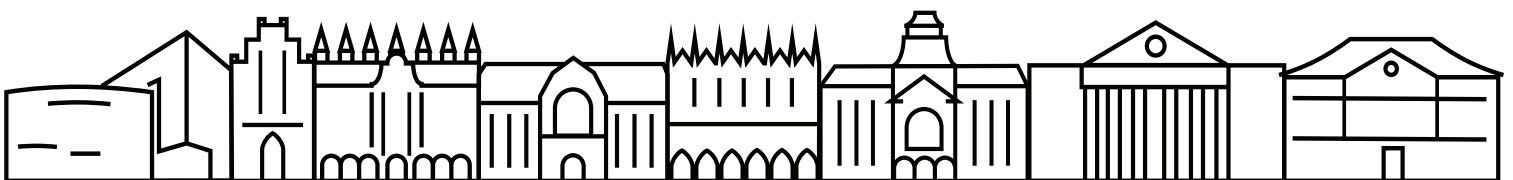




CRUISE MARKETING STRATEGY - JOHANN

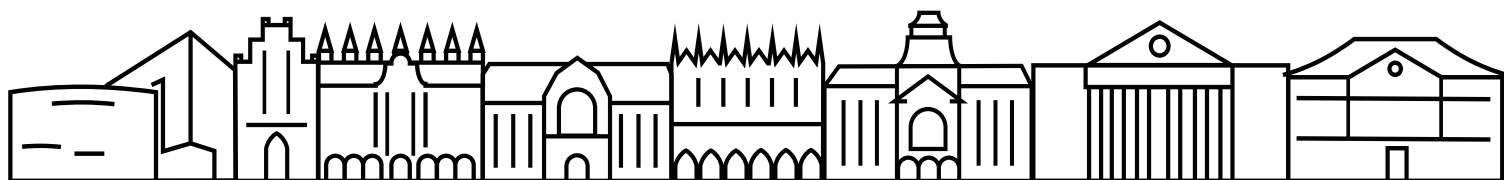


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The contents of this strategy are the sole responsibility of the authors and can in no way be taken to reflect the views of the European Union, the Managing Authority or the Joint Secretariat of the Interreg South Baltic Programme 2014-2020.



INTRODUCTION

The project Johann (Joint development of small cruise ship tourism heritage products in the Southern Baltic Sea Region), involves six project destinations (Rostock, Wismar, Stralsund, Szczecin, Karlskrona and Kalmar). Its overall idea is to develop the South Baltic Region as an attractive small cruise ship destination. Strengthening the range of cultural and natural excursions, improving the operation on both land- and water-side and integrating the cruise business in the urban city planning are all success factors that the project will focus on. Moreover the partner destinations need to reach the major target group – the cruise ship operators/the cruise line representatives.

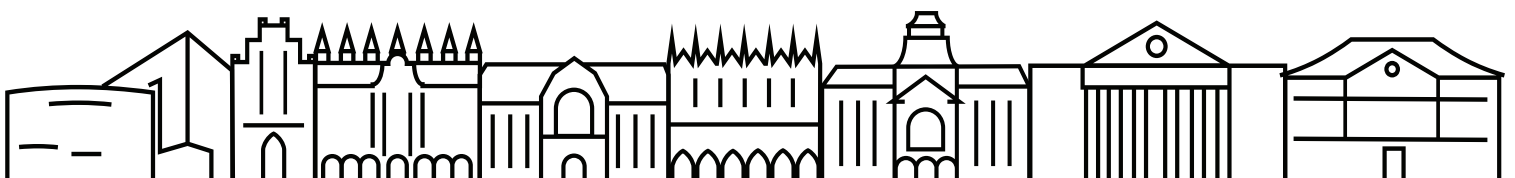
3.

SCOPE

The Cruise Marketing Strategy is the result of the project's activity 3.4: Development of Marketing Strategies for six destinations. We have based this joint strategy on insights from the activity 3.2: Small Cruise Ship Market Analysis, carried out by Mr. Luis De Carvalho, BA Europe as well as the activity 4.2: Cruise Port Benchmark Study, carried out by Gdynia Maritime University. We have also gained input from discussions with established cruise destinations in Europe and North America during the cruise convention, Seatrade Global 2018. Moreover we have gathered information based on surveys made by various organizations primarily within the travel and consumer behavior sector. The relevant knowledge is summarized as insights and success factors as they are valuable for cruise destinations but normally are not a part of a marketing strategy. The cruise marketing strategy will define the strategic goals and tactics to reach them within the scope of communication and marketing. Target groups and target markets are also defined.

PRECLUSION

The Cruise Marketing Strategy is defined with a general perspective for the JOHANN project, to provide the partner destinations with insights regarding marketing approach. A detailed action plan should be stated separately both on a joint level and on a local level based on this document and other relevant input.



INSIGHTS AND SUCCESS FACTORS

4.

These are valuable insights that we have gathered from discussions, analysis, benchmark study and by experience from the cruise business.

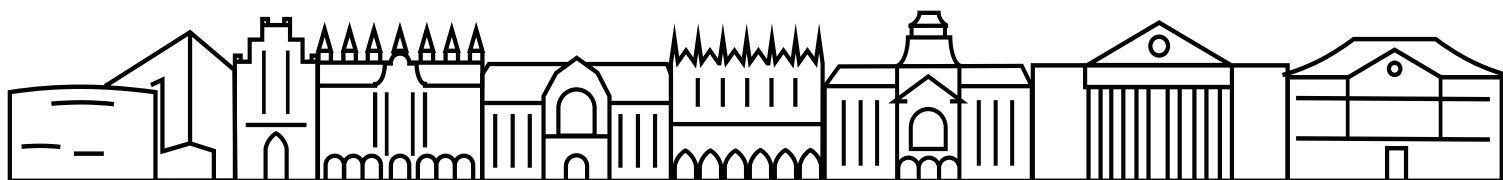
KEEP UP WITH THE TRENDS AND FORECASTS of future travel and consumer behavior (in general not only for the cruise business) is crucial to develop the destination in the right direction. The trends towards higher quality of services and products, skilled workforce, sustainable choices like ecological branding and eco-tourism, better accessibility and increasing tourism from China are some examples.

FOCUS ON INCREASING THE CRUISE KNOWLEDGE/INTELLIGENCE – by situations analysis and insights through benchmarking, networking and keeping up with the state the cruise industry (status, forecast and trends).

GAIN KNOWLEDGE OF THE SMALL CRUISE SHIP SEGMENT and their expectations, for instance how the cruise lines rate different factors based on their importance when selecting destinations, who the key players are within the cruise lines when it comes to itinerary planning, the itinerary planning process, the timeframe and what kind of sales argument to use. Each cruise line has different types of clientele and therefore prioritizes different factors when selecting destinations for their itineraries.

PERFORM A STAKEHOLDER ANALYSIS, which shows the complexity of the cruise business and its vast scope. The main stakeholders are the different departments of the cruise line that influence the itinerary planning decisions, the travel agent and the end-consumer at a worldwide level. On a local/regional level the main stakeholders are the city/destination, port, attractions, guides, transportation, shops, restaurants, security, port agents and tour operators.

DETERMINE A CRUISE STRATEGY approved by the main regional/local stakeholders and communicated to all stakeholders within the region. The cruise strategy should cover overall strategic objectives, value chain, unique selling point, stakeholder analysis and all strategies and tactics associated to the cruise business; for instance water-side-operations, shore excursions, capacity building, service and welcoming.



DEFINE “WHY TO BECOME AND DEVELOP AS A CRUISE DESTINATION” and the value chain – what does the cruise business generate? Beside the fact that the cruise business generates port fees and passengers to the region, there are other factors to take into account. The pride among locals often increases when the cruise vessels are visiting. The cruise guests are international guest, which requires the destination to develop with an international focus (multi-language signage, menus, guides etc). The premium excursions developed for the cruise guests can be used for other premium groups. Moreover the possibility to attract revisiting guests and get brand awareness by recommendations or by word-of-mouth increases but is hard to measure.

ESTABLISH A LOCAL/REGIONAL CRUISE NETWORK with a clear responsibility breakdown – who does what?

APPOINT A DEDICATED CRUISE MANAGER/COORDINATOR. One of the success factors is the ability to get into close contact with the relevant cruise line representatives and by personal relationships communicate the strength of the destination – it is important to appoint the right person on a long-term basis.

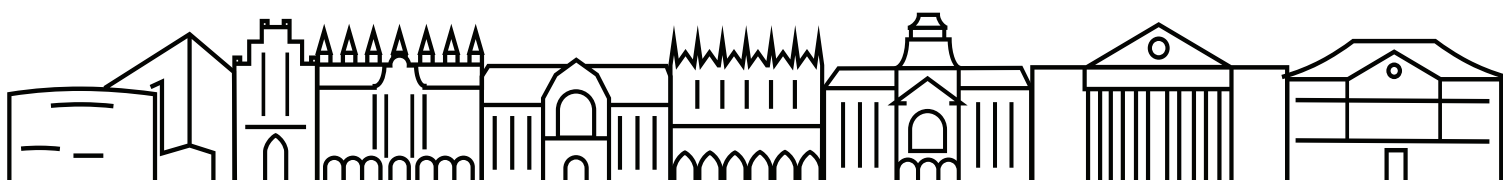
COOPERATE WITH PORT AGENTS AND TOUR OPERATORS since they often meet the cruise lines and should act as ambassadors for the destination.

BEING PART OF DIFFERENT PARTNERSHIPS gives opportunities to gain and share knowledge, benchmark and it also might be a cost-efficient way to brand the region and the destination to get more visibility.

STRATEGIC PRODUCT DEVELOPMENT within several fields, focusing on tours, attractions, guides, land and water side operations, crew services etc.

DETERMINE A UNIQUE SELLING POINT (USP) that makes you special or at least memorable and well defined.

COOPERATE WITH NATIONAL/REGIONAL TOURIST BOARDS to increase the brand awareness and to make cruise a part of the local/regional tourism strategy.



OBJECTIVES, STRATEGIC GOALS AND TACTICS

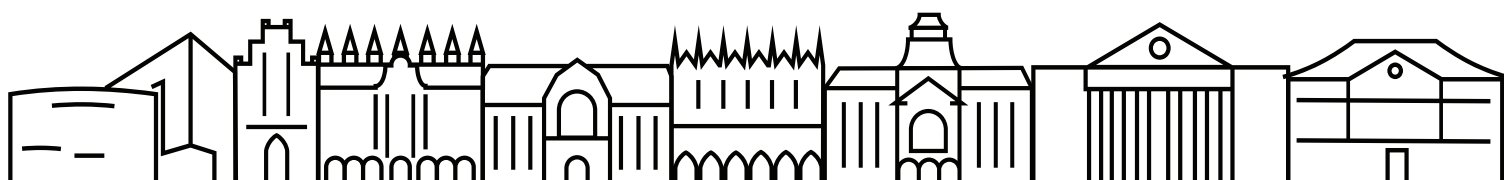
6.

The objectives in terms of number of cruise ships and passengers, has to be suitable to the destination according to the capacity of high quality guides, buses and attractions. Another factor that has to be taken into account is the number of land based tourists already visiting and at which level the destination and its inhabitants are affected in a negative way due to too much visitors. Based on the market analysis and workshops we have determined two major strategic goals that both demand different tactics.

OBJECTIVES

Three major objectives have been determined as JOHANNNS main outputs to be achieved within the project period 2017-2019:

- 10 implemented small ship cruises involving at least one South Baltic city port outlying the main cruise routes (project partner destinations).
- 10 000 passengers on small cruise ships visiting the partner destinations (city ports outlying the main cruise routes).
- 10 small cruise ship operators shall have an increased knowledge about the South Baltic Sea as an attractive cultural and natural heritage destination for small cruise ships.



STRATEGIC GOAL #1: INCREASE THE KNOWLEDGE WITHIN THE CRUISE BUSINESS

7.

If the cruise operators lack or have poor knowledge of the destination, the chance to gain attention by the cruise operators is slim to none. The first strategic goal is to increase the knowledge about the partners as cruise destinations within the cruise business. The destinations need to find different ways to get into contact with the cruise line representatives.

TACTICS FOR #1:

Focus on direct communication with the key players within the river cruise and small cruise business and give them a greater knowledge of the cruise destination by:

- one-to-one meetings pre-booked at cruise conventions
- sales calls at the office of the cruise line (cruise line visit)
- inviting the cruise line representatives to familiarization (fam) trips

Focus on relevant communication with the right content.

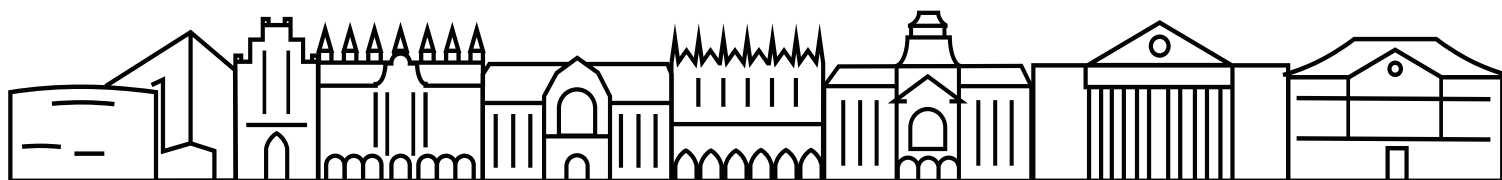
- do not oversell
- communicate a true story and a “unique/well-defined” USP
- communicate with the key players through digital channels i.e. e-mail and newsletters, writing about relevant news continuously
- produce relevant promotion material – designed for short one-to-one meetings
- appoint a dedicated cruise marketing coordinator/manager, which is crucial to build relationship and trust among the key players

Create earned space (news or features of the destination) in external media/relevant cruise media to spread knowledge about the cruise destination focusing on highlights and news related to the destination or port.

- send out press releases
- arrange press events
- invite relevant cruise media to fam-trips in the region

Get ambassadors to promote your cruise destination.

- provide the tour and port agents as well as the travel agents with relevant information continuously
- invite tour and port agents to experience new tours or see new investments on site
- use the crew to talk about your destination by treating them extraordinary well



STRATEGIC GOAL #2: INCREASE THE CRUISE DESTINATION AWARENESS

8.

The second strategic goal is to increase the cruise destination awareness among the potential cruise guest. However, strengthening the image of the destination as an attractive place by increasing the awareness, knowledge and interest requires great resources on a long-term basis. Cooperation with national/regional/local tourist boards is vital to increase the brand awareness among end consumers on relevant target markets.

TACTICS FOR #2:

Loyalty growth by transforming visitors and inhabitants into advocates/ambassadors telling others about the reasons to visit:

- deliver a high-quality experience to all visitors
- keep the locals informed and give them proper arguments easy to share on social media or by mouth to-mouth

Increased online visibility:

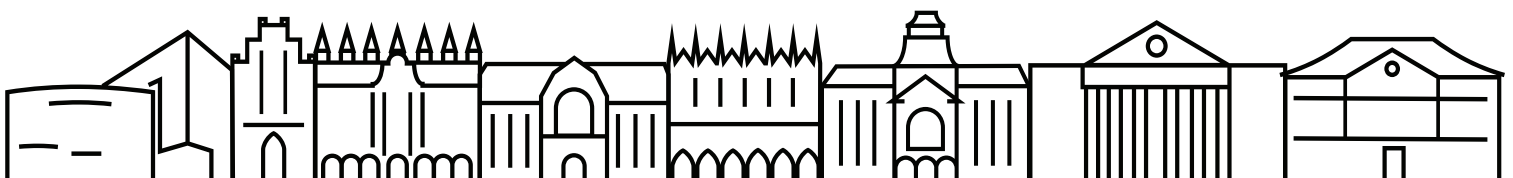
- create online content that engage and gives the recipient the right perception of the cruise destination

Proactive media and PR work:

- invite influencers and travel media to site visits in cooperation with the regional/local tourist boards

Evolve strategic partnerships to improve online reputation:

- establish a partnership together with important actors like TripAdvisor, Google Places etc
- engage attractions to manage their online reputation to give the end consumer an accurate image of the destination, its attractions and other points of interest



TARGET GROUPS AND MARKETS

The cruise business consists of a limited number of cruise operators but the business is complex due to its many stakeholders, also on a local level. The passengers origin from all parts of the world whereas the cruise lines have their headquarters concentrated to Europe and North America.

9.

CRUISE LINE REPRESENTATIVES dealing with small and medium size ships or river cruise ships in their fleet. The cruise lines operating in Northern Europe are mainly located in Germany, the United Kingdom, Italy, Spain and the USA.

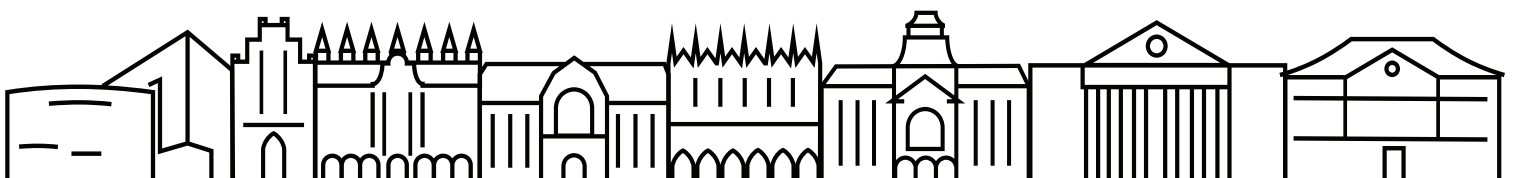
CRUISE MEDIA, based in North America and Europe, (covering cruise industry news related to cruises in Northern Europe)

TOUR AND PORT AGENTS that operate on the cruise destination. They operate normally quite rarely at the destination when it comes to small cruise destinations.

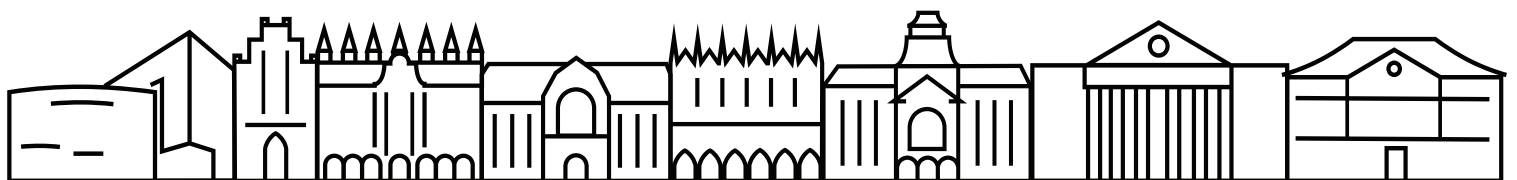
TRAVEL AGENTS selling cruises, operating from the country where their clients are. In Germany, the United Kingdom and the USA the travel agents still have a strong position between the operator and the end-consumer.

CREW including captains, shore excursion staff etc. The crew might have the influence to revisit a destination, but even more impact in case of the opposite. Dealing with crew should be carried out with great sense of the individual s needs.

END-CONSUMER – the potential cruise passenger. Cruise as a way of travel continues to increase and the cruise passengers are all over the world making it hard to influence them. The demographics of small cruise ships passengers and river cruise guests helps to segment this target group based on mainly age and income.



CRUISE STRATEGY - KALMAR



PREFACE: INTRODUCTION TO THE DESTINATION AND CRUISE DEVELOPMENT

Kalmar is one of Sweden's oldest cities and has received the Europa Nostra award twice for the town's historical and well-preserved atmosphere: A few minutes' walk from the cruise pier, 17th-century architecture adorns the downtown area, and a distinct historical ambiance mix with modern art and design.

The Port of Kalmar lies in a sheltered position, adjacent to the shipping lane in Kalmar Sound. The port is fully equipped and has a long experience in receiving cruise ships. Smaller cruise ships moor at the dedicated cruise quay Elevator kajen in the city center, whereas larger cruise ships anchor just south of the port. There is a purpose-built jetty/landing stage for tender boats where passengers can easily step ashore and return on board.

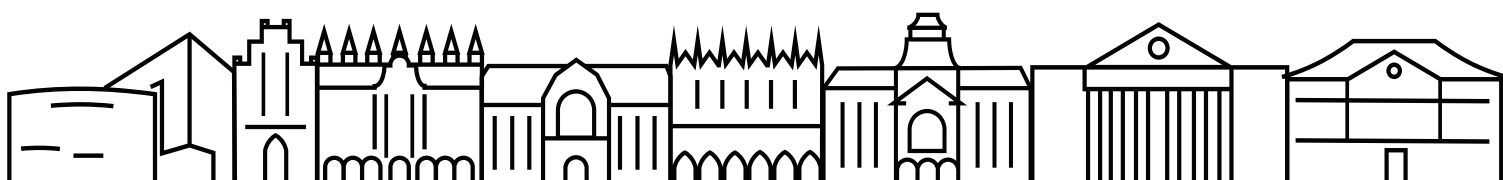
Regarding Kalmar as a cruise destination, the strengths are the city center itself with its closeness to the interesting attractions like Kalmar Castle, Warship Kronan exhibition and the old town and excursions to the Kingdom of Crystal and the island of Öland. Also the experience from the port and destination regarding welcoming cruise ships (since the 90's) are important. The challenge is the port/pier dimensions and waste handling at the cruise quay in the city center.

The cruise development has been quite poor the last 10-15 years with 1-4 cruise calls per year. The most calls arrived during late 90's (10-20 calls per year). With no further focus on marketing and development the number of calls will decrease even more. With a strategic plan and efforts accordingly, the long-term goal is to have a continuous level of 10-15 calls per year.

Picture 1: Port overview



Source: Kalmar Destination AB



CRUISE STRATEGY - KALMAR

This strategy determines the objectives, five strategic focus with specific tactics and our prime target groups.

12.

OBJECTIVES

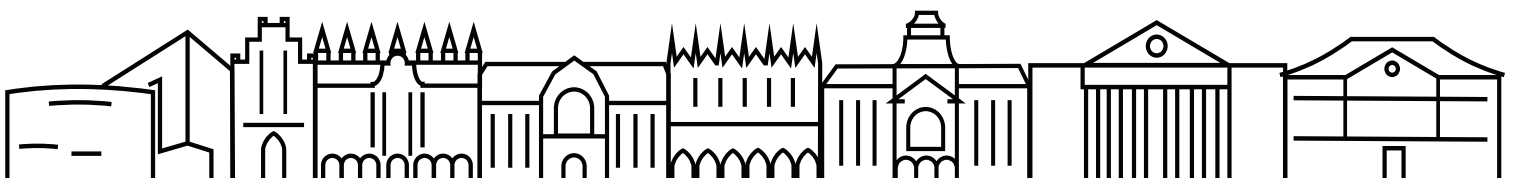
The objectives in terms of number of cruise ships and passengers, has to be suitable to the destination according to the capacity of high quality guides, buses and attractions. Another factor that has to be taken into account is the number of land based tourists already visiting and at which level the destination and its inhabitants are affected in a negative way due to too much visitors.

- 10 cruise ship operators annually shall have an increased knowledge about Kalmar as a cruise destination.
- Short term goal is to greet 1-5 cruise ships annually.
- Long-term goal is to have a continuous level of 10-15 calls per year.
- Maximum capacity is approx. 1200 pax per call and 20 calls per year.

STRATEGIC FOCUS #1: INCREASE THE CRUISE INTELLIGENCE

We need to be know about the upcoming travel trends (in general – and the cruise industry) as is crucial to develop the destination in the right direction. The trends towards higher quality of services and products, skilled workforce, sustainable choices like ecological branding and eco-tourism, better accessibility and increasing tourism from China are some examples.

It is also important to understand the cruise lines determine their itineraries, for instance how the cruise lines rate different factors based on their importance when selecting destinations, who the key players are within the cruise lines when it comes to itinerary planning, the itinerary planning process, the timeframe and what kind of sales argument to use. Each cruise line has different types of clientele within the small cruise ship segment and therefore prioritizes different factors when selecting destinations for their itineraries.



TACTICS FOR #1:

Keep up with the trends and forecasts of future travel and consumer behavior by:

13.

- participate in tourism summits
- active partner in the Cruise Baltic network and take notice to cruise industry updates through communication channels and by attending the partner meetings
- keeping up with the state of the cruise industry by cruise related newsletters or articles

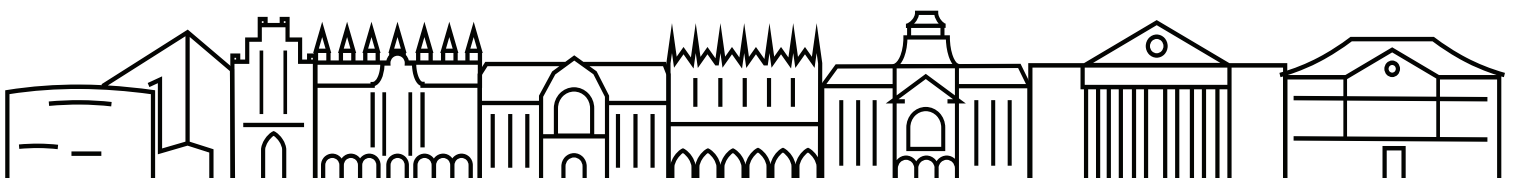
Gain knowledge of the cruise ship segment and their expectations by:

- listen to cruise panel “debates” within Cruise Baltic or other forum

STRATEGIC FOCUS #2: LOCAL COLLABORATION AND PARTNERS

Beside the fact that the cruise industry generates port fees and passengers to the region, there are other factors to take into account. The pride among locals often increases when the cruise vessels are visiting. The cruise guests are international guest, which requires the destination to develop with an international focus (multi-language signage, menus, guides etc). The premium excursions developed for the cruise guests can be used for other premium groups. Moreover the possibility to attract revisiting guests and get brand awareness by recommendations or by word-of-mouth increases but is hard to measure.

To be able to show who benefits from the cruise industry we use a stakeholder analysis, which shows the complexity of the cruise industry and its vast scope. The main stakeholders are the different departments of the cruise line that influence the itinerary planning decisions, the travel agent and the end-consumer at a worldwide level. On a local/regional level the main stakeholders are the city/destination, port, attractions, guides, transportation, shops, restaurants, security, port agents and tour operators.



TACTICS FOR #2:

We need to define “why to become and develop as a cruise destination” and what does the cruise industry generate to the local society by:

14.

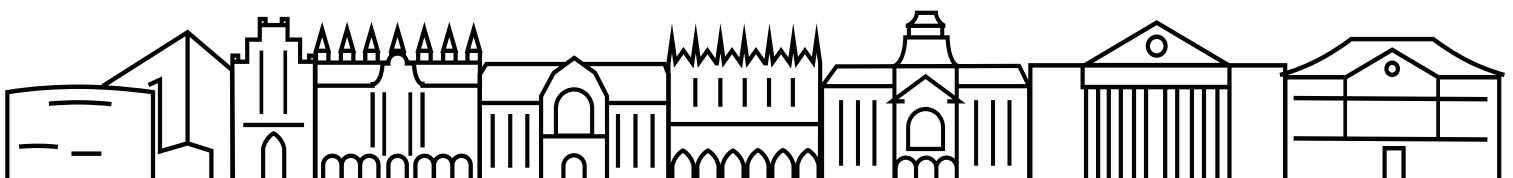
- performing a value chain for local cruise industry
- performing a stakeholder analysis on a Kalmar level

We need to determine how we should work on a local basis by:

- establishing a local/regional cruise network
- responsibility breakdown – who does what?
- appointing a dedicated cruise manager/coordinator (on a long-term basis)

We need to use our connectors and partners by:

- cooperating with port agents and tour operators since they often meet the cruise lines and should act as ambassadors for the destination.
- cooperating with national/regional tourist boards to increase the brand awareness and to make cruise a part of the local/regional tourism strategy



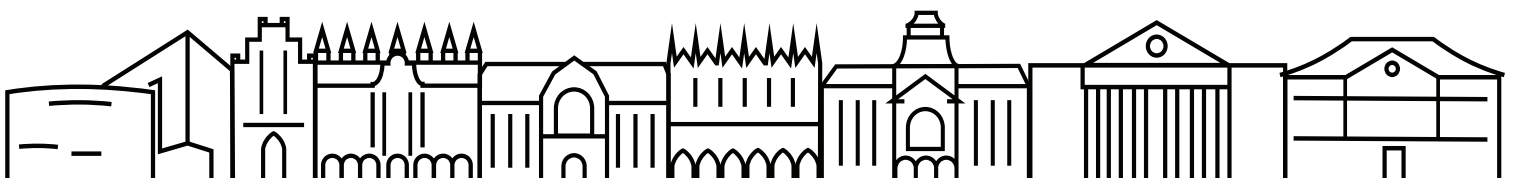
STRATEGIC FOCUS #3: PRODUCT DEVELOPMENT

15.

To be able to meet the expectations of both cruise guests and the cruise lines we need to continuously work on developing the destination within the fields of attractions, greeting/hosting, physical environment and communication.

We need to offer a desirable destination by product development focusing on:

- tour development
- attraction development
- guide performance & education
- improving water side operations
- improving land side operations – welcome area
- improving crew services etc.



STRATEGIC FOCUS #4: INCREASE THE KNOWLEDGE OF KALMAR REGION WITHIN THE CRUISE INDUSTRY

16.

If the cruise operators lack or have poor knowledge of the destination, the chance to gain attention by the cruise operators is slim to none. The strategic goal is to increase the knowledge about Kalmar region as a cruise destination within the cruise industry.

TACTICS FOR #4: Focus on direct communication with the key players within the cruise industry and give them a greater knowledge of the cruise destination by:

- one-to-one meetings pre-booked at cruise conventions
- sales calls at the office of the cruise line (cruise line visit)
- inviting the cruise line representatives to familiarization (fam) trips in cooperation with others

Focus on relevant communication with the right content.

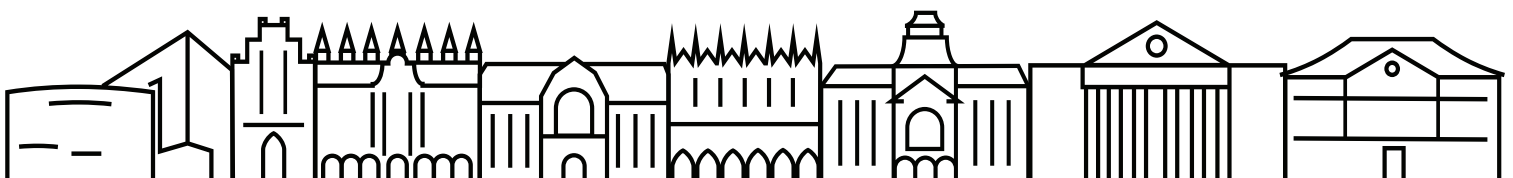
- no overselling
- communicating a true story and a “unique/well-defined” USP
- communicating with the key players through digital channels i.e. e-mail and newsletters, writing about relevant news continuously
- producing relevant promotion material – designed for short one-to-one meetings

Create earned space (news or features) in external media/relevant cruise media to spread knowledge (in cooperation with Cruise Baltic or other forum)

- sending out press releases
- arranging press events
- inviting relevant cruise media to fam-trips in the region

Get ambassadors to promote your cruise destination by:

- providing the tour and port agents as well as the travel agents with relevant information continuously
- inviting tour and port agents to experience new tours or see new investments on site
- using the crew to talk about your destination by treating them extraordinary well



STRATEGIC FOCUS #5: INCREASE THE CRUISE DESTINATION AWARENESS

The last strategic goal is to increase Kalmar s awareness among the potential cruise guest. However, strengthening the image of the destination as an attractive place by increasing the awareness, knowledge and interest requires great resources on a long-term basis. Cooperation with national and regional tourist boards is vital to increase the brand awareness among end consumers on relevant target markets.

17.

TACTICS FOR #5:

Loyalty growth by transforming visitors and inhabitants into advocates/ambassadors telling others about the reasons to visit by:

- delivering a high-quality experience to all visitors
- keeping the locals informed and give them proper arguments easy to share on social media or by mouth-to-mouth

Increased online visibility by:

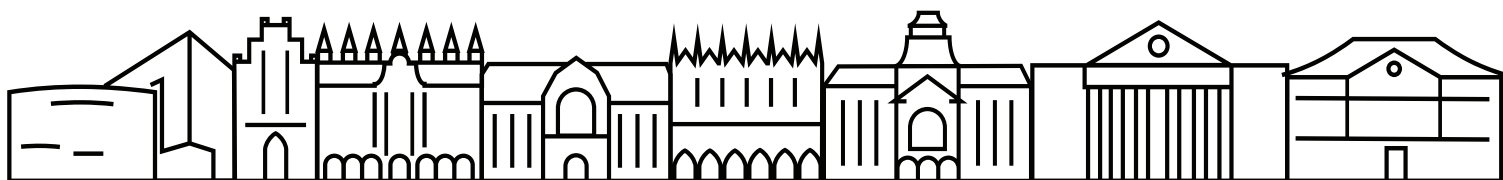
- creating online content that engage and gives the recipient the right perception of the cruise destination

Proactive media and PR work by:

- inviting influencers and travel media to site visits in cooperation with the regional/local tourist boards

Evolve strategic partnerships to improve online reputation by:

- establishing a partnership together with important actors like Trip Advisor, Google Places etc.
- engaging attractions to manage their online reputation to give the end consumer an accurate image of the destination, its attractions and other points of interest

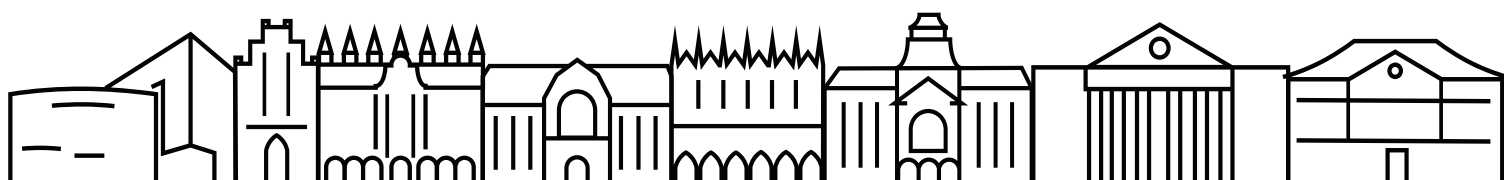


TARGET GROUPS AND MARKETS

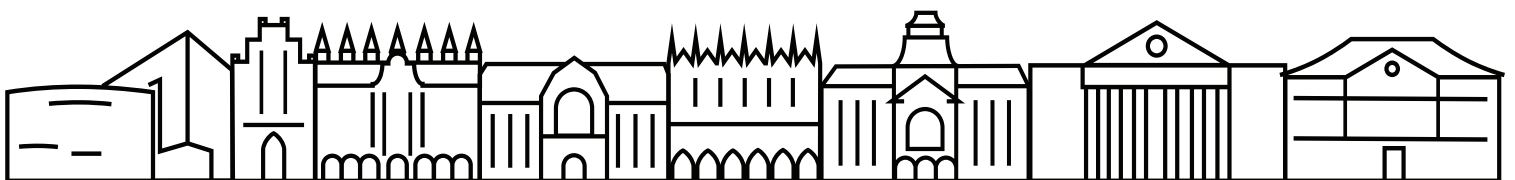
The cruise industry consists of a limited number of cruise operators but the industry is complex due to its many stakeholders, also on a local level. The passengers origin from all parts of the world whereas the cruise lines have their headquarters concentrated to Europe and North America. Our main target group is the cruise line representatives. We will not focus on the target market of travel agents selling cruises.

18.

- Cruise line representatives dealing with small and medium size ships in their fleet. The cruise lines operating in Northern Europe are mainly located in Germany, the United Kingdom, Italy, Spain and the USA.
- Cruise media, based in North America and Europe, (covering cruise industry news related to cruises in Northern Europe)
- Tour and port agents that operate on the cruise destination. They operate normally quite rarely at the destination when it comes to small cruise destinations.
- Travel agents selling cruises, operating from the country where their clients are. In Germany, the United Kingdom and the USA the travel agents still have a strong position between the operator and the end-consumer.
- Crew including captains, shore excursion staff etc. The crew might have the influence to revisit a destination, but even more impact in case of the opposite. Dealing with crew should be carried out with great sense of the individual s needs.
- End-consumer – the potential cruise passenger. Cruise as a way of travel continues to increase and the cruise passengers are all over the world making it hard to influence them. The demographics of small cruise ships passengers helps to segment this target group based on mainly age and income.



CRUISE STRATEGY - ROSTOCK



CRUISE STRATEGY - ROSTOCK

In Rostock, the concept of tourism is generally applied to cruise tourism in 2022. The JOHANN and the JOHANNA project should underpin this strategy for the city harbour and the niche segment "small cruise ships".

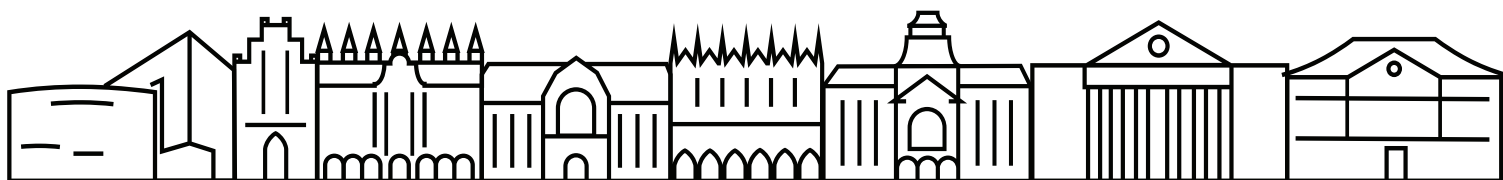
20.

The Rostock JOHANN-team is convinced that for the next years the city harbour is not competitive for visits by small cruise ships, mega-yachts or tall ships (with profit intention). This tourism segment is subordinate to the strategy "Rostocker Oval/maritime economy, maritime appeal" and the next main urban development step "BUGA2025" (federal garden exhibition2025 around and with city harbour).

Picture 1: Rostock city harbour- Haedgehalbinsel, pier for small cruise ships



Source: Aerial view Günther Hanke / small picture "Haedgehalbinsel" with small cruise ship (from Johann study ARCHITECTUURPLATFORM TERWECOREN VERDICKT/ Analysis of the urban waterfront area in 6 cities around the South Baltic, Del 5.1)



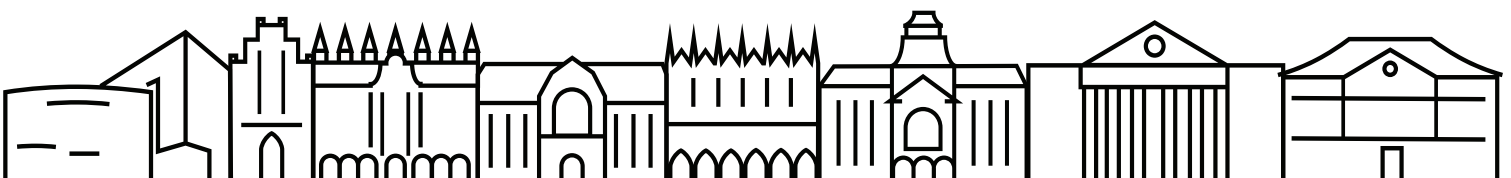
Thanks to dredging of the channel/waterway and the deepening of the two berths the technical-nautical conditions for cruise visits are meanwhile given. However, the potential of the city harbour is far from being exhausted – or in other words and as mentioned by Port and Cruise Destination Development Firm Bermello Ajamil & Partners and complained by local partners: “ parking charm in the city harbour”. Initiatives like “The Rost-Dock” (gastronomy in yellow containers managed by start-ups, <https://rost-dock.de>) are important to gradually turn the latter into an attractive cruise area. It will be discussed with new mayor, to co-operate with the above-mentioned company, to install at the container walls some basic information about small cruise business plans for Rostock’s city port and Rostocker Oval/BUGA2025 in general. The expertise of the Brussels architect’s office ARCHITECTUURPLATFORM TERWECOREN VERDICKT is completed since September 2019. The process of its development was used as tool for activation, to sensitize the expert community in the Baltic Sea. This study will be taken as basis to convince e.g. the new city-parliament of Rostock for further detailed planning and its implementation. Rostock-owned urban development agency RGS is currently working on the more detailed and investment related Buga2025 planning on behalf of the city administration (comparable master plan Rostocker Oval / heritage city port) (please see international workshop 2017 http://www.smallships.eu/#section_3). An international architects' and planners competition prepared for the autumn/turn of the year 2019/2020 will use this study as a basis, as well as the public discussion about the JOHANN and JOHANNA projects, also mentioning the running EU-wide tender for "mobile, high-quality ISPS fence".

INTERNAL MARKETING (PUBLIC / POLITICAL)

The current series of controversial discussions in local politics (new citizenship, new mayor) regarding the development of the city port clearly indicates the need for more information and clarification by the JOHANN and JOHANNA team, as well as the BUGA2025 consortium to be set up. A new citizenship was constituted in September in Rostock and a new Lord Mayor will start his job. Under the light of the above all responsible local councils and committees of the Rostock citizenship are to be informed and involved with the results and plans of JOHANN Und JOHANNA-and BUGA2025planing.

INTERNAL MARKETING (ADMINISTRATION)

At present, the project team considers the function of the "Cruise Port Area Development Manager" as essential for Rostock and communicates it. In the medium term, the appointment of this function will be indispensable. The regular coordination of the project activities with the BUGA2025 plans and their investment or organizational implementation, which takes place already, will be deepened. For this purpose, there will be more local advisory and committee meetings in future; the ARCHITECTUURPLATFORM TERWECOREN VERDICKT provides a valuable basis for meetings.



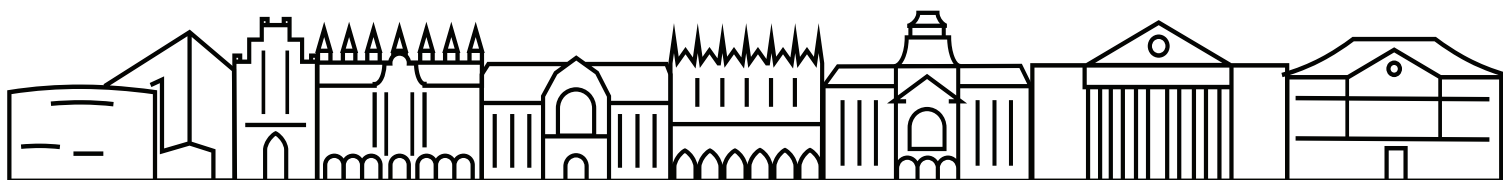
EXTERNAL MARKETING (PUBLIC, POLITICS):

In 2019, Rostock was represented at the Cruise Fair in Miami by both Port Rostock and the project team JOHANN (and related small cruise network). The focus on small cruise ships presence at key fairs and congresses is to be settled to build up face-to-face contacts. The JOHANN project was presented in April 2019 in Riga at the BSSC meeting in front of the European Commission "Mare". The Cruise Europe network manager was also present and promised to give its support after the Rostock presentation. In connection with the procurement of the ISPS fence, to be installed in the city port, the instrument "voluntary EU-wide invitation to tender" was used to promote the tender as such and to make Rostock's city port known as a (future) cruise destination. The global acting AIVP provided support through its newsletter which is distributed worldwide. Rostock also had an active part in the AIVP conference in Riga (spring 2019) and presented the current status of the Rostock oval strategy. The Baltic Sea Tourism Coordinator and thus the Ministry of Economic Affairs were informed about the current developments and its future in JOHANNA- project. Last but not least, the final conference JOHANN in October 2019 will be a forum to meet stakeholders and experts from cruise business.

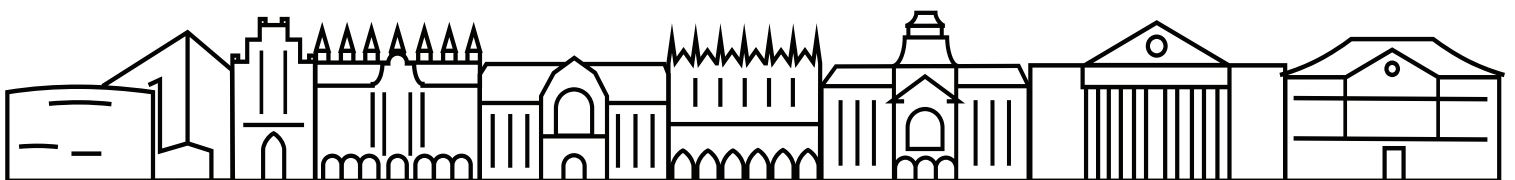
22.

SUMMARY

Since Rostock received both- a new citizenship and a new mayor in the summer of 2019- all strategically targeted projects (BUGA2025 City Port) are put to the test. It can be assumed that the JOHANNA project will be able to tie seamlessly to the JOHANN project and that the interaction with the other Buga2025 players will be deepened. A concrete marketing strategy for the city port area requires a clear political decision- which is not given so far.



CRUISE STRATEGY - WISMAR



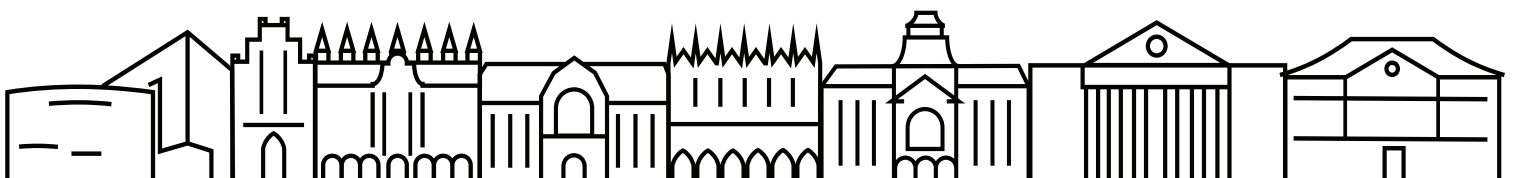
PREFACE: INTRODUCTION TO THE DESTINATION AND CRUISE DEVELOPMENT

Due to its status as a UNESCO World Heritage site, Wismar has more and more become an attractive tourism destination. Tourists can decide if they want to travel to Wismar by car, train or even by cruise vessel. In favor of excellent framework conditions, Wismar is a predestined location for cruise tourism. In this context, the port of Wismar plays an important role. The port looks back on an eventful history that began more than 800 years ago. It was first mentioned in an official document in 1211, even before the town was officially founded in 1229. It was thus the nucleus from which the town developed and contributed strongly to the economic growth of the future Hanseatic city. The port of Wismar provides modern facilities and direct connection to all on-land transportation. Short ways and a harbour with direct access to touristic sights in town provide literally a 'Gangway into the UNESCO World Heritage' for cruise liners. The first cruise call in Wismar has been in 2008. In 2014, Wismar already registered 15 cruise calls, which is immense considering that in 2013 there were only 2 ship calls.

For another, Wismar's shipyard for cruise ships needs to be mentioned as an enormous infrastructural node in the port area. Consequently, there is a clear need for further developing essential cruise related infrastructures to promote the touristic development of the Hanseatic city of Wismar as a cruise destination.

In 2012, the foundation of the Columbus Cruise Center Wismar (CCCW) on September 9th paved the way for the cruise tourism in Wismar. CCCW sees itself as a service provider and competence centre for cruise passengers, shipping lines, tour operators and ships' agents.

Picture 1: Wismar port overview



CRUISE STRATEGY - WISMAR

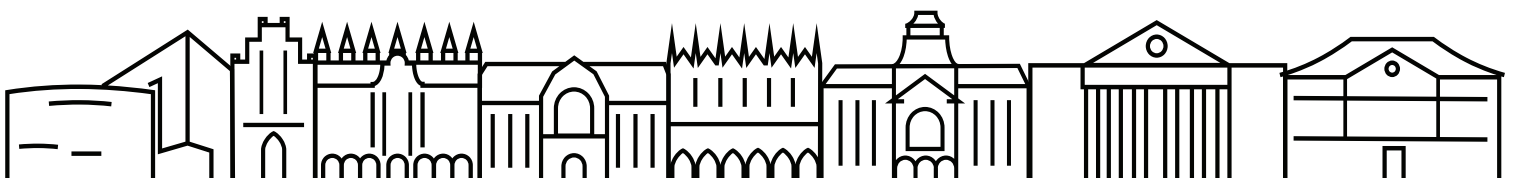
In order to better integrate the cruise industry into the existing tourism concept of the Hanseatic city of Wismar, the following strategy will outline the main objectives, related actions as well as key target groups of Wismar. All objectives are interrelated and therefore depend on each other regarding the realization of the overall strategy. In the following, a “cruise action plan” will be presented describing our approach more in detail.

25.

OBJECTIVES

When it comes to defining the objectives, it is crucial to consider the number of cruise ships and passengers arriving in Wismar in accordance to existing capacities in terms of trained guides, high- quality attractions and well-equipped buses. Linked to that there must be a sufficient number of personnel in charge for the interests and needs of tourists. Furthermore, the number of visitors not arriving in Wismar via the seaside need to be considered in this context. This approach will also consider possible arising negative effects on residents living in Wismar as well as related factors.

- 6 cruise ship operators annually shall have increased knowledge about Wismar as a cruise destination.
- Short-term goal is to greet 1-4 cruise ships annually.
- Long-term goal is to a continuous level of 6-10 calls per year.
- Maximum capacity is 1,500 passengers per call and 15 calls per year.



STRATEGIC FOCUS #1: INCREASE THE CRUISE INTELLIGENCE

26.

Identifying and evaluating future travel trends is essential for promoting the development within the destination in the right way. To mention only a few, possible future trends and developments in tourism relevant for Wismar are i.e. ecological branding and eco-tourism, better accessibility and increasing the number of tourists coming from Asia.

Furthermore, it is important to understand the process of how cruise lines determine their itineraries, for instance how cruise lines rate certain factors based on their relevance when introducing a destination into their current portfolio, who the key players and decision makers are within the cruise lines when it comes to itinerary planning, the itinerary planning process, the timeframe and what kind of sales arguments to use. Each cruise line has different types of clientele within the small cruise ship segment and therefore prioritizes different factors when selecting destinations for their itineraries.

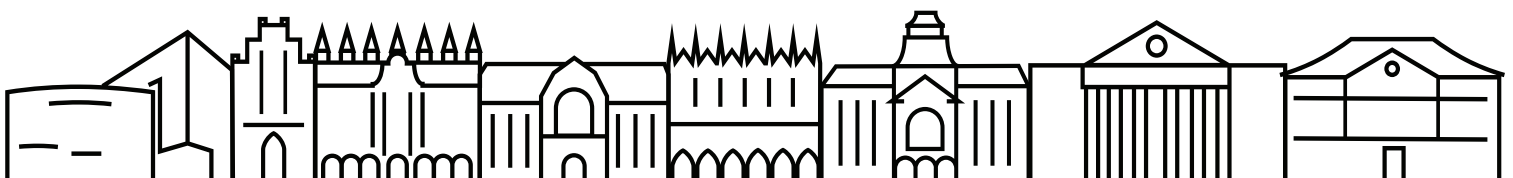
TACTICS FOR #1:

Enlarge the knowledge of current and future travel trends under consideration of changing behavior patterns of tourists and guests by:

- participating in tourism summits
- being actively involved into the Cruise Europe network and being updated on new developments within the cruise industry by means of diverse communication channels and networking events
- being in direct dialogue with all relevant cruise lines

Enlarge the knowledge of the cruise ship segment and getting a sense of prevailing expectations by:

- communicating with cruise lines in order to find out about decisive selection criteria
- getting informed in the framework of the Cruise Europe forum concerning debates and decisions



STRATEGIC FOCUS #2

LOCAL COLLABORATION AND PARTNERS

27.

Beside the fact that the cruise industry generates port fees and passengers for the city of Wismar, there are other factors which need to be considered in this context. Locals often get excited when the cruise vessels arrive in the harbor. The cruise guests are international guests requiring the destination to develop with an international focus (multi-language signage, menus, guides etc). Premium excursions particularly developed for cruise guests can be used for other premium groups as well. Moreover, the possibility to attract revisiting guests and to create brand awareness by recommendations or by word-of-mouth increases but is hard to measure.

In order to show who benefits from the cruise industry, we use a stakeholder analysis, which shows the complexity of the cruise industry and its vast scope. The main stakeholders are the different departments of the cruise line that influence the itinerary planning decision process, the travel agent and the end-consumer at a worldwide level. On a local/regional level, the main stakeholders are the city/destination, port, attractions, guides, hotels, transportation, shops, restaurants, security, port agents and tour operators.

Together with the company CCCW we will market the destination Hanseatic City of Wismar. We will share the work. CCCW will market the port and the waterside. The Tourist Office will market the city and other shore excursions.

TACTICS FOR #2:

We need to define “why to become and develop as a cruise destination” and what does the cruise industry generate to the local society by:

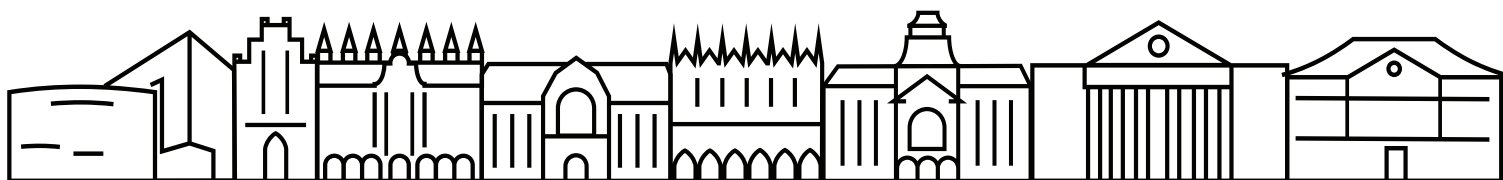
- performing a value chain for local cruise industry
- performing a stakeholder analysis on a Wismar level

We need to determine how we should work on a local basis by:

- establishing a local/regional cruise network
- responsibility breakdown structure – who does what?
- appointing a dedicated cruise manager/coordinator (on a long-term basis)

We need to use our connectors, multipliers and partners by:

- cooperating with port agents and tour operators since they often meet the cruise lines and should act as



STRATEGIC FOCUS #3: PRODUCT DEVELOPMENT

To be up to date in the fields of attractions, hospitality, physical environment and communications we have to develop products that satisfy the expectations of cruise guests and cruise lines.

28.

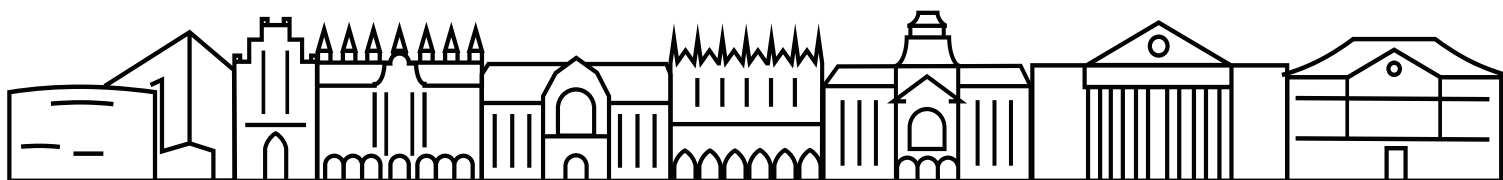
TACTICS FOR #3:

We need to offer a desirable destination by product development focusing on:

- tour development
- attraction development
- guide performance & education
- improving water side operations
- improving land side operations – welcoming area

STRATEGIC FOCUS #4: RAISE AWARENESS FOR WISMAR WITHIN THE CRUISE INDUSTRY

If the cruise operators lack or have poor knowledge of the destination, the chance to gain attention by the cruise operators tends to be zero. Therefore, the strategic goal is to increase substantially the knowledge about Wismar being well perceived as a cruise destination within the cruise industry.



TACTICS FOR #4:

Focus on direct communication with key players within the cruise industry and give them greater knowledge of the cruise destination by:

29.

- arranging in advance one-on-one meetings at cruise conventions with relevant players and decision makers
- sales calls at the office of the cruise line (cruise line visit)
- inviting cruise line representatives to familiarization (fam) trips organized in cooperation with further stake holders

Focus on relevant communication with correct substance:

- no overselling
- communicating a true story and an outstanding/well-defined USP
- communicating with key players through digital channels i.e. via mail and newsletters, writing about relevant news on a regular basis
- producing relevant promotional material – designed for short one-to-one meetings

Create earned space (news or features) in external media/relevant cruise media to spread knowledge (in co-operation with Cruise Baltic or other forum)

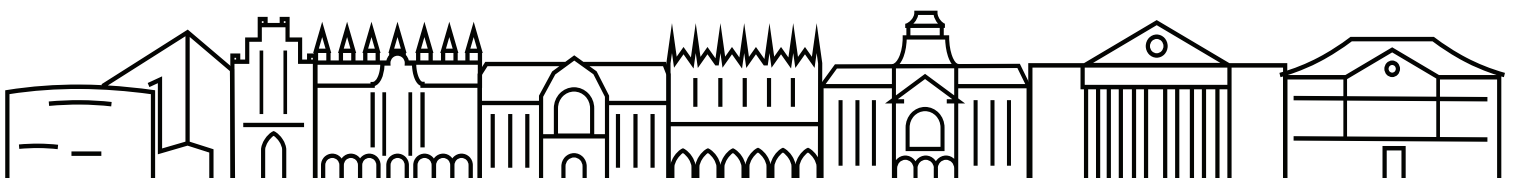
- sending out of press releases
- arranging press events
- inviting relevant cruise media representatives to fam-trips to the city of Wismar

Get ambassadors to promote Wismar as a cruise destination by:

- providing the tour and port agents as well as the travel agents with relevant information in a regular basis
- inviting tour and port agents to experience new tours or see new investments on site
- encouraging the crew to talk about Wismar as an excellent cruise destination by treating them extraordinary well

STRATEGIC FOCUS #5

The last strategic goal is to increase Wismar's awareness among potential cruise guests. However, strengthening the image of the destination by raising awareness, knowledge and interest involving great resources on a long-term basis. Collaborations with national and regional tourist boards is vital to increase brand awareness among end consumers on key target markets.



Loyalty growth by transforming visitors and inhabitants into advocates/ambassadors telling others about the reasons to visit the city of Wismar by:

- delivering an exceptional experience to all visitors
- keeping the locals informed and give them proper reasons easy to share on social media or passed on by mouth-to-mouth

30.

Increased online visibility by:

- creating online content in a way that engages the recipient to become involved while giving him the right perception of the cruise destination

Proactive media and PR work by:

- inviting influencers, bloggers and travel media representatives to individual site visits in cooperation with the regional/local tourist boards

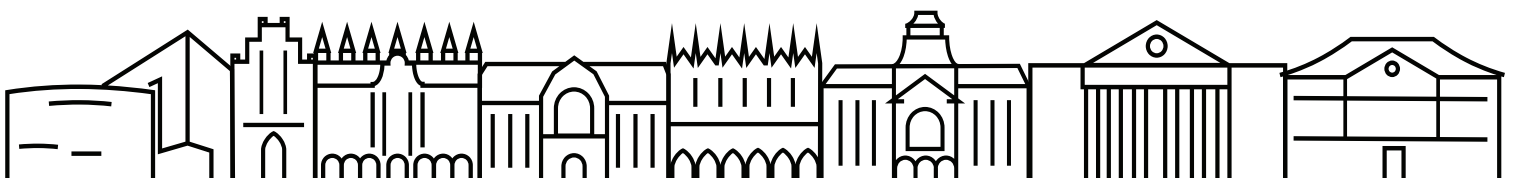
Evolve strategic partnerships to improve online reputation by:

- establishing long-term partnerships with important operators and players like Trip Advisor, Google Places etc.
- engaging operators of attractions to manage their online reputation in order to give end consumers an accurate

TARGET GROUPS AND MARKET

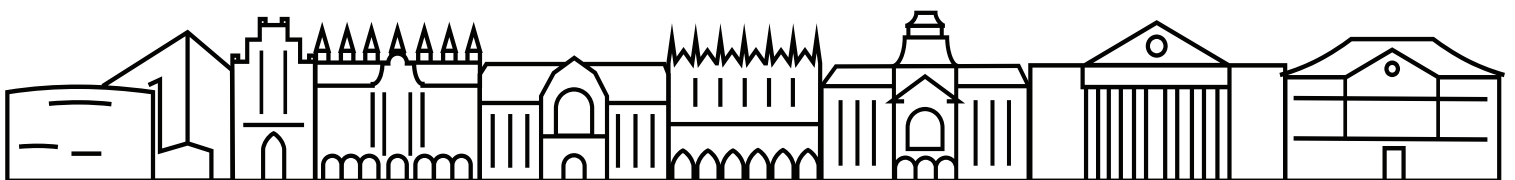
The cruise industry consists of a limited number of cruise operators but the industry is complex due to its many stakeholders, also on a local level. Passengers origin from all parts of the world, whereas the cruise lines have their headquarters concentrated to Europe and North America. In the framework of this strategy, cruise line representatives represent main target group. We will less focus on the target market of travel agents selling cruises.

- **Cruise line representatives** dealing with small and medium sized ships in their fleet. The cruise lines operating in Northern Europe are mainly located in Germany, the United Kingdom, Italy, Spain and the USA.
- **Cruise media representatives, based in North America and Europe**, (covering cruise industry news related to cruises in Northern Europe)
- **Tour and port agents that operate in the cruise destination.** Usually they operate quite rarely at the destination when it comes to small cruise destinations.
- **Travel agents selling cruises**, operating from the country where their clients are. In Germany, the United Kingdom and the USA, the travel agents still have strong bonds to operators and end-consumers.
- **Crew including captains, shore excursion staff etc.** The crew might have the influence to revisit a destination, but even more impact in case of the opposite. Dealing with crew should be carried out with great sense of the individual's needs.
- **End-consumer – the potential cruise passenger.** Cruise as a way of travel continues to increase and the cruise passengers are all over the world making it hard to influence them. The demographics of small cruise ships passengers helps to segment this target group based on mainly age and income.





RÜGEN



PREFACE: INTRODUCTION TO THE DESTINATION AND CRUISE DEVELOPMENT

The Rügen Island is one of the most popular holiday destinations on the south Baltic Sea coast, with more than 1,000,000 visitors per annum. Germany's largest island not only entices its guests with more than 2,000 hours of sunshine per year on average, but also has many tourist attractions.

Especially the imposing chalk cliffs framed by sea and forest has made Rügen world famous. Visitors can enjoy the picturesque bays and seaside resorts, but also discover original and idyllic destinations, e.g. the Jasmund National Park as part of the UNESCO World Natural Heritage Beech Forests.

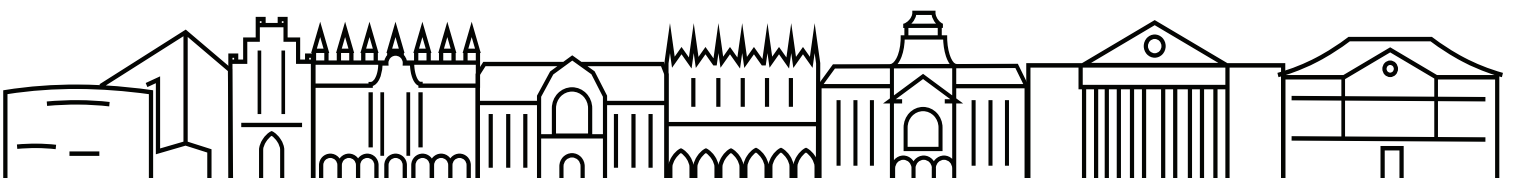
The Hanseatic City of Stralsund connected to the Rügen Island via two bridges offers a cultural experience. The historical old town center with its town hall fashioned in north-German redbrick Gothic and also a St. Nicholas' Church are among the most impressive buildings from centuries past and have been placed together with the other parts of Stralsund's old town center under the protection of UNESCO.

The following picture provides the sightseeing Map of Rügen Island including the Hanseatic City of Stralsund and the car-free island Hiddensee.

Picture 1: Rügen Island Sightseeing Map



Source: Mukran Port

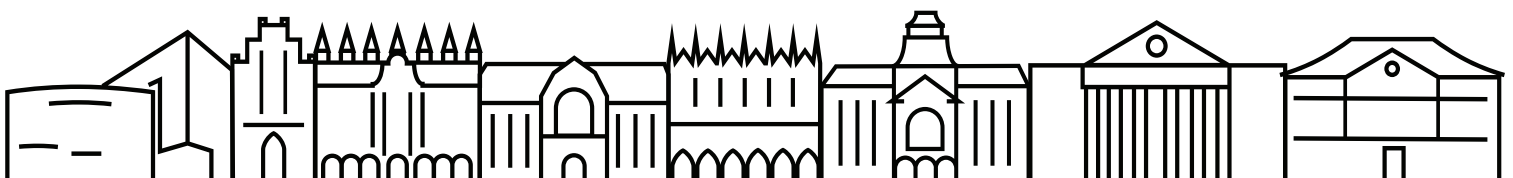


With its two ports – Sassnitz City Harbour and Mukran Port – the City of Sassnitz is a cruise gateway to Rügen Island. A joint marketing strategy and promotion will increase the service portfolio of both ports: Sassnitz City Harbour is predestined for small cruise ships. Mukran Port offers ideal mooring conditions for big cruise liners and can be called alternative to Sassnitz City Harbour when bad weather conditions.

Picture 2: Overview Sassnitz City Harbour and Mukran Port



Source: Mukran Port



The following two tables provide a list of port characteristics related to cruise operations in Sassnitz.

Table 1: Overview Sassnitz City Harbour

Sassnitz City Harbour	
Country	Germany
Port name	Sassnitz City Harbour
Number of piers available for cruise	1: berth 5-7
Pier dimensions	Length: 175 m
	Depth: 6,5 m
Approch	No channel navigation
Pilot	for vessels from 85 m length compluslory
Tides	No
Port development plans	Welcome area

Table 2: Overview Mukran Port

Mukran Port	
Country	Germany
Port name	Mukran Port
Number of piers available for cruise	2: berth 6, berth 8/9
Pier dimensions	Length: 248-365
	Depth: 9,5 m
Turning basin	600 m
Approch	No channel navigation
Pilot	Not compulsory
Tides	No
Port development plans	Construction of a new 400-m-long berth, welcome area

History of Cruise Calls in Sassnitz for last 13 years

The following two tables provide an overview of cruise calls in Sassnitz City Harbour and Mukran Port for the past 13 years and already booked calls for 2020/21.

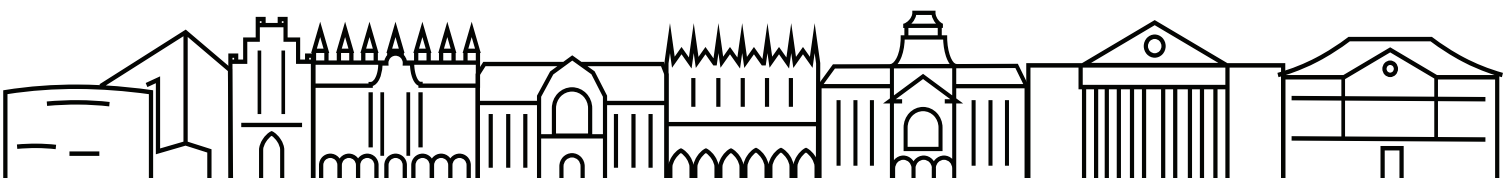


Table 3: Cruise calls in Sassnitz City Harbour

Cruise Line	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	Total
Adriana Shipping NC				1													1
AmI Shipmanagement						1											1
Cruise & Maritime Voyages	1	1	1	1	3	1											8
FTI Cruises								1									1
Hapag Lloyd	1	2															3
Mystic Cruises																1	1
Noble Caledonia			1	1									1				3
Peter Deilmann Reederei											1	1					2
Phoenix Reisen															2		2
Seabourn Cruise Line							1	1									2
Sea Dream Cruises						1			1								2
Star Clippers							1										1
Silversea Cruises			1														1
Total	2	3	3	3	3	3	2	2	1	0	1	1	1	0	2	1	28

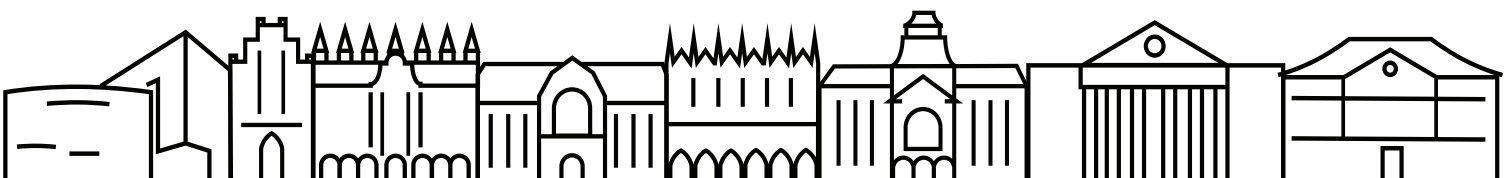
Table 3: Cruise calls in Sassnitz City Harbour

Cruise Line	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	Total
AIDA Cruises	12		10	10									1				33
Birka Cruises AB													2	2	1		5
Carnival UK							1										1
Compagnie Du Ponant					1												1
Cruise & Maritime Voyages							1		2			1	1	2	5		12
Delphin Kreuzfahrten			1														1
Fred. Olsen Cruise Line	2	3		1	2	1											9
Hansa Touristik						1											1
Hapag Lloyd	1		1	3													5
Holiday Kreuzfahrten	3																3
Holland America Line								1									1
Kyma Shipping					3												3
P&O						1		4	2	1							8
Peter Deilmann Reederei	1			2	1			1				1					6
Phoenix Reisen				1	1			1	1							1	5
Plantours & Partners		2			1				1								4
Saga Cruises				1			1			1			1				4
Seabourn Cruise Line							2										2
Silversea Cruises																	0
Swan Hellenic				1													1
TUI Cruises					3												3
Vivamare Urlaubreisen	1	2															3
Voyages of Discovery UK							2										2
Total	20	7	12	19	12	3	7	7	6	2	0	2	5	4	7	0	113

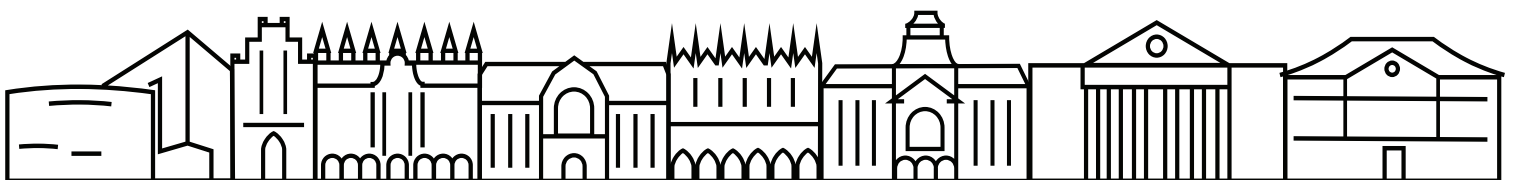
During the past 13 years there were maximum 3 cruise calls a year in Sassnitz City Harbour.

In 2008 and 2009 Mukran Port experienced a significant increase in calls and more than 8 times as many passengers in 2008 compared to 2007. This was due to 10 calls by AIDA Cruises in 2008 and 2009 respectively. AIDA Cruises has returned once in 2018. In general, the cruise activity in Sassnitz has been fluctuating over the past 10 years and there was no major strategy or efforts related to the cruise business.

Since 2019, after the appointment of a cruise coordinator promoting the destination with its two ports, the booking of cruise calls has increased.



CRUISE STRATEGY -RÜGEN ISLAND



OBJECTIVES

According to the capacity of high-quality guides, buses and attractions, we aim to increase cruise deployments to Rügen island including passengers, cruise calls and destination spending:

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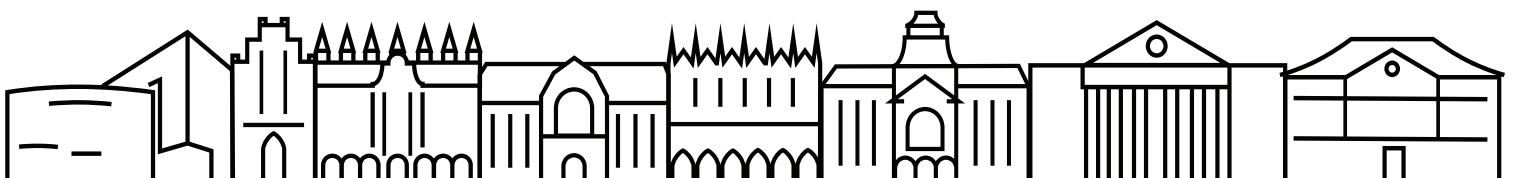
- 10 cruise ship operators annually shall have an increased knowledge about Rügen Island as a cruise destination.
- Short term goal is to greet 10 cruise ships annually.
- Long-term goal is to have a continuous level of 30-40 calls per year.
- Maximum capacity is approx. 2500 pax per call.

STRATEGIC FOCUS #1: INCREASE THE CRUISE INTELLIGENCE

The strategy of Rügen Island is to promote the entire destination with two ports in Sassnitz and the neighboring area including the Hanseatic City of Stralsund to extend the shore excursion offer.

It is important to be in dialogue with cruise lines to learn about their individual needs, development as well as factors important for planning itinerary. This can be done through:

- Visits directly to cruise lines offices (UK, USA, Germany, Italy, Switzerland, Italy, Monaco)
- Meeting with cruise lines at international events such as Seatrade Global, Seatrade Europe, Seatrade Med, International Cruise Summit in Madrid, Cruise Europe meetings
- Fam trips done for cruise lines and cruise media
- E-mails, phone calls
- Visits to tour and port agents
- Cruise media articles



STRATEGIC FOCUS #2: Increase local collaboration and partnership

In order to increase the collaboration and partnership with local tourism players and agents, we established the organization “Destination Rügen - Cruise & Ferry Network” in Feb’19. This cooperation should have a positive impact for the cruise development of the destination:

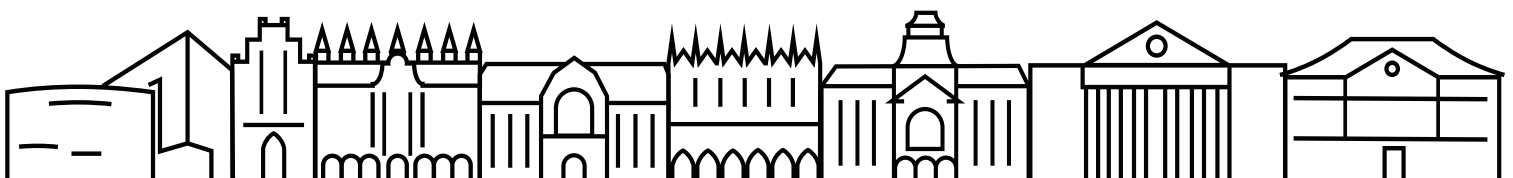
- The agents and tour operators often meet the cruise lines and act as ambassadors for the destination
- The local tourism boards increase the brand awareness and make cruise a part
- The appointed cruise coordinator acts as a chain link between the cruise lines, port and local cruise network

STRATEGIC FOCUS #3: Product development

To make the destination for cruise passengers and cruise lines attractive in terms of hospitality, both ports Sassnitz City Harbour and Mukran Port offer following services from 2019:

- Personal welcoming by cruise coordinator
- Welcoming by mayor of the city of Sassnitz (shareholder of the ports), port management and port authority when maiden call
- Development of welcoming area for cruise guest in Sassnitz City Harbor
- In Mukran Port, the guest already has a possibility to wait for their shuttle in a special waiting room at the passenger terminal with sit opportunities, WC facilities, drinking water provision, when the ship calls berth Nr. 6. For berth Nr. 8/9 we offer a colorful info counter/container with destination flyers, destination film, hosted by cruise coordinator and additional port staff consisting of 2-4 people assisting the passengers and crew.
- We offer a stay opportunity for crew during ship’s berthing time in the Seemann’s mission with free WIFI, water, coffee and tea.
- We organize a local Shanty-Choir one hour before ship departure.

38.



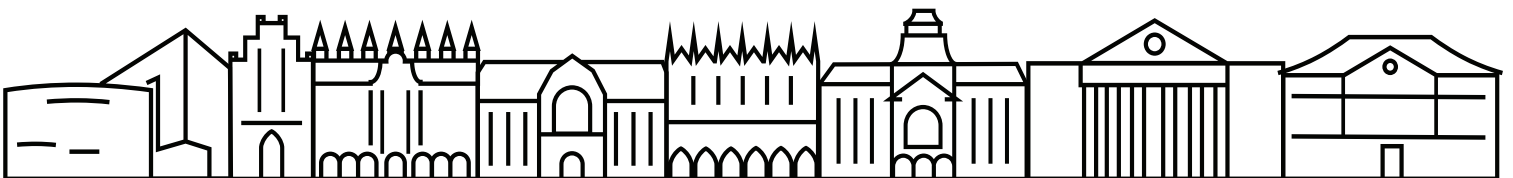
Picture 1: Shanty-Choir Sassnitz performance for Vasco Da Gama guests



Source: Mukran Port

To increase the cruise deployments with English-speaking guests we need to educate the local guides. The improvement of operating activities at the port include:

- The provision of better transport links: Organizing a shuttle service for cruise tourists from Mukran Port to Sassnitz.
- Development of a direct train connection for cruise passengers between Mukran Port / Sassnitz and Stralsund / Ozeaneum Stralsund to establish the cruise location Rügen as a cruise port for Stralsund



STRATEGIC FOCUS #4:

Raise awareness for rügen island within the cruise industry

40.

The practice has shown, a direct contact to the cruise line representatives was one of the key factors to increase the awareness of the destination. The activities started from 2019 such as direct visits of cruise lines, attending the fairs and cruise events increased the bookings for the next years.

The appointment of the cruise coordinator as a chain link between the destination and cruise lines provided a direct contact and simplified the communication.

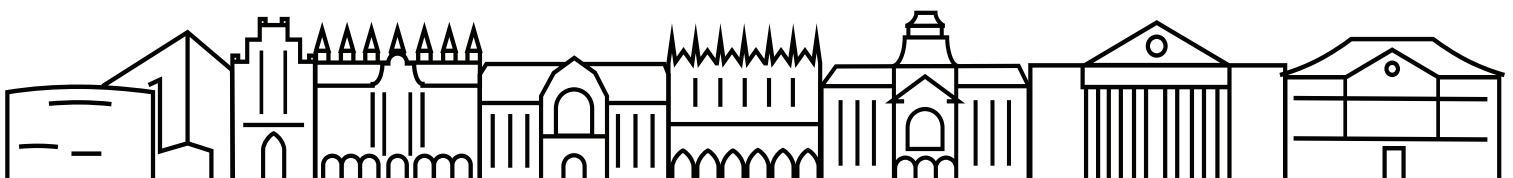
One of the next steps will be inviting of the cruise line representatives in cooperation with tour and port agents as well as media representatives to fam trip.

Due to the establishment of the local cruise network “Destination Rügen – Cruise & Ferry Destination” there will be an online platform – a website – with all cruise related information about the destination: port handbook, top sightseeing, tour proposals, image film.

Picture 2: Rügen's chalk coast and Jasmund National Park

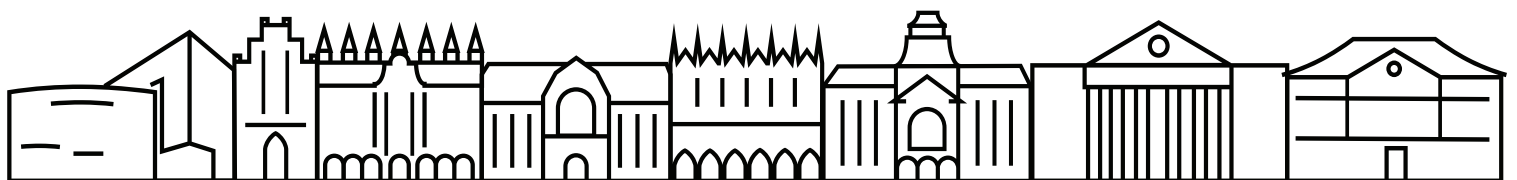


Source: Mukran Port





SZCZECIN



PREFACE: INTRODUCTION TO THE DESTINATION AND CRUISE DEVELOPMENT

42.

Szczecin received a total 47 cruise calls between 2007 and 2018, including two calls from a German school ship in 2010 and one from a Norwegian school ship in 2016.

The maximum size for a vessel to be allowed to dock safely in the designated cruise port near the city center in Szczecin (Wały Chrobrego) is: LOA of 215 m, a beam of 26 m and a draft of 6,5 m.

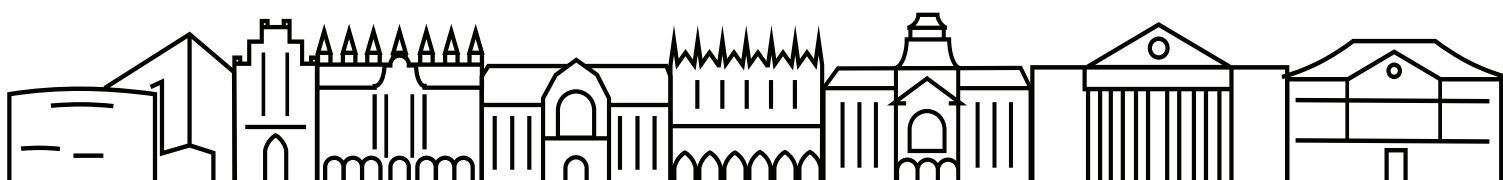
Waly Chrobrego pier is the best option for the cruise lines due to the central location but the pier depth is too shallow and bigger ships will have to dock at the industrial Polskie pier.

The vessels allowed to dock at Polskie pier are limited to LOA of 215 m, a beam of 31 m and a draft of 9,15 m, however it is a cargo pier and cruise lines want to avoid their passengers being welcomed in these type of berths. The port is not attractive and is located away from the city center with nothing to do in walking distance.

Picture 1&2: Pier options Szczecin Wały Chrobrego (city center) & Polskie pier (industrial port)



Source: Żegluga Szczecińska



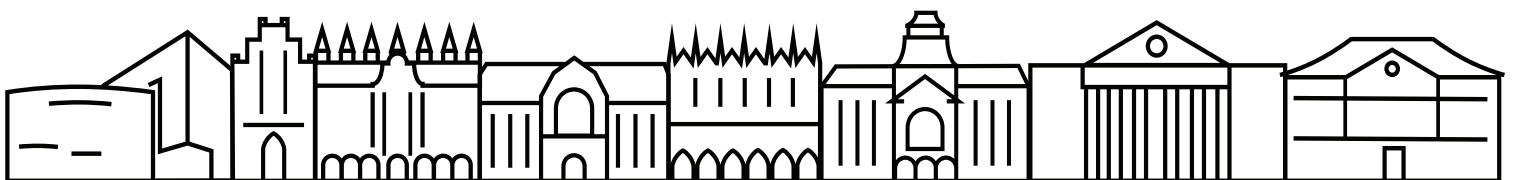
Picture 2: Szczecin SWOT analysis

Strengths	Weaknesses
<ul style="list-style-type: none">- Located in the Baltic Sea Region - popular region amongst cruise lines and passengers- Politically stable, safe and secure area- Access to Berlin which attracts cruise lines- Recognized tourist destination within the German market- Already receiving many river cruise calls- Given the small number of calls so far, each call can be given a more personalized service	<ul style="list-style-type: none">- No clear USP- Limited cruise experience from local stakeholders- Limited passenger capacity- Maritime related challenges: - Long seaway from the Baltic Sea to the harbor (68 km) - Pilots are compulsory - Limited port size in the city port - Larger cruise vessels are allocated to the industrial port area- Destination development: - Lack of guides and languages availability- Online presence: - Lack of dedicated cruise webpage - Limited control over online presence

Picture 4: View Waly Chrobrego, cruise ship "Black Watch"

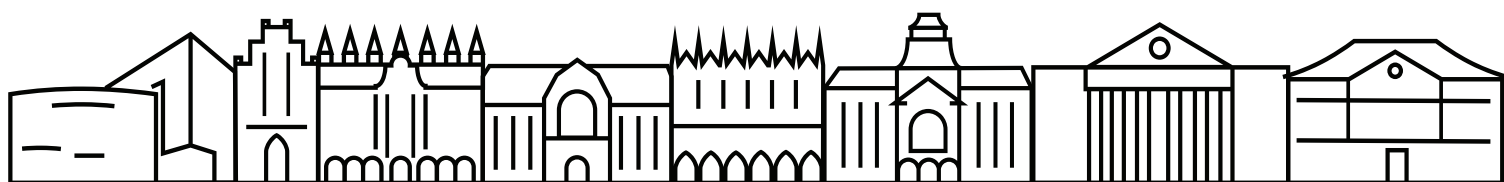


Source: Żegluga Szczecińska





CRUISE STRATEGY -SZCZECIN



This strategy determines the objectives, five strategic focus with specific tactics and our prime target groups. An annual or biannual action plan, based on this document, should be carried out where the activities are described in more detail.

45.

OBJECTIVES

The objectives in terms of number of cruise ships and passengers, must be suitable to the destination according to the capacity of high-quality guides, buses and attractions. Another factor that must be considered is the number of land-based tourists already visiting and at which level the destination and its inhabitants are affected in a negative way due to too much visitors.

- 10 cruise ship operators annually shall have an increased knowledge about Szczecin as a cruise destination.
- Short term goal is to greet 1-5 cruise ships annually.
- Long-term goal is to have a continuous level of 15-20 calls per year.
- Maximum capacity is approx. 2000 pax per call and 34 calls per year (23 cruise lines).

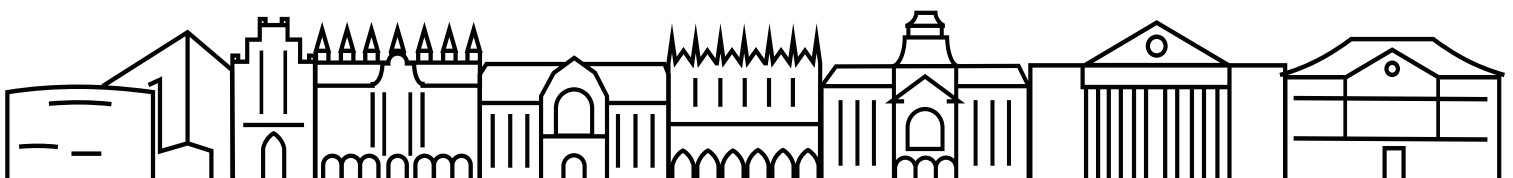
FOCUS ON INCREASING THE CRUISE KNOWLEDGE

We need to know about the upcoming travel trends (in general – and the cruise industry) as is crucial to develop the destination in the right direction. The trends towards higher quality of services and products, skilled workforce, sustainable choices like ecological branding and eco-tourism, better accessibility and increasing tourism from China are some examples.

TACTICS FOR #1:

Keep up with the trends and forecasts of future travel and consumer behavior by:

- participate in tourism summits in Madrid, Berlin, Seatrade Global, Seatrade Europe
- active partner in the Cruise Europe network and take notice to cruise industry updates through communication channels and by attending the partner meetings
- keeping up with the state of the cruise industry by cruise related newsletters, posts or articles



INCREASE LOCAL COLLABORATION AND PARTNERSHIP

46.

Beside the fact that the cruise industry generates port fees and passengers to the region, there are other factors to take into account. The pride among locals often increases when the cruise vessels are visiting. The cruise guests are international guest, which requires the destination to develop with an international focus (multi-language signage, menus, guides etc). Using the synergies between traditional and cruise tourism to complement each other. The premium excursions developed for the cruise guests can be used for other premium groups. Moreover, the possibility to attract revisiting guests and get brand awareness by recommendations or by word-of-mouth increases but is hard to measure.

TACTICS FOR #2:

We need to define “why to become and develop as a cruise destination” and what does the cruise industry generate to the local society by:

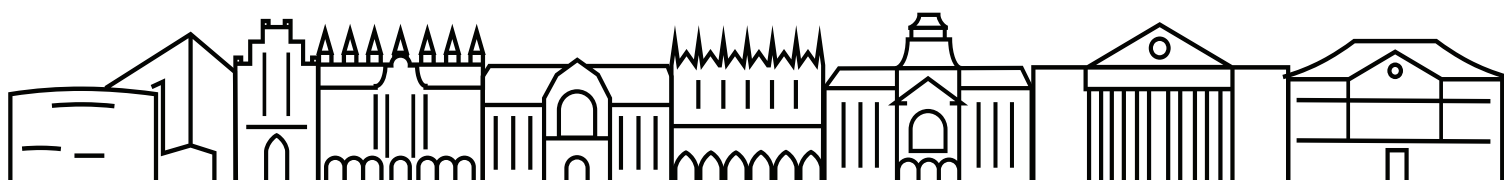
- performing a value chain for local cruise industry
- performing a stakeholder analysis on a regional level
- define unique selling point

We need to determine how we should work on a local basis by:

- create a local working group
- define the organizations objectives
- assign cruise coordinator

We need to use our connectors and partners by:

- cooperating with port agents and tour operators since they often meet the cruise lines and should act as ambassadors for the destination.
- cooperating with national/regional tourist boards to increase the brand awareness and to make cruise a part of the local/regional tourism strategy



SUSTAINABLE PRODUCT DEVELOPMENT

To be able to meet the expectations of both cruise guests and the cruise lines we need to continuously work on developing the destination within the fields of attractions, greeting/hosting, physical environment and communication.

47.

TACTICS FOR #3:

We need to offer a desirable destination by product development focusing on:

- tour development
- attraction development
- guide performance & education, language skills
- improving water side operations
- improving land side operations – welcome area
- improving crew services etc.

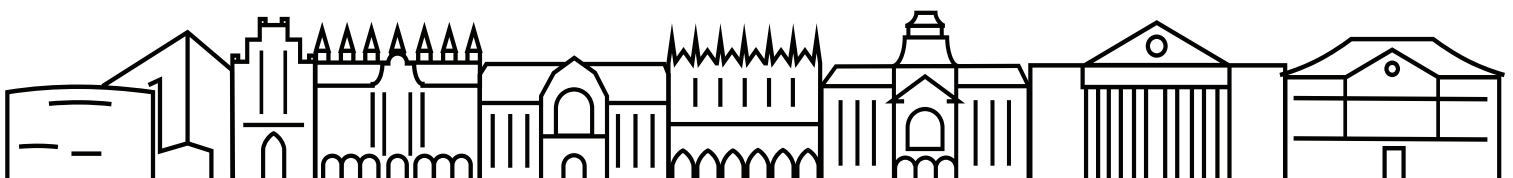
INCREASE THE KNOWLEDGE OF SZCZECIN REGION WITHIN THE CRUISE INDUSTRY

If the cruise operators lack or have poor knowledge of the destination, the chance to gain attention by the cruise operators is slim to none. The strategic goal is to increase the knowledge about Szczecin region as a cruise destination within the cruise industry.

TACTICS FOR #4:

Focus on direct communication with the key players within the cruise industry and give them a greater knowledge of the cruise destination by:

- one-to-one meetings pre-booked at cruise conventions
- sales calls at the office of the cruise line (cruise line visit)
- inviting the cruise line representatives to familiarization (fam) trips



Focus on relevant communication with the right content.

- Do not oversell
- communicating a true story and a “unique/well-defined” USP
- communicating with the key players through digital channels i.e. e-mail and newsletters, writing about relevant news continuously
- dedicated cruise website
- producing relevant promotion material – designed for short one-to-one meetings

48.

Create earned space (news or features) in external media/relevant cruise media to spread knowledge

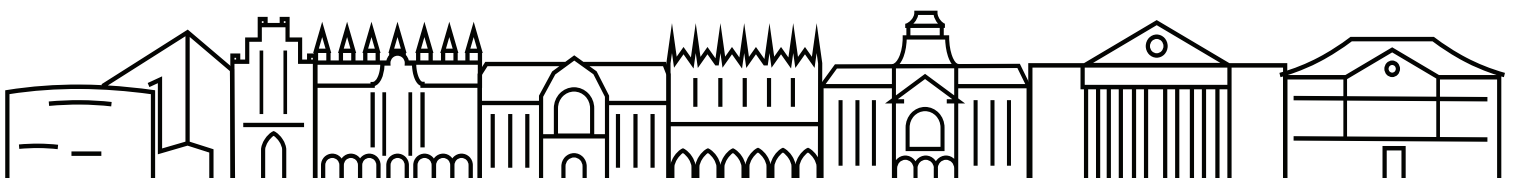
- sending out press releases
- arranging press events
- inviting relevant cruise media to fam trips

Get ambassadors to promote your cruise destination by:

- providing the tour and port agents as well as the travel agents with relevant information continuously
- inviting tour and port agents to experience new tours or see new investments on site
- using the crew to talk about your destination by treating them extraordinary well

INCREASE THE CRUISE DESTINATION AWARENESS

The last strategic goal is to increase Szczecin’s awareness among the potential cruise guest. However, strengthening the image of the destination as an attractive place by increasing the awareness, knowledge and interest requires great resources on a long-term basis. Cooperation with national and regional tourist boards is vital to increase the brand awareness among end consumers on relevant target markets.



TACTICS FOR #5:

49.

Loyalty growth by transforming visitors and inhabitants into advocates/ambassadors telling others about the reasons to visit by:

- delivering a high-quality experience to all visitors
- keeping the locals informed and give them proper arguments easy to share on social media or by mouth-to-mouth

Increased online visibility by:

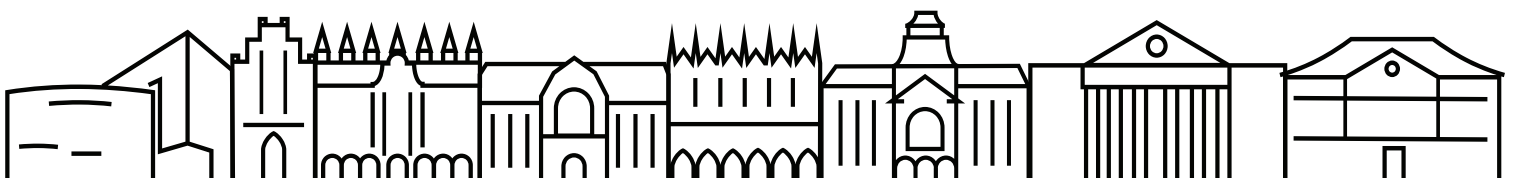
- creating online content that engage and gives the recipient the right perception of the cruise destination
- dedicated cruise website

Proactive media and PR work by:

- inviting influencers and travel media to site visits in cooperation with the regional/national tourist boards etc

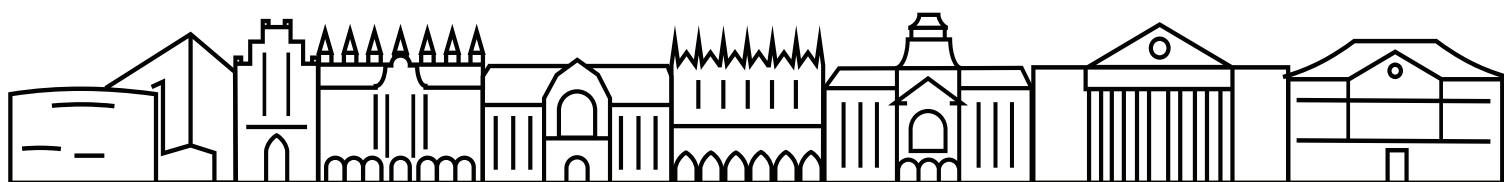
Evolve strategic partnerships to improve online reputation by:

- establishing a partnership together with important actors like Trip Advisor, Google Places etc.
- engaging attractions to manage their online reputation to give the end consumer an accurate image of the destination, its attractions and other points of interest





KARLSKRONA



PREFACE: INTRODUCTION TO THE DESTINATION AND CRUISE DEVELOPMENT

51.

Karlskrona is an exciting encounter with Sweden's naval history! The city center of Karlskrona is uniquely situated in the middle of the archipelago, 6 km from the mainland. This give a unique, spacious sense to the city and breath-taking views.

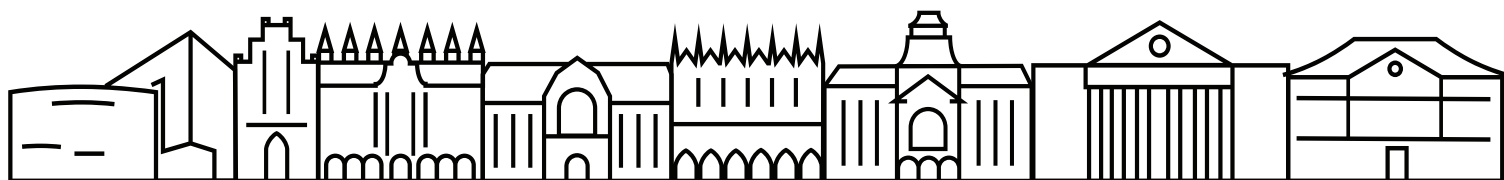
It was in 1680 the king, Charles XI ordered the construction of the city as Sweden's naval base. The naval presence has ensured distinctive architectural qualities, and UNESCO has named Karlskrona a World Heritage City.

"Karlskrona is an exceptionally well-preserved example of a European planned naval base, and although its design has been influenced by similar undertakings it has in tum acted as a model for comparable installation. Naval bases played an important part during the centuries when the strength of a nation's navy was a decisive factor in European power politics, and of those that remain from this period Karlskrona is the most complete and well preserved."

Despite its militant past, Karlskrona is a very peaceful town, with an open and friendly atmosphere. Gunpowder towers and fortifications make a splendid backdrop, together with a mix of yellow ferries, white sails and the occasional submarine visible in the waters surrounding the city.

Small cruise ships can berth in Karlskrona City Port, situated right in the city center, on the Island of Trossö, with shopping, cafés, attractions and soft activities at easy walking distance (approx. 300 m). An alternative is the Karlskrona Tender Port. Those arriving by tender boats will enter the city in a Royal manner, docking at the Kings Bridge, where all Royal members used to arrive Karlskrona – and still do. The tender distance is approx. 10 minutes and the landing a fixed pier whit stairs. The much-appreciated welcoming committee will of course greet our guests even in the tender port, as well as the mini-train and all other services and amenities.

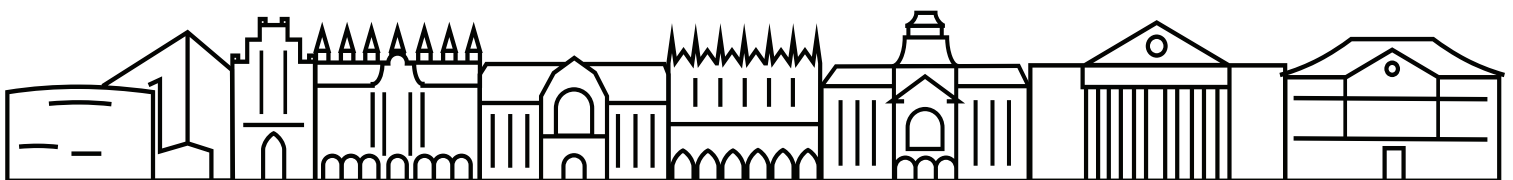
Between 2008 and 2018, Karlskrona had 56 calls in total- however the number of calls per year fluctuates quite much. There were four years with just 1-2 calls per year, four with 5 – 6 calls and two years with 9-10 calls.



Picture 1: Port overview

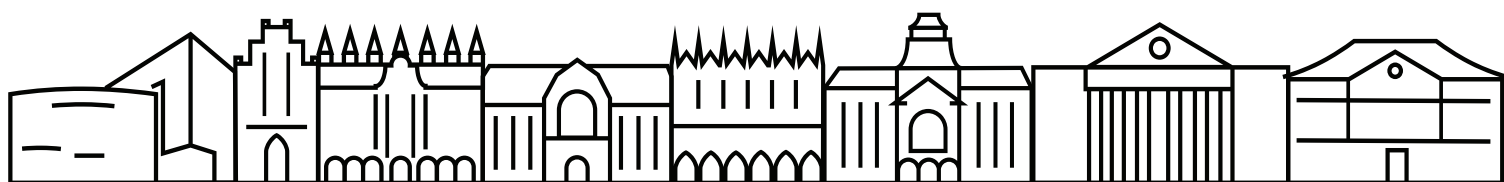


Source: Karlskrona Municipality





CRUISE STRATEGY -KARLSKRONA



OBJECTIVES

The objectives in terms of number of cruise ships and passengers, has to be suitable to the destination according to the capacity of high quality guides, buses and attractions. Another factor that has to be taken into account is the number of land based tourists already visiting and at which level the destination and its inhabitants are affected in a negative way due to too much visitors.

- 10 cruise ship operators annually shall have an increased knowledge about Karlskrona as a cruise destination.
- Short term goal is to greet 5-10 cruise ships annually.
- Long-term goal is to have a continuous level of 15-20 calls per year.
- Maximum capacity is approx. 2000 pax per call and 20 calls per year.

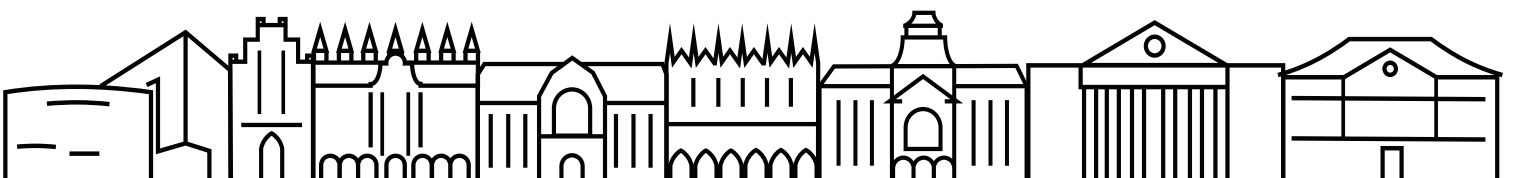
CRUISE INTELLIGENCE

We need to be know about the upcoming travel trends (in general – and the cruise industry) as is crucial to develop the destination in the right direction. The trends towards higher quality of services and products, skilled workforce, sustainable choices like ecological branding and eco-tourism, better accessibility and increasing tourism from China are some examples.

It is also important to understand the cruise lines determine their itineraries, for instance how the cruise lines rate different factors based on their importance when selecting destinations, who the key players are within the cruise lines when it comes to itinerary planning, the itinerary planning process, the timeframe and what kind of sales argument to use. Each cruise line has different types of clientele within the small cruise ship segment and therefore prioritizes different factors when selecting destinations for their itineraries.

We have to keep up with the trends and forecasts of future travel and consumer behavior by:

- participate in tourism summits
- being an active partner in the Cruise Baltic network and Cruise Europe and take notice to cruise industry updates through communication channels and by attending the partner meetings
- keeping up with the state of the cruise industry by cruise related newsletters, posts or articles



INCREASE LOCAL COLLABORATION AND PARTNERSHIP

55.

Beside the fact that the cruise industry generates port fees and passengers to the region, there are other factors to take into account. The pride among locals often increases when the cruise vessels are visiting. The cruise guests are international guest, which requires the destination to develop with an international focus (multi-language signage, menus, guides etc). The premium excursions developed for the cruise guests can be used for other premium groups. Moreover, the possibility to attract revisiting guests and get brand awareness by recommendations or by word-of-mouth increases but is hard to measure.

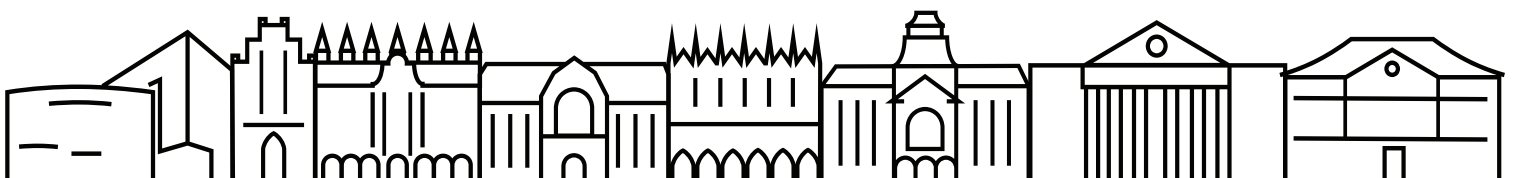
To be able to show who benefits from the cruise industry we use a stakeholder analysis, which shows the complexity of the cruise industry and its vast scope. The main stakeholders are the different departments of the cruise line that influence the itinerary planning decisions, the travel agent and the end-consumer at a worldwide level. On a local/regional level the main stakeholders are the city/destination, port, attractions, guides, transportation, shops, restaurants, security, port agents and tour operators.

We need to determine how we should work on a local basis by:

- establishing a local/regional cruise network
- responsibility breakdown – who does what?
- appointing a dedicated cruise manager/coordinator (on a long-term basis)

We need to use our connectors and partners by:

- cooperating with port agents and tour operators since they often meet the cruise lines and should act as ambassadors for the destination.
- cooperating with national/regional tourist boards to increase the brand awareness and to make cruise a part



SUSTAINABLE PRODUCT DEVELOPMENT

To be able to meet the expectations of both cruise guests and the cruise lines we need to continuously work on developing the destination within the fields of attractions, greeting/hosting, physical environment and communication.

56.

We need to offer a desirable destination by product development focusing on:

- tour development
- attraction development
- guide performance & education
- improving water side operations
- improving land side operations – welcome area
- improving crew services etc.

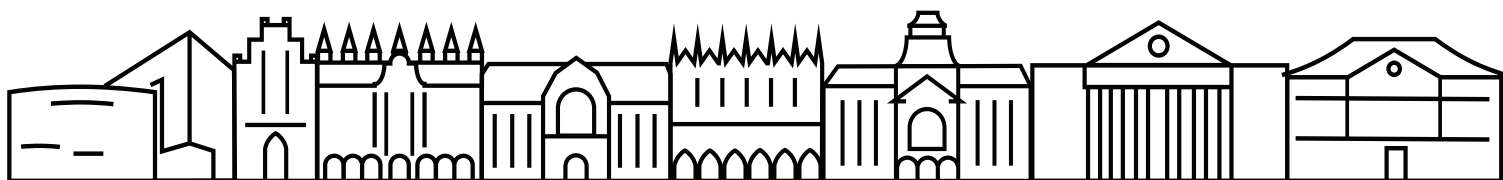
INCREASE THE KNOWLEDGE OF KARLSKRONA WITHIN THE CRUISE INDUSTRY

Focus on direct communication with the key players within the cruise industry and give them a greater knowledge of the cruise destination by:

- one-to-one meetings pre-booked at cruise conventions and at partner meetings with Cruise Baltic
- sales calls at the office of the cruise line (cruise line visit)
- Inviting the cruise line representatives to familiarization (fam) trips in cooperation with Cruise Baltic

Focus on relevant communication with the right content:

- communicating a true story and a “unique/well-defined” USP
- communicating with the key players through digital channels i.e. e-mail and newsletters, writing about relevant news continuously
- producing relevant promotion material – designed for short one-to-one meetings



Create earned space (news or features) in external media/relevant cruise media to spread knowledge (in cooperation with Cruise Baltic, Cruise Europe or other forum)

- sending out press releases
- arranging press events
- Inviting relevant cruise media to familiarization (fam) trips in cooperation with Cruise Baltic

57.

Get ambassadors to promote your cruise destination by:

- providing the tour and port agents as well as the travel agents with relevant information continuously
- inviting tour and port agents to experience new tours or see new investments on site
- using the crew to talk about your destination by treating them extraordinary well

INCREASE THE CRUISE DESTINATION AWARENESS

Loyalty growth by transforming visitors and inhabitants into ambassadors telling others about the reasons to visit by:

- delivering a high-quality experience to all visitors
- keeping the locals informed and give them proper arguments easy to share on social media or by mouth-to-mouth

Increased online visibility by:

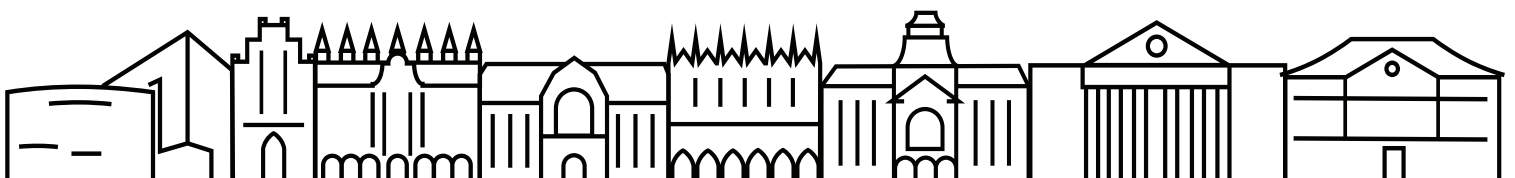
- creating online content that engage and gives the recipient the right perception of the cruise destination

Proactive media and PR work by:

- inviting influencers and travel media to site visits in cooperation with the regional/national tourist boards etc

Evolve strategic partnerships to improve online reputation by:

- establishing a partnership together with important actors like Trip Advisor, Google Places etc.
- engaging attractions to manage their online reputation to give the end consumer an accurate image of the destination, its attractions and other points of interest



TARGET GROUPS AND MARKETS

58.

The cruise industry consists of a limited number of cruise operators but the industry is complex due to its many stakeholders, also on a local level. The passenger's origin from all parts of the world whereas the cruise lines have their headquarters concentrated to Europe and North America.

We will prioritize the target groups listed below. When it comes to marketing activities, cruise line representative is the most important target group, followed by cruise media and agents which we use to influence the main target group.

- **Cruise line representatives** dealing with small and medium size ships in their fleet. The cruise lines operating in Northern Europe are mainly located in Germany, the United Kingdom, Italy, Spain and the USA.
- **Tour and port agents that operate on the cruise destination.** They operate normally quite rarely at the destination when it comes to small cruise destinations.
- **Crew including captains, shore excursion staff etc.** The crew might have the influence to revisit a destination, but even more impact in case of the opposite. Dealing with crew should be carried out with great sense of the individual's needs.
- **End-consumer – the potential cruise passenger.** Cruise as a way of travel continues to increase and the cruise passengers are all over the world making it hard to influence them. The demographics of small cruise ships passengers helps to segment this target group based on mainly age and income.
- **Travel agents selling cruises,** operating from the country where their clients are. In Germany, the United Kingdom and the USA the travel agents still have a strong position between the operator and the end-consumer.

