

The importance of international cruise
passengers for the Stockholm region

2018



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Key figures for the 2018 cruise season at Ports of Stockholm:

- A total of 623,000 cruise passengers at Ports of Stockholm
- Passengers, crew and shipping companies spent EUR 82.6 million
- Turnaround passenger spends on average EUR 256.2
- Transit passenger spends on average EUR 72
- Crew member spends on average EUR 48.4
- Total economic effect is EUR 176.4 million
- Every million EUR spent (MSEK 10.6) generated 14 jobs in the Stockholm region
- The employment effect was 1,116 jobs

Sweden's largest passenger port

Each year more than 12 million passengers travel via Ports of Stockholm by ferry or international cruise ships. In addition, more than 4 million passengers use the archipelago boats and seaborne urban traffic each year.

This makes Ports of Stockholm by far the largest passenger port in Sweden.

This report presents the results of a survey that represents more than 600,000 international cruise passengers plus crew members, as well as the cruise shipping companies that visited Stockholm in 2018



The survey

The survey was commissioned by Cruise Baltic. It was carried out by GP Wild and encompassed the entire Baltic Sea region. The period studied was May to August 2018 and included Ports of Stockholm's ports in Stockholm and Nynäshamn.

The survey includes responses from the cruise shipping companies Aida, Costa, Cruise & Maritime, Holland America, Princess, Regent and Royal Caribbean.

In total 1,697 cruise passengers and 617 crew members provided survey responses.

The survey included cruise services calling at Stockholm and Nynäshamn.

The amounts reported in the survey are calculated according to the EUR exchange rate on 31 August 2018, which was SEK 10.6094.

Definition of categories

The cruise passengers have been divided into two categories; transit passengers and turnaround passengers.

Transit passengers are passengers who arrive by cruise ships from another port and spend the day ashore, often before departing the same evening to continue their cruise.

Turnaround passengers are passengers who either begin or end their cruise in Stockholm. They have often arrived in Stockholm by air or by railway. These passengers often stay one or two nights in hotels in conjunction with their cruise voyage.

Crew members are people working aboard the cruise liners. They generally eat and sleep aboard the vessel, but some go ashore and therefore contribute to the city's revenue.

The cruise shipping companies are the cruise vessel owners. The shipping companies pay for the vessel's call to Stockholm and contribute in this way to the city's revenue, primarily through the payment of port dues, pilotage and fairway and passenger fees, in addition to food and drink for passengers.



Visiting cruise passengers and crew members

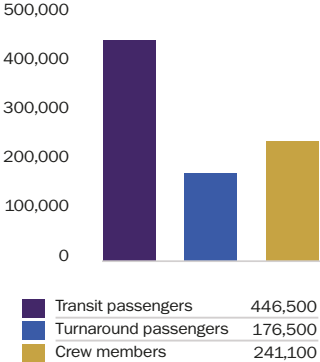
During the 2018 cruise season in Ports of Stockholm, April to October, 864,100 cruise passengers and crew members visited Stockholm.

During the 2018 cruise season 623,000 passengers (both transit and turnaround passengers) travelled via Ports of Stockholm.

- A total of 446,500 transit passengers visited Stockholm and Nynäshamn during the year.
- A total of 176,500 turnaround passengers visited Stockholm during the year.

- 95 percent (401,850) of all transit passengers went ashore and visited Stockholm and Nynäshamn.
- A total of 241,100 crew members visited Stockholm during the year. Of these crew members 35 percent (84,400) went ashore and visited Stockholm and Nynäshamn.

Arriving passengers and crew members



Visitor nationalities

The international cruise passengers come from all over the world. Most visitors come from Central and Southern Europe and the USA.

Visitor nationality

- Germany 163,993 passengers
- USA 129,575 passengers
- Great Britain 58,125 passengers
- Italy 42,290 passengers
- Spain 37,722 passengers
- Other 191,061 passengers

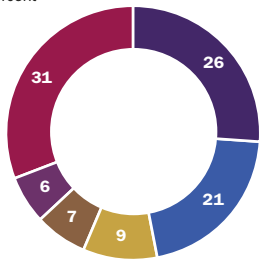
The typical visitor to Stockholm

- is 57-years old
- travels with one companion



Visitor nationality

Percent



	Passengers
Germany	163,993
USA	129,575
Great Britain	58,125
Italy	42,290
Spain	37,722
Other	191,061

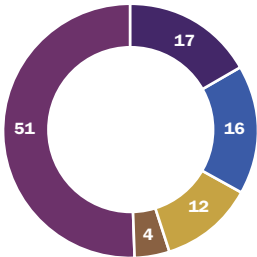


Average spending of passengers and crew members

- Turnaround passengers on average spend EUR 256.2 per person. Of that amount, 67 percent is spent on accommodation, food, drink and entertainment.
- Transit passengers on average spend EUR 72 per person. Of that amount, 78 percent is spent on guided excursions, transport and shopping.
- Crew members who go ashore spend on average EUR 48.4 per person. Of that amount, 78 percent is spent on food and drink, entertainment and shopping.

Expenditure of turnaround passengers

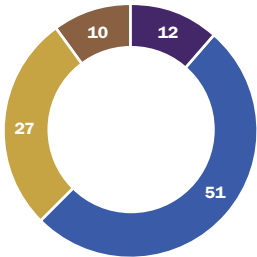
Percent



EUR per person	
Food, drink/entertainment	42.74
Excursions and transport	42.38
Retail goods	30.56
Other purchases	11.18
Accommodation	129.38
Total	256.24

Expenditure of transit passengers

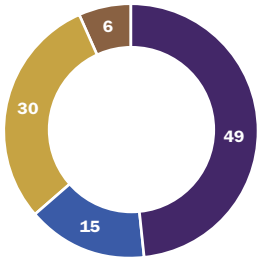
Percent



EUR per person	
Food, drink/entertainment	8.41
Excursions and transport	36.67
Retail goods	19.68
Other purchases	7.18
Accommodation	0
Total	71.95

Expenditure of crew members

Percent



EUR per person	
Food, drink/entertainment	23.41
Excursions and transport	7.47
Retail goods	14.39
Other purchases	3.12
Accommodation	0
Total	48.39



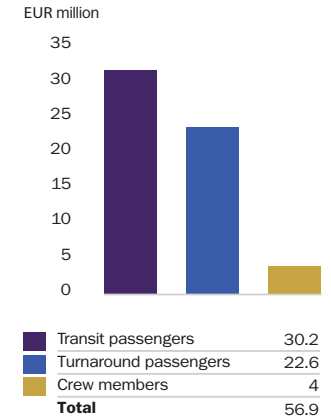
Total spending of passengers and crew members

In total, passengers and crew members spent more than EUR 56.9 million in the Stockholm region in 2018.

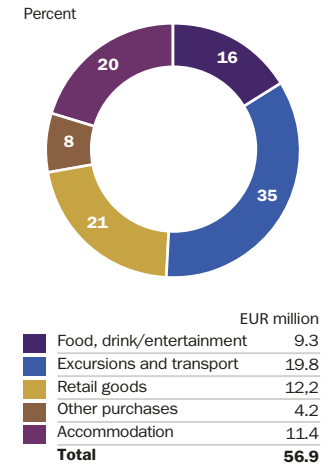
- Transit passengers accounted for 53 percent of the total amount. Turn-around passengers accounted for 40 percent and crew members accounted for the remaining 7 percent.
- Passengers and crew members spent EUR 19.8 million on sightseeing and other forms of transport. This represents 35 percent of the total amount spent by passengers and crew members.
- Turnaround passengers spent EUR 11.4 million on accommodation, which is around 20 percent of the amount passengers in total spent.
- Retail revenue was EUR 12.1 million. This equates to 21 percent of the total amount spent by passengers and crew members.
- Transit passengers accounted for 68 percent of the retail revenue generated by the cruise traffic. Turnaround passengers accounted for 22 percent and crew members for the remaining 10 percent.



Expenditure per category



Visitor expenditure total



Economic effect for Stockholm

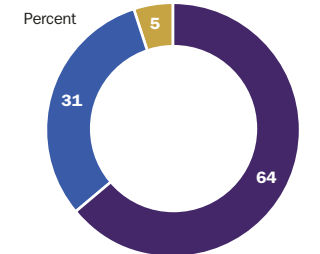
The economic effect for the Stockholm region is EUR 176.4 million and more than 1,100 jobs.

- In total passengers, crew members and cruise shipping companies spent EUR 82.6 million when visiting Stockholm.
- The cruise passengers spent EUR 52.9 million, which equates to 64 percent of the total amount spent by passengers, crew members and the cruise shipping companies.
- The cruise shipping companies spent EUR 25.6 million, which equates to 31 percent of the total spending by passengers, crew members and the cruise shipping companies.
- The major expenditure for the cruise shipping companies was on port dues, pilotage and fairway dues, fuel, sight-seeing excursions, accommodation, food and drink.
- Cruise ships crew members spent EUR 4.1 million, which equates to 5 percent of the total spending by passengers, crew members and the cruise shipping companies.
- Total spending was EUR 82.6 million, which created 563 direct jobs and wages corresponding to EUR 18 million.*
- The total economic effect of EUR 176.4 million created in total 1,160 jobs and total wages of EUR 42.2 million.*
- Transport and tour operators sector experienced the highest effect on total employment levels, with 324 jobs and an economic effect of EUR 12.8 million generated.
- The hotel and restaurant sector experienced the second highest effect on total employment levels, with 311 jobs and an economic effect of EUR 7 million generated.
- The wholesale and retail sector experienced the third highest effect on total employment levels, with 202 jobs and an economic effect of almost EUR 7 million generated.

*Employment information is derived from BREA economic impact models. GP Wild uses OECD Data (Organization for Economic Cooperation and Development) as the basis for the figures for each sector.



Distribution of spending for passengers, crew members and cruise shipping companies



	EUR million
Passengers	52.9
Cruise shipping companies	25.6
Crew members	4.1

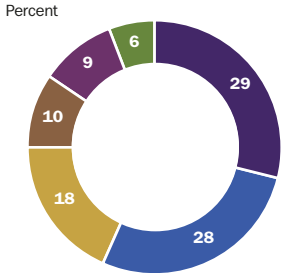
Total economic impact for Stockholm in 2018

Cruise traffic was of major importance for employment and revenue in the Stockholm region in 2018. This importance was most significant for the transport, hotel, restaurant and retail sectors.

The economic importance of the cruise traffic gave rise to the following effects for Stockholm in 2018:

- Each million EUR (SEK 10.6 million) that the cruise passengers and crew members spent ashore generated around 14 jobs in the Stockholm region. (Total spending was more than EUR 56 million).
- Each job created generated around EUR 38,000 in wages.
- The transport, hotel, restaurant and retail sectors comprised 75 percent of the total employment effect.

Total employment effect



	Employees
Transport and services	324
Accommodation	311
Wholesale and retail	202
Manufacturing	108
Other	106
Finance and commercial services	65
Total	1,116



Transit passenger satisfaction

Both Stockholm and Nynäshamn transit passengers who spent a day ashore were very satisfied with their visit. One factor that lowered satisfaction levels was that prices were generally perceived to be high.

Visitors to Stockholm

- 75 percent were extremely satisfied or very satisfied with their visit.
- 92 percent were willing to recommend Stockholm as a destination to their friends.
- 65 percent thought it likely they would return to Stockholm for a vacation.

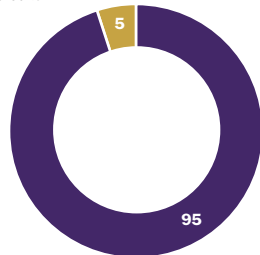
Visitors to Nynäshamn

- 57 percent were extremely satisfied or very satisfied with their visit.
- 69 percent were willing to recommend Nynäshamn as a destination to their friends.
- 35 percent thought it likely they would return to Nynäshamn for a vacation.



Satisfaction levels for Stockholm

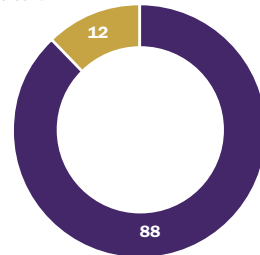
Percent



Very satisfied or satisfied
Not really satisfied or dissatisfied

Satisfaction levels for Nynäshamn

Percent



Very satisfied or satisfied
Not really satisfied or dissatisfied

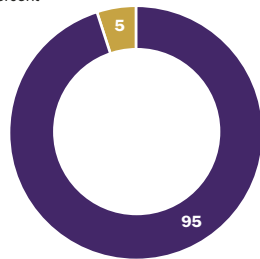
Turnaround passenger satisfaction

Turnaround passengers, who began or ended their cruise in Stockholm, were consistently very satisfied with their visit. Lowering satisfaction levels also for turnaround passengers was that prices were generally perceived to be high.

- 74 percent of turnaround passengers were extremely satisfied or very satisfied with their visit.
- 81 percent stated they were willing to recommend Stockholm as a destination to their friends.
- 57 percent thought it likely they would return to Stockholm for a land-based vacation.
- Around 65 percent spent one or more nights in Stockholm, before or after their cruise.
- The average time reported by passengers for their total stay in Stockholm, before and after their cruise, was 2.2 nights.

Met expectations as a destination

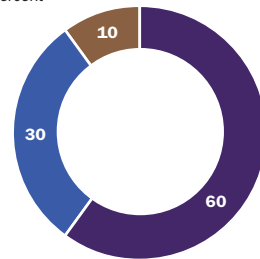
Percent



■ Very satisfied or satisfied
■ Not really satisfied or dissatisfied

Duration of stay before the cruise

Percent



■ 1 night 60
■ 2 nights 30
■ 3 nights 0
■ 4+ nights 10





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