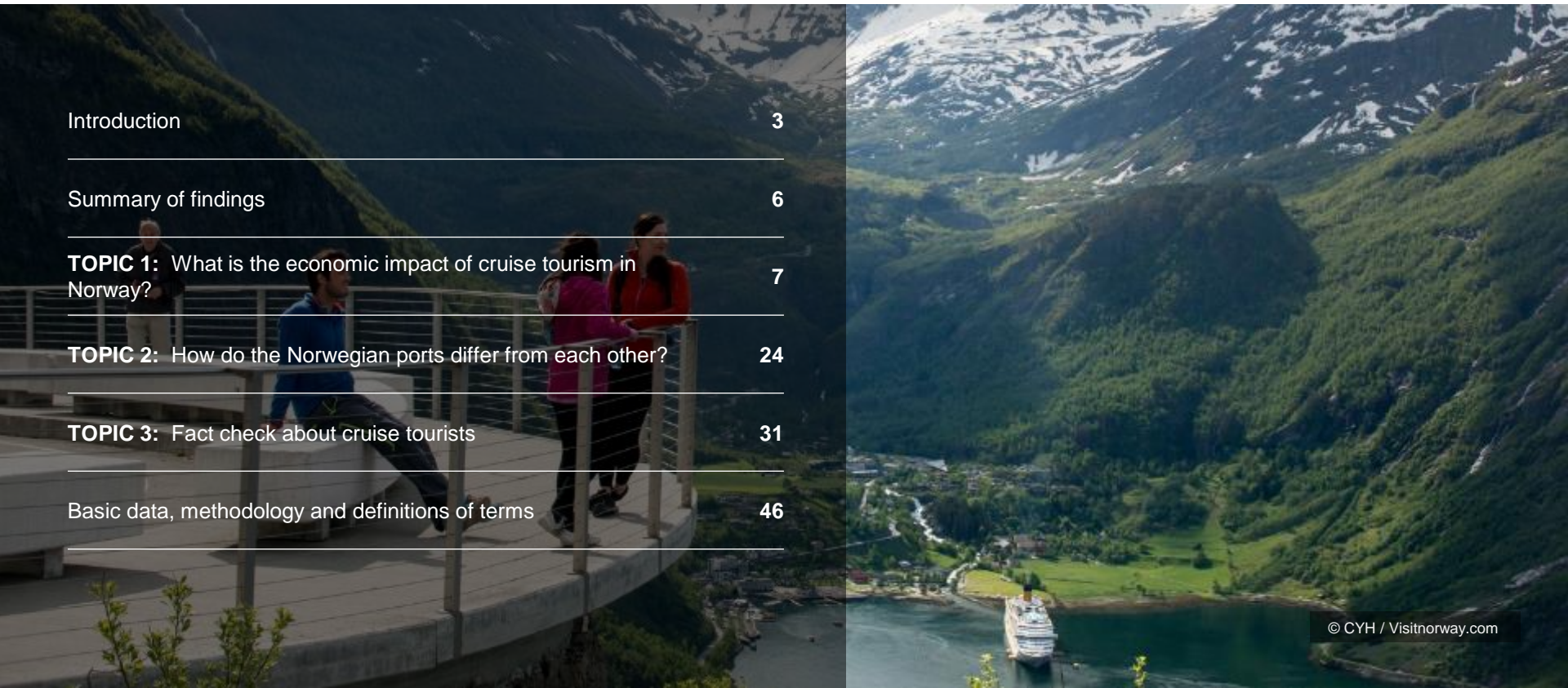


CRUISE TOURISM IN NORWAY 2019

CRUISE SURVEY – SUMMER 2019

INNOVATION NORWAY





Introduction	3
Summary of findings	6
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The most comprehensive cruise survey in Norway ever

The survey is based on interviews with 3 232 cruise tourists

A total of 3 232 interviews were conducted with cruise passengers in 14 ports along the entire Norwegian coast – from Kristiansand in the south to North Cape in the north. Collection of the data took place from 21 May to 31 September 2019. The planning of the survey took into account many different factors: from the size of ships, number of calls and nationality of the cruise tourists, to the geographical location of the port, type of port and cruise line, and the assumed segment of the ship/cruise line.

All of the interviews were conducted as a personal interview using tablets. Data collection took place over 75 interview days with 80 cruise ships on 175 cruise calls. The interviews were conducted with cruise passengers who were on their way back to the ships after a visit on shore.

The survey would not have been possible without the assistance of 36 different ports, which contributed information about the port of call, and statistics from the Norwegian Coastal Administration on the distribution of nationalities in 2018 and actual calls in 2019.

The survey was planned and conducted by Epinion in collaboration with Gyger on behalf of Innovation Norway.

See the chapter on methodology on page 46 for more information about basic data, data collection methodology, data processing and weighting of data.

The cruise survey's basic data

14 ports

80 cruise ships

175 cruise calls

3 232 interviews



<u>Ports</u>	<u>Calls</u>	<u>Interviews</u>
Bergen	20	387
Flåm	9	203
Geiranger	13	244
Hammerfest	4	52
Kristiansand	8	134
Leknes	3	33
Molde	5	74
North Cape	8	142
Oslo*	51	1125
Stavanger	18	317
Svolvær	5	63
Tromsø	12	142
Trondheim	9	136
Ålesund	10	180

*On assignment from the Port of Oslo, expanded data collection was carried out in Oslo. These interviews are included in the basic data.

Norway enjoys a strong position as a cruise destination

"The world's most beautiful sea voyage" attracts steadily more cruise tourists

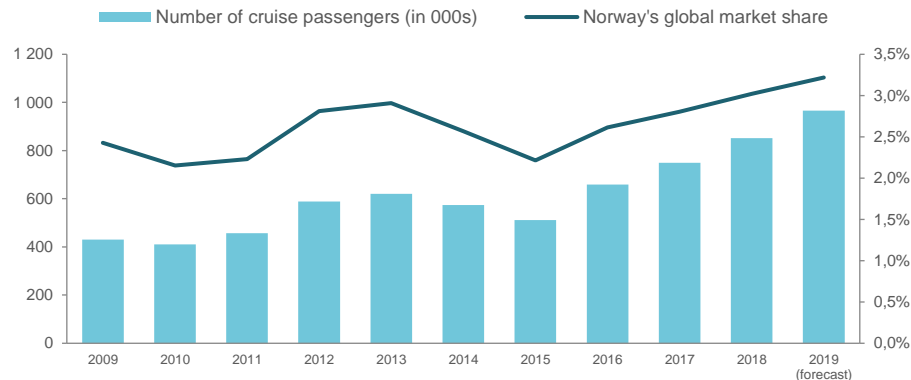
Today, Norway's share of international cruise tourism is around three percent¹ and it is steadily inching upward. The cruise market share is considerably higher than for other forms of tourism, where Norway has a share of under 0.5 per cent². Hurtigruten and Norway have marketed the coast and fjord landscape as the world's most beautiful sea voyage for many years. Nowadays, tourists from all corners of the world can choose between a large selection of types of cruises along the Norwegian coast geared to different desires, interests and wallets.

The United States is the dominant market for international cruise tourism, with a share of 46 per cent of cruise tourists globally. The Chinese cruise market is growing rapidly and is expected to approach or surpass the US market by 2030. It is reasonable to expect that more Chinese tourists will want to experience Norway on a cruise in the years to come.

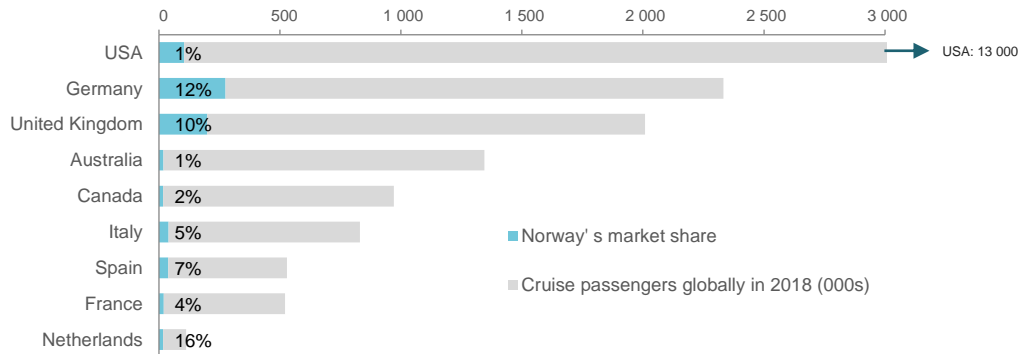
Norway has the largest market share in the Dutch cruise market (16 per cent), followed by the UK (12 per cent) and Germany (10 per cent).

Germany is the largest market for cruises to Norway.

The development of cruise tourism in Norway



Norway's market share among the various nationalities



Cruise tourism is growing rapidly internationally

Cruise tourism is growing rapidly – a boon and bane

The cruise industry has been growing ever since the paddle wheeler Quaker City embarked on what is considered the first cruise from New York to Europe in 1867. It is only since 1990 to present day that the cruise industry has really taken off – both internationally and in Norway. In 2019, Cruise Lines International Association (CLIA) estimated that 30 million will travel on cruises worldwide, almost twice as many as 10 years ago. Norway was visited by just under 100 cruise ships operated by approx. 40 cruise lines during the summer of 2019. In total, these ships carried out over 400 cruise voyages along the entire coast of Norway. The largest ship, the MSC Meraviglia, can carry around 4 500 passengers and a crew of 1 500.

The cruise ships are getting bigger and their numbers are multiplying. Norway is a favourite destination for cruise tourists. When many ships and visitors arrive at the same time, it creates congestion, pollution and tension in many local communities along the coast. Many surveys have documented that cruise tourists spend less money locally than other types of tourists. On the other hand, the cruise industry reports increased willingness to pay and demand from all parts of the market.

This survey charts how much cruise tourists leave in total and illuminates how much different groups of cruise tourists spend on shore in Norway.



Sources:

- Cruise lines international Association, 2019 Cruise Trends & Industry Outlook.
- <https://www.marineinsight.com/know-more/top-10-largest-cruise-ships-2017/>
- <https://www.cruise.no/alt-om-cruise/cruisehistorien>
- Photo: André E. Eilertsen.

Summary of main findings



A group of tourists willing to pay

Cruise tourists are tourists who are willing to pay and spend a lot of money on their trip to Norway. The bulk of the spending is payment for the cruise package, which largely falls to the cruise lines. Of the spending that accrues to Norway, most is spent on shopping, food and beverages, as well as on excursions, attractions and activities. Of the cruise tourists in Norway, Americans and Australians spend the most money.



Spend less than the other holidaymakers in Norway

Cruise tourists leave less money in Norway than the average for the other holidaymakers during the summer season. This is primarily due to the fact that cruise tourists do not spend money on accommodation and transport. Spending outside accommodation and transport is at roughly the same level as the other tourists during the summer season.



Cruise tourists are experiencing a greater degree of overtourism

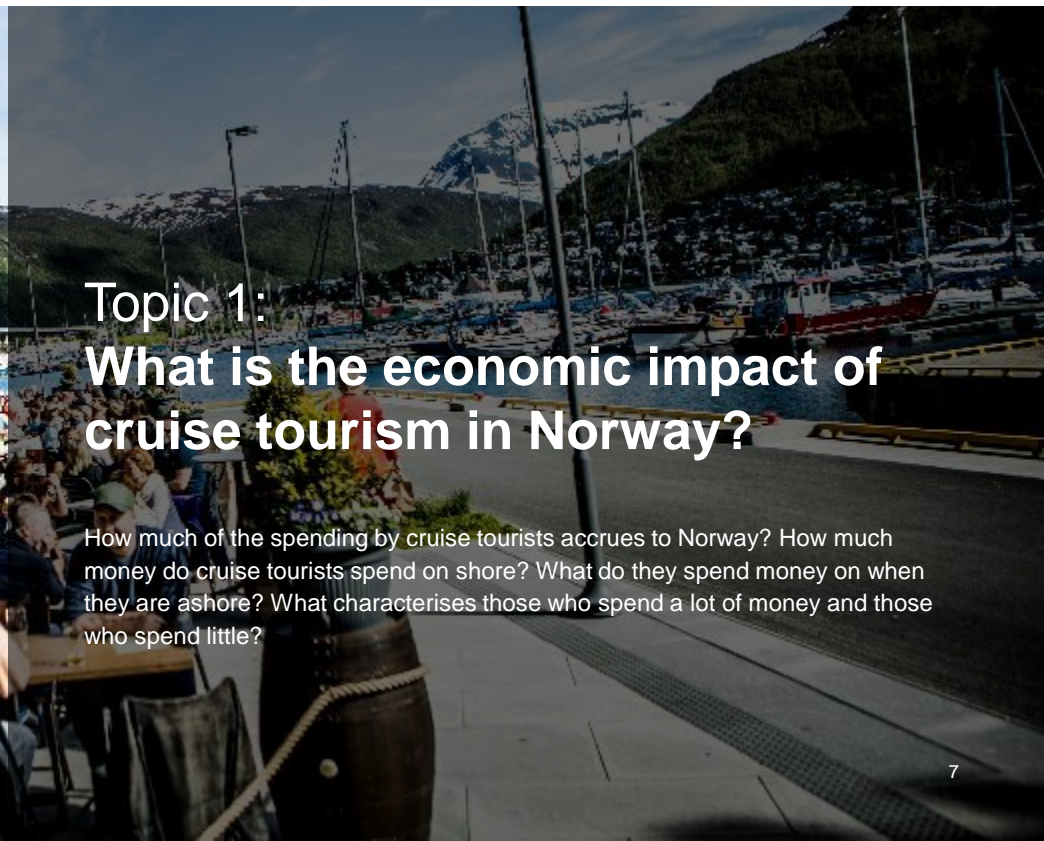
Compared with land-based holidaymakers, cruise tourists are increasingly experiencing that the places they visit are crowded. The challenge posed by crowding and overtourism is particularly large in the most visited ports of Fjord Norway and Lofoten.



Spending has decreased since the last survey in 2014

Spending by cruise tourists in Norway has declined compared to the previous national cruise survey conducted in 2014.

While total spending by the cruise tourists has risen from NOK 12.1 billion to NOK 21.8 billion, a considerably smaller share of the tourists' total spending accrues to the Norwegian economy. It is particularly spending on activities and experiences on shore that has decreased from 2014 to 2019.



Topic 1: What is the economic impact of cruise tourism in Norway?

How much of the spending by cruise tourists accrues to Norway? How much money do cruise tourists spend on shore? What do they spend money on when they are ashore? What characterises those who spend a lot of money and those who spend little?

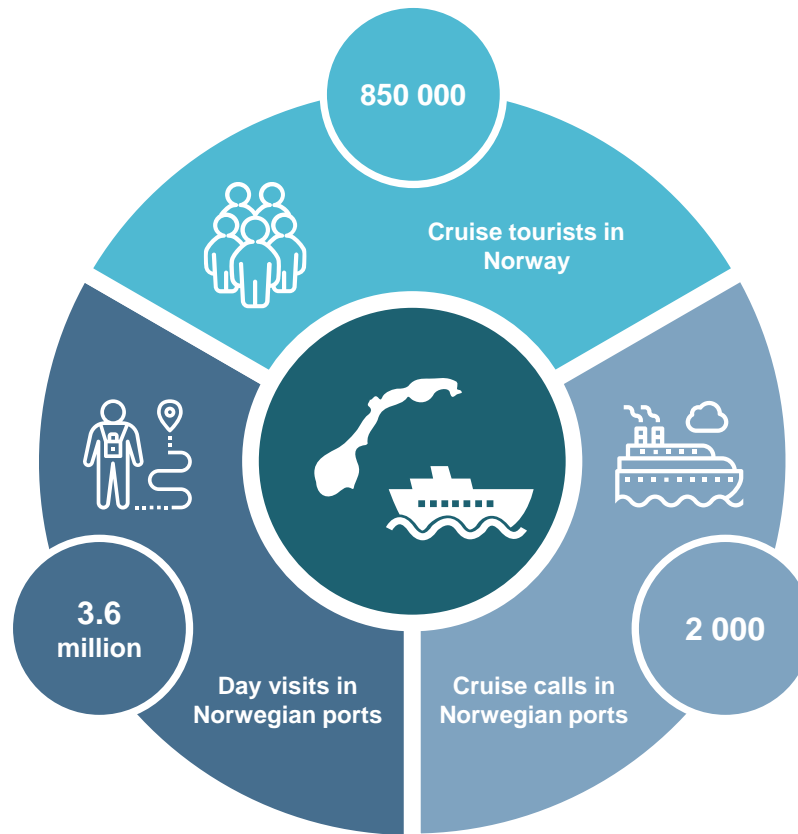
Cruise tourism in Norway

Well on the way towards 1 million cruise tourists during the summer season


On a par with cruise tourism internationally, cruise tourism is steadily increasing in Norway. There are currently considerably more and larger ships visiting Norway than was the case just a few years ago. In the summer of 2019 about 850 000 cruise tourists visited Norway. Which – and how many – ports they visit varies from sailing to sailing, but overall there were approximately 2 000 cruise calls along the Norwegian coast. There is a wide variation in the number of calls and day visits between the various ports. Overall, there were 3.6 million day visits in Norwegian ports; some of these visits lasted only a few hours, while other ships stayed from early morning until late at night, or overnight.

To put this into perspective, foreign holidaymakers in the same period had 7.4 million overnight stays in hotels, 2.1 million overnight stays at campsites and 700 000 overnight stays in cabin villages.

Scope of cruise tourism in Norway from May to September 2019



For comparison:
Overnight stays by foreign holidaymakers in the period

 **7.4 million**
overnight stays at hotels

 **2.1 million**
Overnight stays at campsites

 **0.7 million**
Overnight stays in cabin villages

Source: Statistics Norway, Accommodation Statistics 2019

Germany is Norway's largest cruise market

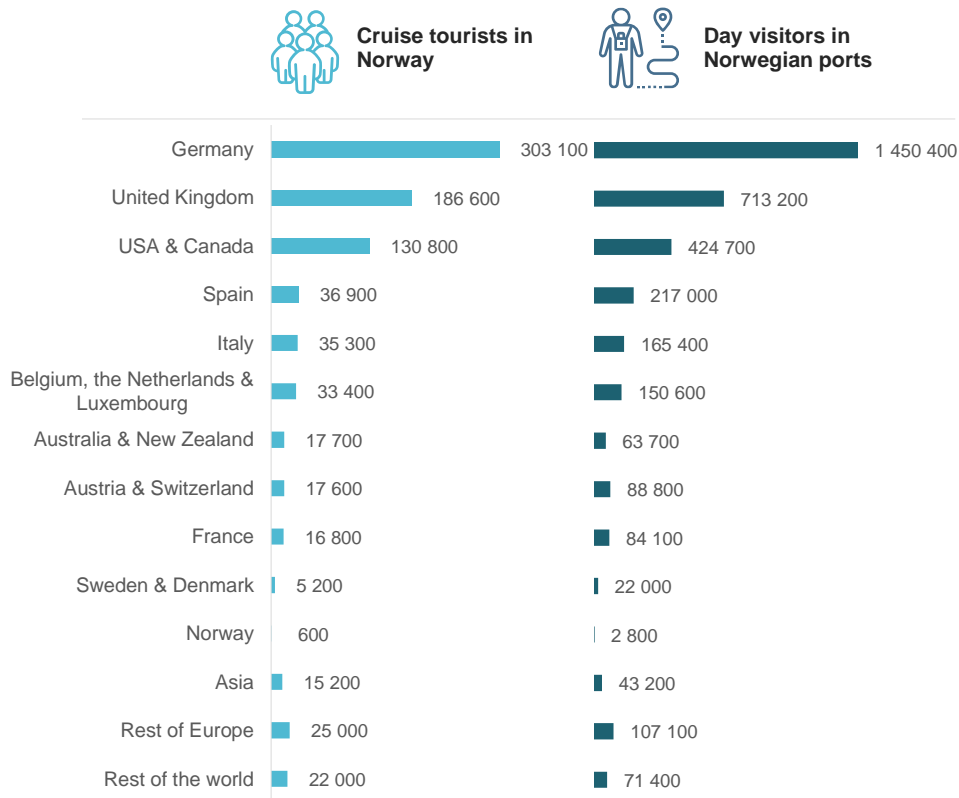
Germans, Brits and North Americans account for 75 per cent of the cruise tourists

Germany is by far the largest cruise market for Norway, with over 300 000 cruise tourists in the summer of 2019. It amounts to 36 per cent of all cruise tourists in Norway. Many come from the UK and the US and Canada as well, with respectively 186 600 and 130 800 cruise passengers. Together, these three markets make up 75 per cent of all cruise tourists who visited Norway the summer of 2019.

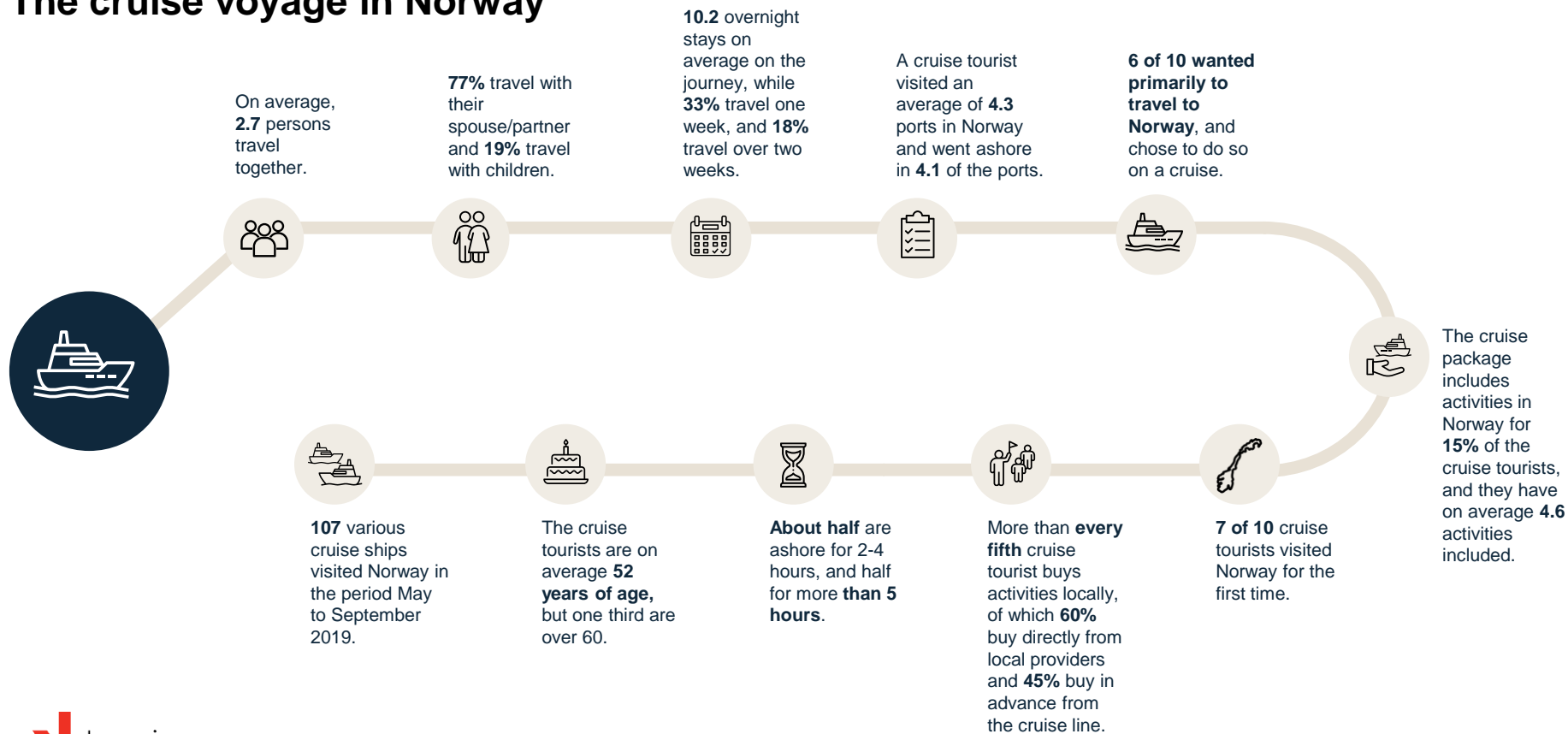
Spanish cruise tourists have the most day visits

The total number of day visits naturally follows the number of cruise passengers. German cruise tourists go on the most day visits in Norwegian ports. Looking, however, at the number of day visits per cruise passenger it is Spanish cruise tourists who go on the most day visits per cruise passenger, with nearly six day visits on average. In comparison, German cruise tourists take about 5 day visits, UK cruise tourists approximately 4 and US & Canadian cruise tourists about 3. The number of day visits affects total spending ashore in Norway.

Distribution of nationalities of cruise tourists



The cruise voyage in Norway



Most of the cruise tourists go ashore in all ports the ship visits

The majority of the cruise tourists go ashore in all of the ports the ship visits

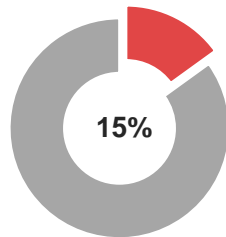
15 per cent of the cruise tourists respond that they were not ashore in **all** the Norwegian ports the ship visited on the voyage. Particularly bad weather and short port stays are given as the reason why the tourists chose to stay on board the ship while it was docked. Some also chose to stay on board because they were not feeling well or needed to relax. Attractive offers aboard the ship are not a major reason why the cruise tourists remain on board. Overall, in only 4 per cent of the ports visited by the cruise ships did the tourists state that they did not go ashore. This means that 96 per cent of cruise passengers go ashore. The tourists visiting few ports in Norway go ashore to a greater extent than those visiting many ports on the voyage.

There is no aggregated overview of how many go ashore

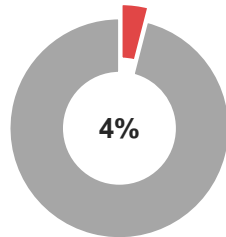
There is no overview of how many cruise passengers go ashore in the various ports. The numbers listed here are based on what the cruise tourists themselves have stated. They were asked how many Norwegian ports they would visit on this cruise, and how many of these ports they went ashore or plan to go ashore. In the sampling plan we emphasised conducting the interview in the last port or towards the end of the sailing as far as possible.

The share of cruise tourists who do not go ashore in all ports and the share of ports where they were not on shore

The share of **cruise tourists** who do not go ashore in **all** ports

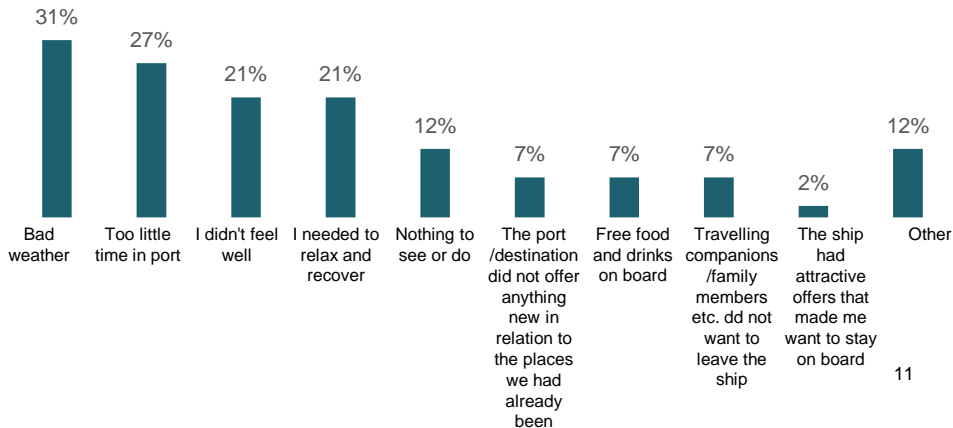


The share of **visited ports** where the cruise tourists were not ashore



Why did you choose to stay on board? Please select all that apply

Reason they chose to remain on board the ship (only those who were not ashore responded)



Distribution of spending by cruise tourists

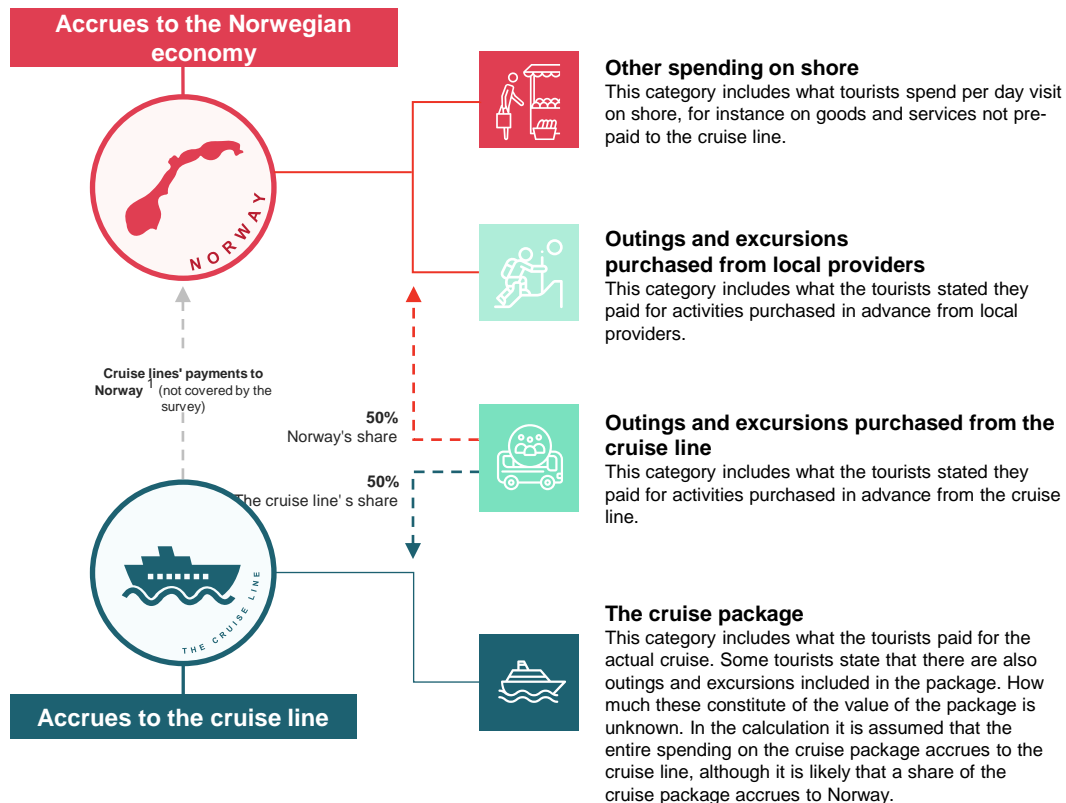
It is not possible to estimate exactly how much of the cruise tourists' total spending accrues to the Norwegian economy

Spending by cruise passengers is one of several key topics in the debate about the cruise industry in Norway. It is not possible to measure the share of the cruise tourists' total spending that accrues to the Norwegian economy, without having an insight into the cruise lines' purchases of services from Norwegian actors. Anyone travelling on a cruise purchases a form of cruise package, but how much and what is included in the cruise package varies among passengers, ships and cruise lines.

How is spending estimated?

In this survey, spending is estimated and divided into four different components: the cruise package, outings and excursions purchased from the cruise line, outings and excursions purchased from local providers and other spending on shore. The cruise tourists were asked both about how much they spent in total and how much they spent in the specific port they were interviewed in. We assume that all "other spending on shore" and "outings and excursions purchased locally", as well as 50 per cent of "outings and excursions purchased from the cruise line" accrue to the Norwegian economy. The cruise package is expected to accrue in its entirety to the cruise line.

Components in the calculation of spending by the cruise tourists and the share that accrues to the Norwegian economy



1: Deals with activities included in the cruise package, port and environmental fees, procurement of goods and services, purchase of bunkers/fuel in Norway, spending by crew in Norway, administration in Norway etc.

How much of the spending is left in Norway?

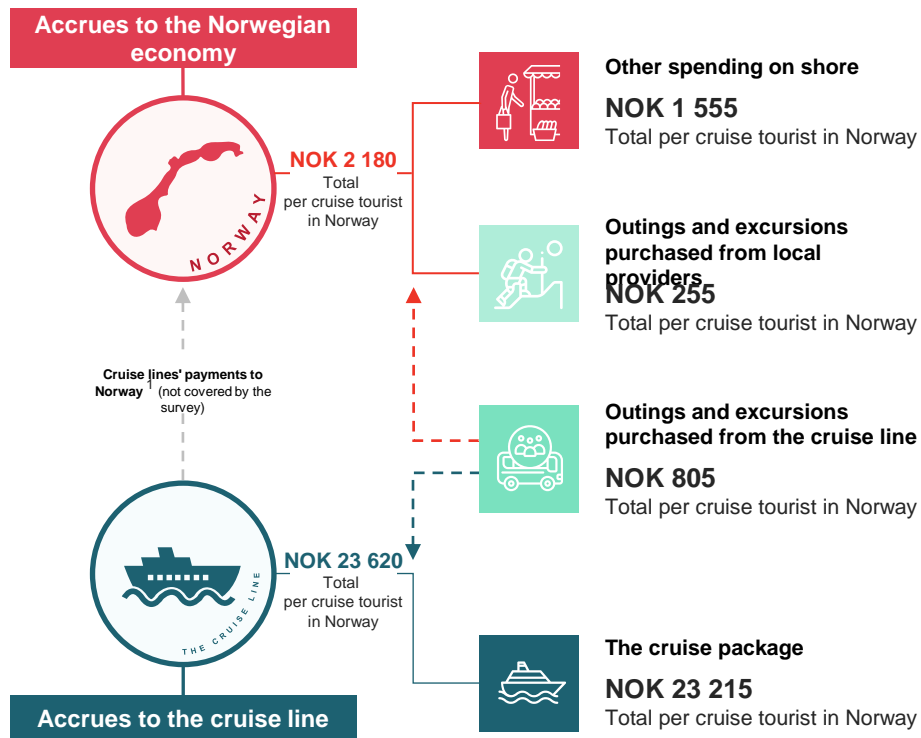
Spending by the cruise tourists largely accrues to the cruise line

Of the average total spending of NOK 25 800 per cruise passenger, over 90 per cent goes to the cruise lines. This is because the spending on the actual cruise package, which on average is NOK 23 620 per cruise tourist, constitutes a very large share of the total spending of cruise tourists in Norway. It is worth noting that the cruise package covers the entire cruise – both in and outside Norway. The share of the cruise that is in Norway varies widely; what is included in the cruise package also varies.

The cruise tourists spend an average of NOK 2 180 on shore in Norway

The cruise tourists spend an average of NOK 2 180 per person on shore in Norway. The majority of this is other spending on shore totalling NOK 1 555. The remainder consists of an average amount of NOK 255 on outings and excursions purchased from local providers, and 50 per cent of the average NOK 805 spent on outings and excursions purchased from the cruise line. The mark-up cruise lines have on the sale of outings and excursions is unknown; the calculation uses the same estimate as the cruise survey from 2014.

Components in the calculation of spending by the cruise tourists and how much accrues to the Norwegian economy



1: Deals with activities included in the cruise package, port and environmental fees, procurement of goods and services, purchase of bunkers/fuel in Norway, spending by crew in Norway, administration in Norway etc.

Total spending by cruise tourists distributed by cruise line and on shore in Norway

A small share of the spending by cruise tourists accrues to Norway

The total spending of the cruise tourists visiting Norway in the summer season is estimated at NOK 21.8 billion. Based on the calculation model explained on the preceding pages, 92 per cent of this will accrue to the cruise lines, while the remaining 8 per cent will accrue to the Norwegian economy. The cruise tourists thereby contribute NOK 1.8 billion as a direct financial contribution to Norway. Spending in Norway is primarily related to shopping, purchases of food and beverages, and activities. Spending on accommodation is low, as it is applicable only to those passengers who disembark and/or board the ship in Norway, or who otherwise have on shore stays that are not part of the cruise package. In comparison, the spending that accrues to the Norwegian economy from other onshore holidaymakers over the same period is NOK 10.3 billion.

Somewhat more of the spending of cruise tourists will indirectly accrue to Norway

NOK 20 billion basically accrues to the cruise lines. The cruise lines have expenses when they call at Norwegian ports. Examples include port fees, purchase of fuel and purchase of goods and services from local suppliers. This survey focuses solely on spending by tourists, completely on the same level of similar approaches to other types of tourists surveyed through the national tourist survey. The cruise lines' payment of fees and purchases of goods and services must be documented in other ways. A survey of the tourists is not a suitable way to chart the costs of the cruise lines.

Total direct financial contribution of cruise tourists to Norway



Spending by cruise tourists at the cruise lines (in Norway and abroad)

20.0 billion NOK in total spending

Cruise tourists' spending on accommodation in Norway

Cruise tourists' spending on accommodation outside Norway

Cruise ships'/cruise lines' payments to Norway (and other countries)



Spending by cruise tourists on shore in Norway

1.8 billion NOK in total spending

Activities on shore in Norway

Shopping and food/beverages on shore in Norway

Accommodation and local transport on shore in Norway

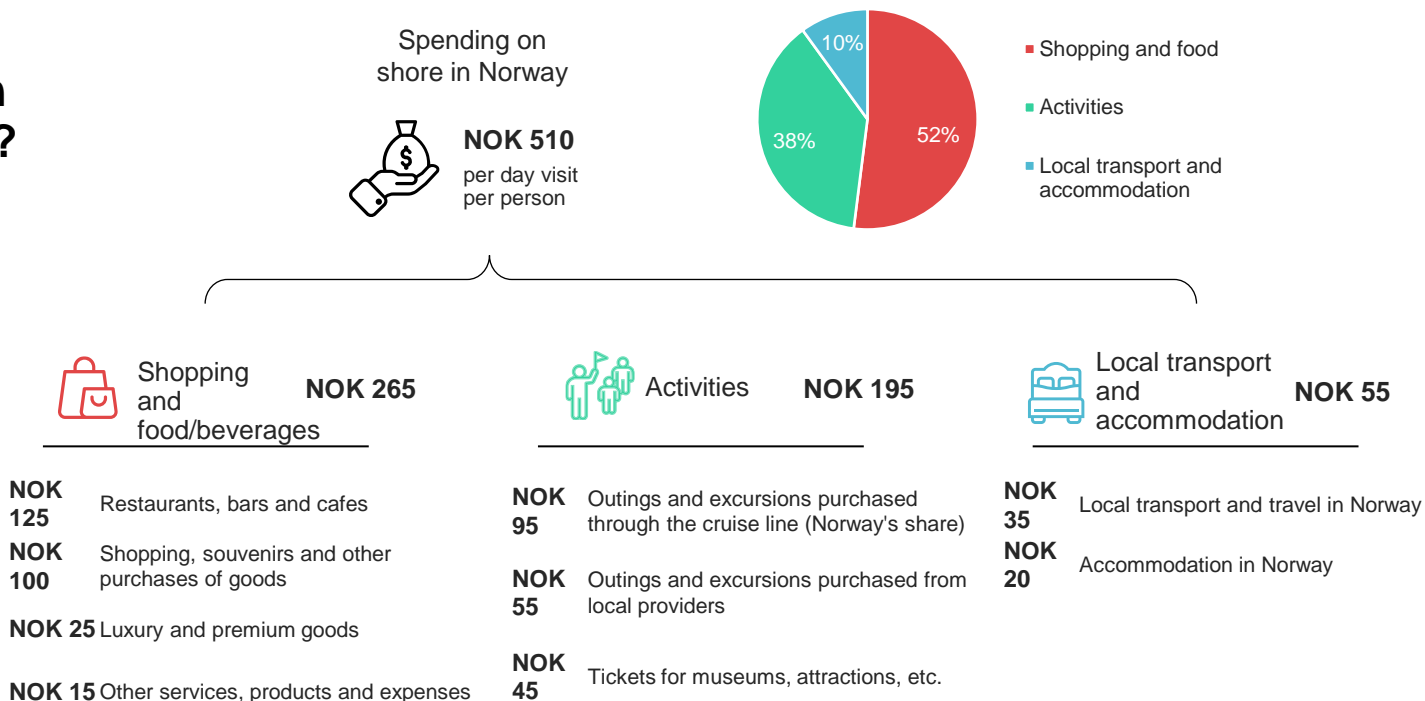
What do the cruise tourists spend money on when they are on shore in Norway?

Cruise tourists spend most of their money on shopping, food and beverages

Of the cruise tourists' average onshore spending of NOK 510 per day visit per person, most of the money is spent on shopping, souvenirs and other purchases of goods and restaurants, bars and cafes. This is followed by spending on outings and excursions, both purchased through the cruise line and from local providers. The low spending on accommodation and transport is due to the fact that most cruise tourists stay overnight on the cruise ship and are transported around by the cruise line.

Distribution of spending by cruise tourists on shore in Norway

Average spending per person per day visit on shore



The majority of cruise tourists spend money when they are on shore in Norway

95 per cent of the cruise tourists spend money on shore in Norway

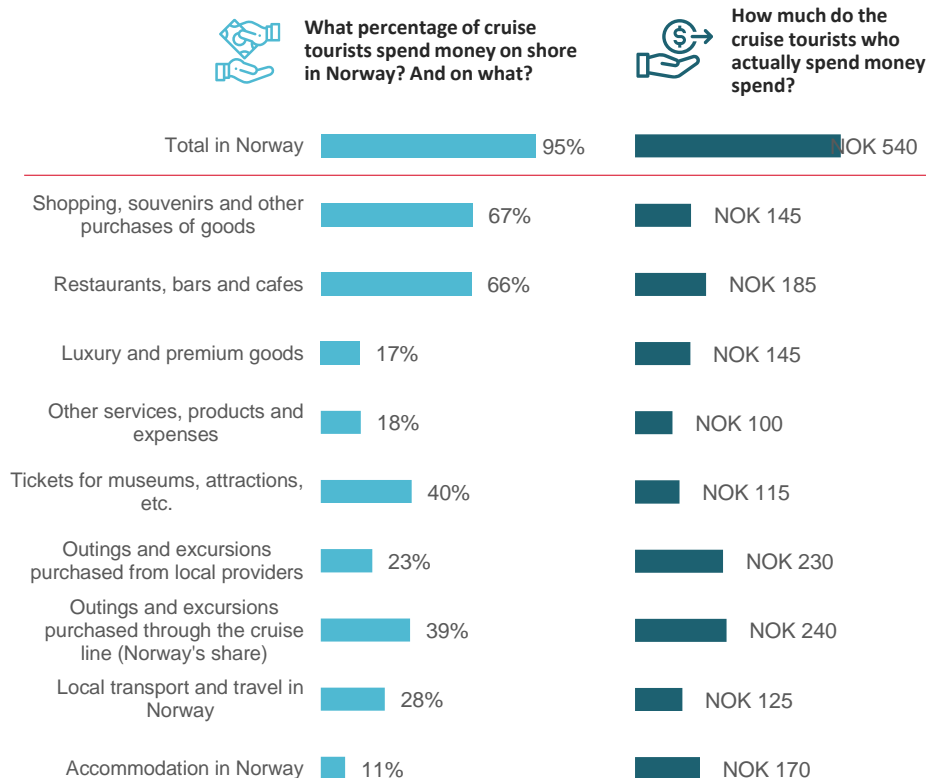
A large majority of the cruise tourists spend money in Norway, although a small minority of 5 per cent state that they do not spend money in Norway at all. How much they spend varies; the average for those who state that they spend money is NOK 540 per person per day visit. Most people spend money on shopping, souvenirs and purchases of goods (67 per cent), as well as restaurants, bars and cafes (66 per cent). Only 17 per cent of the cruise tourists spent money on luxury and premium goods. The amounts quoted in the graph are an average amount of the spending in all the ports visited in Norway by those who spent money. It is likely that those who spent money on luxury, have not done so in all the ports. What is perceived to be luxury is subjective and can be perceived differently for different respondents.

Most money is spent on outings and excursions

Most people spend money on shopping, souvenirs and other purchases of goods, and restaurants, bars and cafes. Those who spend money on outings and excursions spend the most money on this, regardless of whether it is purchased from local providers or through the cruise line. The average amount that accrues to Norway is roughly the same regardless of whether the excursion was purchased directly from local providers or through the cruise line.

Spending by cruise tourists on shore in Norway

Average shares and spending per person per port visit



Total spending of cruise tourists in Norway distributed by nationality

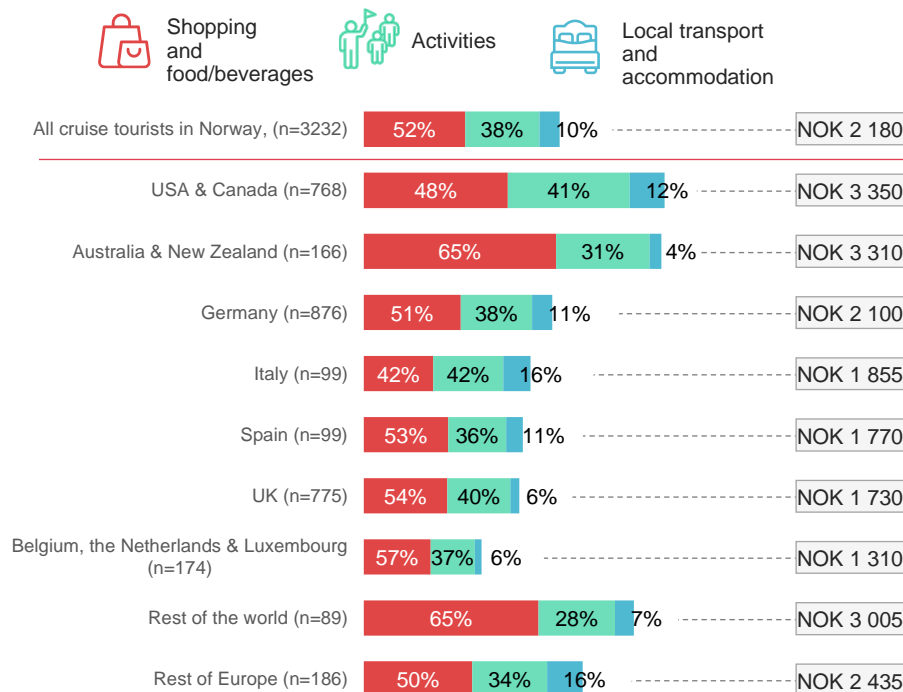
The markets that leave the least, leave less than half of those who spend the most

There are large variations in spending between different nationalities. Cruise tourists from the United States and Canada have the highest spending in Norway, with an average of NOK 31 350 per person. This is NOK 1 170 more than the average cruise tourist in Norway, who spends NOK 2 180. Cruise tourists from Australia and New Zealand have almost as high spending as Americans, with NOK 3 310 on average per person. The cruise tourists from Belgium, the Netherlands and Luxembourg spend the least money on shore in Norway, with only NOK 1 770 per person, under half of what cruise tourists from the United States and Canada spend.

The cruise tourists spend the most money on shopping and food

The vast majority of the cruise tourists spend most of their money on shopping and food, closely followed by attractions and activities. The cruise tourists from Australia and New Zealand stand out by spending a slightly larger share on shopping and food than the other cruise tourists. It can be due to the fact that they do fewer activities or that they have more activities/experiences/attractions included in the cruise package that are not included in the calculation.

Total spending in Norway on spending categories per market



The cruise markets' economic contribution to Norway

Germany is the cruise market that, overall, contributes the most to the Norwegian economy

Although German cruise tourists do not have the highest spending in Norway per person, Germany still comes out as the main cruise market for Norway overall. Over a third of all cruise tourists in Norway come from Germany. With average spending of NOK 2 100 per person and 303 100 cruise tourists, German cruise tourists alone account for total spending of over NOK 600 million that accrues to the Norwegian economy.

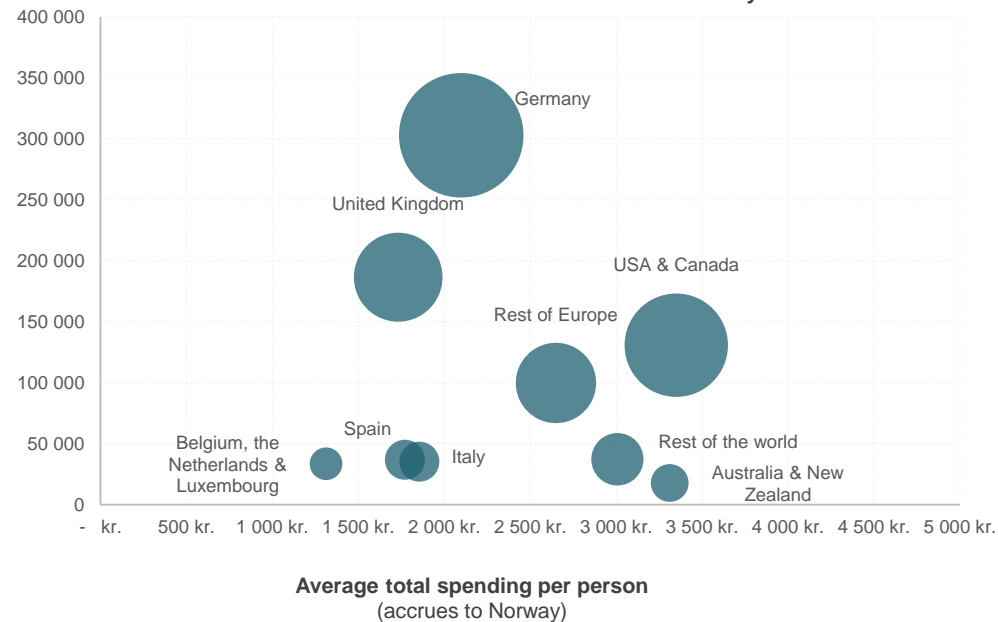
USA and Canada are the second most important cruise market

The United States and Canada are number 3 on the list measured by the number of cruise tourists, but these tourists have a high spending per person. With average spending of NOK 3 350 and a volume of 130 800 cruise tourists, the United States and Canada account for total spending of over NOK 400 million in Norway.

The cruise markets' economic contribution to the Norwegian economy

Share of cruise tourists

The size of the bubble indicates the market's total contribution to Norwegian business and industry



Spending by cruise tourists and time spent ashore

Most cruise tourists are on shore for at least 2 hours

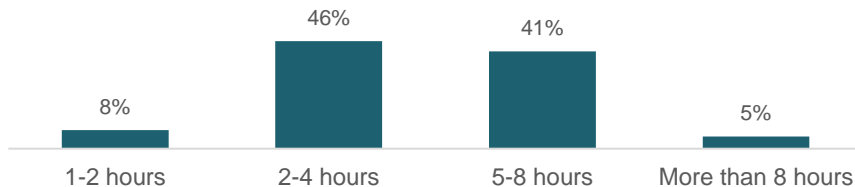
Less than half of the cruise tourists were on shore for 2-4 hours in the port where they were interviewed before returning to their ship. 41 per cent were ashore for 5-8 hours. 87 per cent of the cruise tourists were on shore between 2 and 8 hours. There is a small share of 8 per cent that are only on shore for 1-2 hours, and a similar proportion that is ashore for more than 8 hours.

Those who spend the most time ashore spend more on activities, whereas those who spend the least amount of time ashore spend more on shopping and food

Not unexpectedly, spending on activities follows the number of hours spent on shore. Those who spend the most time ashore spend more on average on activities (purchased locally or from the cruise line). However, those who spend the least time on shore, spend a very large share on shopping and food/beverages.

This confirms that the more time cruise tourists spend on shore, the more money they spend in total – even if the difference may not be as large as one might expect. Cruise tourists who only spend a few hours on shore are an important target group for commerce and eateries.

How many hours in total did you spend ashore today before you returned to the ship?



Daily spending on shore depends on time spent on shore

Average spending per day on shore on activities and shopping/food and beverages.

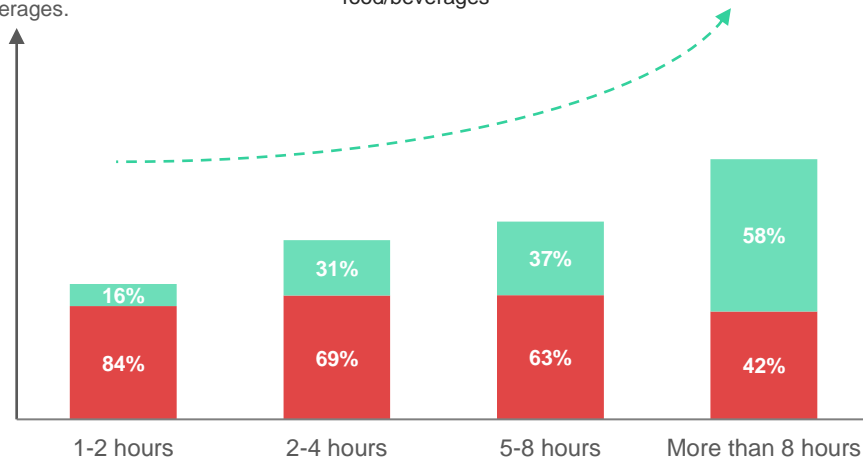


Shopping and food/beverages



Activities

Spending rises the longer they spend on shore.



The value of a cruise tourist depends largely on how many ports they visit

Most cruise tourists visited between 4 and 6 Norwegian ports during the summer season of 2019

Approximately 60 per cent of the cruise tourists visited between 4 and 6 Norwegian ports on their cruise. The most common is 4 ports, with a share of 27 per cent of the cruise tourists.

Median spending rises by number of ports

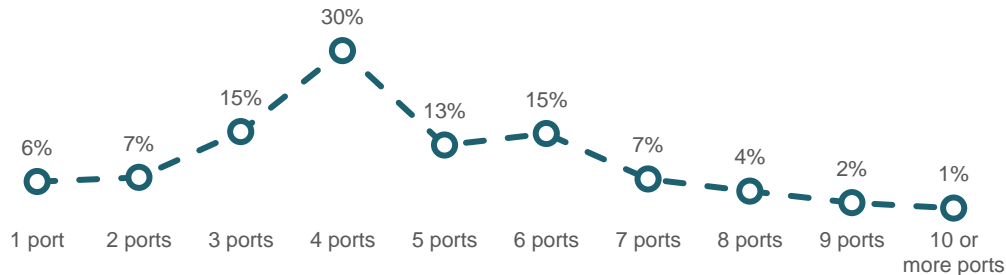
There is a correlation between median spending and the number of ports the cruise ship visits in Norway; the more ports, the higher the median spending.

...but there is a saturation point at around 5 ports

Although median spending increases with the number of ports, there is a saturation point. Spending does not rise to the same extent when the ship visits more than 5 ports. The value of visiting an extra port reaches a peak at around 5 ports. This means that more accrues to each destination from ships that visit up to 5 ports, after which the value declines for each additional port visit.

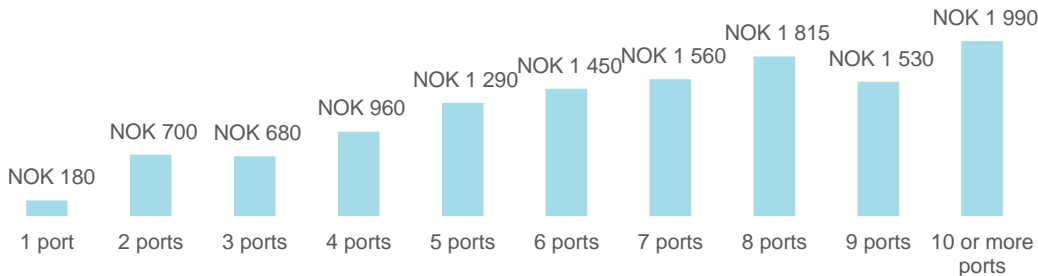
How many Norwegian ports will the ship visit on the voyage?

The percentage of cruise tourists



How much does a typical cruise tourist spend in Norway?

Median spending that accrues to Norway per person



Notes:

Median spending is calculated from all the ports the ships visit, not per port.

Comparison of spending with other foreign holidaymakers

While cruise tourists spend the most in total, it is the land-based tourists who contribute most to the Norwegian economy

Cruise tourists spend more overall on their trip than the foreign land-based holidaymakers during the summer season. Earlier in the report, it was noted that much of this spending does not accrue to the Norwegian economy. Although the land-based holidaymakers spend less money overall on their holiday per person, the share of the spending that accrues to Norway is significantly higher for these tourists. While land-based holidaymakers contribute NOK 1 240 per day per person, the cruise tourists contribute only NOK 510 per day visit per person.

This is primarily due to the fact that the cruise tourists do not spend much money on accommodation and transport. However, the cruise tourists spend over 30 per cent more per day than the land-based tourists on experiences, shopping and other spending.

Read more about the comparison with other foreign holidaymakers in Norway in topic 3.



Cruise tourists



Foreign holidaymakers

in Norway during the summer season

Total spending on the entire trip ¹

NOK 25 800

Spending per person for the entire trip

NOK 16 040

Spending per person for the entire trip

The spending that accrues to Norwegian business and industry ²

NOK 510

Spending per day visit in Norway

NOK 1 240

Daily spending per person in Norway

Other spending in Norway ³

(Restaurants, shopping, entertainment, activities etc.)

NOK 460

Spending per day visit in Norway

NOK 355

Daily spending per person in Norway

Notes:

- 1: The price of the cruise package also covers stays in ports outside Norway. The other spending of the cruise tourists in ports outside Norway is not included in this amount.
- Similarly, the total spending of the land-based tourists also includes overnight stays outside Norway.
- 2: "Transport to Norway" is not counted for foreign holidaymakers during the summer season, as only part of this accrues to Norway.
- 3: Exclusive onshore accommodation and transport in Norway

Spending by the cruise tourists has declined since the summer of 2014

In the summer of 2019, cruise tourists spent less on shore in Norway than in 2014

In the previous national cruise survey conducted in 2014, average spending per day visit on shore was estimated at approx. NOK 860. In this year's survey, corresponding spending is estimated at NOK 510. It is particularly spending on activities on shore that has decreased since the previous survey. Total spending by the cruise tourists was estimated at NOK 12.1 billion in 2014. It has increased to NOK 21.8 billion. Norway's share of the cruise tourists' total spending has dropped significantly since the last survey in 2014.

More comprehensive survey with more than twice the number of interviews

The scope of this year's survey is significantly larger than the survey in 2014. Interviews were conducted on 137 more cruise calls to ensure greater variation, and there are more than twice as many interviews as in 2014. At the same time, changes have been made to the questionnaires so that all of the questions are not directly comparable.

Other circumstances may also affect the results

It is natural to believe that there are also other factors that affect the changes in spending. The Norwegian krone is weaker today than it was in 2014. More ships and more types of cruise lines and ships are included in the sample. It is also likely that the cruise lines have gotten better at selling cruise packages where more is included in the package itself; this may be a possible explanation since spending on activities has declined.

The difference in spending from Cruise Survey 2014 to 2019

Spending that directly accrues to the Norwegian economy per day visit in Norway.

Cruise Survey 2014

38 cruise calls in 14 Norwegian ports

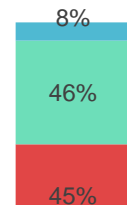
1 423 interviews from **July to September**
with 30 interview days

Cruise Survey 2019

175 cruise calls in 14 Norwegian ports

3 232 interviews from **May to September** with 75
interview days

NOK 860



Shopping
and food/beverages

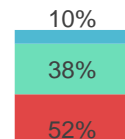


Activities



Local transport
and
accommodation

NOK 510



Notes:

2014 is shown in 2014 prices. 2014 does not include accommodation, as it was not included in the questionnaire used.

Do the cruise tourists spend more money than they expected to do?

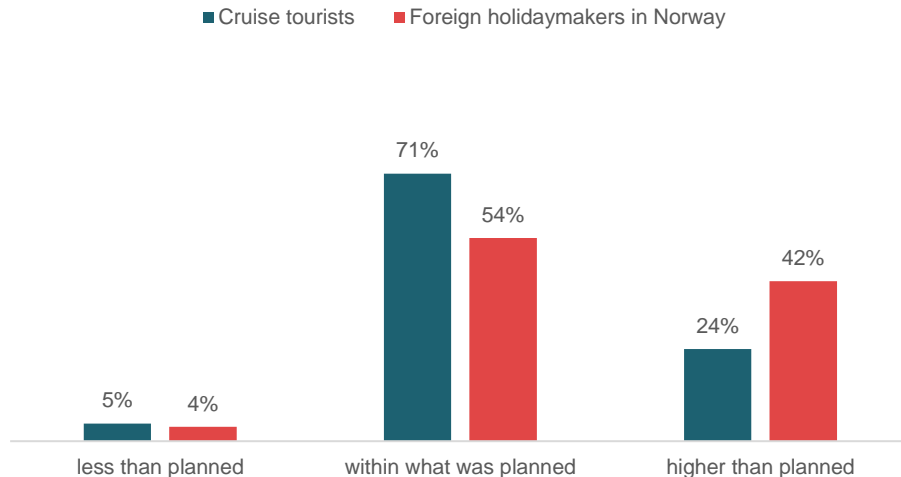
Most tourists in Norway expect to spend as much or more money than planned on their holiday in Norway

71 per cent of the cruise tourists in Norway state that they expect to spend within what was planned on their trip in Norway, while 24 per cent state that they expect their spending to be higher than planned. Few tourists expect to spend less than planned.

Predictable expenses

The cruise tourists state to a greater degree that they expect to spend within what was planned compared with the other holidaymakers in Norway. One of the reasons may be that many cruises include a lot in their prepaid cruise packages. The cruise tourists have more control, especially over spending related to transport, room and board than other foreign holidaymakers in Norway have. At the same time, the cruise tourists spend much less time on shore in Norway than the other tourists in the summer.

The expectations for spending on their holiday trip in Norway
While on this cruise/this holiday, do you expect your expenses will be...





Topic 2: How do the Norwegian ports differ from each other?

The data collection was carried out in 14 different ports along the Norwegian coast. They naturally vary in size, offers and types of cruises they receive, but are there any differences between them beyond that? Do any stand out with more satisfied tourists? We take a closer look at this in this section.

Which attractions/activities are popular in the various ports?

Certain attractions are a must see

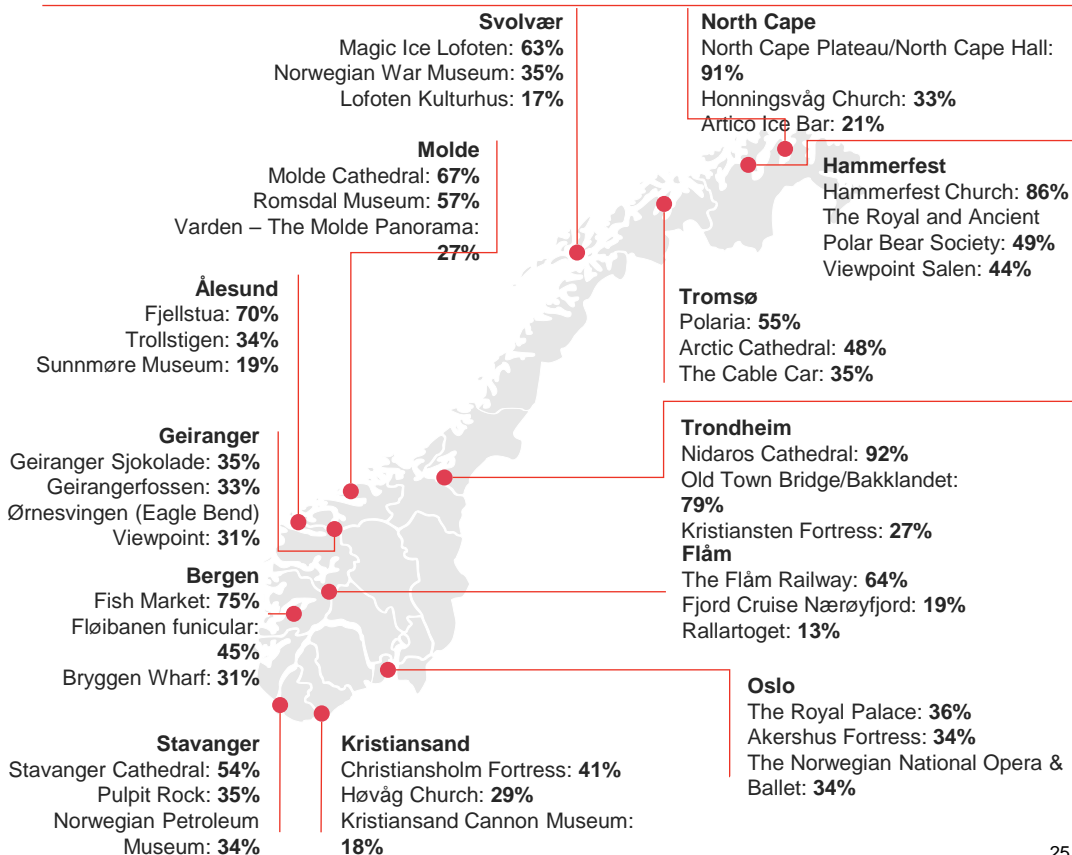
There are some attractions that stand out by the fact that a very high percentage of cruise tourists visit them when they are on shore at the destination.

1. Nidaros Cathedral, 92 per cent
2. North Cape Plateau, 91 per cent
3. Hammerfest Church, 86 per cent
4. Old Town Bridge/Bakklandet, 79 per cent
5. Fish Market in Bergen, 75 per cent

In Trondheim, Nidaros Cathedral and the Old Town Bridge/Bakklandet are must sees for the cruise tourists. These attractions are easily accessible for the tourists to explore on their own, and it can explain why so few spend money on pre-paid experiences and activities precisely in Trondheim.

Top 3 Local attractions/activities

Share that has visited/experienced the attraction/activity

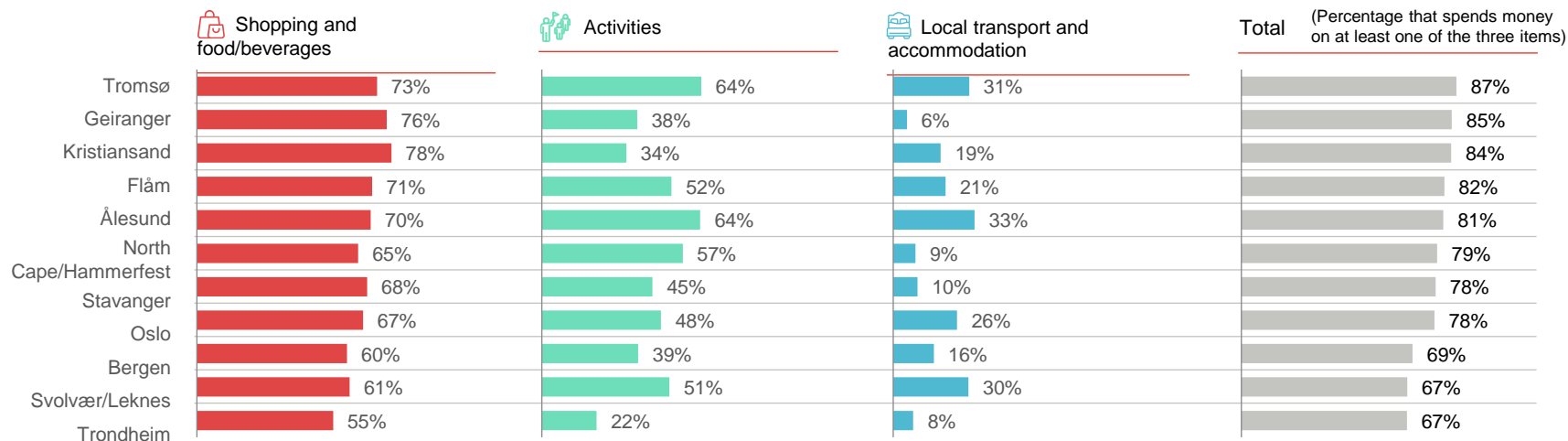


What percentage of the cruise tourists spend money and what do they spend money on in the various ports?

Spending on activities and local transport and accommodation that sets the ports apart

Tromsø has the highest share of cruise tourists who spend money. Here, 87 per cent respond that they spent money ashore. When we look more closely at the percentage per spending category, it is mainly activities and local transport and accommodation that give rise to major differences between the destinations. Tromsø and Ålesund have the highest percentage of cruise tourists who spend money on activities and local transport and accommodation. In Trondheim, more than 30 per cent said that they had not spent any money ashore.

The percentage of cruise tourists who spend money on the various spending categories at each destination



Cruise tourists' purchases of activities at the destinations

Cruise passengers in Tromsø and Ålesund purchase most activities locally

In Tromsø and Ålesund, 60 per cent of cruise passengers purchase activities directly from local providers. North Cape/Hammerfest has the highest percentage of cruise passengers who buy activities/excursions from the cruise line.

Few purchase activities in Trondheim

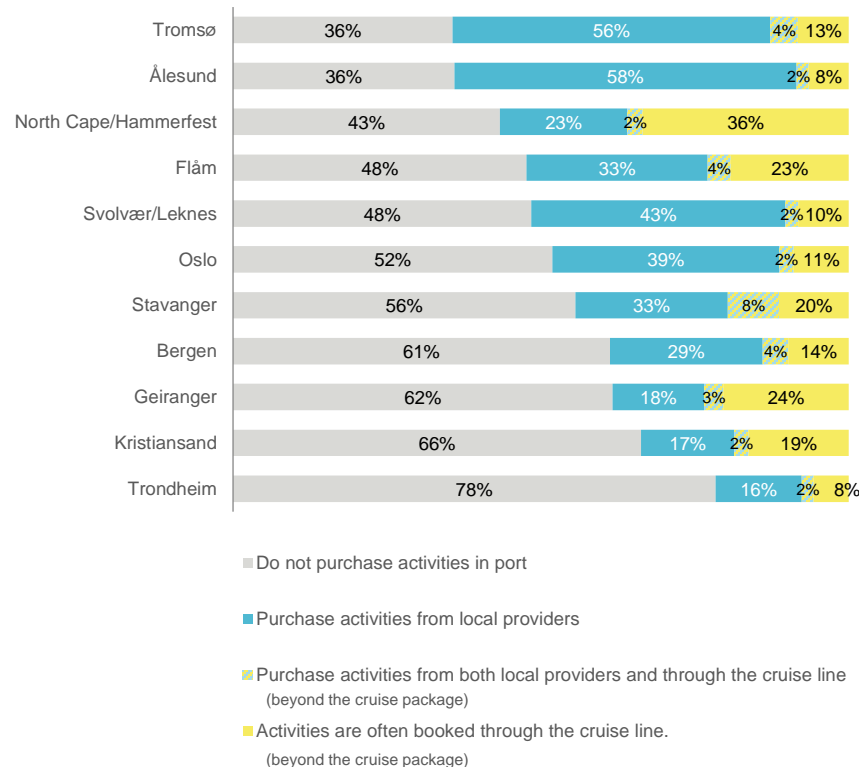
Close to 80 per cent of cruise passengers in Trondheim do not buy activities/excursions on shore. In all of the major cities – Oslo, Bergen, Stavanger and Trondheim – the majority of cruise passengers prefer to explore the destinations on their own.

Activities not included in the cruise package

The figure on the right shows only the percentage that have purchased activities that were not included in the cruise package. The distribution would look different if the excursions and activities included in the cruise package were also in the overview. These statistics are the preserve of the cruise lines.

Cruise tourists' purchases of activities in port

The percentage that has purchased activities and the type of activities they have purchased in the specified port



How much do the cruise tourists spend on shore at the different destinations?

The vast majority of cruise tourists spend less than NOK 1 000 per person per day visit at all of the destinations

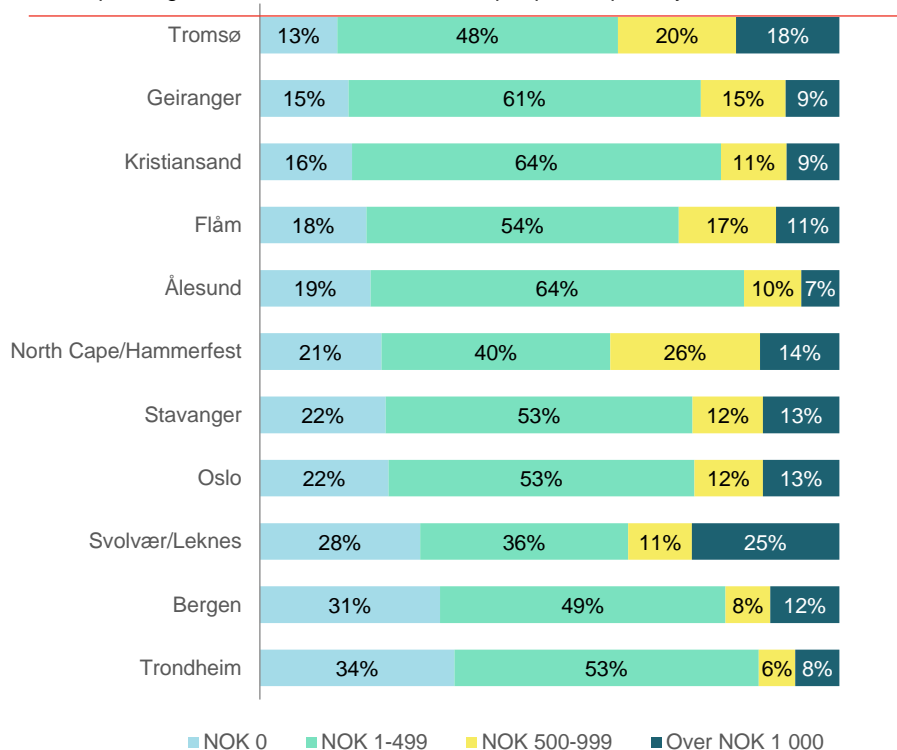
The largest percentage of cruise tourists spend less than NOK 1 000 per person per day visit, regardless of which destination they visit. Nearly 1 out of 5 replied that they did not spend money on shore at the destination they were interviewed. Bergen and Trondheim have the highest share who do not spend any money on shore, with a percentage of upwards of 30 per cent of those interviewed in these cities.

13 per cent of the cruise tourists in the ports spent more than NOK 1 000 on shore per person at the destination they were interviewed at

These tourists spend more time on shore, obtained information from the destinations' websites to a greater degree, and are more interested in culinary experiences, museums and art exhibitions than the other cruise tourists. They are consistently more satisfied with service, hospitality, access to culinary experiences and information and signage. At the same time, several of the tourists who spent a lot of money on shore, replied that they experienced a high degrees of overtourism on their voyage in Norway. Tromsø and Svolvær/Leknes have the highest percentage of tourists who spend a lot of money on shore; Ålesund and Trondheim have very few tourists in this group.

The spending of the cruise tourists according to the amount of daily spending on shore

Total spending that accrues to the destination per person per day visit ashore



How satisfied are cruise passengers with information and signage and the service level at the destinations?

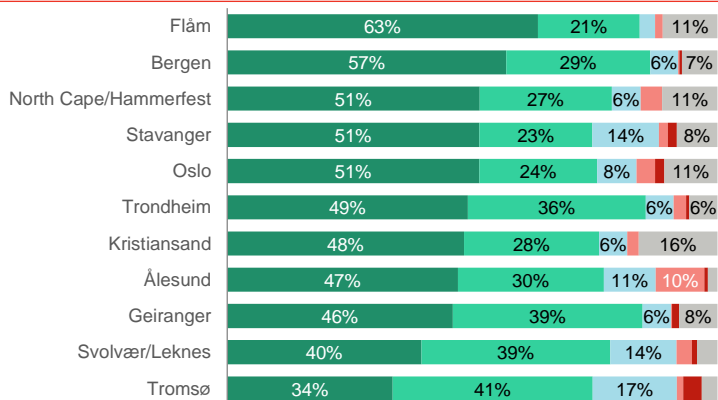
The cruise tourists are very satisfied with their visit on shore

Overall, the cruise tourists' satisfaction is at 9.0 on a scale of 0 to 10. That is a very good score, which is on par with other holidaymakers in the summer. When we look closely at the satisfaction of some of the sub-dimensions, there are differences between the destinations.

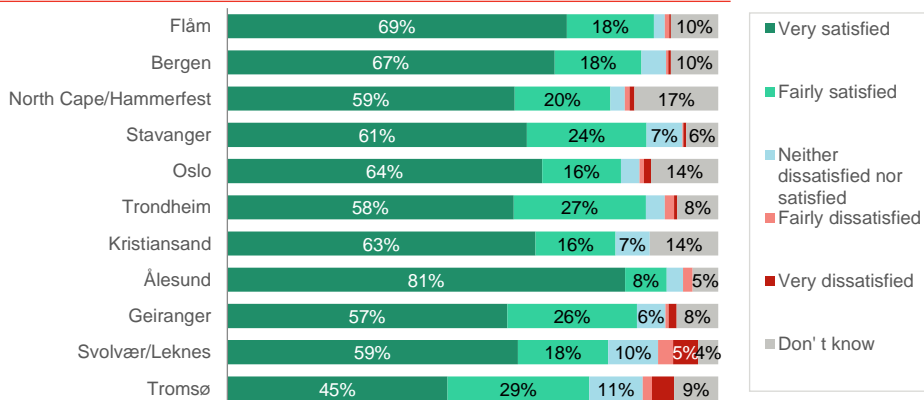
Flåm and Bergen are best at information, Ålesund is best at service

Those interviewed in Flåm and Bergen are most satisfied with the information and signage, with respectively 84 per cent and 86 per cent responding that they are very satisfied. Even for Tromsø, which has the lowest score, 75 per cent say they are satisfied. Ålesund rates clearly highest on satisfaction with the level of service, with 90 per cent saying that they are satisfied with the level of service. Tromsø scores the lowest on service.

Satisfaction with information and signage



Satisfaction with the level of service



Notes:

For the readability of the figures, percentages below 5% are not shown in the figures.

Do the cruise tourists experience congestion and overtourism? Are the places clean and tidy?

Many experience places that are crowded

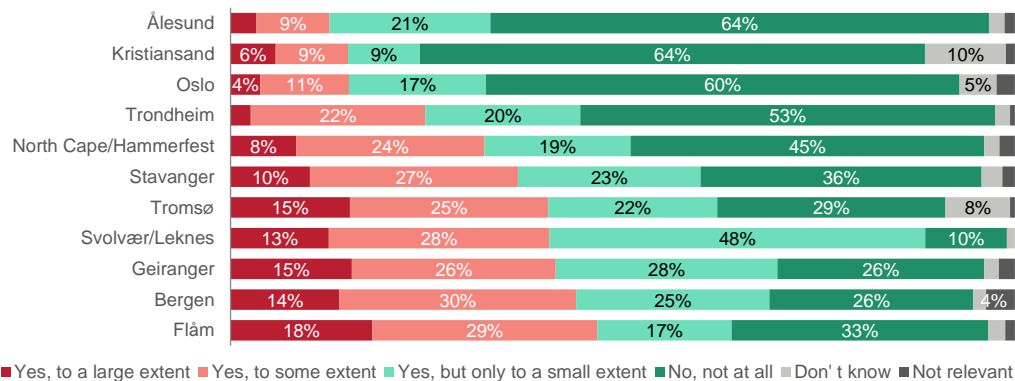
The cruise tourists experience overtourism to a greater or lesser extent in all the ports where interviews were conducted. There are great differences between the ports. In Flåm, fully 67 per cent responded "yes" to the question of whether the places they visited felt crowded. The big cruise ports and tourist destinations have the greatest challenges with overtourism.

The places are viewed as neat and clean

The vast majority experience the places they visit as neat and clean. Those interviewed in Ålesund were the least satisfied with cleanliness. At the same time Ålesund is the port that is experienced as least crowded.

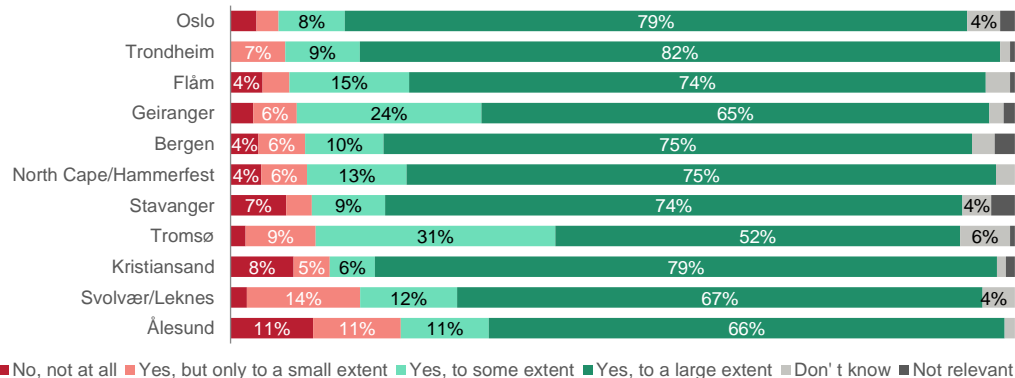
Experienced overtourism among cruise tourists

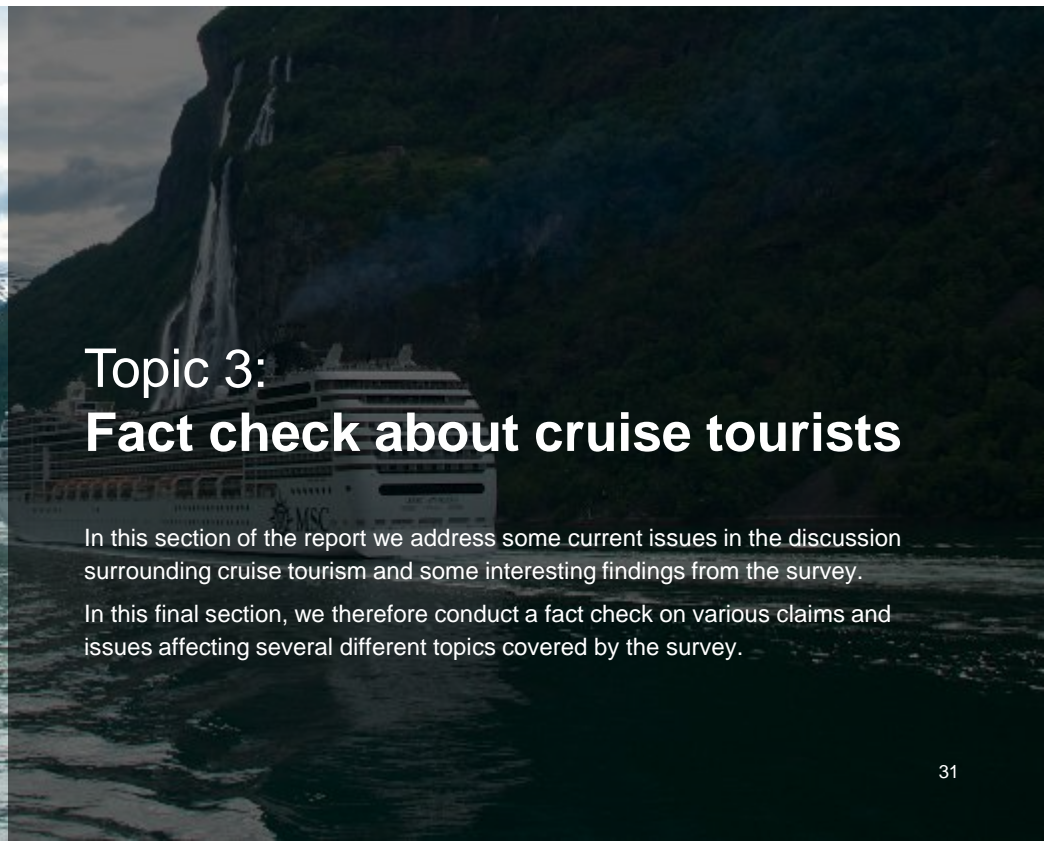
"The places I visited felt crowded because there were too many tourists there"



Experienced cleanliness among cruise tourists

"The places I visited were clean, tidy and without rubbish"





Topic 3:

Fact check about cruise tourists

In this section of the report we address some current issues in the discussion surrounding cruise tourism and some interesting findings from the survey.

In this final section, we therefore conduct a fact check on various claims and issues affecting several different topics covered by the survey.

Cruise tourists are willing to pay, but little is left in Norway

A significantly smaller percentage of spending by the cruise tourists accrues to the Norwegian economy, compared with land-based holidaymakers during the summer

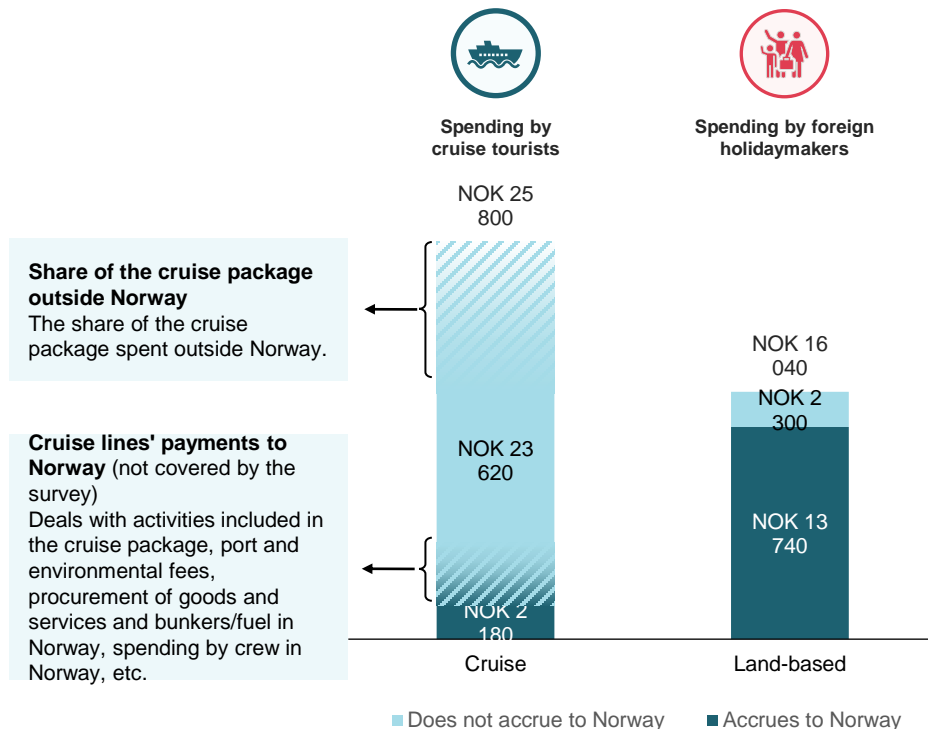
Of the cruise tourists' total spending of NOK 25 800 per person, only 8 per cent remains in Norway. However, for those holidaying on land, about 86 per cent of spending is left in Norway. Cruise tourists pay more overall to experience Norway, spending NOK 9 760 more per person on their trip in Norway compared with other foreign holidaymakers during the summer.

The comparison is perhaps not so simple?

A cruise often also visits destinations outside Norway during the voyage. At the same time we know nothing about the percentage of the cruise package the tourists pay that indirectly accrues to the Norwegian economy. The cruise lines pay port and environmental taxes, purchase goods and services from Norwegian suppliers, and they fill bunkers/fuel while in Norway. 15 per cent of the cruise tourists state that their cruise package includes excursions/activities on shore in Norway. They state that their cruise package includes an average 4.6 activities/excursions. A share of the cruise package therefore likely goes to pay Norwegian providers, if the line does not have its own guides or uses foreign bus companies etc.

Overall total spending for the entire holiday for cruise tourists and land-based holidaymakers

Total spending per person on all spending categories



Other things being equal – are cruise tourists stingy?

Spending by the cruise tourists on shore is on par with tourists visiting friends/family, and cabin and camping tourists

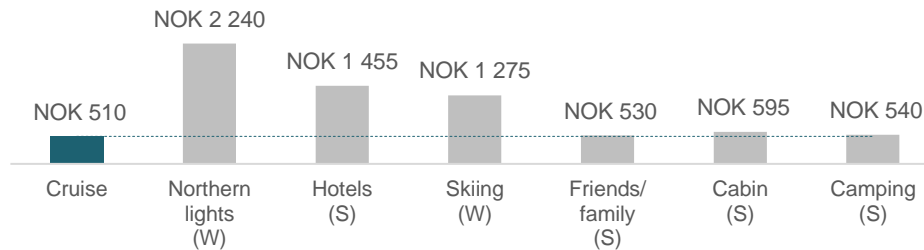
Cruise tourists contribute almost as much to the Norwegian economy as tourists who primarily visit friends and family, stay in a cabin or are on a camping holiday. None of these groups spend a lot of money on accommodation; it contributes to lower than average spending. Northern Lights tourists have, without comparison, the highest spending per person per day that accrues to the Norwegian economy.

Cruise tourists spend roughly the same on "other spending" as tourist staying in hotels or are on a ski holiday

At NOK 470, other spending by the cruise tourists is at the level of land-based holidaymakers. If we compare the cruise tourists' other spending on experiences, shopping, restaurant visits, etc. with other groups of tourists, we see that the cruise tourists spend more money when they are on shore than many other tourists spend per day on their trip in Norway.

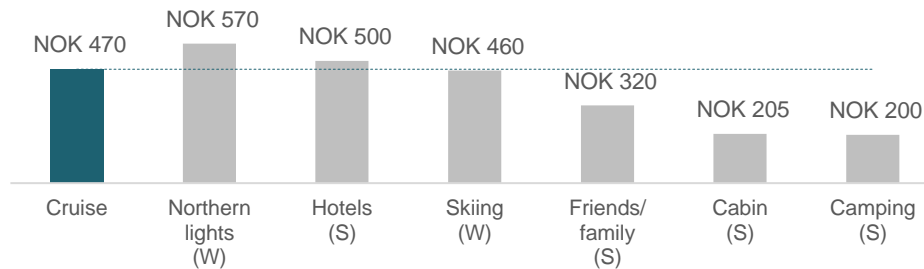
Spending that accrues to the Norwegian economy per day/port visit

Spending per person for selected target groups



Other spending per day/port visit

Spending per person for selected target groups



Notes:

(W) = Holidaymakers during the winter season. (S) = Holidaymakers during the summer season. Hotels, friends/family, cabin (own, rented or borrowed) and camping (on and off the site) are defined as the holidaymakers who have had the majority of their overnight stays at the nominal form of accommodation. Northern Lights tourists and ski tourists are defined after they assess that the Northern Lights and skiing, respectively, are important to their holiday.

The following are included in 'Spending that accrues to the Norwegian economy':

- Cruise tourists: Fifty per cent of outings and excursions purchased from the cruise line, 100% of outings and excursions purchased from local providers, or accommodation and transport on shore, as well as other spending on shore.
- Land-based holidaymakers: Accommodation, transport in Norway, package travel in Norway, as well as other spending in Norway (incl. outings and excursions).

The following is included in 'Other spending':

- Cruise tourists: Fifty per cent of outings and excursions purchased from the cruise line, 100% of outings and excursions purchased from local providers, as well as other spending
- Land-based holidaymakers: Other spending in Norway (incl. outings and excursions).

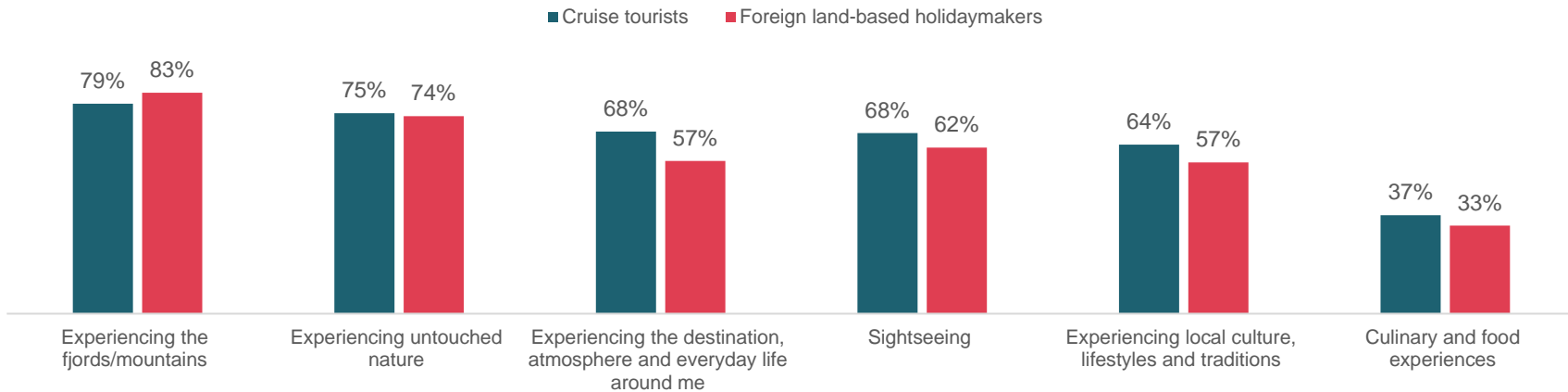
Do cruise tourists only come to Norway to experience spectacular scenery?

Cruise tourists are more interested in cultural experiences

Like land-based holidaymakers, cruise tourists want to experience beautiful scenery. Perhaps a little surprising, the cruise tourists are more interested in soaking up the atmosphere, local culture and culinary experiences of the places they visit than the average land-based holidaymaker who visited Norway the summer of 2019. Cruise tourists have money and are willing to spend it on experiences. Maybe there is more to get many places?

Meaning of different experiences to cruise tourists and land-based tourists during the summer season

The percentage of the tourists indicating that the experience is 'Very important' (alternative answers were 'Not important' and 'Somewhat important')



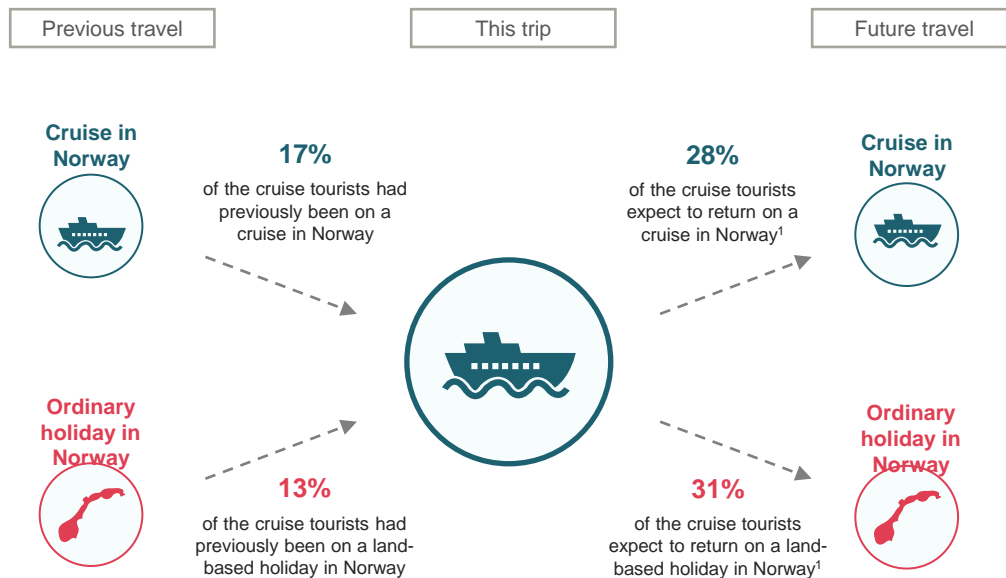
Is cruise a promotion tour for Norway that will prompt more people to return on a land-based holiday?

About a third of the cruise tourists could imagine returning to Norway on holiday

Only 3 percentage points more say they could imagine returning to Norway on a land-based holiday, than those who say that they will come back on a new cruise. At the same time, 17 per cent of the cruise tourists had been on a cruise in Norway previously, and only 13 per cent had been on a land-based holiday in Norway before.

Although it is a crude simplification, it can be argued that the best way to predict future travel habits is to look at existing and past travel habits. The findings suggest that cruises are a great promotion tour for yet another cruise holiday in Norway. Almost 1 out of 5 said they had been on a cruise holiday in Norway earlier, and they are back in Norway on a new cruise this summer. Although marginally more say they want to return on a land-based holiday, it is just as likely that they will return on a new cruise. It is by no means certain that they will return; 70 per cent are not entirely convinced that they will travel to Norway on holiday again – either on shore or at sea.

Percentages of the cruise tourists who had been in Norway before and percentages who expect to return



Notes:

Share of the respondents who answered 9 or 10 to the following questions: "On a scale from one to ten, where 0 is Highly likely, how likely or unlikely is it that you will return to Norway in the next three years..."

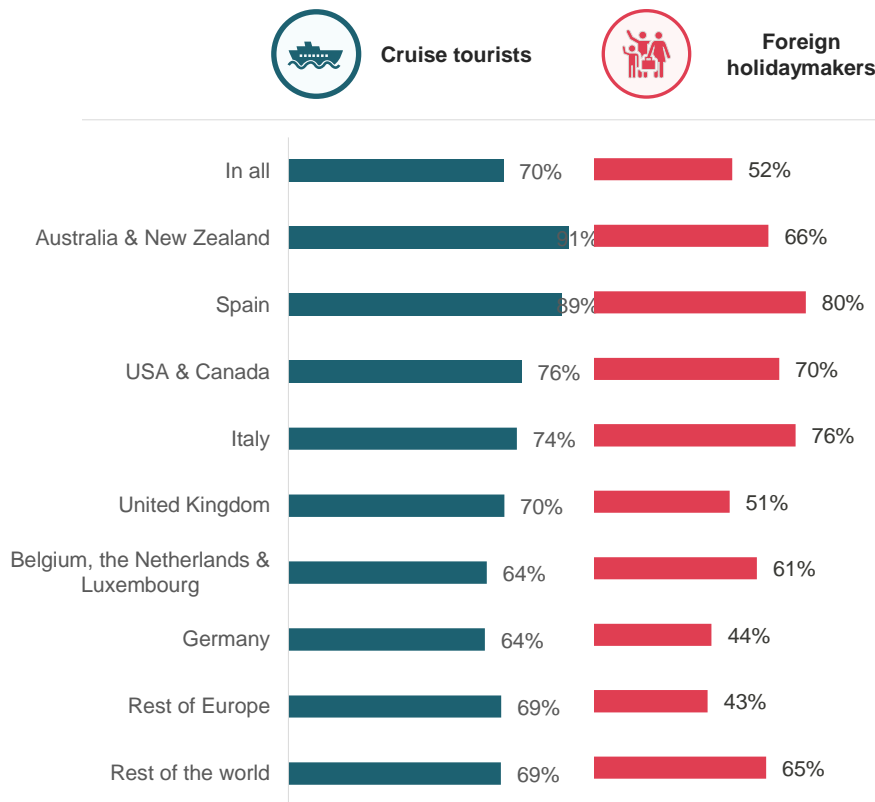
The share of first-time travellers has risen and is still higher for cruise tourists

There are considerably more that come to Norway for the first time as cruise tourists

70 per cent of the cruise tourists who visited Norway the summer of 2019 were in Norway for the first time. Only Italians have a higher percentage of first-time travellers among land-based holidaymakers, than on cruises. This may indicate that cruises are important promotion tours for Norway, which can whet the tourists' appetite and desire to come back to experience more of Norway on a different type of trip. The percentage of first-time visitors has increased from 65 per cent in 2014 to 70 per cent in 2019 for cruises. The percentage of first-time visitors has increased for all markets where there are comparable numbers. Note that the survey in 2019 is more extensive than in 2014; the surveys are therefore not directly comparable.

Much indicates that the sharp rise in cruising has contributed to the fact that more people have experienced Norway for the first time, both because a larger percentage came here for the first time and because the number of cruise tourists has increased a lot from 2014 to 2019.

The share of first-time visitors in total and per market
Have you visited Norway on a holiday or leisure trip? Share of 'No'.



Is it only the elderly who travel on cruises?

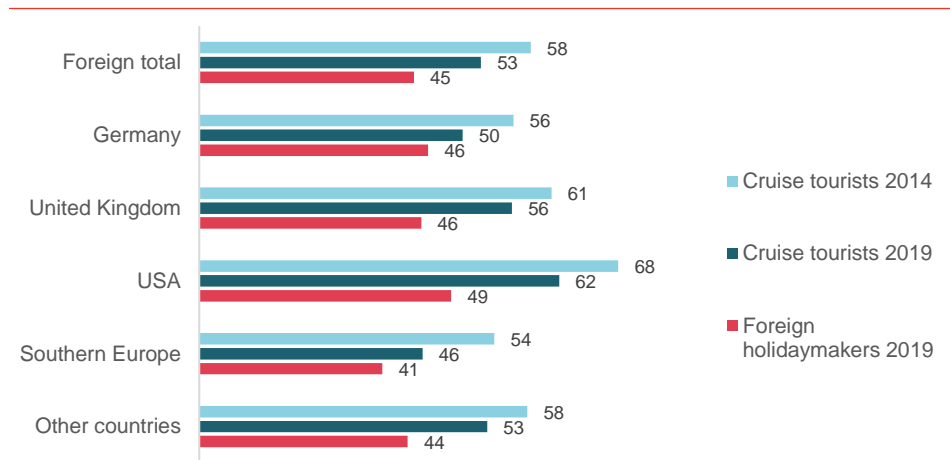
The average age of cruise tourists is declining but is still higher than for land-based holidaymakers in the summer

Although the average age among cruise tourists is still slightly higher than for land-based holidaymakers, the average age has declined by 5 years since the previous survey in 2014. The average age for the cruise tourists in the summer of 2019 was 53 years of age, while in 2014 it was 58. It is especially the cruise tourists from the US and southern Europe who are younger now than in 2014. 19 per cent of those travelling on cruises in Norway state that they are travelling with children, and many ships have offerings aimed at families with children.

The youngest prefer to come back on an ordinary holiday, the oldest prefer cruises

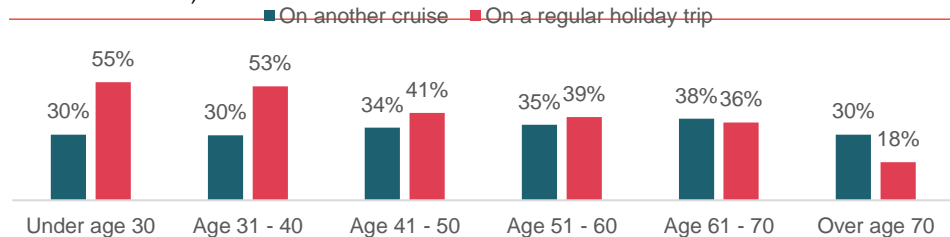
Among those under 50 years of age there is a clear preponderance that want to return to Norway on an ordinary holiday trip. For those under 40 years of age, almost twice as many prefer a future land-based holiday over a cruise. The oldest will, to a lesser extent, return, and if they are to return, they prefer to go on a cruise. For those under 40-50 years of age, cruises can be a great opportunity to give the tourists a taste of what Norway has to offer; the chance is then great that they will return on a land-based trip at a later time.

Average age of cruise tourists in 2019, other holidaymakers in the summer of 2019 and cruise tourists in 2014



Probability of return visit per age

Percentages that have answered 8-10 to questions about the probability of return visits (on a scale from 0 to 10)



The youngest spend the least on their cruise holiday and least on shore

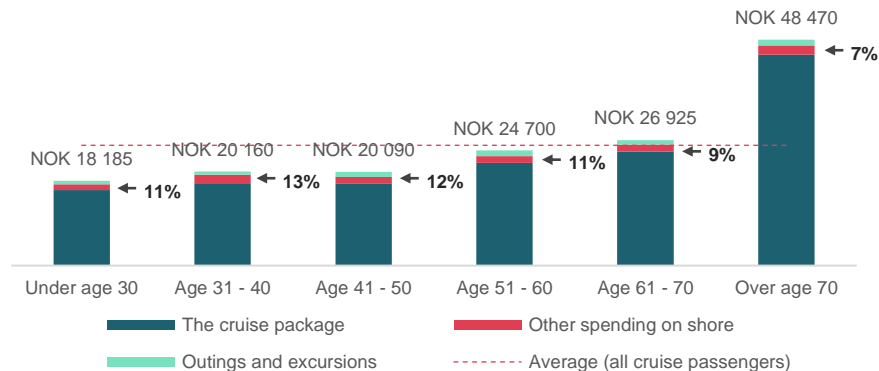
Young people spend less money in total on cruise trips

There is a correlation between age and spending on cruise trips. We see that the youngest age group (under 30 years of age) spends the least money in total, while the oldest (over 70 years of age) spends the most money in absolute terms. This is especially due to the fact that the oldest pay much more for their cruise package. Those over 60 years travel on longer cruises, with a duration of between 10 and 14 days, while the average for those under 40 years of age is 9 days. On average, the oldest visit one more port than those under 40. This may explain some of the difference in spending, but there is still a strong correlation between spending and age, even if it must be taken into account that the cruises taken by the oldest last longer.

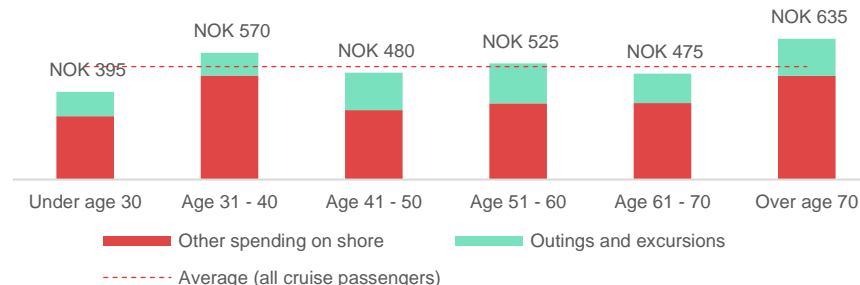
The youngest spend a larger share of their budget on shore

It is the spending on the cruise package that distinguishes the most between the different age groups. If we only look at the average spending per day visit that accrues to the Norwegian economy, the difference between the age groups is considerably less. The younger age groups spend a significantly larger share of their total holiday budget on shore in Norway. The youngest spend less on excursions and more on other spending on shore.

Total spending on the entire cruise trip divided by age group
Average total spending per person on the entire cruise trip



Average spending per person per day visit on shore that accrues to Norway
The share of excursions and excursions that accrue to Norway, as well as other spending in Norway



Cruise tourists experience overtourism of sites to a greater degree

Compared with land-based holidaymakers, a significantly larger percentage of the cruise tourists experience that the places they visit are overcrowded

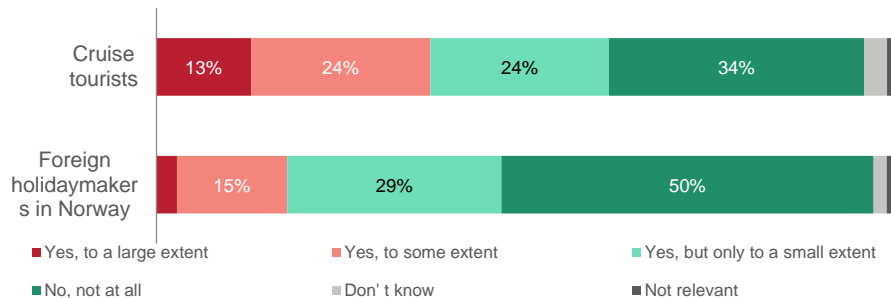
Only 34 per cent of the cruise tourists answered "no" to the question of whether the places they visited felt crowded because there were too many tourists there. The corresponding figure for land-based holidaymakers is 50 per cent. Too many cruise ships or too large cruise ships also degrade the experience for the cruise tourists.

Cruise tourists in Oslo and Kristiansand experience the sites as crowded to a lesser extent.

A possible explanation in Kristiansand and Oslo is that cruise tourists, to a lesser extent, visit popular attractions such as the zoo in Kristiansand, which attracts many visitors during the summer.

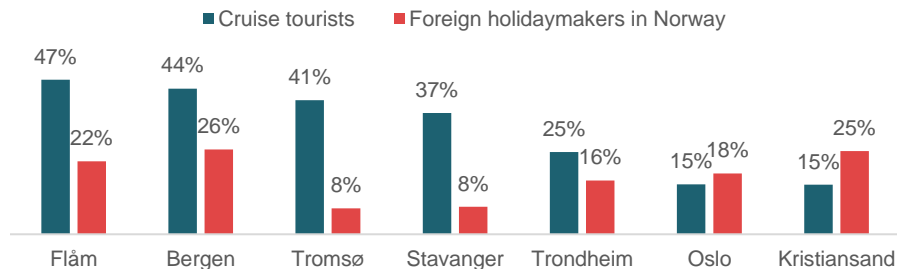
Experienced overtourism for cruise tourists and other foreign holidaymakers in Norway

"The places I visited felt crowded because there were too many tourists there"



Cruise tourists' and land-based tourists' experience of overtourism

Percentage that to some or a great extent experience that the places they visited felt crowded



Notes:

The issue of overtourism is asked generally for the whole holiday, but it is nonetheless natural to believe that the answer is influenced by their current experience in the interview situation.

Cruise tourists are not as willing to recommend Norway as a destination

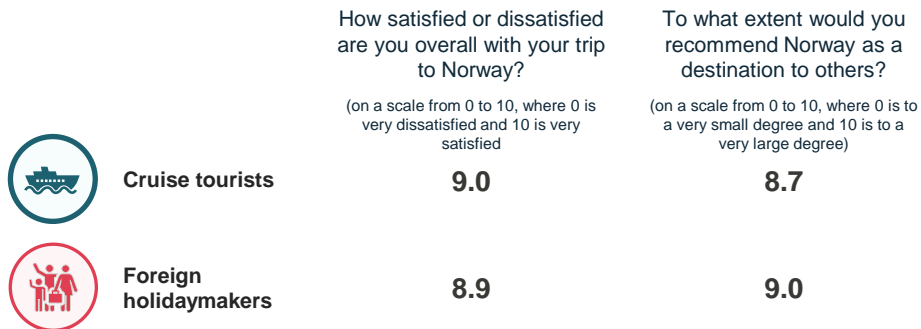
Cruise tourists are somewhat less willing to make recommendations

Referral willingness is high among cruise tourists and other foreign holidaymakers. Cruise tourists are marginally more satisfied with their trip, but despite this, are somewhat less willing to recommend Norway as a destination to others.

High satisfaction with trip to Norway

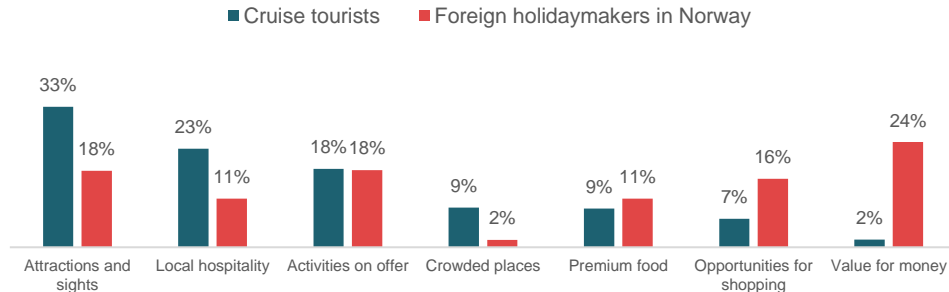
Cruise tourists' satisfaction is largely influenced by how satisfied they are with attractions and sights and the local hospitality, whereas value for money is the main driver of satisfaction among other foreign holidaymakers. Attractions and sights, activity offers and shopping opportunities are other important drivers for the foreign holidaymakers in Norway during the summer of 2019. Value for money is a negligible driver of the satisfaction of cruise tourists, who are not similarly exposed to the price level of Norway. Cruise tourists are more sensitive to overtourism than other foreign holidaymakers.

Average satisfaction and referral willingness for cruise tourists and other foreign holidaymakers



What drives satisfaction among cruise tourists and other foreign holidaymakers?

The relative percentile significance of the satisfaction dimensions in regard to overall satisfaction



Norwegians' attitudes to tourism

Many Norwegians think there are too many cruise tourists

61 per cent of the inhabitants of areas that have many cruise tourists (pressure zones) think there are too many cruise tourists where they live. On a nationwide basis 28 per cent said the same. A majority of 53 per cent in these areas find that there are too many tourists in general, regardless of the types of tourists. This is a sharp rise from 44 per cent the previous year. The attitude towards the number of cruise tourists in the pressure zones is unchanged from 2018, which was the first year the citizen survey was conducted.

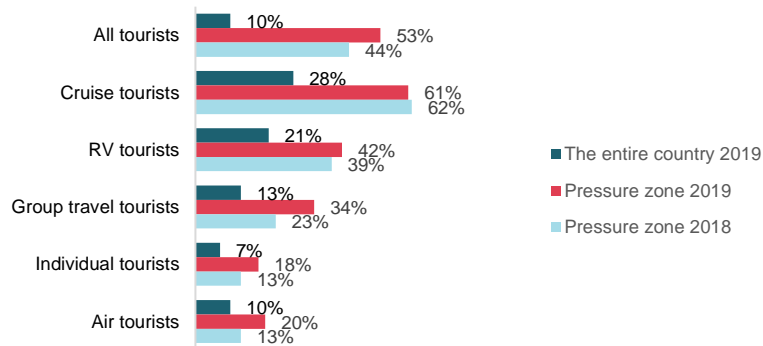
An increasing percentage of the inhabitants of pressure zones want limitations on tourism

A majority of the inhabitants of both the pressure zones and Norway generally find that tourist sites and attractions are often overcrowded. Meanwhile, 6 out of 10 of the inhabitants of the pressure zones believe that cruise tourists leave little money. In these areas, an overwhelming majority believes that a tourist tax should be introduced in Norway. It is on this question that the greatest change has taken place since 2018. The percentage who answered that they completely or partly agree that a tourist tax should be introduced in Norway has risen from 44 per cent in 2018 to all of 65 per cent in 2019.

You can read more about the citizen survey on [VisitNorway.no/innsikt](https://www.visitnorway.no/innsikt).

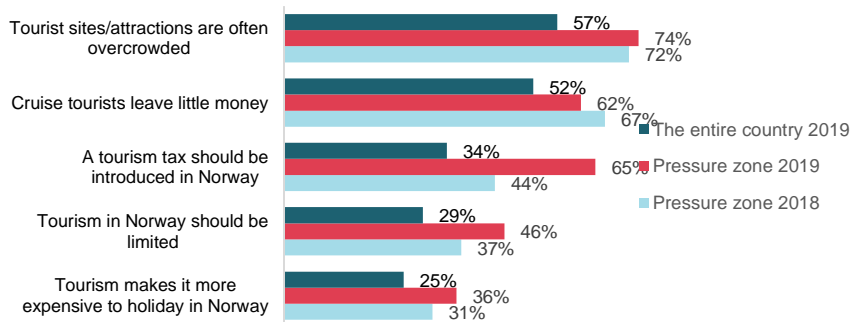
Where you live - What do you think of the number of tourists today..?

Percentage of a little too many and all too many



To what extent do you agree or disagree with the following statements?

Percentage of totally and partly agree.



Notes:

Pressure zones: Stavanger, Bergen, Ålesund, Stranda (Geiranger), Lofoten, Aurland, Stryn, Longyearbyen
Source: Citizen Survey 2019, Innovation Norway

Who is experiencing overtourism? Are there any differences between nationality and cruise line?

Southern European cruise tourists experience a greater degree of overtourism

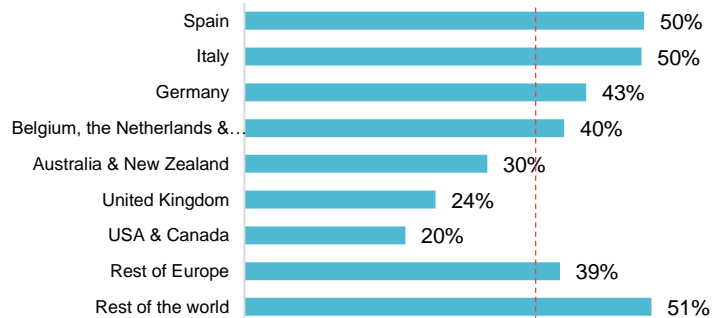
Cruise tourists from Southern Europe are most likely to state that they have experienced overtourism in the places they visited in Norway. The issue of overtourism is generally formulated for the entire journey in Norway, but it is probable that their answer is influenced by how they experienced the situation in the place they have just been ashore and were interviewed.

There is a correlation between cruise line and experienced overtourism

The tourists travelling with MSC Cruises, AIDA and Costa feel to the greatest extent that the places they visit are overcrowded. The tourists travelling with these cruise lines usually arrive on relatively large ships with 2 000 or more passengers. One or more large ships arriving at a small destination are likely to affect the experience to a greater extent than similar numbers in a larger city such as Oslo. Many of the cruise tourists travelling with RCCL were interviewed in Oslo and arrived there by ships that also visit other major cities outside Norway during the sailing. Expectations of experiencing untouched nature also likely affects the assessment of what is perceived as crowded.

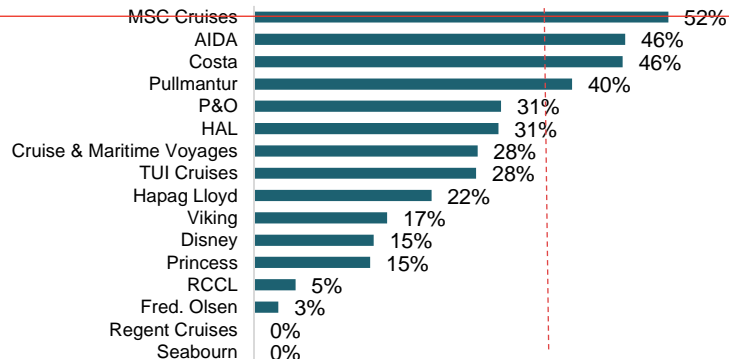
Cruise tourists' experiences of overtourism across nationalities

Percentage that to some or a great extent experience that the places they visited felt crowded



Cruise tourists' experiences of overtourism across cruise lines

Percentage that to some or a great extent experience that the places they visited felt crowded



Cruise tourists in total: 37%

Do those who have paid a lot for the cruise package spend more money on shore?

Those who pay the most for the cruise package, spend more money on shore

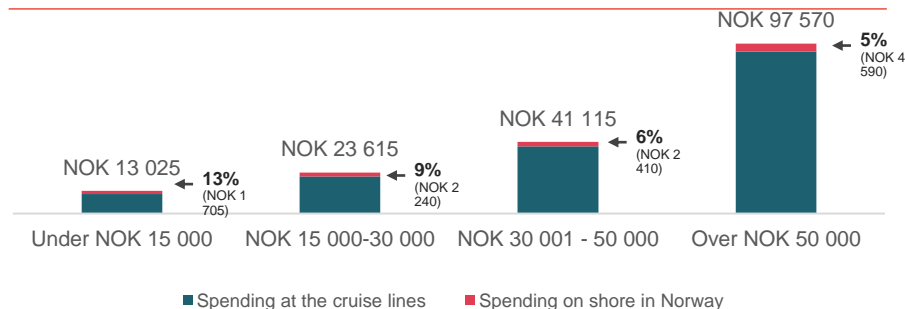
Cruise tourists who pay more than NOK 50 000 for the cruise package spend considerably more money on shore, than those who pay less for the cruise package. They spend NOK 4 590 per person on shore, which is twice as much as an average cruise tourist. It amounts to a significantly smaller percentage of the total spending than for cruise tourists who have paid less for the cruise package. The more capable and willing to pay the tourists are, the larger percentage of the spend the cruise lines take. The cruise tourists who travel on "cheap cruises" spend an average of NOK 1 705 on shore in Norway. This accounts for 13 per cent of their total spending; the corresponding share for those who spend over NOK 50 000 on their cruise package is only 5 per cent. This can also be correlated with the fact that more excursions and experiences are included in the package on the most expensive cruises.

Surprisingly small difference in spending on shore for all who pay less than NOK 50 000 for the cruise package per person

Although there is a correlation between segment and spending on shore, the difference is relatively small between those who pay under NOK 15 000 and those who pay between NOK 30 and 50 000. It is only for the most expensive cruises that spending increases noticeably.

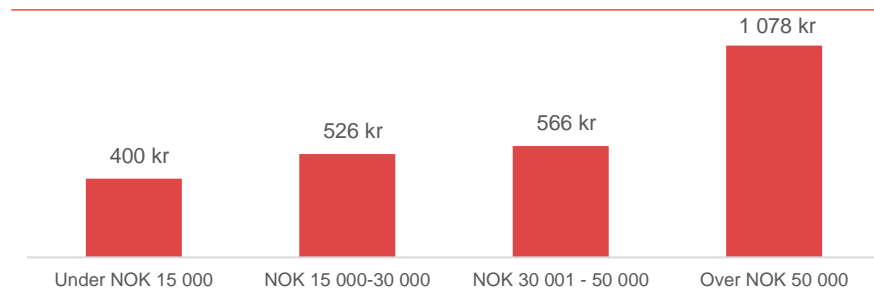
The composition of spending for different segments of cruise tourists

Total spending for the entire cruise trip per person depending on spending on the cruise package



Daily spending that accrues to the Norwegian economy according to the price of the cruise package

Spending in countries per person per port (Norway's share)



Notes:

The cruise tourists are divided into the four segments according to the amount they paid for the cruise package: **Budget:** Below NOK 15 000, **Medium:** NOK 15 001 – 30 000, **Upper medium:** NOK 30 001-50 000, **Luxury:** Over NOK 50 000

Do large or small ships leave more money on shore?

Cruise tourists arriving on ships with fewer than 1 000 passengers spend more money on shore

Cruise tourists who travel on smaller ships, spend more money on the cruise package and more money on shore in Norway. The smaller ships visit more ports than the larger ships. The tourists on the largest ships still leave almost 5 times more in total per sailing than the smallest ships. It is only for ships with up to 1 000 passengers that there is a significant difference between the amount of money the tourists spend on shore. Even the passengers on the smallest ships leave considerably less money than an average land-based holidaymaker in the summer.

The composition of spending for different segments of cruise tourists

Total spending for the entire cruise trip per ship per sailing



Cruise ships with **under 500 passengers** provide on average:

NOK 900 000
per sailing to Norway from
the cruise tourists' spending



Cruise ships with room for **1000 – 1499 passengers** provide on average:

NOK 1 900 000
per sailing to Norway
from the cruise tourists'
spending

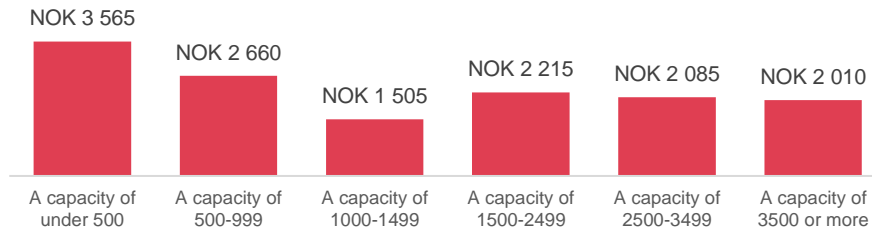


Cruise ships with room for **2500 – 3499 passengers** provide on average:

NOK 4 600 000
per sailing to Norway
from the cruise tourists'
spending

Spending that accrues to the Norwegian economy according to size of ship

Total spending that accrues to Norway in total per person during the entire cruise trip



Notes:

The cruise tourists are divided into the three segments according to the number of passengers on board the ships.

The cruise lines are the cruise tourists' main source of inspiration and information

The majority of cruise tourists get information about the attractions and activities at the destination from the cruise lines

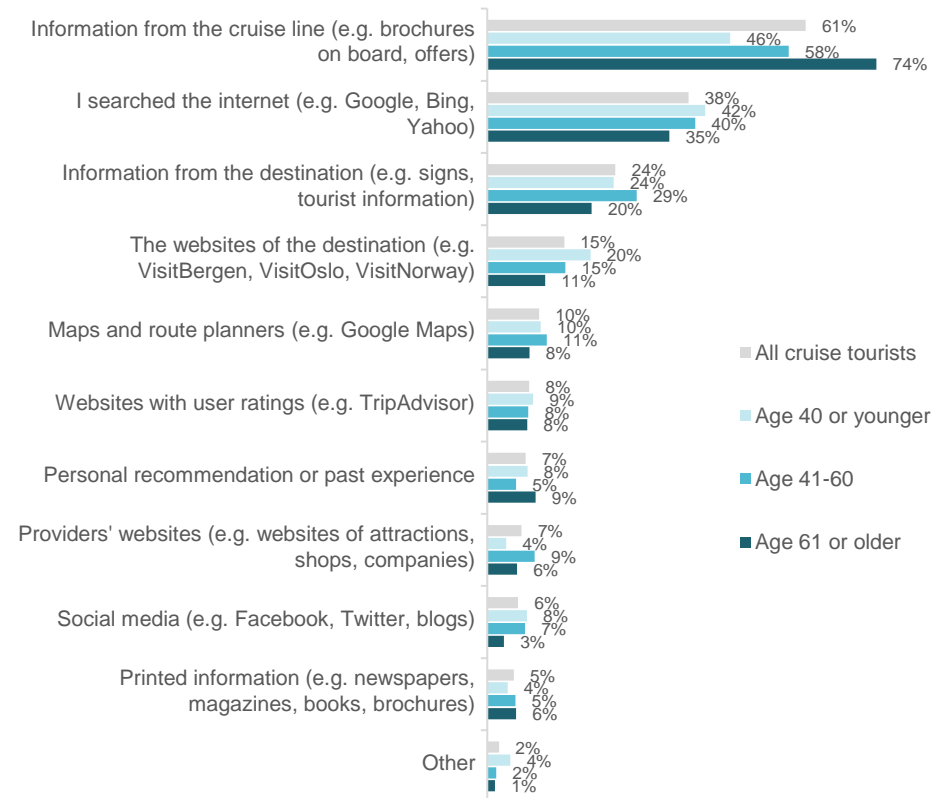
61 per cent of the cruise tourists get information about activities and attractions at the various destinations from the cruise line. A total of 75 per cent of those over 60 find information from the cruise line. Less than half of all age groups search the internet for information. It can be related to the fact that the network aboard the ships can be both expensive and poor.

Information when they go ashore

Many cruise tourists do not participate in organised excursions on shore, but choose to explore the destination on their own. There are great opportunities here to find new ways to inspire, inform and guide a group of tourists capable of paying when they arrive on shore at the destination. When a family of four came ashore in Geiranger this summer, the first thing they asked our interviewers is where they could book a helicopter tour. This is a small example that illustrates that there are many cruise tourists with a willingness to pay in Norway. So it is not certain that helicopter tours are what the Norwegian destinations want more of, but as long as the offer is there, and good information is provided, it should be possible to increase the spending of cruise tourists on shore.

Information searching

The percentage of people who used different sources to find information about activities and attractions in the ports in which they were interviewed





Basic data, methodology and definitions of terms

This section describes the basic data in more detail, the development of sampling plans, the implementation of data collection and processing and weighing of data. In conclusion, some key terms used in the report are defined.

This report presents results based on several different data sources, primarily from the Cruise Survey 2019, but there are also results from Cruise Survey 2014, the Citizen Survey in the summer of 2018 and 2019, and the Tourist Survey for the summer season of 2019. This section only describes the methodology for Cruise Survey 2019.

Basic data for the Cruise Survey

All interviews were conducted at the ports by Epinion's own interviewers in the period 21 May to 31 September 2019.

The report is based on 3 232 interviews with cruise tourists in Norway. The tables on the right show the number of responses distributed by the characteristics of the cruise tourists.

Interviews were conducted on 75 different days, 80 different cruise ships (for some ships, interviews were conducted on several different sailings) and 175 cruise calls in 14 ports of Norway.

This makes Cruise Survey 2019 the most comprehensive survey of cruise tourism in Norway ever.

On assignment from the Port of Oslo, expanded data collection was carried out in Oslo. These interviews are included in the basic data. The basic data is weighted so that the additional interviews do not have any impact on the size of Oslo as a cruise port.

Nationality	Interviews
Total	3 232
Germany	876
United Kingdom	775
USA & Canada	768
Italy	99
Spain	99
Belgium, the Netherlands & Luxembourg	174
Australia & New Zealand	166
Rest of Europe	186
Rest of the world	89
Port	
Ålesund & Molde	254
Trondheim	136
Tromsø	142
Svolvær & Leknes	96
Stavanger	317
Oslo	1 125
North Cape & Hammerfest	194
Kristiansand	134
Geiranger	244
Flåm	203
Bergen	387

Month	Interviews
Total	3 232
May	177
June	502
July	657
August	1 180
September	716
Cruise line	
AIDA	356
HAL	324
TUI Cruises	273
Princess	259
RCCL	230
MSC Cruises	218
P&O	214
Costa	163
Viking	132
Fred. Olsen	109
Cruise & Maritime Voyages	75
Pullmantur	65
Disney	64
Regent Cruises	58
Other cruise lines	692

Design of sampling plan

Establishing a cruise universe for cruise calls in Norwegian ports the summer of 2019

There is no aggregated overview of planned or actual cruise calls to Norwegian ports, nor statistics on how many of the cruise tourists go ashore in the various ports. In order to carry out a largely representative survey of cruise passengers, lists of planned calls were collected from a total of 36 ports throughout the country. All ports with assumed cruise calls were contacted by Innovation Norway. Information is lacking from some smaller ports where it has not been possible to obtain an overview of the calls. The information provided by the ports varied widely both in content and scope. If similar surveys are to be carried out in the future, a common database with an aggregated overview of planned cruise calls for all Norwegian ports should be established.

The selection of interview locations and date of interviews was made based on the information from the following 36 ports:

Alta, Arendal, Bergen, Bodø, Brønnøysund, Eidfjord, Eresfjord, Flåm, Fredrikstad, Geiranger, Hammerfest, Harstad, Hellesylt, Haugesund, Kristiansand, Kristiansund, Leknes, Longyearbyen, Molde, Narvik, Nordfjordeid, Nordkapp, Olden, Oslo, Rosendal, Sandefjord, Skjolden, Sortland, Stavanger, Svolvær, Tromsø, Trondheim, Ulvik, Vik in Sogn, Åndalsnes and Ålesund.

Development of the sampling and interview plan

In total, these ports reported that they expected 2 192 calls in the period May to September 2019. Based on these calls, and statistics from the Norwegian Coastal Administration on the number of passengers and distribution of nationalities on the ships in 2018, an interview plan was set up for which ports, ships and days interviews were to be conducted. Interviews were conducted in 14 ports, which were selected to ensure geographical spread, balance between large and smaller cruise ports and between cities and smaller locations.

The ships and the calls are also selected to ensure a representative distribution of nationalities and interviews with passengers of various types of cruise lines and ships, as well as a sufficient number of interviews with passengers on smaller ships. The main purpose of the survey is to say something about spending by cruise passengers during the voyage and on shore, but also satisfaction and experience of quality, information sources, priority experiences, etc. in different regions (Western Norway, Southeastern/Southern Norway, Northern Norway and Trøndelag (Trondheim)), in cities and in smaller locations, across ships/cruise lines, nationalities, time in port and with few or many calls in Norwegian ports.

The interviews were conducted in the following ports:

Bergen, Stavanger, Flåm, Geiranger, Ålesund, Molde, Trondheim, Leknes, Svolvær, Tromsø, Nordkapp, Hammerfest, Kristiansand and Oslo.

Implementation of data collection for Cruise Survey 2019

How are cruise tourists defined?

A cruise tourist is defined as a foreign holidaymaker who visited Norway in the period 21 May to 31 September 2019 aboard a cruise ship. This regardless of whether they boarded or disembarked the cruise ship at one of the ports of Norway, or in another port outside Norway.

Contact with the selected ports

When the 14 ports for conducting interviews were selected, a process of contacting each individual port was initiated. One of Epinion's employees called each port and established a dialogue with a contact person who could approve that the interviewers got to come to the port to conduct interviews with the cruise passengers. Which ships and dates were to be covered was presented during the conversation, so that the contact was given the opportunity to make comments if they had additional information about the selected ships. Some minor adjustments were made based on the conversations before the data collection started. In addition, some ports were asked about the possibility of admission to the ISPS area, depending on the design of the port area. The contact person was asked if they thought it could have any purpose for the interviewer to stand inside the ISPS area, and if they thought it had a purpose, personal data about the individual interviewer was shared with the contact person for clearance by the appropriate security personnel.

The reason why it was not applicable at all ports is because the ISPS area at some ports is so small that cruise passengers exited the ISPS area about the same time they went ashore.

The actual interview situation

When the data collection was underway, the interviewers were sent out to the various ports based on the sampling plan. The number of interviewers who were present on the interview days in question was based on needs in relation to the number of interviews that were to be collected. All interviewers are part of Epinion's own interview corps and have undergone special training on how to conduct field interviews. Many of the interviewers also work on the national Tourist Survey that Epinion conducts on behalf of Innovation Norway. All of the interviews were conducted with cruise passengers who were on their way back to the ships. It was desirable to collect data from passengers who had finished their onshore visit in the port in question to ensure the best possible data. There is a wide variation in the size of the ports. In some ports there were only a few places where it was appropriate to stand to meet the most possible passengers, while in other ports it was more scattered. Where the individual interviewer was placed was decided in consultation with the contact person in the port, as well as based on the interviewers' experiences from field interviews. On several occasions the interviewer moved around over the course of the shift in order to be able to cover as many passengers as possible, but still ensure that they only interviewed those who were on their way back to the ship.

Implementation of data collection for Cruise Survey 2019

The questionnaire was set up and translated into 7 different languages to minimise language barriers. The languages were selected based on the most common nationalities of cruise tourists in the distribution of nationalities from the Norwegian Coastal Administration. The following languages were used: English, German, Dutch, French, Spanish and Italian.

Data collection in line with the sampling plan

The data collection was continuously monitored by the Epinion field manager. Weekly status meetings were held between Epinion's consultants and the field apparatus, where quota achievement and the plan for the coming week were reviewed. If the predetermined quota was not achieved, the sampling plan was adjusted accordingly. The reason that the pre-determined quota was not achieved could have various reasons, e.g. because the ship's call was cancelled or because extremely bad weather made it difficult to collect data because there are few suitable places to stand under a roof at most ports. Cancellations on short notice before a planned call were especially true for the smaller luxury ships. In these cases, measures were taken to correct the sampling plan, either by adding additional interview days, or by conducting more interviews on other ships in the same segment. Several factors had to be taken into account when adjustments were made to the original sampling plan. In order not to affect the

representativeness of the survey as a whole, the adjustments had to be carefully processed concerning nationality, cruise line, port, period, etc.

Weighting of data

To ensure the representativeness of the Cruise Survey, data in the aftermath of completed data collection was weighted to represent the cruise tourists' port visits in Norway. The cruise tourism population was obtained through an enrichment of the cruise lists in the sampling plan. The cruise lists were corrected for cancellations and changes in the calls, where it was then linked to real passenger figures from the Norwegian Coastal Administration. To cover the population that did not appear in the figures from the Norwegian Coastal Administration, manifest data with information collected by certain ports was used.¹

The data set was weighted on a collection period from 21 May to 31 September 2019, with the assumption that it is also representative for the entire May-September period. The scope of cruise tourism at the start of May is limited, but their behaviour is not expected to deviate from the rest of the population.

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Weighting and calculations of spending

Each interview with a cruise tourist is assumed to constitute a port visit. The cruise tourists can therefore be weighted in place across port, cruise line, month and nationality, through the port visits in the cruise population. Specifically, three different weights are used according to the level it is desired to represent:

- The whole of Norge: Weights on all calls throughout the period from 21 May to 31 September.
- The interview port: Weights in the same period, but only for the calls in the port in question in which an interview was conducted.
- The cruise lines: Weights in the same period, but only for the cruise lines for which interviews were conducted.

Calculation of spending

It is generally a challenge to measure the spending of tourists, and Norway's share of this spending. To account for this, the survey asked questions about spending at several different levels: spending on the cruise package, activities purchased from the cruise line, activities purchased from local providers, as well as other spending on shore in Norway.

The cruise package is particularly controversial, as we know with certainty that part of this will accrue to Norway through the cruise line's payments to the ports, although the scope is unknown. This also includes an element that the cruise package may include activities in Norway. In this survey, 15% stated that their

cruise package included activities in Norway. Neither of these two elements is included in the spending for the cruise survey. Direct questions were also asked about spending in "this port", including both spending on activities and excursions and other spending in the port. All spending is specified for the entire financial travel party, i.e. those paying together, and it was possible to specify the spending in 30 different currencies. This is to make it easier for the respondent, particularly on the issues of spending on the actual cruise package, which is often paid in their local currency. Amounts entered in other currencies were then converted to Norwegian kroner according to Norges Bank's currency converter.

Spending is a sensitive topic that can be difficult to ask questions about, in addition to often giving rise to misunderstandings and incorrect entries. To correct for this, outliers for spending² were dealt with. The biggest challenge in this process is those people who have stated that they spent zero kroner on shore, which can be the case, but may also be due to the fact that they do not want to divulge their spending. In particular, some nationalities do not want to divulge their spending. In order to be able to separate between the genuine and non-genuine 0 answers, the responses are seen in conjunction with the other questions about spending, as well as whether the respondent has participated in activities on shore that indicate that they should have spent money (e.g. restaurant visits, museum visits, etc.). In contrast to the 2014 survey, it was consequently accepted this year that spending on shore may be NOK 0, unless other information indicates otherwise.

DEFINITIONS OF TERMS

TERM	DEFINITION
Cruise tourist/Cruise passenger	Tourists who are passengers on one of the cruise ships in the sampling plan in the period 21 May to 31 September 2019.
Cruise call	A cruise ship that puts into port.
Day visit	A cruise tourist who is on board a cruise ship that puts into port.
Day visit on shore	A cruise tourist who is on board a cruise ship that puts into port, and where the passenger goes ashore.
Travelling companions	Persons who travel together and share their travel expenses on the trip.
Foreign holidaymakers/Land-based tourism	A foreign holidaymaker who has visited Norway on a land-based holiday (all other holidays than cruises) in the period May to August 2019.
Outings and excursions (in Norway) purchased from the cruise line	Outings and excursions in Norway that are not already included in the prepaid cruise package, and are purchased from the cruise line.
Outings and excursions (in Norway) purchased from local providers	Outings and excursions in Norway that are not already included in the prepaid cruise package, and are purchased from local providers. This can either be in advance, on board or while they are ashore.
Other spending	All other spending on shore other than the spending on the cruise package itself and outings and excursions in Norway.
Sailing	All the calls a ship makes in Norway on a voyage in Norway. A ship can have several sailings in the period and one or many calls per sailing.
Median spending	Median spending is a measure of central tendency that is defined as the spending that divides the respondents into two halves so that each half has an equal number of responses.

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