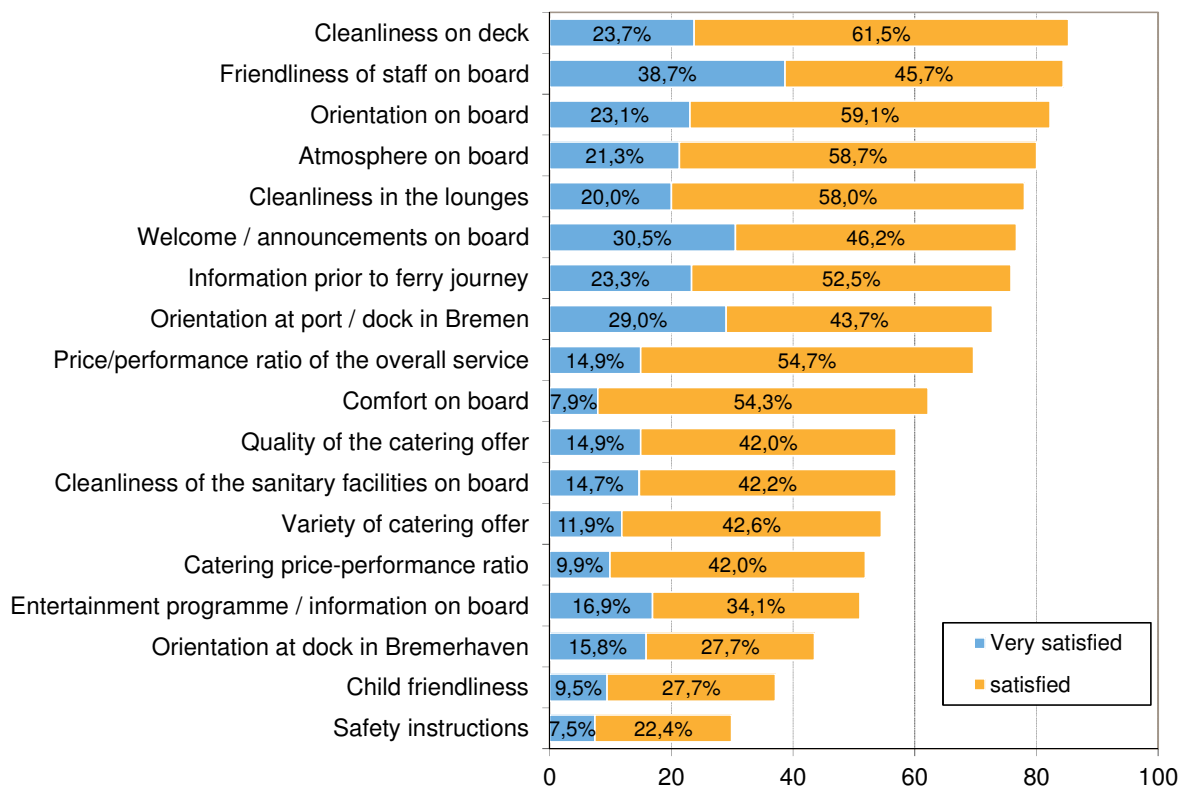
### Origin of the travellers

- Trips from home clearly dominate. On the Oceana, over 80% of passengers come straight from home; on the Fair Lady, it is only 66%

- In contrast, the number of holidaymakers among the passengers on the Oceana is comparatively low with just under 15% (Fair Lady: 31.9%)
- ➔ In the increased advertising of this service in the holiday regions, more potential for additional passengers can thus be seen.

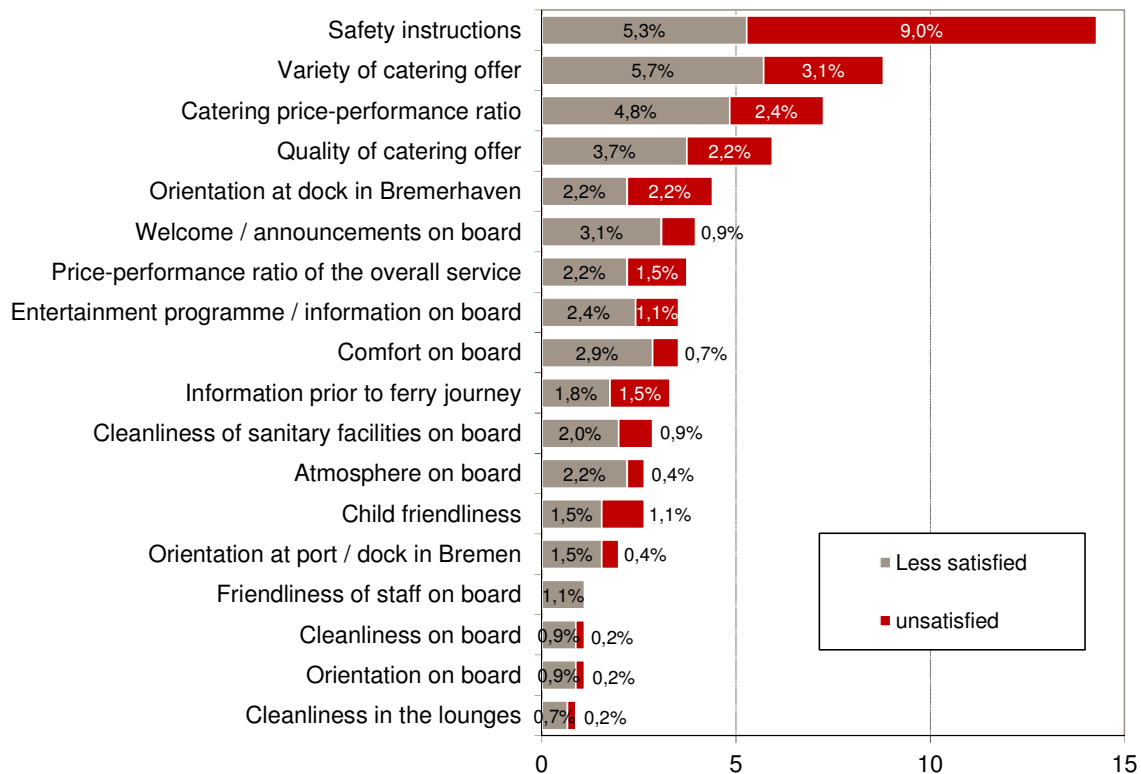
**Satisfaction with selected aspects**

**Fig. 6: Satisfaction with various aspects on board**



Source: Passenger survey Oceana, dwif 2012

**Fig. 7: Dissatisfaction with selected aspects**



Source: Passenger survey Oceana, dwif 2012

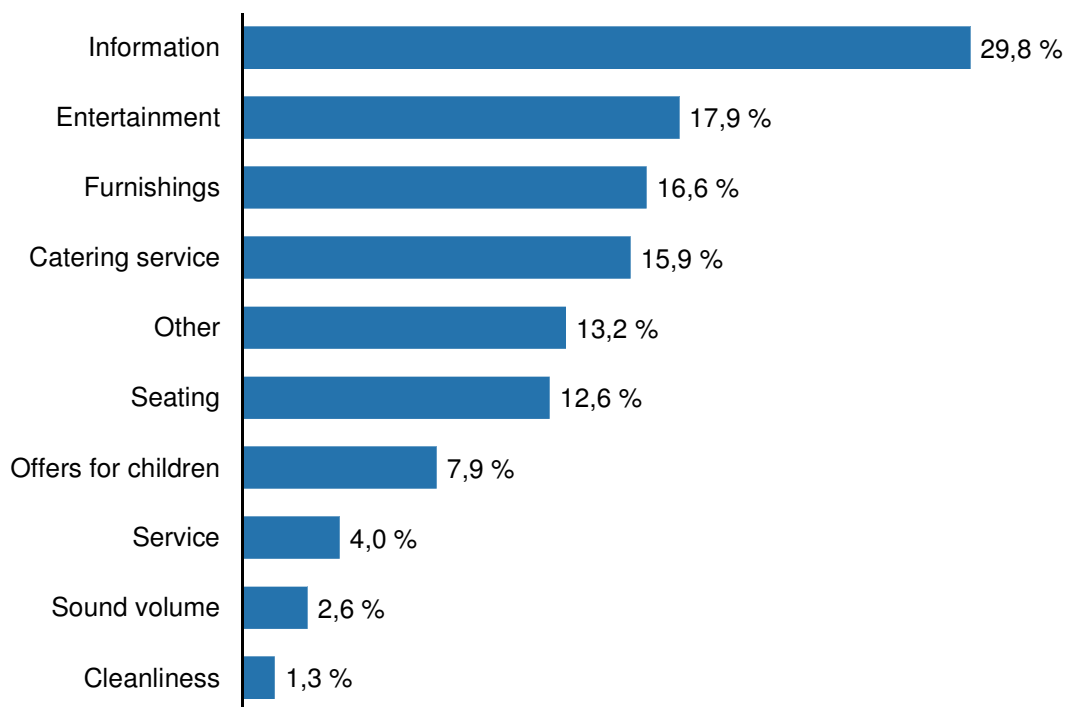
Almost all aspects that were evaluated by surveyed passengers as less satisfied or unsatisfied are results in the single-digit range. Nevertheless, some aspects should be accorded greater attention:

- There is clear dissatisfaction in terms of the safety instructions on board. With 14.3% of the surveyed passengers, this is by far the highest value
- The variety of the catering offer on board is inappropriately low for trip catering. This is expressed in the corresponding evaluations
- Some passengers clearly have problems with the orientation from the dock in Bremerhaven. Information on board about the destination area and information boards at the dock may be a possible remedy.

### Suggestions for improvement

Around a third of the surveyed passengers gave suggestions for improvements in this respect. The suggestions are distributed into the following categories:

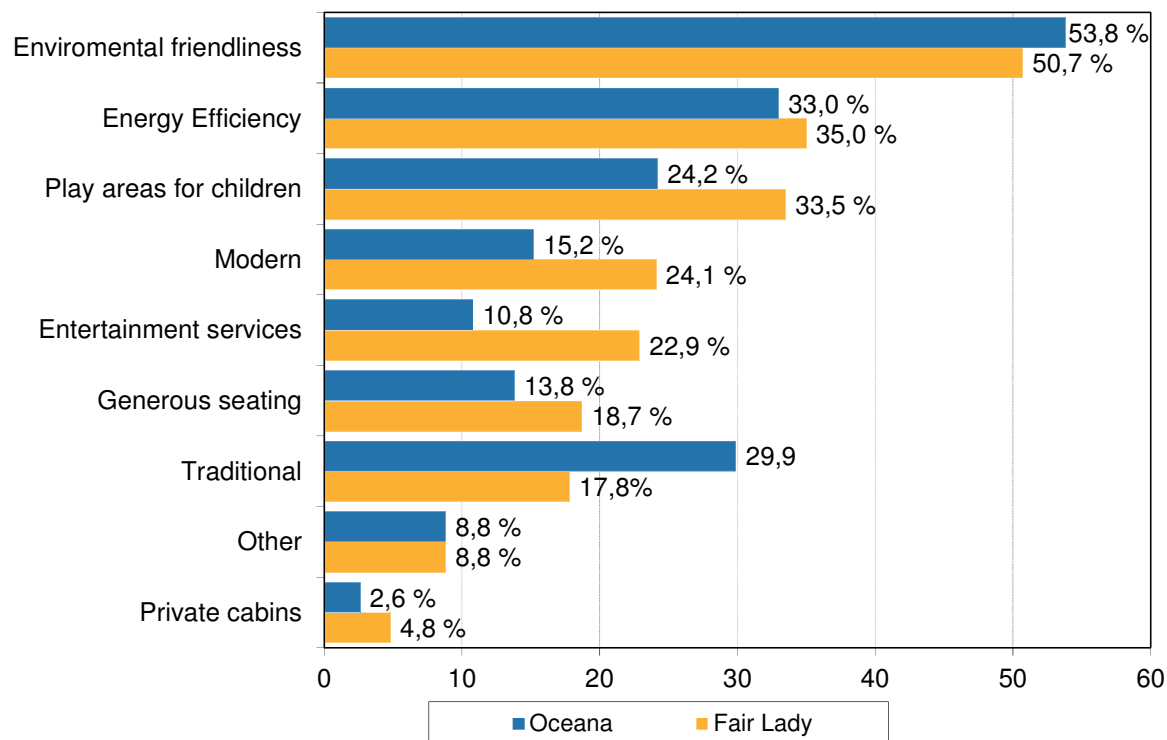
**Fig. 8: Suggestions on board the Oceana**



Source: Passenger survey Oceana, dwif 2012

### Ship of the future (Fair Lady and Oceana)

**Fig. 9: Aspects which from the passengers' perspective a ship of the future must fulfil**



Source: Passenger surveys Fair Lady and Oceana, dwif 2012

- Environmental friendliness and energy efficiency are generally of high importance
- As the Oceana is a traditional ship with which many people in the region feel a connection, this aspect plays a larger role compared to the Fair Lady
- Entertainment services occupy a rather subordinate role on the wish list for the ship of the future. This is a little surprising as many passengers made suggestions for precisely this area. As a result, entertainment services should clearly be understood rather as a supplement which gives the ship journey an important additional charm but which is not a priority

### **Aspects which are important to passengers for a ship of the future**

Many passengers link their improvement suggestions to their suggestions for a ship of the future. The statements can definitely be transferred to other services. The following aspects were highlighted by passengers on both ships.

- Sufficiently comfortable seating inside and outside
  - Sun protection and seats in the shade, flexible canopies
- Ship type and furnishings: modern, with classical and maritime elements
  - Generous seating, friendly, open, modern, maritime
  - Large viewing windows and observation windows, glass bottoms, underwater windows
  - Accessible services
- Environmentally friendly and efficient drive technologies
- Play area for children, child-friendly furnishings
- Varied entertainment and multimedia services
- Sanitary facilities: modern, clean, accessible
- Catering: attractive selection, vegetarian dishes, different catering types (buffet, self-service, with service), bar, selection of coffee specialties

For these aspects it is necessary to note that they reflect the ideas and desires of the surveyed passengers. Not all aspects can be implemented but the statements give important indications of the direction in which the passenger is thinking. And thus there are definitely suggestions worth considering even if they were sometimes only stated occasionally.

## **3. Online survey**

### **Methodology:**

- Survey of visitors on the websites of the customer and project partner
- Field time: August/September 2012
- Response: 895 participants

### **Aims:**

To determine the following facts:

- Previous experience and future interest in boat trips
- Evaluation of furnishing features for passenger ships
- Visions for the “passenger ship of the future”

## Evaluation of various service and furnishing features

The participants were asked how important a range of aspects are to them as service features on a ship of the future. The following information was made in individual predefined categories:

### Catering service

- In addition to self-service options, every second person surveyed values the service and being served at their seat
- The current trend is coffee specialities, e.g. at a coffee bar with a sufficient selection.

### Furnishings: comfortable and convenient seating!

- The option of sitting on board is particularly important to those surveyed (93%). In particular, sufficient capacity should be ensured inside and outside
- The option of staying outside is also particularly important for a good 90% of those surveyed
- Particularly when the weather is fair, comfortable seating on deck is desired. In addition to sufficient seating, services are requested that make staying outside more pleasant. These may be blankets and cushions but also the provision of sun loungers.

### Entertainment

- Entertainment for children is important / very important for 60.3% of those surveyed
- A range of newspapers and magazines is appreciated
- Just under a third of those surveyed consider shopping services on board as important
- An internet connection on board is only important for around a quarter of those surveyed. It can be assumed, however, that demand will continue to increase.

### Booking and accessibility

- The ability to book online is indispensable in future for most of those surveyed
- However, the internet is not replacing the ability to book by telephone. A large number of those surveyed value personal contact
- Seating reservations are important for many of the participants in the survey
- Booking at an on-site ticket machine is also reasonable for just under two thirds of those surveyed
- Arrival polarises: the connection by public transport and the option of parking near the dock play an equally important role.

### Ship features

- Environmental aspects are a priority for those surveyed
- The availability of accessible services is considerably more important to the survey participants than to the passengers on board the Oceana and Fair Lady
- The ship should tend to take into account modern aspects. The preservation of maritime traditions is equally important to many of those surveyed, however
- Luxury is less important to guests. Consistent comfort is preferred.

## The passenger ship of the future – visions of the survey participants

In their visions and desires for a passenger ship of the future, survey participants particularly display pragmatic approaches. In addition to a good price-performance ratio, potential passengers consider consistent quality of all services along the journey chain to be important. This also applies especially to lounge areas on board. A high level of comfort and comfortable seating are of fundamental importance. However, the catering services must also be right. Following the saying “sea air makes you hungry”, a varied, diverse range is desired. Alongside this, information on the journey and the destination also plays an important role. This also includes the consideration of safety aspects. These statements are frequently reflected in the statements from the surveyed passengers, though sometimes with different emphases.

### 4. Summary of important aspects of the surveys

The surveys revealed that from the point of view of the passengers, this does not mean fundamentally new concepts in transport. Rather, it means optimising the set screws most important to customers. This does not just concern the transport itself. It is necessary to organise the entire service chain optimally for passengers, from the initial information before the journey, to booking, arrival, boarding, stay on board, stay at the destination through to the return journey. Below is a summary of important aspects which were mentioned.

- Passengers expect a high level of **service quality and friendliness** from the staff.
  - Here there was mainly a high level of satisfaction among surveyed passengers. The faults revealed in the investigation in this area should nevertheless be remedied in future.
- **Comfortable seating and sufficient space!** A high level of seating comfort and variability in seating are very important for passenger satisfaction.
  - The many suggestions for improvements in this area were noticeable. Insofar as the basic conditions permit it (spatial structure of the ship, safety requirements, etc.), corresponding adaptations should be made in this respect.
  - Depending on the weather, the outside area on the ship is a popular lounge area. When there is good weather, seats outside quickly become rare. Therefore, ideally there would be options of individually varying the capacity outside. In addition to the provision of additional seating capacity, variable inside and outside areas may also help.
- **Attractive catering:** A varied and appealing catering service on board affects passengers' satisfaction considerably. Regional products and specialties should also be considered
  - In particular, the variety of the catering services was often criticised by guests on both ships. Here it is necessary to accommodate customer requests to a greater degree. Particularly on the Oceana, improvements should be reviewed with regard to the limited options of the existing on board kitchen. At least in terms of the journeys from Bremen to Bremerhaven, the lower counter area was not being used. This space may potentially be used for an extension to the kitchen area.



- Though the widely offered form of self-service catering is consistently appreciated by passengers, as part of the efforts to enhance the quality of the ferry journeys, many passengers would also welcome personal table service.
- Particularly for ferry journeys with an overriding transfer nature, **entertainment services** gain in importance as the journey length increases
  - Entertainment services for children: even on connections which are used a lot by families with children, such services are an important addition.
  - Music services. Many passengers would like more music services on board. On the one hand, as background music but on the other hand, in the form of a music programme that can be selected at one's seat which one can use via headphones, similar to trains. More rarely, the presentation of live maritime music was also suggested. Such a service is worth considering possible if larger groups register for an excursion. Older target groups in particular react positively to services like this.
  - Reading material: a selection of current newspapers and magazines as is normal at airports and on board aeroplanes is also viewed by passengers as a convenient service
  - For longer transfer times, a small selection of board games can pleasantly shorten the journey time
  - The request for internet services (connection options or via terminal) was still surprisingly low among the survey participants on both ships. In particular, in light of the increasing use of smartphones and social media services, it can be assumed that the demand for the availability of an internet connection will grow.
- Comprehensive **safety information** are absolutely necessary to reassure the passengers' marked perception of safety
  - Numerous written safety notices are provided on both ships. Nevertheless, many passengers requested more detailed information. In particular, loudspeaker announcements with safety instructions help to increase the feeling of security among passengers. Short films with information on how to act in an emergency could be transmitted across the screens already available on the two ships.
- In principle, passengers on board the passenger ships have a **great need for information**.
  - Passengers are inquisitive. They are interested in a variety of information: on the journey course (including location display), on sights to see and history along the route, and also on technical matters that concern the ship. Information on board about the destination also helps the passenger to prepare for his or her stay. In practice, for this type of information cooperation with local tourism organisations and interested service providers is available.
  - Crucial for understanding announcements on board is a consistently high technical quality of the transmission to various lounge areas on board (inside, outside). This should be ensured for all areas.

The passengers surveyed think very pragmatically for their suggestions and requests for the furnishings of current and future passenger ships. First there is the satisfaction of basic requirements

as part of this type of journey. In addition to the aspects already mentioned above, the following aspects were also named:

- **Environmental friendliness:** It is not just current discussions about climate change that have caused environmentally friendly circumstances to increase in importance for the public. The use of environmentally friendly and energy efficient technologies for maintaining and operating a ship is therefore not just important for them in the future. The possibilities of considering these technologies and methods should therefore definitely be examined.
- **Accessibility:** Due to the construction, it is difficult to create comprehensive accessibility on the existing ships. In light of the increasingly older population, these aspects are increasing in importance, however. The surveys carried out also show this. Specific considerations should therefore be made on how connected areas of the ships at least can be better designed in this respect (access and exit, parts of the lounge area, sanitary facilities, parts of the outside area) in order to enable persons of reduced mobility a continuous use and participation in the journey.
- **Modern or traditional:** The technology should be modern, the furnishings modern or classically elegant. There are no clear trends in this regard. Each trend has its own adherents. In any case, it should be comfortable on board. The consistent implementation of the aspects considered particularly important by passengers is crucial
- **Optimal viewing areas:** Good visibility in wind and weather contributes to the positive experience of the passengers. Particularly with new constructions, it should be checked to what extent generous viewing windows (e.g. observation windows) can be achieved in light of the regulations.

## 5. Social media analysis

As part of a short analysis, it was examined to what extent and with what content both passenger ship services are part of social media platforms. Both services that are used by participants for these purposes (particularly Facebook) and third party services which involve the ferry services were considered. Overall it should be established that both services are currently only considered to a small extent in discussion on social networks. The single exception is the private blog "Nordreport" which has comprehensive information on the Heligoland boat trip overall. On the part of the provider, the shipping company Cassen Eils should be highlighted, which actively operates a Facebook page for all areas of the shipping company. Below is a brief presentation of the principal results.

### Network platforms

**Facebook:** most current network platform.

- There are no ship-specific Facebook pages with their own fans or friends. The project partners involved also provide information about ferry connections as part of their respective companies' Facebook pages
- Facebook is used by all partners apart from Hal över Schreiber shipping company. The shipping company Hal över Schreiber currently does without a Facebook page deliberately and focuses its activities on its website

- Shipping company Cassen Eils operates its Facebook page actively and as a model
  - interesting information, numerous pictures
  - The shipping company's all in all good Facebook page is rather unknown to many customers on board the Fair Lady, however
- Bremerhaven Touristik: the Facebook page of Bremerhaven Touristik has fewer fans than the private page "MeinBremerhaven"
- Heligoland's Facebook page includes image material and information on events. Many guests talk about Heligoland but hardly any about the boat trip.

**Google+:** not used by any provider

**Twitter** (short message service): no active use by the partners

**You Tube** (video portal): here there are a few short films and reports by passengers. There are no official films by the shipping companies or the customer. Bremerhaven uses its own video portal without guest participation.

**Open forums** (discussion platforms):

On the internet there are various forums on Heligoland and the ship transport. The forums are a meeting place for interested parties who talk about various topics and events, e.g. Küstenforum.de (forum for holidaying on the North Sea) and Hochseeinsel.de (topics specific to Heligoland).

**Blogs** (publicly visible diary or journal on specific or general topics of the author)

E.g Nordreport.de: private blog with detailed and comprehensive reports on boat travel to Heligoland (but also other topics).

**Recommendation portals:** Qype, Tripadvisor

Only individual comments on the services available

**Bremerhaven comment section:**

Comments and contributions on web pages of Bremerhaven Touristik. Commenting is only possible after registering beforehand. As a result, the willingness to make individual comments is reduced.

**Conclusion:**

- Among the partners, the shipping company Cassen Eils displays the most active engagement in social media. Current information on the Fair Lady is also published. For all others it currently plays a rather subordinate role
- Overall, only a few activities in social media regarding the two ship connections can be listed. Hardly any trends for improvement requirements on the ship or even for the ship of the future can be deduced from the infrequent comments
- In the surveys on the ships, it became clear that the existing services are sometimes not known
- Social media services are hitherto hardly actively used for marketing both ship connections. In light of the ever increasing use of social media and the increasing use of mobile

smartphones, a targeted increased use may be sensible. However, as already experienced by the shipping company Cassen Eils, this requires professional support which should not just take place as a side-line.

## 6. Observations at selected touchpoints

Alongside the surveys on board the two ships, the behaviour of the passengers at certain touchpoints was observed. The touchpoints are ship areas where a larger number of passengers come together temporarily or for a longer period. Observing the touchpoints provides information on functional restrictions or bottlenecks at these places. Furthermore, other striking features at these points were also recorded irrespective of the passenger figures. The extent to which bottlenecks and thus potentially to obstructions or restrictions occur depends heavily on the passenger figures. Though the ships were never fully booked on any of the observation days, certain problem areas became apparent when there were large numbers of passengers. The bottlenecks and shortcomings felt as especially disruptive by the passengers were frequently also mentioned in the surveys. It should be noted that the observations were naturally just snapshots of situations which may not always occur in the observed form. Nevertheless, these aspects should be examined closely by those responsible in order to counteract them where necessary. The following observations were recorded:

### Fair Lady

- **Boarding**  
Though entry to the ship via the gangway is not disability-friendly or accessible, the staff are ready to help actively support passengers.
- **Ticket sales at the dock in Bremerhaven**  
Depending on the numbers, there were sometimes longer queues at the pavilion in Bremerhaven. Complaints were not heard, however, and also not stated in the surveys.
- **Stairs**
  - The stairs are often steep though accessible with handrails. Nevertheless, older passengers only reached the upper decks backwards.
  - Prior to and during exit, there were jams particularly on the main stairs meaning that it is no longer accessible.
- **Sanitary facilities**
  - In principle, the sanitary facilities are outdated but suitable. The cabins are also furnished differently (with and without handrails, different flushing). There is no disabled-access toilet. The separating walls sometimes have drill holes which do not have opaque holes. The facility sometimes looks rather badly kept. Thus, for example, the mirror (ladies toilet) was not cleaned throughout the entire investigation period and had marks.
  - To use the toilet, a voluntary donation was requested, which was frequently criticised by passengers. Though such a procedure is thoroughly normal and is becoming more and more obligatory for public toilets, it is usually dispensed with in transportation (e.g. on a train or an aeroplane). Service-oriented solutions should be preferred in this respect

- **Exit with *Börteboote* (boats for disembarking)**
  - Exiting onto the *Börteboot* proves to be an adventure for many passengers. This elicits both positive and negative feedback. Helpers are ready but the spirited grasp under the arms is unpleasant for some passengers. On the *Börteboot*, taking one's seat is laborious as sometimes benches have to be climbed over. During the crossing to the Heligoland dock, it sometimes happened that some passengers had to stand due to overcrowding which was not always easy with the fluctuations of the small boat. It lacks a non-slip floor.
  - Embarking from the *Börteboot* onto the ship also causes similar problems. Some passengers do not manage the height of the step and fall on the hard iron edge which cannot always be prevented by the helpers. Here customised padding could reduce the impact.
  - Throughout the investigation period, passengers were injured in rare cases. A Passenger injured his knee and fellow passengers reported other injuries.
- **Doors to the outdoor areas**

The doors on the ship are sometimes locked or are opened with difficult so that people have to turn around and find an alternative route. Thus, for example, the door to the compass platform was so difficult to open that some passengers never managed to open it and assumed that the compass platform was also locked during the journey.

- **Staff**

The staff are friendly and helpful. It was positively emphasised by passengers that the staff would provide very good information about the sites to see on the journey and tips on Heligoland, if necessary. Conversely, it was criticised that few to no announcements were made on appropriate topics and there was no information provided.

## MS Oceana:

- **Dock / Pontoons**
  - Thanks to the floating pontoons, there are no serious height differences to overcome when entering the ship directly. However, access is not completely accessible and so wheelchair users require extra help. For the most part, there were no serious issues or impairments when passengers boarded and when loading bicycles.
  - Depending on the water level, varying height differences are to be overcome to get to the pontoon. At low water levels, the incline angle of the access path to the pontoon increases, meaning that careful walking is necessary.
  - Depending on the waves, the ship sometimes moved against individual pontoons with some force which accordingly swelled and were shaken. The people waiting on it were sometimes not prepared for it and lost their balance. Nevertheless, risks for waiting passengers should be prevented.
- **Cash point on board**
  - Because the ship does not stay at the dock for long, in the boarding room there are often long queues for the cash point. Customers therefore receive small receipts which they have to hand in again to pay their journey fare. This system seems cumbersome and

prone to error in the observation and requires passengers to be called out frequently to redeem their receipts. The problem is particularly apparent at the stopping places without an outlet.

– It was frequently criticised that not all tickets are available on site, so, for example, the VBN ticket and the extra Klimahaus offer.

- **Counter on the main deck**

The lower counter was often not used at all or only for short periods. The opening was not obvious for some guests meaning that they waited in vain for service. Here a screen with an indication of the service on the upper deck or a bell could help.

- **Accessibility of the outside deck**

For passengers with walking difficulties or for wheelchair users, it is mainly just the lower part of the ship that is accessible if they are not able to overcome the stairs to the upper deck. In such cases, they are also denied access to the outside decks as they can only be reached via the upper deck. Unfortunately, there are no outside areas below. In principle, the stairs are themselves wide and equipped with handrails, they are sometimes relatively steep.

- **Rear outside deck**

– Here some of the benches are sometimes ramshackle and wobbly. One bench fell apart during the journey. In the middle area of the outside deck, there is still a lot of space which should be better furnished with benches instead of standing tables on sunny and well-frequented days, as many passengers prefer to sit due to the journey time.

– A number of passengers criticised the fact that the ship's exhaust fumes were discharged directly above the outside deck. In some cases, this led to soot marks on the passengers' clothes.

- **Sanitary facilities**

To access the sanitary facilities, a small step has to be overcome. The toilet cabins themselves are narrow, which may lead to impairments for disabled and more corpulent passengers. There is no disabled-access toilet. The wash basins often cannot be reached by many children; a stool would be a solution here. Changing tables are also not available. It has happened that passengers have changed their children's nappies on the floor. Even if these cases only occurred rarely, solutions should nevertheless be considered for this. As the windows in the sanitary areas cannot be opened, though hand dryers are used in the narrow rooms, it gets warm and stuffy in the rooms even in low temperatures.

- **Staff**

– The staff were found to be on the whole very friendly, committed and helpful by the passengers. It was only during boarding that some customers wished for more support.

– When there were large numbers of passengers, sometimes not all of the tasks could be carried out satisfactorily. Thus, tables in the service area were sometimes no longer covered and cleared up, chairs were not returned to their intended place or toilets not cleaned up afterwards. This struck some passengers as unpleasant.

- **Multi media services**

Screens for displaying information (e.g. route progress and displaying the current location or for displaying safety information) are available though not used.

### III. Further recommendations for product improvements and marketing

The preceding remarks contain numerous indications for product and service improvements. In addition, there are a range of other measures with which marketing activities can be improved. In the proposals below, there are suggestions and recommendations which should be specifically developed further where necessary.

#### 1. Enhancing the ticket and service range

In the surveys, the passengers demonstrated a high level of sensitivity to prices both in relation to the service itself and also with regard to the prices on board. In this respect, it is necessary to enhance the existing services on the one hand, and to develop new services on the other, with which passengers can be offered attractive added values at an attractive price. This can be the targeted and nuanced enhancing of combo tickets for which there are already initial signs on both ships (combination with the Klimahaus or combinations with catering services) and also completely new appealing services. The following are possible, for example:

- Multiple tickets / season passes
- Differentiation of journey prices e.g. depending on season (except for the catamaran, a price differentiation is so far only practised during summer transport on the MS Atlantis)
- Themed journeys with special offers
  - culinary themes (culinary travel, gastronomic emphases, regional references, etc.)
  - cultural themes (literary travel, musical offers)
  - other special events (definitely take place on the Oceana but also check events that can be linked with the journey, e.g. special family or experience journeys)
- Combination tickets with offers in Bremerhaven (like Oceana, ideally other offers or combinations, can be booked online)
- Ticket combinations with other islands or other destinations
- Early booking discounts (like the rail budget price)
- Connection tickets with other public transport systems (ideally also bookable online)
- Inclusive or premium tickets (e.g. parking included, or preferred parking in special car parks nearby)
- Especially Heligoland: development of stay offers which include the ship journey



## 2. Improving online services

The internet plays a significant role in getting attention and for prior information as the surveys confirmed. But the option of being able to book tickets and services directly online is very important for many internet users and will increase in importance in the future. It is therefore necessary to continue to improve this sales channel. Not all partners work on the same level or they have different emphases. While the shipping company Cassen Eils already operates the area of social media on the recorded platforms professionally, for example, the shipping company Hal über Schreiber deliberately does without them completely and the social media platforms of Bremerhaven and Heligoland are still capable of improvement. The booming use of smartphones, for example, requires making internet sites suitable for mobile applications. To make use of mutual synergies and to achieve increases in efficiency, joint cooperation also presents itself. The following measures are being considered

- Ensuring the ability to book online: all services by the project partners should be uncomplicated for guests to book online. This concerns both the individual ticket and combination offers.
- Options to what extent the partners can benefit from the growing area of mobile internet applications (for smartphones and tablet PCs) should be checked. Applications for prior information, booking offers on a mobile or even information during the journey (thus passengers expressed a great need for information in the surveys. Passengers could find out about a corresponding "info app" individually) are possible.
- Involvement in social media can also be intensified in joint cooperation with the partners. A central, professional hosting generates synergies and ensures uniform quality of the services
- In striving to enhance combination offers with interesting attractions, corresponding mutual linking should be carried out. The information content and thus the attractiveness increase as a result.
- Joint action with attractive facilities serving as a beacon increases interest in the services.

## 3. Product and sales improvements

### **Increasing product and service quality**

As the surveys revealed, high product and service quality is very important to passengers for a successful holiday experience and a high level of satisfaction. The proposals and suggestions made by passengers for improvements to the services should therefore be examined in detail and taken into account where possible and reasonable. Alongside measures to improve the seating and stay comfort and the improvements to the entertainment service, this concerned increasing the quality of the catering services in particular. Numerous indications of this can be seen in the ship-specific details in the preceding chapters.

### **Introduction of a comfort or premium class**

In light of the existing sensitivity of passengers to price on the one hand and the existing desire for greater seating quality on the other, considerations regarding a possible seating differentiation



should also be examined (e.g. following the model of first class on trains). Alongside greater seating quality, additional services are available to the user, which make the higher transport price attractive to the passenger. This includes, for example

- Fixed seat reservations
- Parking fees included
- Preferred / quick boarding
- Preferred packing service
- Personal service at one's seat,
- A free hot beverage included.

### **Cooperation with travel agents**

Additional passenger potential could be generated through cooperation with travel agents. In particular, cooperation with regional bus travel agents is an option for promoting excursion transport. With regard to people staying overnight, travel agents across Germany are also contacts. However, a consistently high offer and service quality should be ensured.

### **Strengthening of cross-marketing activities**

The partnership with the shipping company Hal über Schreiber with a regional Bremen radio broadcaster contributes positively to the popularity and image promotion of the service in the region. Joint actions support this issue sustainably. This already model partnership should be motivation for the expansion of other cross-sector cross-marketing cooperation. The cooperation with other sectors and companies offers the mutual opportunity to bring image, popularity and sales into new sections of the population via new channels (examples of this are the marketing cooperation between Nordsee GmbH and the clothing chain Engbers not long ago or the partnership between EWE and Nordseelauf). The range of these types of cooperation is very broad. In the case of the shipping company Hal über Schreiber, it is a long-term partnership, though event or campaign-related partnerships are also possible. Thus readers competitions, carried out with regional newspapers, are very popular. This should be increased and expanded for mutual benefit.

In principle, the proposed measures for both ships are under consideration. The specific options should naturally be examined individually. When it comes to the development of a "passenger ship of the future", the results determined as part of this investigation should be considered at an early stage.