

Cruise tourism in Svalbard: Economic contributions and visitor insights

Report

Visit Svalbard & Svalbard Cruise Forum |
Epinion 18. December 2024



Introduction

The following study was conducted by Epinion on behalf of Svalbard Cruise Forum

The Svalbard Cruise Forum (SCF) was established on the initiative of Visit Svalbard in February 2023 as a collaboration between main local cruise stakeholders, including AECO – the Association of Arctic Expedition Cruise Operators.

Svalbard Cruise Forum focuses on logistics, regulations, and local economic impact, working actively to minimize the strain on the local community by spreading cruise calls and coordinating logistics around arrivals. The forum also prioritises minimizing the negative impact on the local community while ensuring that cruise operations are conducted in a professional, safe, responsible and sustainable manner.

The forum emphasizes the involvement of the local community, including businesses, organizations (such as the church and the hospital), and residents. It also fosters close collaboration with operators to ensure sustainable development, and to address both implemented and upcoming regulatory changes effectively.

The ambition is to enhance the local economic impact, reduce the environmental footprint, and maintain a constructive dialogue between the industry and local businesses to balance tourism with the needs of the community.

Svalbard Cruise Forum members contributing to the study:



Introduction

A holistic study of the economic contribution of cruise tourism in Longyearbyen

Cruise tourism has an influence on the economy and development of Svalbard and Longyearbyen. Due to Svalbard's remote Arctic location with stunning natural landscapes and unique wildlife, it has become a sought-after destination for both adventurous and environmentally-conscious travelers.

This analysis aims to update the economic impact of cruise tourism in Longyearbyen to understand its effects on the local economy and the implications for sustainable tourism development.

It involves mapping the expenditures by the cruise passengers (B2C) in Longyearbyen as well as the purchases in Longyearbyen made by expedition cruise operators and conventional cruise lines (B2B). These purchases include goods and services sourced locally, such as fuel, provisions, port fees, and local excursions. By examining both business-to-consumer (B2C) and business-to-business (B2B) transactions, the analysis provides a holistic view of how cruise tourism contributes to the local economy of Longyearbyen.

This study distinguishes between the two main segments of cruise tourism in Longyearbyen: **expedition cruises** and **conventional cruises**. Many expedition cruise vessels spend entire seasons around Svalbard, with passenger changes in Longyearbyen. Conventional cruise ships visit Svalbard briefly as part of longer journeys, often starting in Europe.

Note: Unless otherwise stated, every amount is rounded following these rules; MNOK is rounded to the nearest half million; amounts between 1 MNOK and 10.000 NOK is rounded to the closest 500 NOK; while amounts under 10.000 NOK is written as exact amounts. Operator consumption has been projected from 2023 to 2024.

Overview of data sources



Expedition cruises

Definition:

Expedition cruising features an explorer format with flexible itineraries, minimal reliance on infrastructure, and a focus on nature and cultural experiences, supported by guides, lectures, and educational opportunities.

Expedition cruise vessels range in size from fewer than 12 passengers to about 500, with an average capacity of around 200 passengers.

Data for B2C mapping:

A questionnaire was conducted at Svalbard Airport with departing expedition cruise passengers, gathering insights on their spending, experiences, activities, and attitudes toward sustainability.

Data for B2B mapping:

Local suppliers to cruise operators in Longyearbyen were asked to complete a form covering all potential services and goods provided. Additionally, a form was sent to expedition cruise operators to serve as a validation tool.



Conventional cruises

Definition:

Conventional cruising emphasizes relaxation, leisure, and entertainment with a structured itinerary and abundant on-board amenities. Activities often include live shows, fine dining, casinos, spas, and shopping, providing a resort-like experience at sea. Conventional cruise ships are generally much larger than expedition vessels, with capacities ranging from around 1,000 passengers to more than 4,000.

Data for B2C mapping:

A questionnaire was conducted at Port Longyear with boarding cruise passengers, gathering insights on their spending, experiences, activities, and attitudes toward sustainability.

Data for B2B mapping:

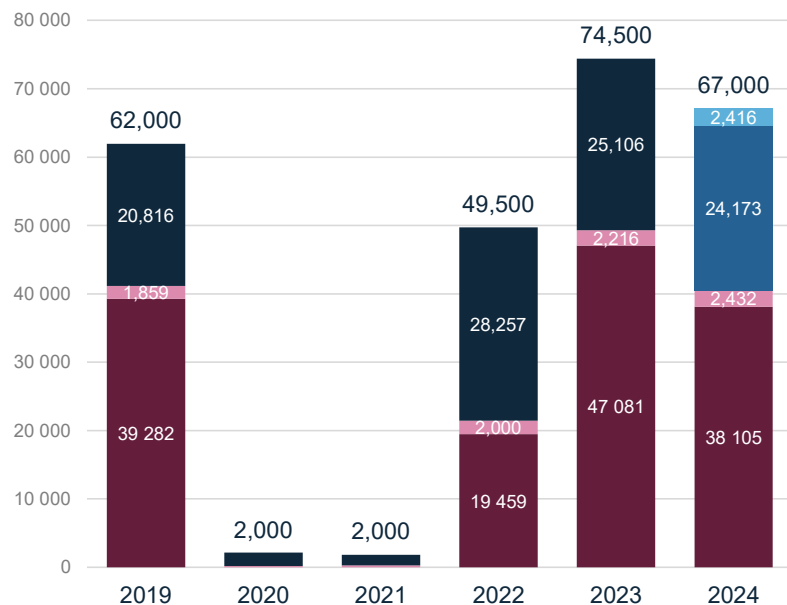
Local suppliers to cruise lines in Longyearbyen were asked to complete a form covering all potential services and goods provided.

Cruise tourism in Longyearbyen

There has been an increase in port calls from vessels with max capacity of 12 passengers to Longyearbyen

Arriving cruise passengers in Longyearbyen 2019 to 2024

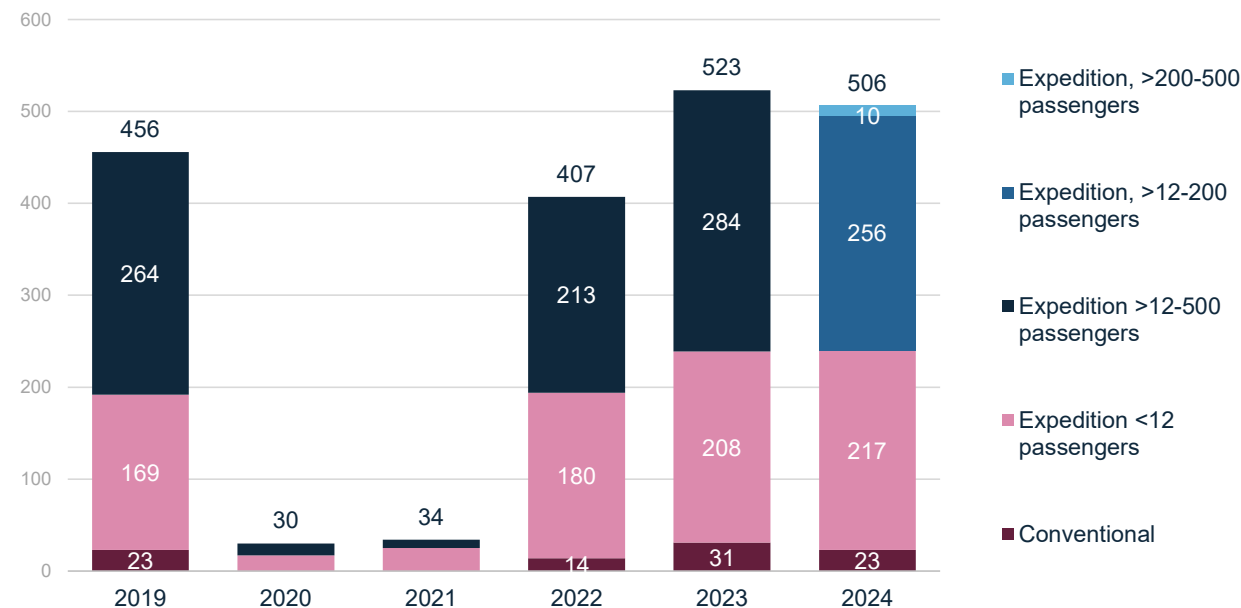
Source: Svalbard Cruise Forum



When looking at port calls and number of passengers in **Longyearbyen**, we see that in 2024 the number of cruise passengers arriving was 67,000. In 2020, the COVID-19 pandemic caused almost all cruise traffic to cease. In 2021, very few cruise operations were conducted during the summer due to ongoing restrictions. During winter 2022, cruise operations resumed, resulting in an unusually high number of expedition cruise vessels to Svalbard from early in the season.

Port calls in Longyearbyen 2019 to 2024

Source: Svalbard Cruise Forum



While the amount of conventional port calls in 2023 and 2024 are comparable to 2019, we see a minor shift in types of expedition port calls. In 2023 and 2024 there were more port calls from expedition cruise ships with max capacity of 12 passengers, compared to 2019.

Currently, no systematic data collection exists for all cruise traffic on Svalbard. Due to the unreliability of data before 2019, these figures have been excluded. For the period 2019–2024, a detailed review of statistics from Port Longyear and AECO, along with individual reports, has been conducted to ensure the highest possible accuracy. In 2024, due to more accurate counting, the expedition segment was divided in <12pax, >12-200pax and >200-500pax.

Cruise tourism in Svalbard

In 2024 the cruise industry contributed 361,5 million NOK in total to Svalbard

The total numbers for Svalbard include cruises that called at Longyearbyen, Ny-Ålesund, one of the two ports, or neither of the two. Five cruises to Svalbard with a total of 916 passengers on board, bypassed Longyearbyen in 2024.

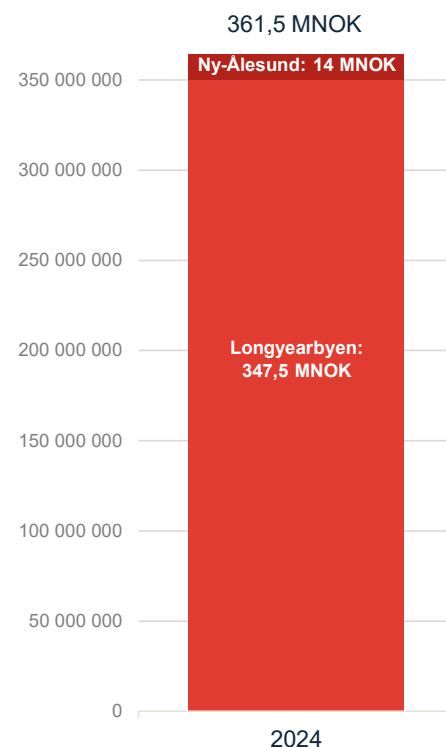
The total economic contribution to Svalbard in 2024 was 361,5 MNOK, and in total 68,000 passengers visited Svalbard. Of these, 21,000 passengers visited Ny-Ålesund, which leads to an economic contribution of 14 MNOK for Ny-Ålesund alone.

In 2020 and 2021, the COVID-19 pandemic brought nearly all cruise traffic to a halt. Only a very limited number of cruise operations took place during these summers. By winter 2022, cruise operations resumed, resulting in an unusually high number of visits during early spring and summer.

Currently, no systematic data collection exists for all cruise traffic on Svalbard. Due to the unreliability of data before 2019, these figures have been excluded. For the period 2019–2024, a detailed review of statistics from Port Longyear and AECO, along with individual reports, has been conducted to ensure the highest possible accuracy. In 2024, due to more accurate counting, the expedition segment was divided in <12pax, >12-200pax and >200-500pax.

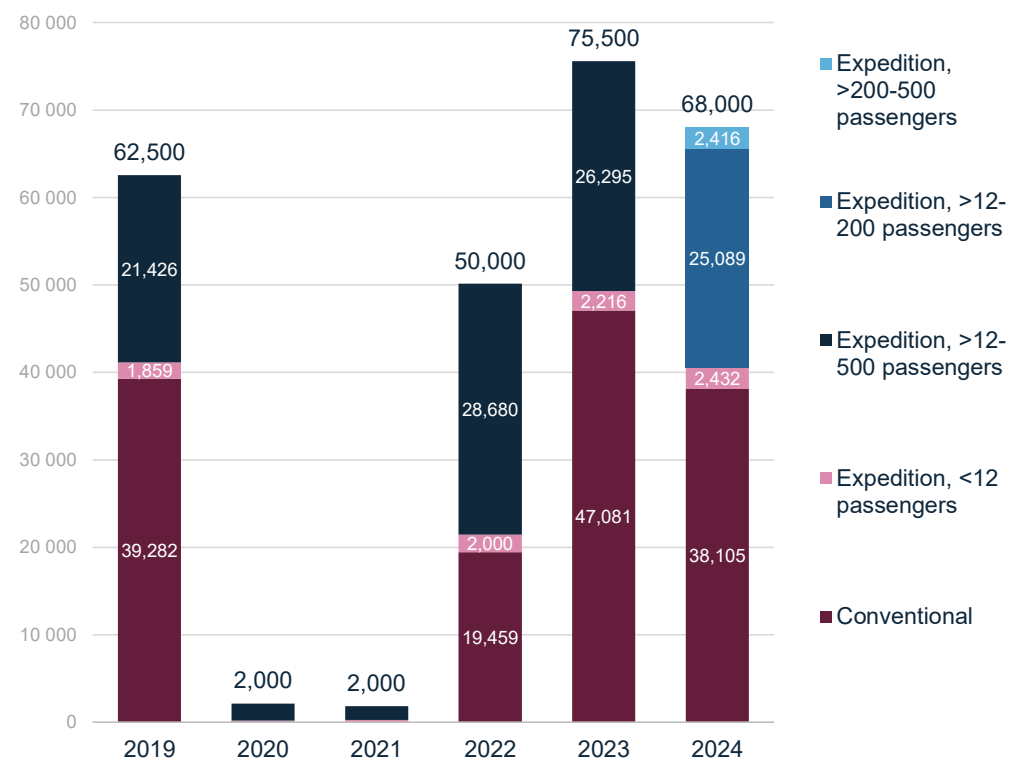
Total economic contribution to Svalbard

Source: Epinion, Svalbard Cruise Forum



Passengers visiting Svalbard 2019 to 2024

Source: Svalbard Cruise Forum



All figures are ex. Hurtigruten Coastal Svalbard Express, bunkers from suppliers outside of Longyearbyen and flight tickets for expedition passengers. Number of passengers visiting Svalbard in total is included passengers visiting other ports in Svalbard, however, each passenger is only counted once.

Overall findings

Key findings include that the cruise industry contributes significantly to Longyearbyen's economy



Cruise tourism to Svalbard generated in total 361,5 MNOK in 2024, and of this 347,5 MNOK was generated in Longyearbyen

For Svalbard, in total 361,5 MNOK was generated by cruise tourism. This includes port calls to both Longyearbyen and Ny-Ålesund, one of the two ports, or neither of the two. In total 68,000 passengers visited Svalbard. Of these, 21,000 passengers visited Ny-Ålesund, which lead to an economic contribution of 14 MNOK for Ny-Ålesund alone.

In 2024, 67,000 cruise passengers visited Longyearbyen, distributed among 506 port calls. This resulted in a total of 347,5 MNOK in economic contributions. Both expedition and conventional port calls contributed to a significant amount of revenue to Longyearbyen, with expedition and conventional port calls contributing respectively 235 MNOK and 112,5 MNOK.

To put the cruise generated turnover into perspective: The total purchases and sales at Svalbard is estimated to be 3,9 billion NOK¹ which means that 9% of the economic activity at Svalbard is generated by cruise tourism.

Since Longyearbyen is the main destination for many cruise passengers, this has been a focal point for the study. The following in depth results concerning economic impacts from the cruise industry is focused on revenue to Longyearbyen and the local suppliers situated there.

1: This number indicates all sales and purchases at Svalbard and thus excluding taxes and investments. Source is table 7382: Svalbard. Investments and purchases of goods and services from Statistics Norway, Industry statistics. Note that it has been projected forward to 2024 with the Norwegian consumer price index. Alternatively, one could use the total revenue (often referred to as the GDP of Svalbard) which was 5,9 billion NOK in 2023. In this case the percentage would be 6%.



Expedition and conventional cruise vessels contribute differently to different industries

When looking at the impact the cruise industry has on different industries in Longyearbyen, it becomes apparent that expedition and conventional cruise port calls have differing contributions to different industries in Svalbard.

Notably, expedition cruise contributes to a greater extent than conventional cruise to the transport and storage industry; expedition port calls contribute with 79,5 MNOK, while conventional port calls contribute with 19 MNOK. This can somewhat be attributed to the number of port calls from expedition cruise operators and conventional cruise lines. Expedition port calls also contribute more to the wholesale and retail trade industry; expedition port calls contribute 83,5 MNOK, while conventional port calls contribute 12 MNOK.

Conventional cruise, on the other hand, contributes more to the arts, entertainment and recreation industry (local activities and guided tours, as well as museums and other cultural experiences). This can be contributed to a higher volume of conventional passengers visiting Longyearbyen, more conventional passengers purchasing activities from local vendors, and conventional passengers spending more money on activities.

Both expedition and conventional port calls contribute to Svalbard Environmental Protection Fund. This equals NOK 5,5 MNOK from conventional cruise passengers and NOK 4,5 MNOK from expedition cruise passengers.

Overall findings

Cruise passengers are concerned with sustainability



Cruise passengers are concerned about sustainability

85% of expedition cruise passengers consider sustainability when traveling, while the same is true for 72% of conventional cruise passengers. Expedition cruise passengers who have received information about sustainable tourism development in Longyearbyen, agree to a higher extent that Longyearbyen appears to be a sustainable and environmentally friendly destination. For conventional cruise passengers, there is no such effect.

The passengers were also asked about willingness to pay a local visitor fee, if the funds were used to supporting local businesses, protecting local nature and wildlife, supporting sustainable efforts and facilitate better experiences, hosting, visitor management, walkways, signs and toilets.

75% of expedition cruise passengers and 78% of conventional cruise passengers are willing to pay a local visitor fee. Thus, there is generally a willingness among cruise passengers to pay a local visitor fee.



Passenger groups for expedition and conventional cruise differ, but both are on average 57 years old

While the average age for both expedition and conventional cruise passengers is 57 years, there are differences when it comes to whom they travel with, how many, and other descriptive facts.

Expedition cruise passengers tend to travel in smaller groups, averaging 2,3 individuals pr. travel party. Notably, only 2% travel with children, suggesting that expedition cruises primarily appeal to adults. Expedition cruise passengers usually travel with their partners, other family members and/or friends. There are also 14% who travel alone.

Conventional cruise passengers usually travel in smaller groups. However, the average travel party is smaller with an average of two people. Conventional cruise passengers are also more likely to travel with children, and 15% do so. Most travel with their partner, friends and other family members.

Key economic figures

Cruise tourism in Longyearbyen contributes significantly to the local economy

The 67,000 cruise passengers and the 506 port calls in Longyearbyen in 2024 contributed with a total of 347,5 MNOK.

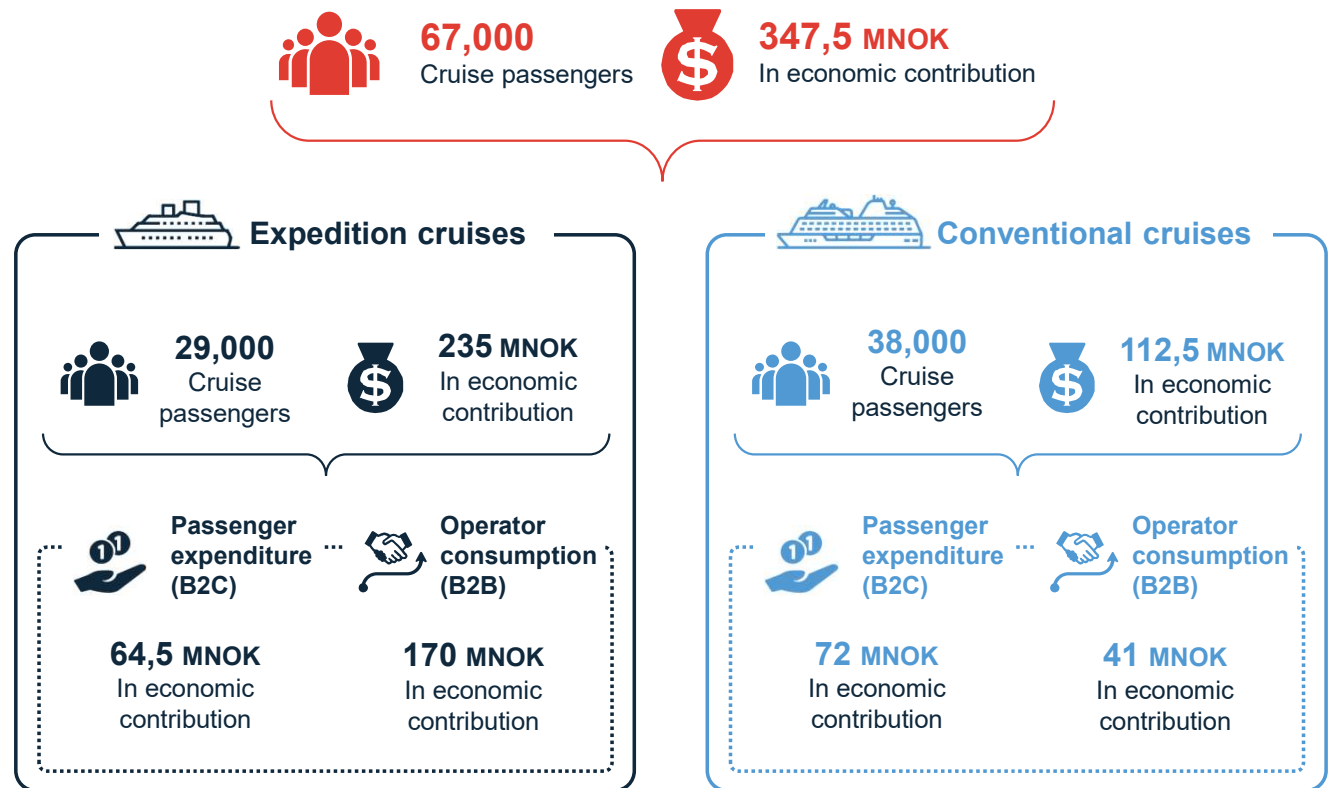
To put the cruise generated turnover into perspective: The total purchases and sales at Svalbard is estimated to be 3,9 billion NOK¹ which means that 9% of the economic activity in Svalbard is generated by cruise tourism.

Both cruise segments contributed a significant amount of revenue to Longyearbyen, and thus also to the local community, with expedition and conventional port calls contributing respectively 235 MNOK and 112,5 MNOK.

Expedition passengers have higher expenditure than conventional passengers. Conventional passengers, however, are higher in volume, compared to expedition passengers. Expedition cruise operators also purchase more services and goods, and spend more on port fees than conventional cruise lines.

1: This number indicates all sales and purchases at Svalbard and thus excluding taxes and investments. Source is table 7382: *Svalbard. Investments and purchases of goods and services* from Statistics Norway (<https://www.ssb.no/en/statbank/table/07382>), Industry statistics. Note that it has been projected forward to 2024 with the Norwegian consumer price index. Alternatively, one could use the total revenue (often referred to as the GDP of Svalbard) which was 5,9 billion NOK in 2023. This can be found in table 7380: *Industry statistics for Svalbard* from statistics Norway (<https://www.ssb.no/statbank/table/07380/>). In this case the percentage would be 6%.

Economic contributions of cruise tourism in Longyearbyen 2024



Note: Cruise passengers rounded to nearest 500 while consumption is rounded to nearest half a million. Operator consumption has been projected from 2023 to 2024.

Ripple effect analysis

Ripple effects are analysed with the use of publicly available statistics provided by Statistics Norway

Cruise tourism in Longyearbyen generates significant ripple effects in the local economy, impacting various sectors and contributing to employment, revenue and taxes. These ripple effects can be categorized as direct, indirect, and induced effects, each representing a distinct layer of economic impact. Lastly there might be long term dynamic effects.

The direct effects consist of the passenger expenditure (B2C) and the cruise operator expenditures (B2B). This is the estimated 347,5 MNOK spread across various industries (e.g. transportation, retail, storage, arts/entertainment). This activity directly supports employment in Longyearbyen across all affected industries and public tax contributions.

In addition to direct effects, there are multiplier effects, that describe how cruise tourism's direct economic impact, leads to additional rounds of economic activity, amplifying the overall impact.

The indirect effects stem from the supply chain of goods and services purchased by businesses that cater directly to the cruise tourism in Longyearbyen. For example, a restaurant serving cruise passengers might source food and beverages from local suppliers. Another example could be infrastructure investments such as port maintenance or road development. This activity in turn creates revenue and secondary employment in Longyearbyen.

The induced effects represent the next level of economic impact, encompassing wages spent by newly generated employment, along with additional revenue and public contributions.

Lastly, **Dynamic effects** refer to the longer-term, structural changes in an economy that arise from the presence or growth of an industry, such as cruise tourism. These effects extend beyond the immediate or secondary rounds of spending (direct, indirect, and induced effects) and capture how an industry influences economic growth, business innovation, workforce skills, and infrastructure development over time.



Ripple effect analysis - Industries

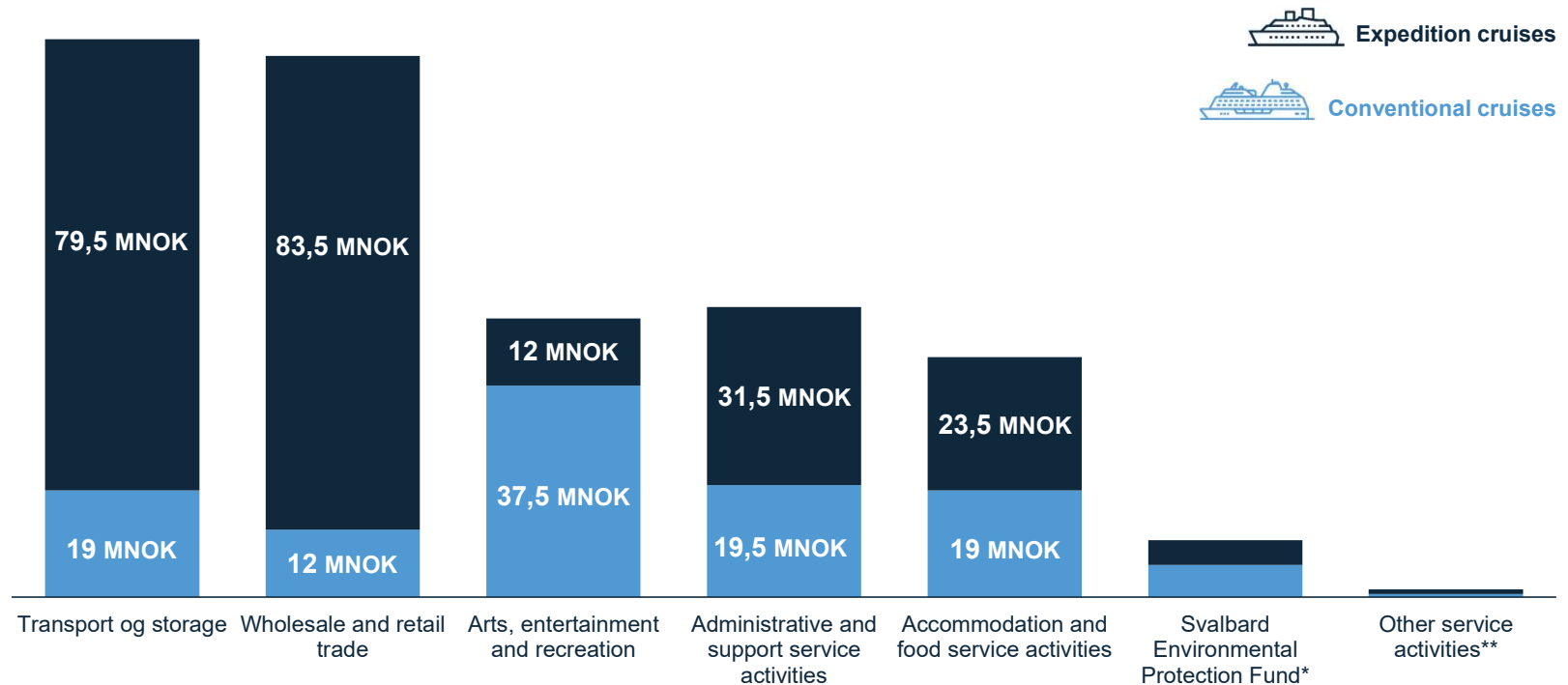
When looking at the cruise industry's influence on other industries in Longyearbyen, it becomes apparent that expedition and conventional cruises contribute differently to different industries

Expedition and conventional cruise port calls have differing contributions to different industries in Longyearbyen.

Expedition cruise contributes to a greater extent than conventional cruise to the transport and storage industry and the wholesale and retail trade.

Conventional cruise, on the other hand, contributes more to the arts, entertainment and recreation industry. This can be contributed to a higher volume of conventional passengers visiting Longyearbyen, more conventional passengers purchasing activities from local vendors and conventional passengers spending more money on activities.

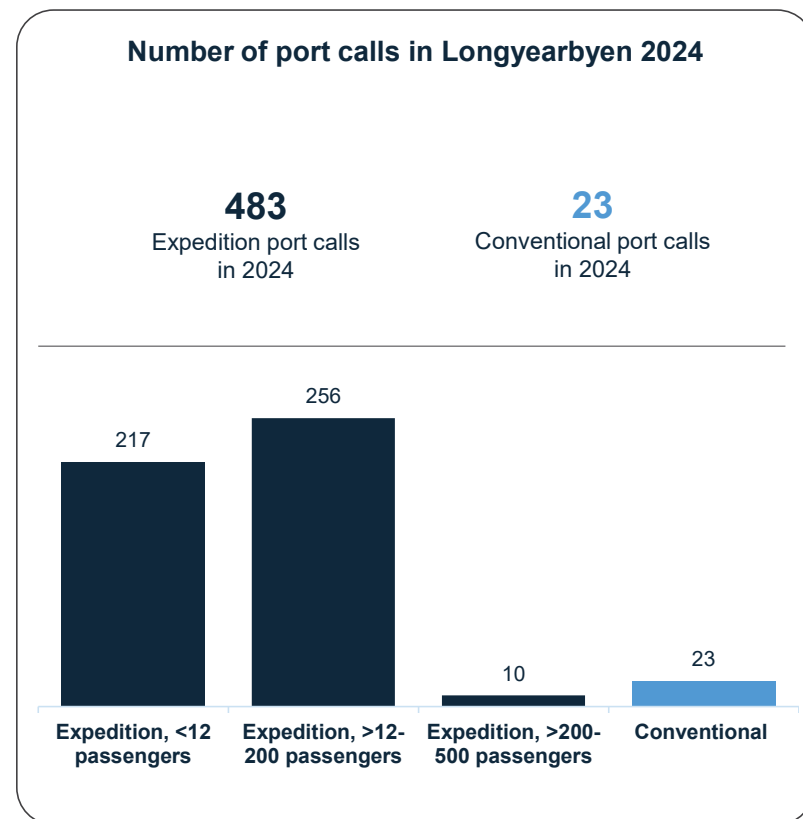
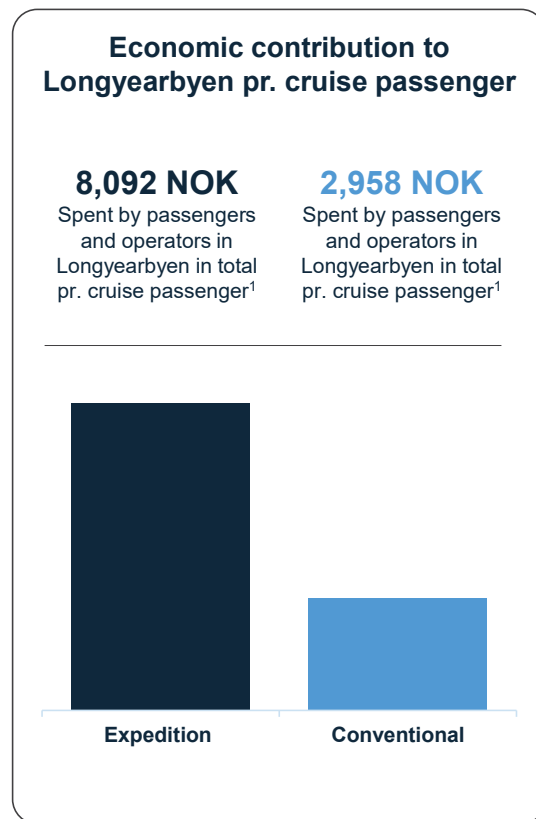
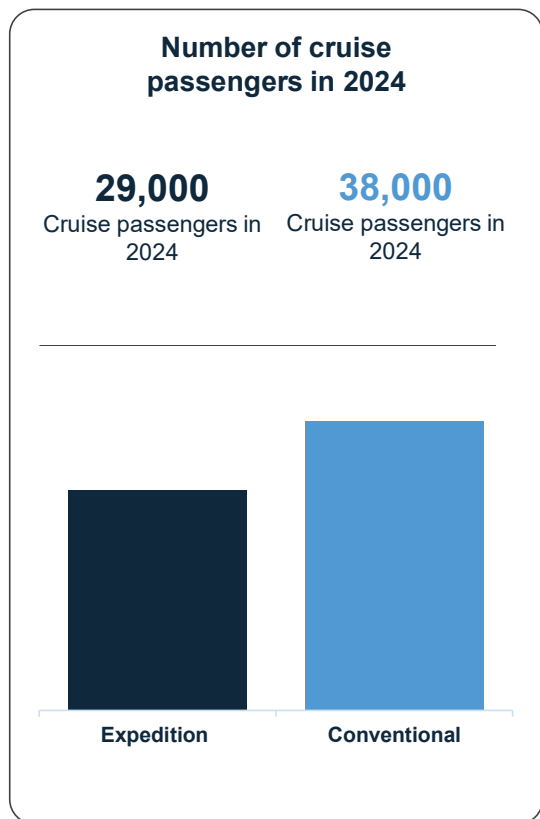
Total turnover for expedition and conventional cruise divided by industry



- Conventional port calls contributed 5,5 MNOK to Svalbard Environmental Protection Fund, while expedition port calls contributed 4,5 MNOK. This is calculated by multiplying the standard fee of 150 NOK pr. passenger with the total number of expedition and conventional passengers in 2024.
- ** Conventional port calls contributed 500.000 NOK and Expedition port calls contributed 800.000 NOK, to other service activities.

Overall economic contribution

Compared to conventional cruises, expedition cruises contribute more economically to Longyearbyen



Note 1: Including contribution to Svalbard Environmental Fund
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Purchases by cruise operators and passengers

Economic impact of expedition vs. conventional cruises in Longyearbyen

There is a clear contrast in the economic impact pr. passenger between expedition and conventional cruises in Longyearbyen.

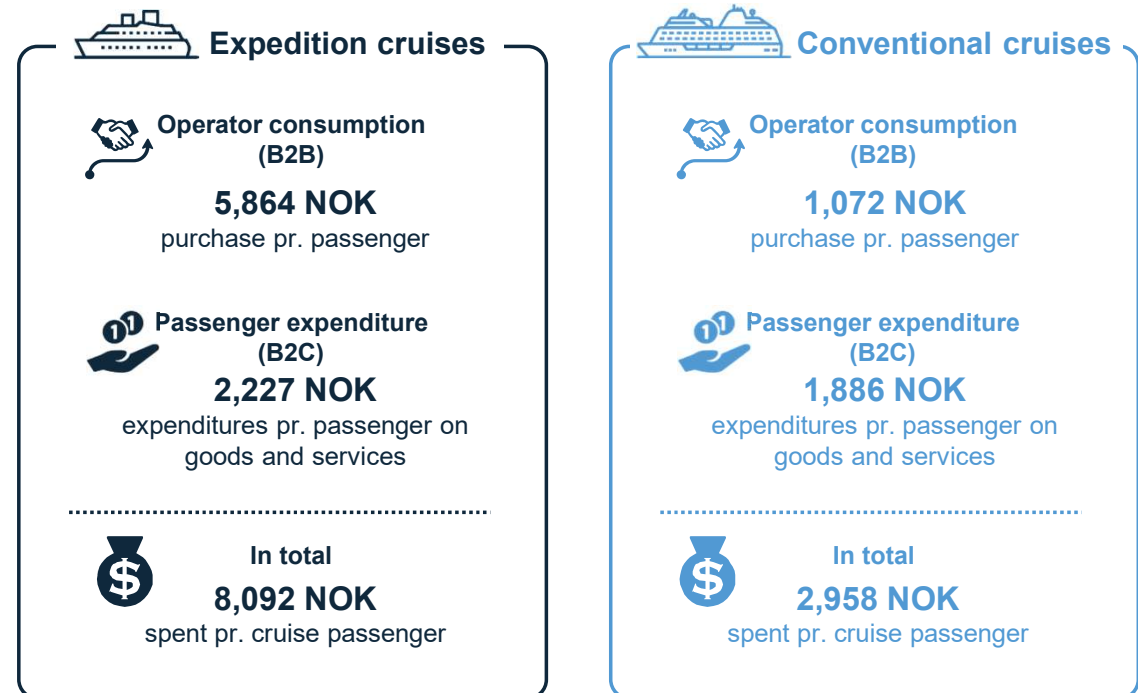
Expedition cruise passengers spend an average of 341 NOK more than their conventional counterparts, indicating a willingness to pay a premium for unique onshore experiences.

Conventional passengers have a larger share of the total passenger expenditure allocated to activities, while expedition passengers to a larger extent have activities included in their cruise package. Therefore, spend on activities can be found both in passenger expenditure and operator consumption.

Generally, expedition cruise passengers often have activities included in their cruise package. Fewer conventional passengers have activities included, and buy shore experiences separately.

The difference is even more pronounced in operator expenses, with expedition cruise operators spending 4,792 NOK more pr. passenger. While conventional cruise lines bring larger volumes of passengers, these figures suggest that passenger numbers alone don't dictate economic impact.

Spend pr. person for operators and passengers



Expedition cruise operator spend

Expedition cruise operators have a high spend with local shipping agents and suppliers – mainly on provisioning and local goods and services



Expedition cruises (B2B)



170 MNOK

purchases by expedition cruise operators in total (ex. vat)

18 MNOK

Port products and services in Longyearbyen

Port product and services include docking fees, pier fees, fees for rental of space, harbor passenger fees, waste fees, ISPS fees, processing fees, freshwater, electricity, mooring assistance, manpower, rental of equipment and harbor vessels.

107 MNOK

Purchases made through local shipping agents and suppliers

Purchases include, transport, cargo, fuel, spare parts, repairs, service, crew change services, medical expenses, pilot orders, pilot services, polar bear guard, provisioning and supply of other local goods and services.

Activities and excursions

Shore and sea-based excursions, entrance fees (e.g. to museums and galleries), overnight accommodation, shore-based dining, and other shore-based activities.

32 MNOK

Purchases regarding flights

Includes purchases made with Svalbard airport, regarding sale of airplane fuel and handling of flights.

9 MNOK 4,5 MNOK

Svalbard Environmental Protection Fund

Each visitor to Svalbard contributes with 150 NOK to the Svalbard Environmental Protection Fund. This fee is managed by the operators.

Conventional cruise line spend

Conventional cruise lines spend most on activities and excursions, followed by port products and services

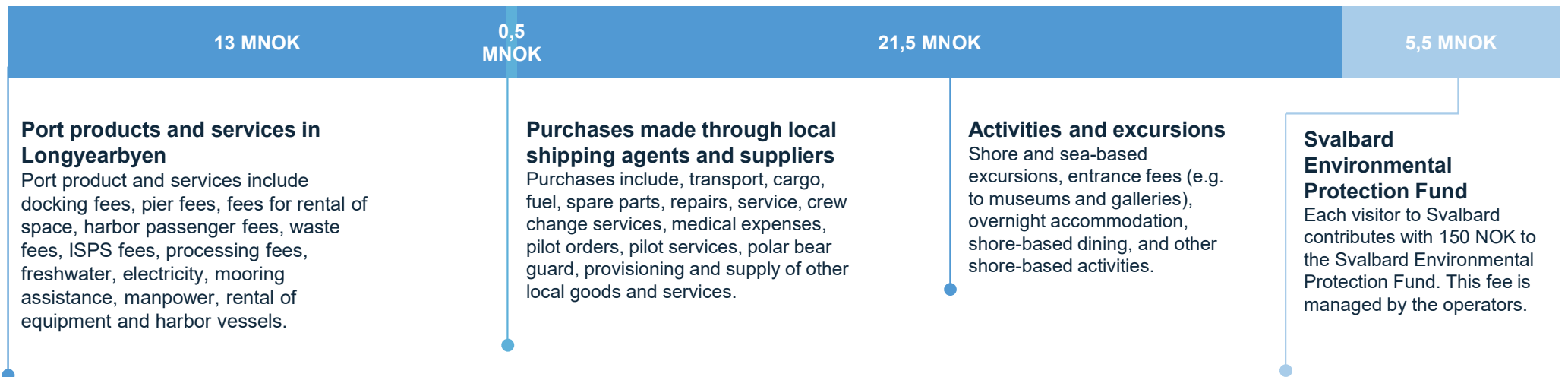


Conventional cruises (B2B)



41 MNOK

purchases by expedition cruise operators in total (ex. vat)



Port products and services in Longyearbyen

Port product and services include docking fees, pier fees, fees for rental of space, harbor passenger fees, waste fees, ISPS fees, processing fees, freshwater, electricity, mooring assistance, manpower, rental of equipment and harbor vessels.

Purchases made through local shipping agents and suppliers

Purchases include, transport, cargo, fuel, spare parts, repairs, service, crew change services, medical expenses, pilot orders, pilot services, polar bear guard, provisioning and supply of other local goods and services.

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Svalbard Environmental Protection Fund

Each visitor to Svalbard contributes with 150 NOK to the Svalbard Environmental Protection Fund. This fee is managed by the operators.

Spend in Longyearbyen by category and in total

Conventional cruise passengers allocate over three times the amount that expedition passengers do on activities, while expedition passengers spend relatively more on shopping and luxury



Expedition cruise passengers (B2C)

64,5 MNOK
Total spend



Conventional cruise passengers (B2C)

72 MNOK
Total spend



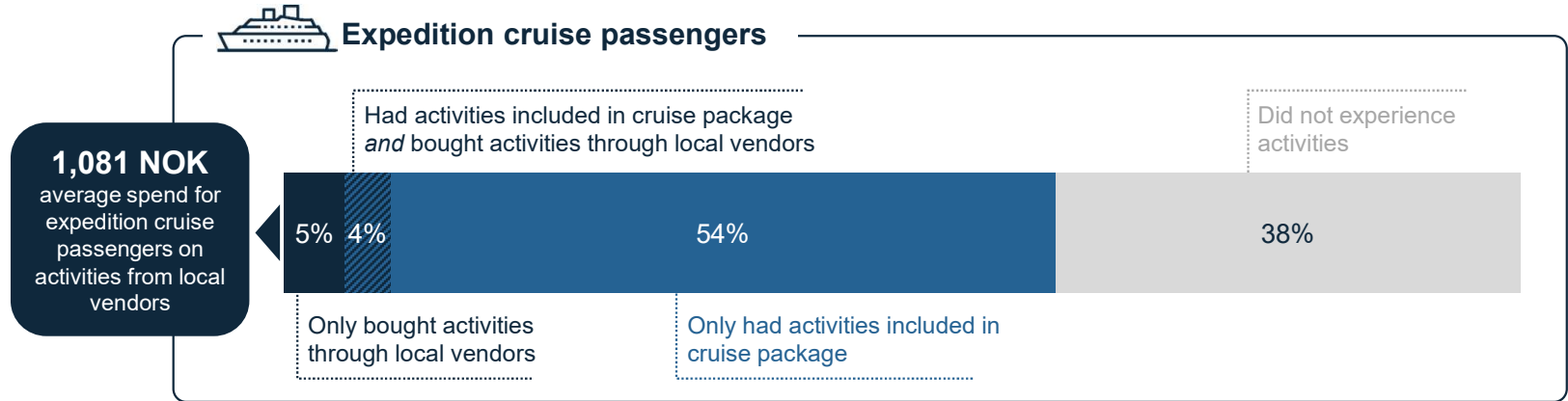
Note: Percentages of 2% or below have been removed for readability purposes.

The respondents were asked to register the amount spent in the following categories: Accommodation in Longyearbyen (besides the cruise); Local transport and travelling in Longyearbyen (besides the cruise); Amount spent on outings and excursions (in Longyearbyen) purchased from local vendors; Restaurant, bars and cafés; Tickets to museums, attractions, recreation and entertainment (e.g. tickets, admissions etc.); Luxury and premium items; Shopping, souvenirs and other retail purchases (other than premium and luxury items); Other services, products or expenses.

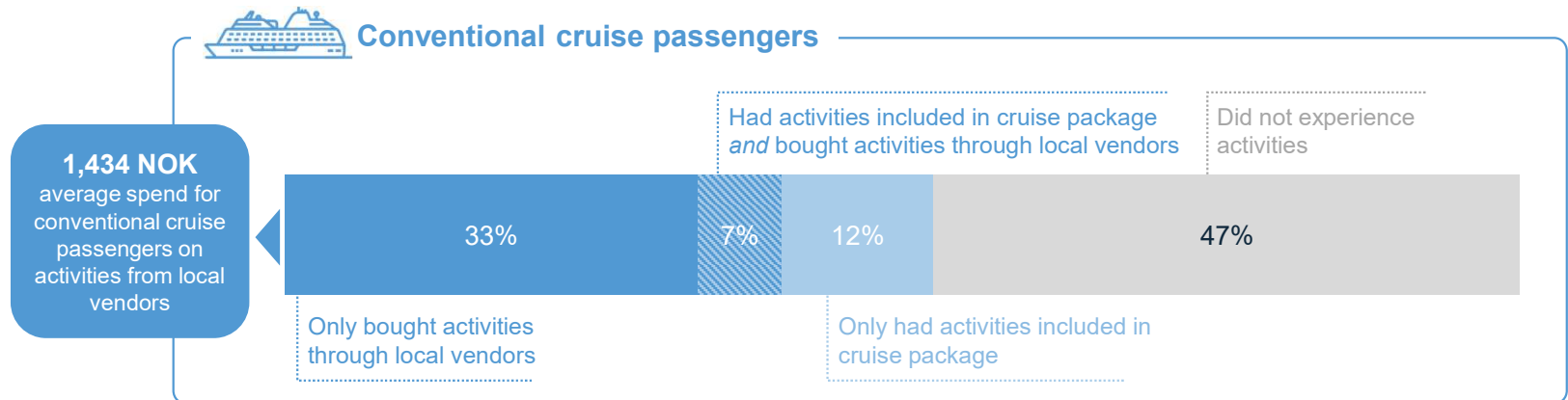
Purchase of activities – B2C

Conventional cruise passengers buy more activities directly from local vendors, and have an average higher spend pr. person compared to expedition cruise passengers

Expedition cruise passengers are more likely to have activities included in their cruise package, and therefore only 9% buy activities locally. They spend an average of 1,081 NOK pr. person on these experiences, which is a bit less than conventional cruise passengers who spend an average of 1,434 NOK pr. person.



Conventional cruise passengers buy more activities from local vendors and have a higher average spend pr. person on activities. In addition, fewer conventional passengers have activities included in their cruise package.*



*The survey did not ask the respondents if they bought activities through organized shore ex programs on board the ship. Therefore, the data presented here only reflects activities included in the cruise package or bought directly from local vendors. While this study cannot reflect the percentage of conventional passengers buying shore ex, Visit Svalbard estimates that 65% of conventional passengers bought experiences from on board shore ex programs

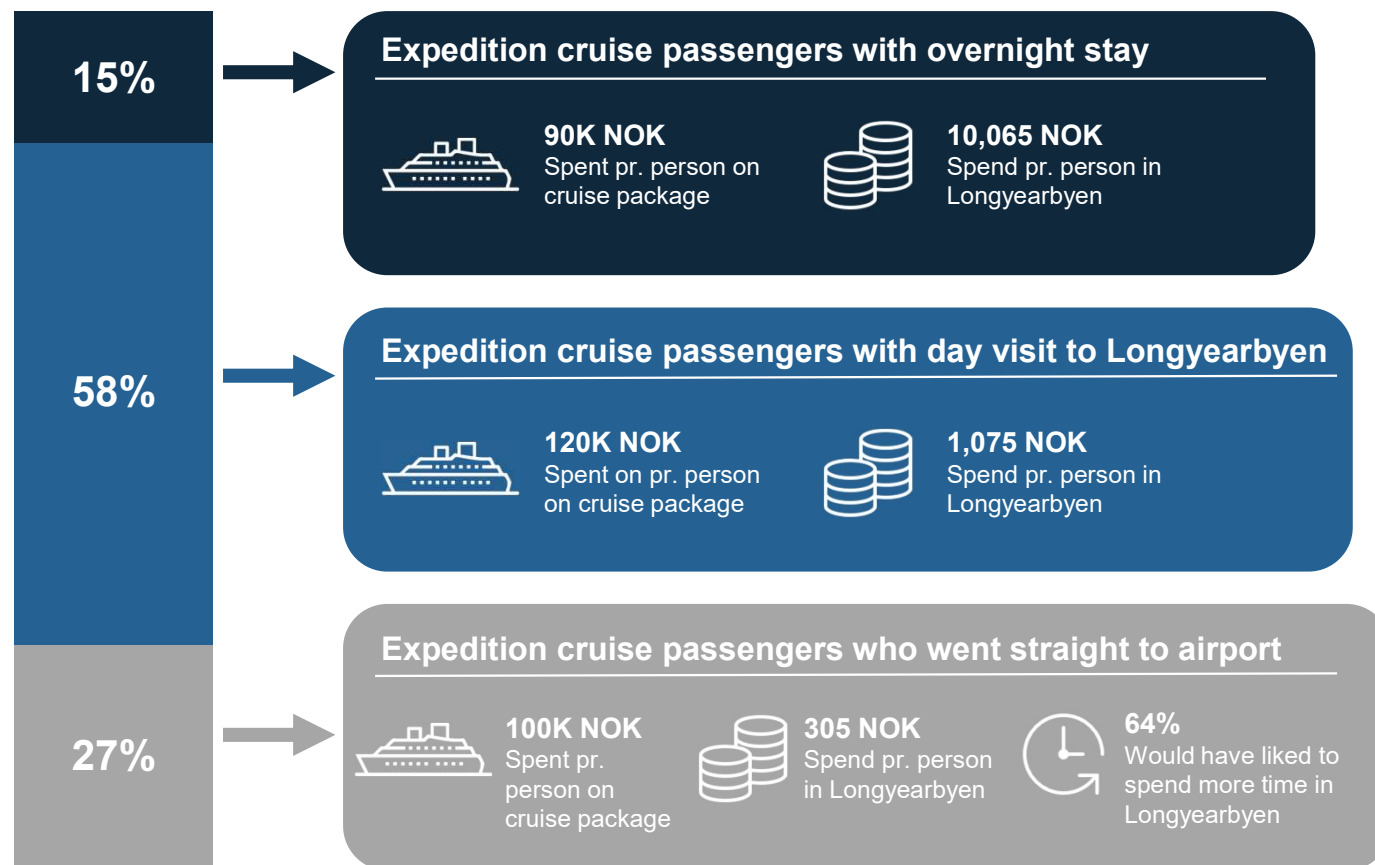
Expedition cruise passenger's actual and potential spend in Longyearbyen – B2C

Expedition passengers who get to spend time in Longyearbyen, spend more money while visiting

Most expedition cruise passengers get to spend hours or days in Longyearbyen in relation to their holiday, and thus spend money in regard with their stay on restaurants, activities, accommodation etc.

However, more than every fourth expedition cruise passenger is transported directly to Svalbard Airport, where there are fewer options to spend money. Most of these passengers would have liked to stay longer in Longyearbyen.

The highest expenditure is naturally found amongst passengers who have overnight stays in Longyearbyen. Staying more nights thus naturally yields higher accommodation and catering expenditures.



Note: average spend has been rounded to the nearest 5 NOK.

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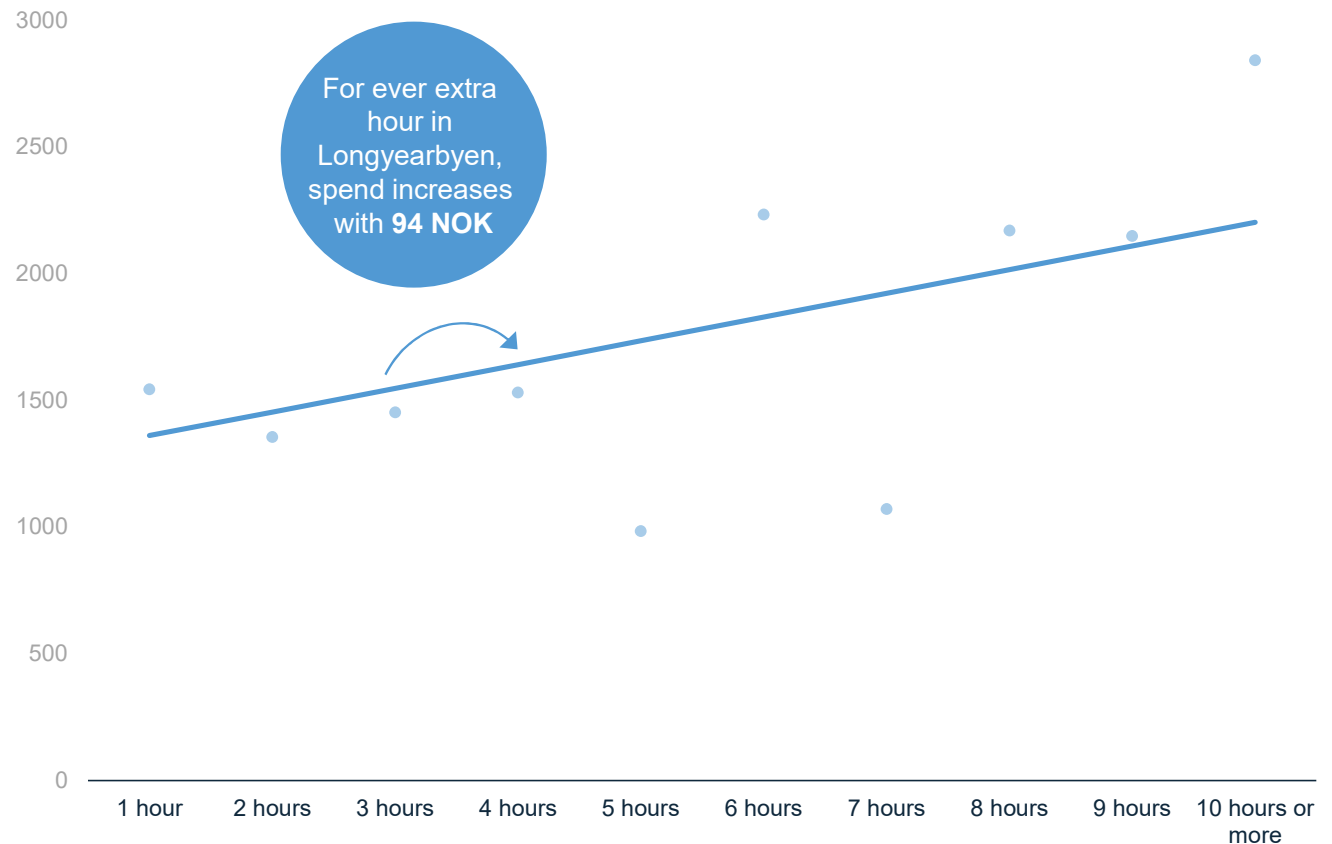
Conventional cruise passengers' actual and potential spend in Longyearbyen – B2C

Passengers on conventional cruises spend more the longer they stay in Longyearbyen, and 2 out of 3 would like to spend more time in Longyearbyen

The graph shows how many hours conventional cruise passengers reported spending ashore while visiting Longyearbyen, and the spend pr. person. Each dot represents average spend for passengers spending 1, 2, 3 hours and so on.

Conventional cruise passengers who stay longer in Longyearbyen while being ashore, spend more money while visiting. For each additional hour a conventional cruise passenger stays in Longyearbyen, local businesses can earn 94 NOK pr. person.

There is potential revenue connected with more passengers staying longer in Longyearbyen, and 65% of conventional cruise passengers wish to stay longer in Longyearbyen.



65%



of conventional cruise passengers would have liked to stay longer in Longyearbyen

Note: average spend has been rounded to the nearest 5 NOK.

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Characteristics for cruise passengers

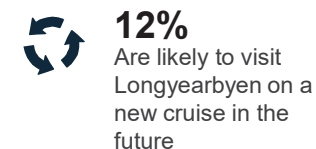
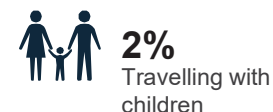
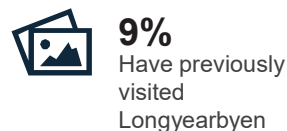
Expedition cruise passengers



The average cruise passenger is a 57-year-old American, traveling without children. Most visitors tend to travel in smaller groups, averaging 2,3 individuals pr. travel party. Notably, only 2% travel with children, suggesting that expedition cruises primarily appeal to adults. Expedition cruise passengers usually travel with their partners, other family members and/or friends. There are also 14% who travel alone.

Few passengers have previously visited Longyearbyen, and 63% indicated they would have preferred to stay longer while visiting. The probability of returning to Longyearbyen for either a land-based holiday or another cruise within the next three years, is low.

Satisfaction levels among expedition cruise passengers are moderate, with 55% reporting being satisfied with their experience in Longyearbyen. Few are decidedly unsatisfied with their stay. Additionally, around half of expedition cruise passengers would recommend Longyearbyen as a travel destination to others. Those who are satisfied with the visit, would recommend Longyearbyen to a higher extent than those who are not satisfied.



Characteristics for cruise passengers

Conventional cruise passengers



The average conventional cruise passenger is a German woman, aged 57 years old. They usually travel in smaller groups, with an average travel party of two people. Only 15% travel with children, while most travel with their partner or friends and other family members.

Only 7% have previously visited Longyearbyen, indicating that Longyearbyen may be a once-in-a-lifetime destination. However, 65% of the passengers expressed a desire to extend their stay. Around one in four are considering returning for a land-based holiday within the next three years, and 15% are open to revisiting Longyearbyen on a new cruise in the next three years.

Conventional cruise passengers are generally satisfied with their experience in Longyearbyen, with three out of four visitors expressing satisfaction. Furthermore, 71% would recommend Longyearbyen as a travel destination for others.



56%
Women



2
Average amount of people in travel party



57 years
Average age



15%
Travelling with children



24%
Are likely to visit Longyearbyen on a land-based holiday in the future



15%
Are likely to visit Longyearbyen on a new cruise in the future



7%
Have previously visited Longyearbyen



65%
Would have liked to stay longer in Longyearbyen



76%
Are satisfied with their visit to Longyearbyen



71%
Would recommend Longyearbyen as a place to visit



62%
Germany



10%
USA



6%
Italy



4%
Australia



3%
Spain

Sustainability

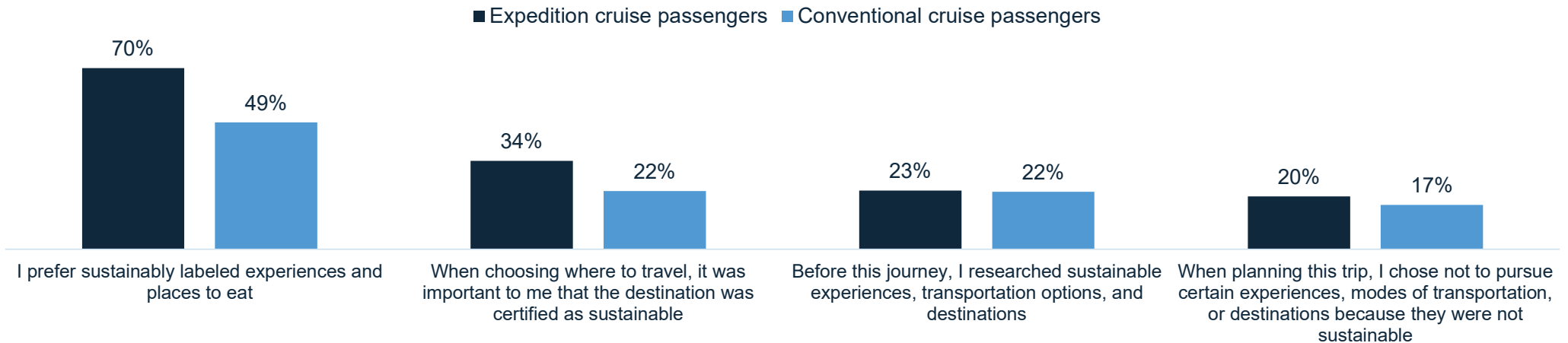
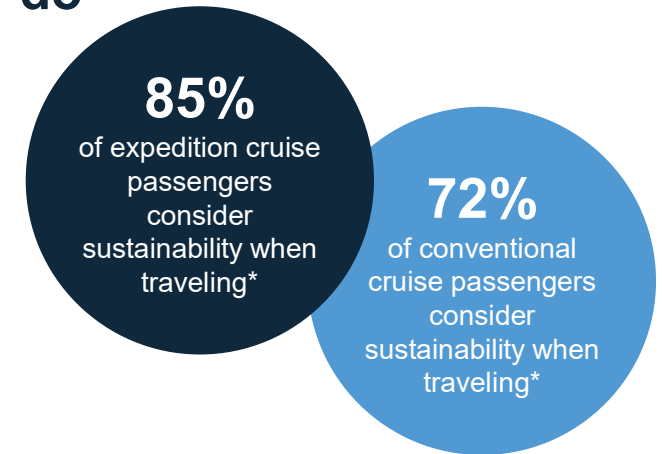
Sustainability is important for a lot of passengers, but few do research or opt out of experiences because of it

72% of conventional cruise passengers and 85% of expedition cruise passengers consider sustainability when travelling. However, only 22% and 23% of conventional and expedition cruise passengers respectively research sustainable experiences, transport modes or destinations before their journey. There are also few cruise passengers that opt out of experiences because they were not sustainable.

In general, expedition cruise passengers are more concerned about their travels having an impact on the environment, and are more likely to prefer sustainably labeled experiences and places to eat.

To what extent do you agree with the following statements?

Amount of cruise passengers that answered agree or strongly agree



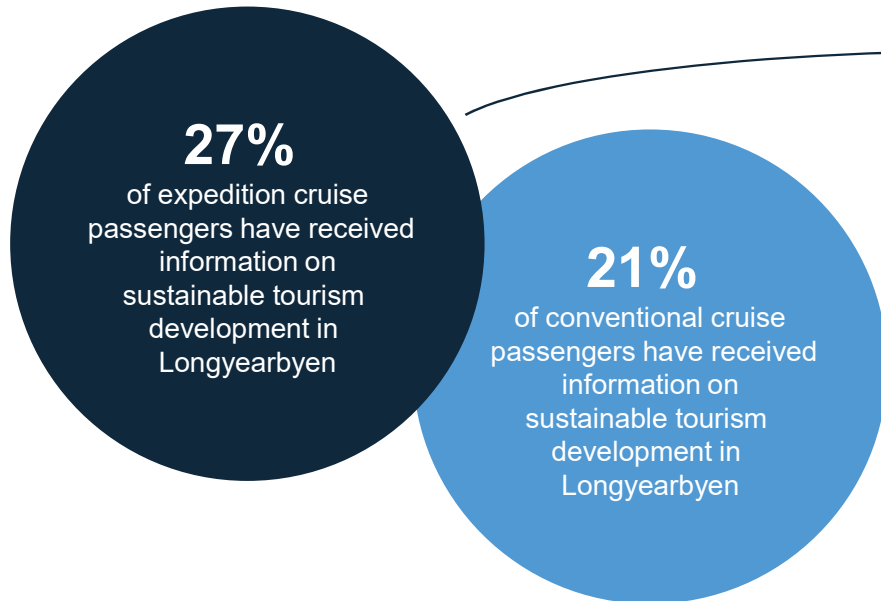
* The percentage shows how many respondents answered "agree" or strongly agree" to the question: "I would like to make sure that the way I travel does not have a negative impact on the environment or the climate"

Sustainability

Few have received information about sustainable tourism development in Longyearbyen, but still many experience the town as an environmentally friendly destination

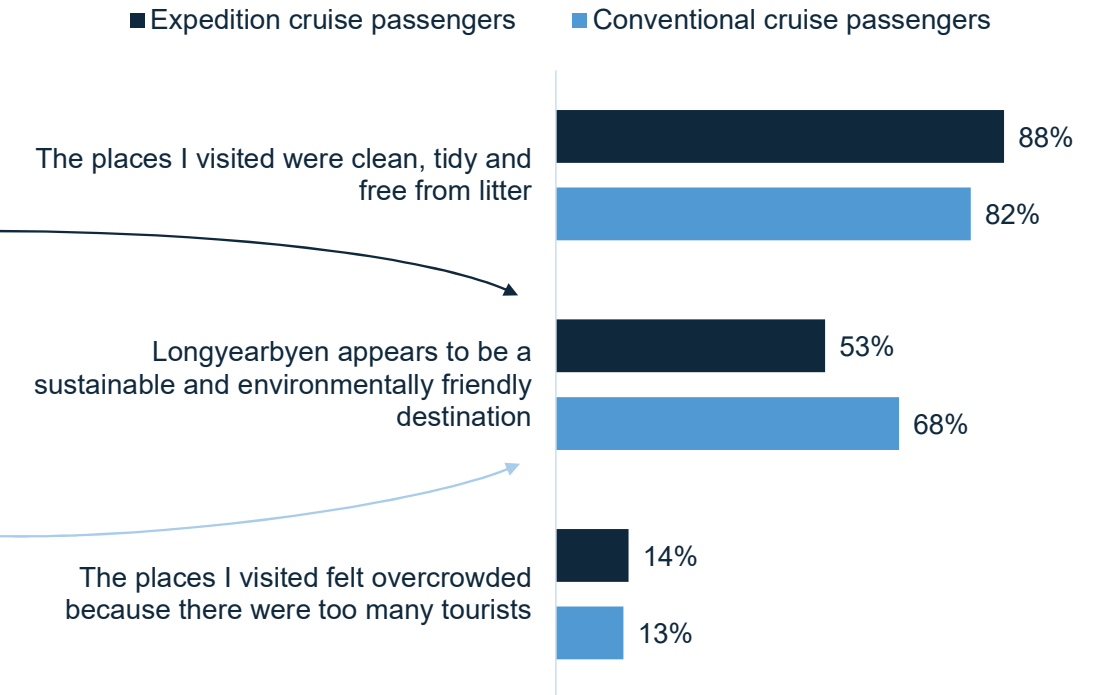
While few have received information about sustainable tourism development in Longyearbyen, the town already appears sustainable and environmentally friendly.

Most of the cruise passengers experience the places they visit as clean and not overcrowded with passengers. Only 13% and 14% of conventional and expedition cruise passengers, respectively, experience the places they visit as overcrowded.



To what extent do you agree with the following statements?

Amount of cruise passengers that answered agree or strongly agree



The significance of activities when visiting Longyearbyen

Most expedition cruise passengers experience local culture and history, but wildlife has the greatest significance for the visit

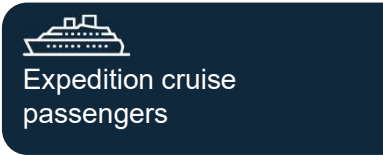
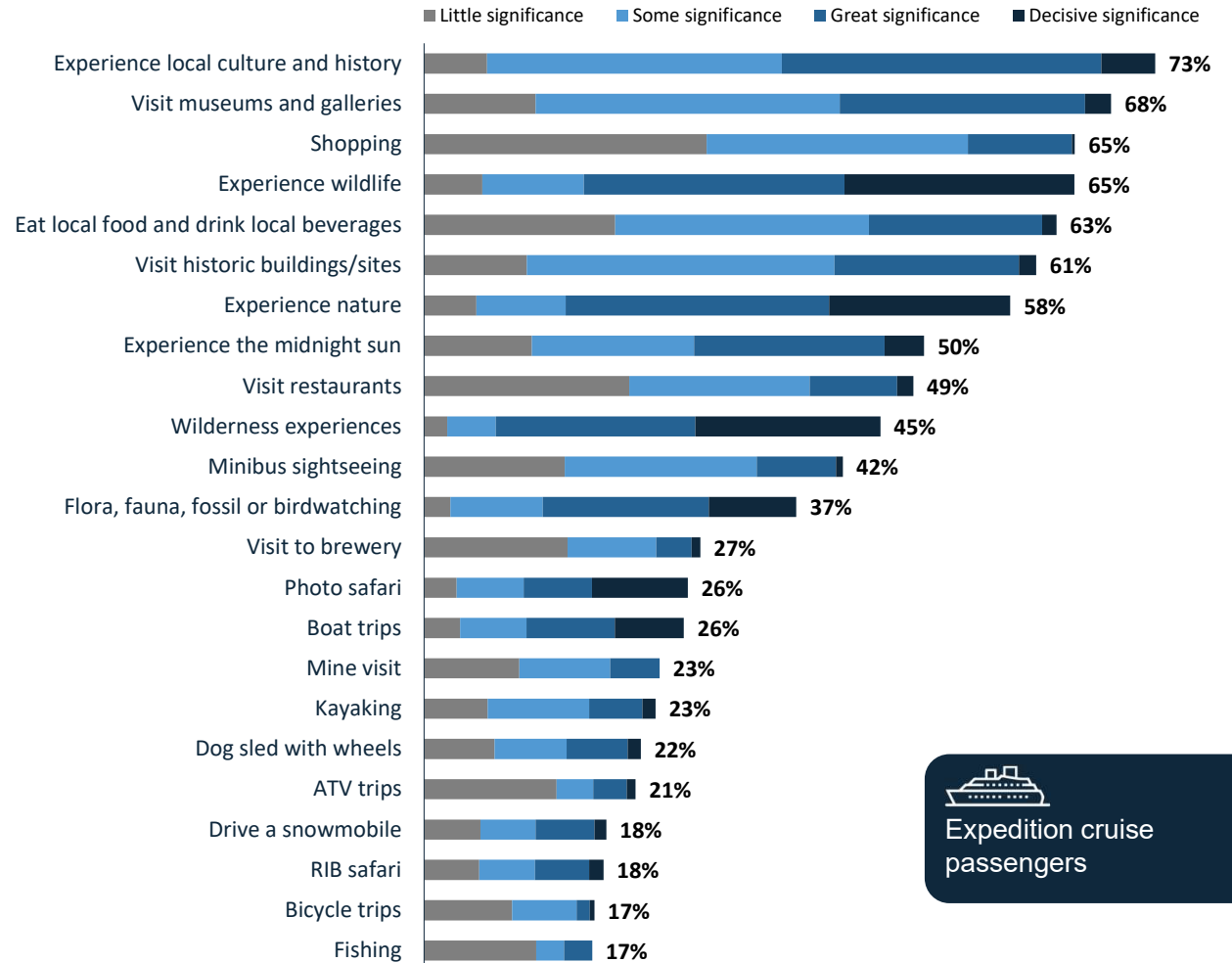
While most expedition cruise passengers have experienced local culture and history and visited museums and galleries, this is not the most significant reason for visiting Longyearbyen.

The most significant experiences are wildlife, nature and wilderness experiences.

The least significant experiences are fishing, ATV trips, visits to brewery, shopping, eating and drinking local products and restaurant visits.

Still, many go shopping, visit restaurants, or eat local food and drink local beverages when visiting Longyearbyen.

For each activity you have done, state how significant or insignificant this activity was for you while visiting Longyearbyen.



The significance of activities when visiting Longyearbyen

Almost all conventional cruise passengers experience wildlife and nature – and these are also very significant for visiting Longyearbyen

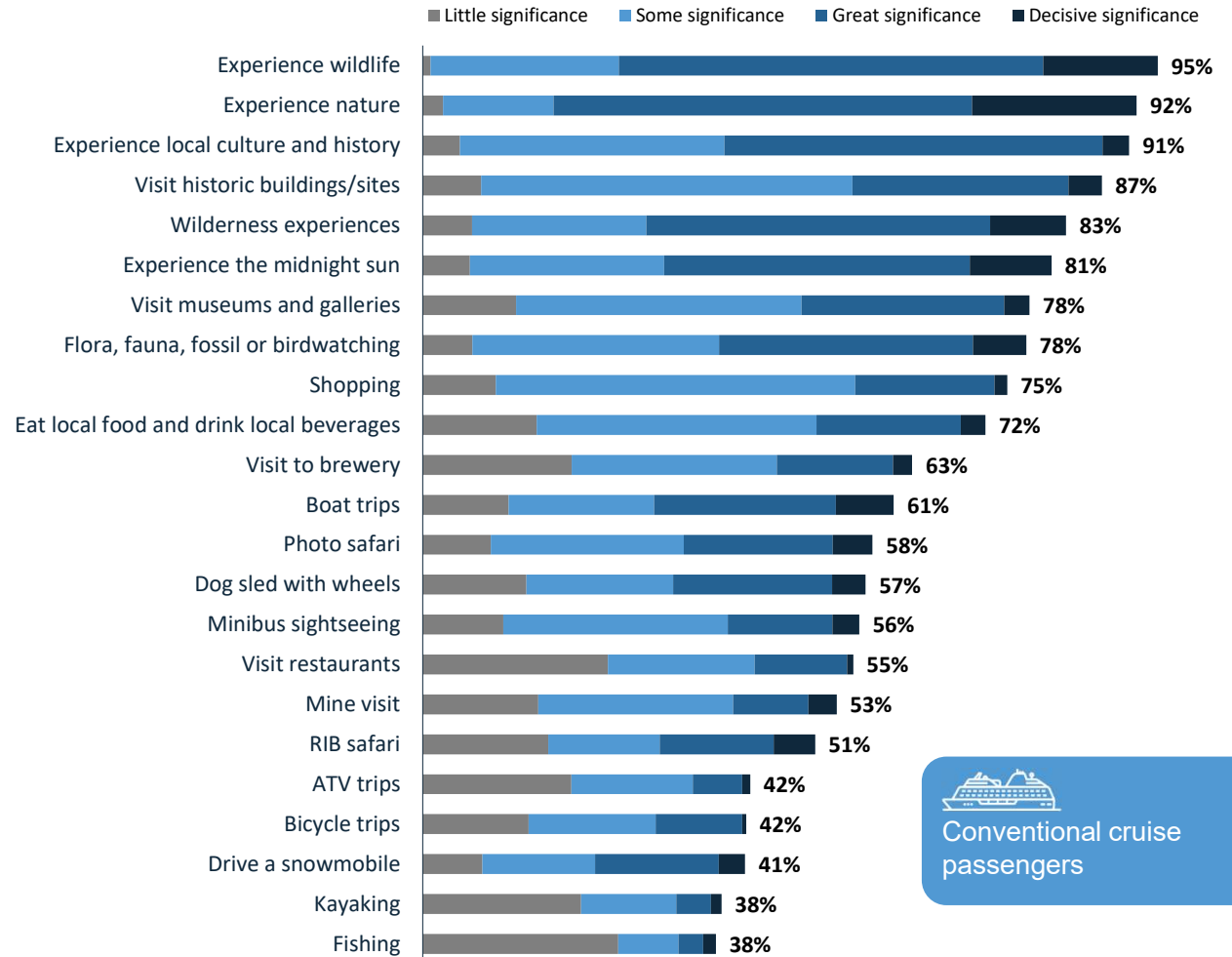
Conventional cruise passengers attribute most significance to wildlife and nature experiences, and these are also the experiences that most conventional cruise passengers have when visiting Longyearbyen.

Experiencing the midnight sun is also a significant activity when visiting Longyearbyen.

The least significant experiences are fishing, kayaking, visiting restaurants, visits to brewery and ATV trips.

Many experience historical buildings, local culture and history, and museums and galleries, however, these do not hold the same significance as nature and wildlife experiences.

For each activity you have done, state how significant or insignificant this activity was for you while visiting Longyearbyen.



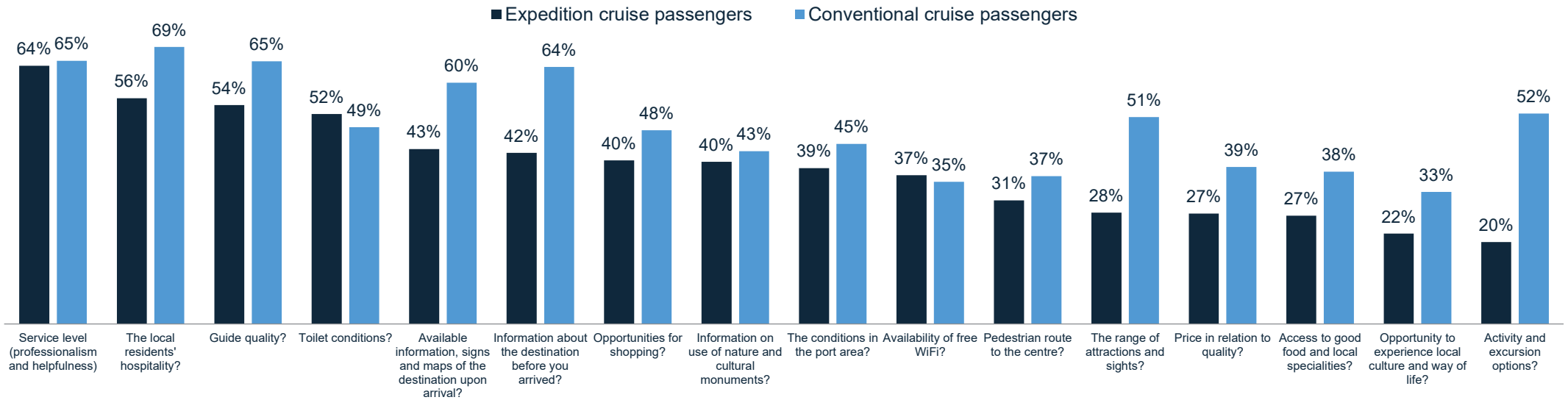
Satisfaction with visit

Conventional cruise passengers are more satisfied than expedition cruise passengers with their visit to Longyearbyen

Conventional cruise passengers are in general more satisfied with their visit to Longyearbyen. They are especially satisfied with activities and excursion options, range of attractions and sights, and information about the destination before they arrived. Both conventional and expedition cruise passengers are most satisfied with the service level, the local resident's hospitality and guide quality.

Cruise passengers' satisfaction with aspects of the trip

Cruise passengers that answered 8-10*



* On a scale from 0 – Very dissatisfied to 10 – Very satisfied, including “Not relevant”

Data collection and methods

Data was collected through in-person recruitment of cruise passengers, either shipside in the harbour or at the airport

Survey of cruise guests – conventional and expedition cruise

- Data was collected was completed as recruitment by in-person interviewers. In total 512 expedition cruise passengers were interviewed, and 143 conventional cruise passengers were interviewed.
- The respondent could answer the surveys either as in-person interviews or in their own time through sharing a QR-code or SMS, providing the respondent with a link to the survey.
- The data collection was conducted at the harbor or in the airport. Passengers embarking a conventional cruise ship were interviewed at the harbor, while passengers embarking pre-selected departures by plane were interviewed at the airport.
- Interviews with conventional passengers proved to be challenging, since the passengers spend a short amount of time in the harbor, and many did not want to partake in the study. Conventional port calls are also limited in numbers, leading to fewer chances to interview passengers.
- The data collection was made with the assumption that respondents interviewed at the harbor were conventional cruise passengers, while passengers interviewed at the airport were expedition cruise passengers. In addition, which ship the passengers had been travelling with, was recorded in the data and used for cross-checking this assumption.
- After data collection was completed, the data was cleaned and weighed in accordance with actual distribution of nationality of all cruise guests, as well as distribution of cruise guests travelling with conventional cruise, expedition cruise with less than 200 passengers, expedition cruise with more than 200 passengers, and expedition cruise with max. 12 passengers.
- To calculate the average spend pr. cruise passenger, outlier identification and processing was done in categories where total spend was at the same level. This ensures that that i.e. a German passengers travelling with an expedition ship with max. 12 passengers will not be regarded as an outlier, since passengers travelling with an expedition cruise ship with max. 12 passengers have higher spend than German passengers in general.



Expedition cruises



512

Cruise passengers interviewed

12 pax or less:	17
Under 200 pax:	49
Over 200 pax:	446



Conventional cruises



143

Cruise passengers interviewed

Data collection and methods

Data was collected through online survey for operators and suppliers in the cruise industry

Survey of expedition cruise operators and local suppliers to the cruise industry

- Expedition cruise operators and local suppliers to the cruise industry were surveyed using and online survey with individual links.
- Some results were provided by email after the online survey had been closed. These results were then coded into the dataset, in order to analyze the results.
- The respondents in the supplier-survey were instructed to differentiate between revenue from expedition and conventional port calls.
- The operator survey was sent out to both AECO members and other expedition cruise operators. Conventional cruise lines were not surveyed.
- After data collection had ended, the data was cleaned, and a quality analysis was conducted. The results from the operator-survey was used in quality analysis of the results from the supplier-survey, as to determine if there had been any mistakes from the respondents in the supplier survey.
- The supplier data was also analyzed in a broader perspective, to make sure that the responding suppliers covered enough of the overall income of suppliers in Longyearbyen. It was determined that the key suppliers had answered the survey and contributed with approximately 80% of all revenue connected to the cruise industry on Svalbard.
- After the data had been analyzed and processed, the supplier survey was used as the foundation for calculating suppliers' overall income from sale to both conventional cruise lines and expedition cruise operators.
- Data was gathered for the fiscal year 2023, since the study was conducted in 2024. Supplier income has been projected from 2023 to 2024, taking into account the inflation rate and the updated number of passengers visiting Longyearbyen in 2024.

28%
of AECO members and other expedition
cruise operators responded
to the **operator survey**.

27%
of suppliers provided by
Svalbard Cruise Forum responded
to the **suppliers survey**.

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