



Cruise travel in the Nordics

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Executive summary

Nordic travelers display a strong interest in cruise holidays

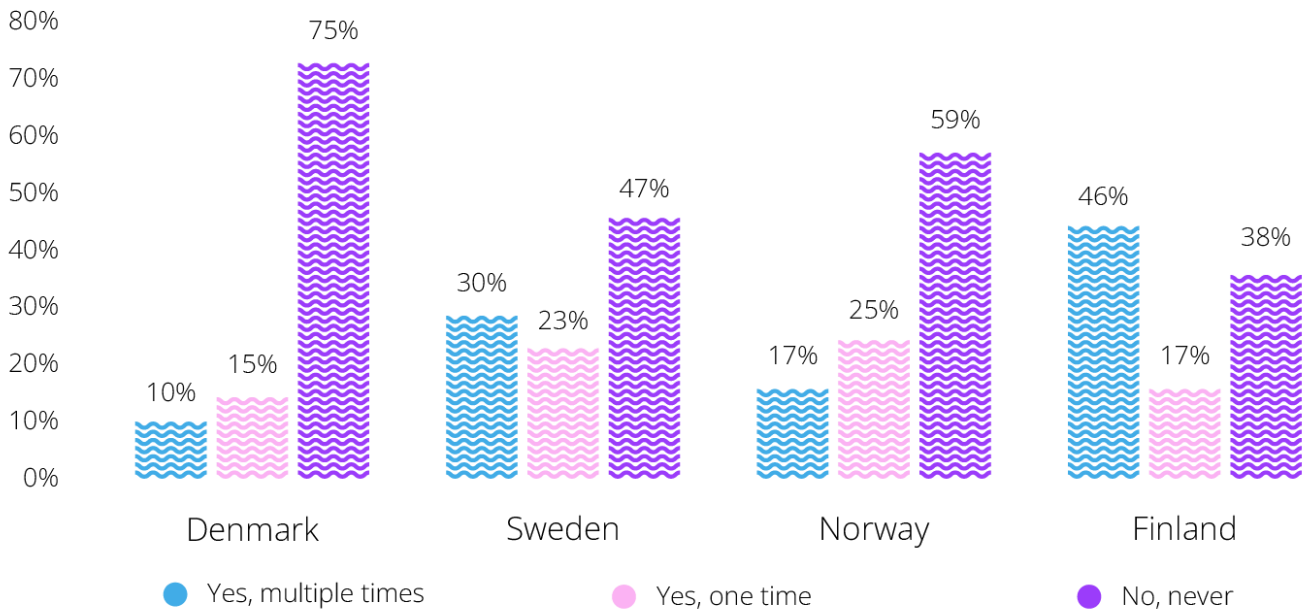
Many Nordic travelers consider cruise holidays in the next 2-3 years. This willingness suggests that cruise holidays have significant appeal among this demographic, potentially offering a lucrative market for cruise operators.

Popular destinations include the Mediterranean Sea, the Caribbean, and Northern Europe.

For most Nordic travelers, we found that price, food quality, and cruise destinations are the most influential factors in decision-making. However, barriers such as affordability and a dislike for crowds also influence their willingness to try a cruise holiday. Covid-19 does not appear to significantly impact Nordic travelers who will go on a cruise.

To capitalize on these insights, cruise operators should focus on value-driven offerings and consider targeted marketing strategies for different Nordic countries.

Have Nordic travelers ever been on a cruise holiday?



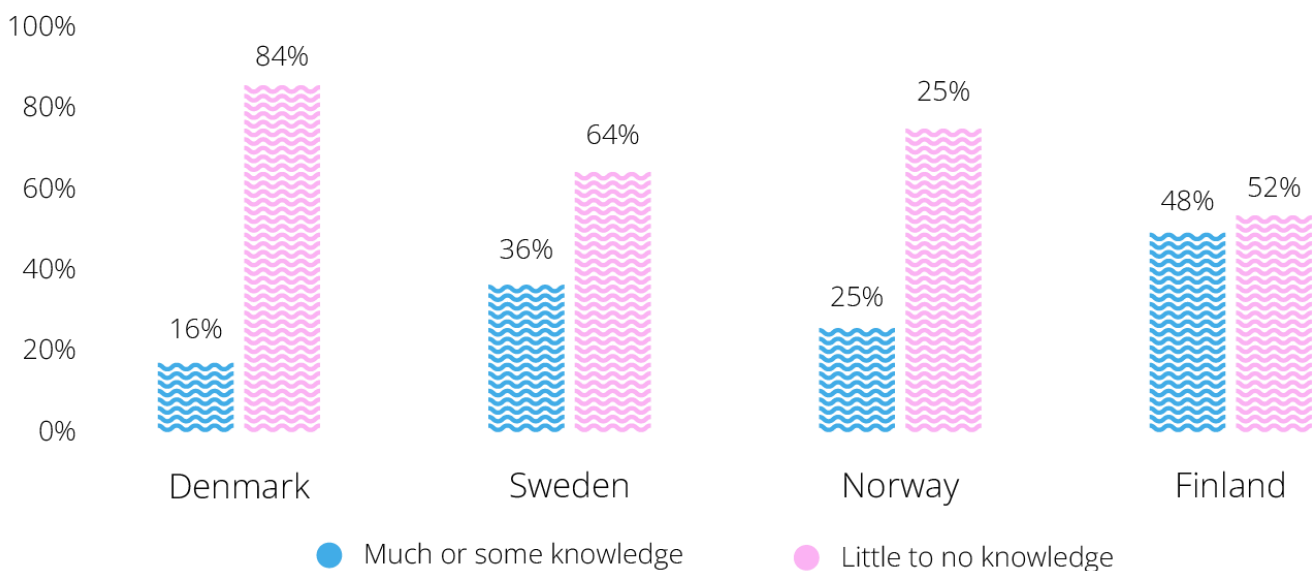
According to our data, the majority of respondents from Denmark have never been on a cruise holiday.

Finland has the highest percentage of respondents who have been on cruise holidays multiple times.

Sweden has a fairly even distribution across the three response categories.

It also becomes evident that many Finnish (63%), Swedish (53%), and Norwegian (42%) travelers have been on a cruise holiday at least once.

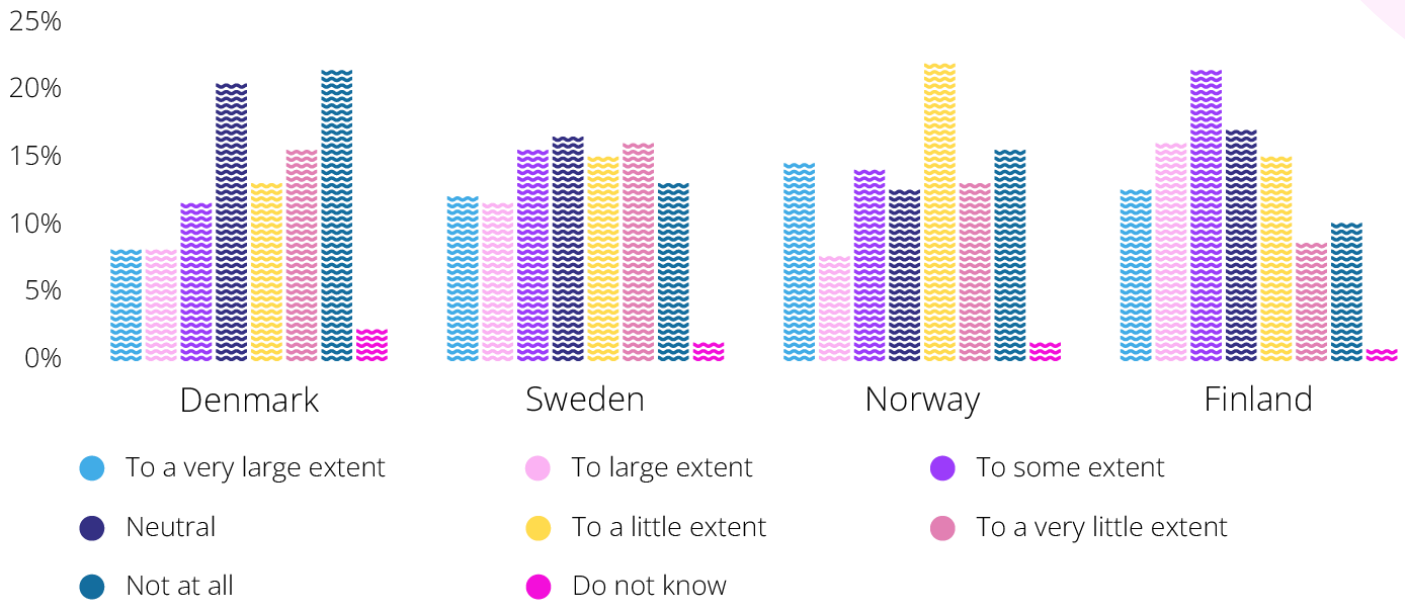
How much do Nordic travelers know about cruise holidays?



The data reveal a diverse landscape of knowledge and potentially, interest, in cruise holidays across the Nordic countries. Finland and Sweden lead in awareness, while Denmark and Norway lag behind. However, tour operators in the cruise market

report that Danish travelers are well aware of the product. This suggests that Denmark is a less mature market, yet the interest is growing.

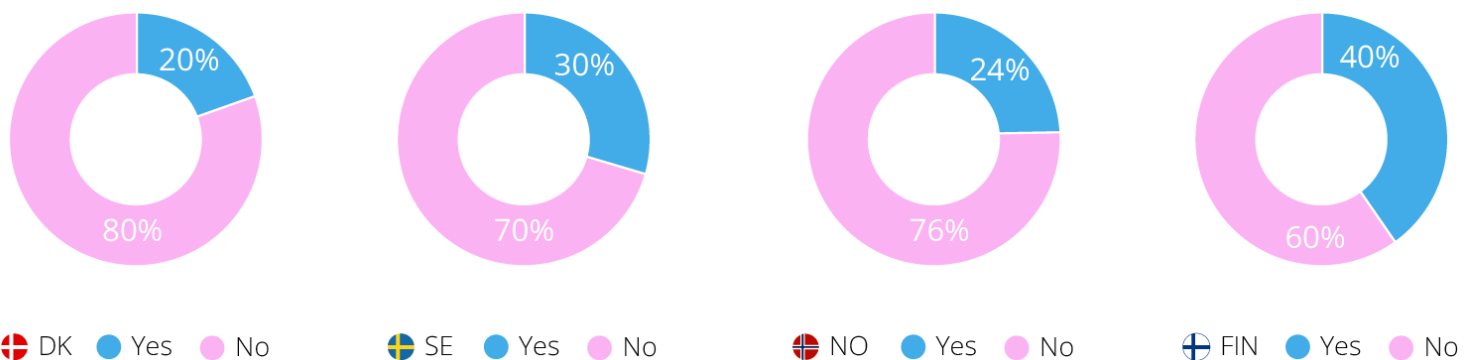
Do Nordic travelers want to go on a cruise holiday?



There is a budding sense of optimism, especially in Finland and Sweden, with a substantial percentage leaning towards a positive outlook on cruising. Even in countries with less positive sentiment like Denmark, there is a large enough neutral group that could be engaged and educated toward a more optimistic view on cruise holidays.

It is also clear that many Finnish (49%), Swedish (39%), and Norwegian (36%) travelers want to go on a cruise. Even though there are slight negative sentiments in Norway and Sweden, the percentages are balanced out by those with a positive view on cruise holidays.

Future Plans: Do Nordic travelers have plans to go on a cruise within 2-3 years?



Our insights present an optimistic landscape for the cruise industry in the Nordic countries. Finland and Sweden are at the forefront, showing strong interest in upcoming cruise holidays. Norway and Denmark also display promising potential, with nearly a quarter of respondents considering cruise holidays in the next few years.

This indicates an exciting trend of increasing interest and openness towards cruise holidays across the Nordic region. It is a great time for the cruise industry to engage these markets and fulfill their rising travel aspirations.

Where do Nordic travelers want to go?

Alaska & North America:

12%

Northern Europe:

36%

Mediterranean Sea:

52%

Caribbean:

40%

Asia:

10%

Australia & New Zealand:

14%

Mediterranean Sea steals the spotlight

It becomes clear that the Mediterranean Sea is the star of the show, with 52% of Nordic travelers setting their sights on this cruise destination.

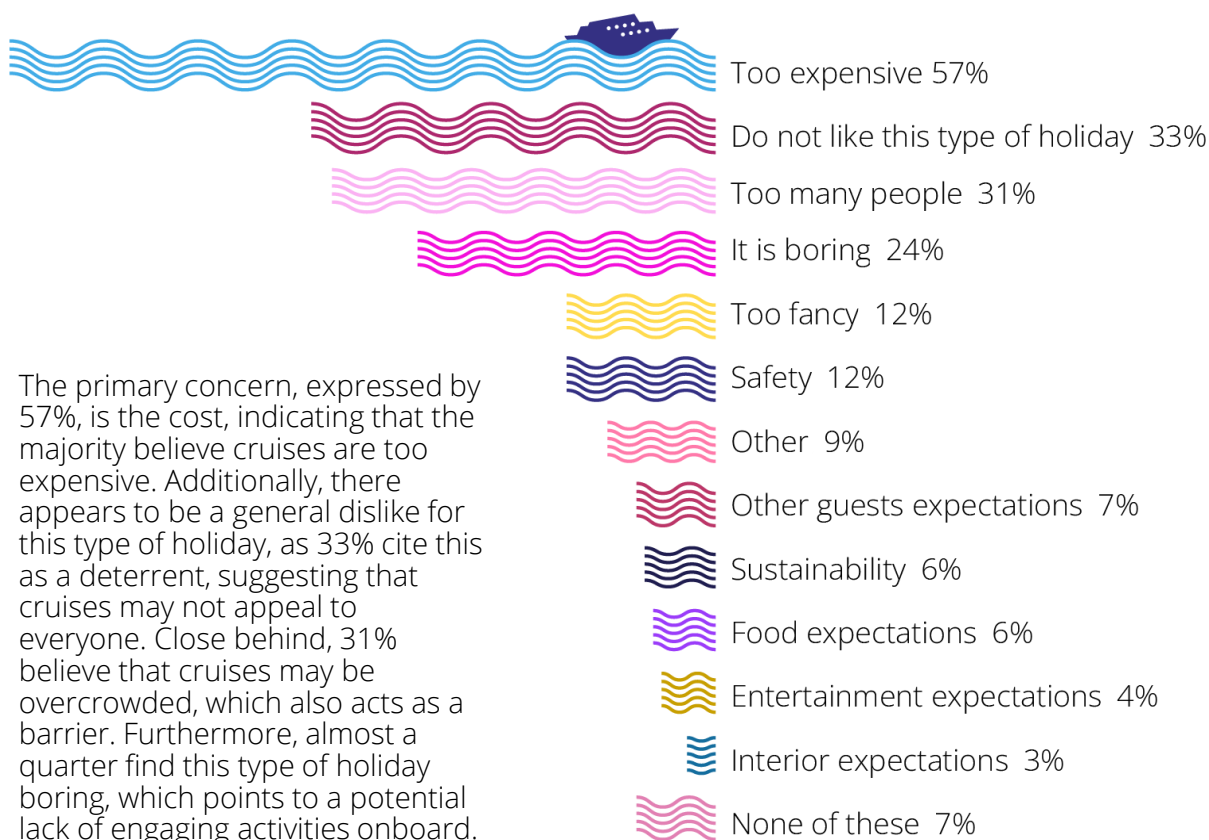
Furthermore, the Caribbean is also perceived to be very popular. Here, 40% of Nordic travelers have a clear desire to visit the region.

Northern Europe should not be overlooked, as 36% of Nordic travelers express a keen interest in exploring Northern Europe through a cruise holiday. So, the region has a strong appeal across the Nordic market.

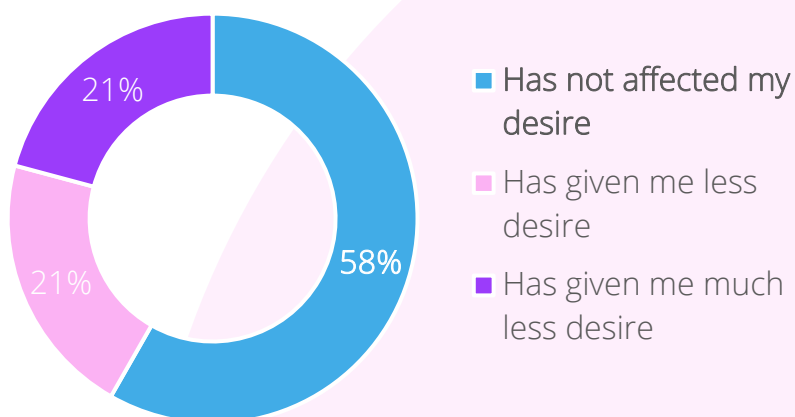
The less popular cruise destinations among Nordic travelers are Australia and New Zealand (14%), Alaska and North America (12%), and Asia (10%). These are not perceived as traditional cruise destinations, which may be the reason behind Nordic travelers being less enthused about these destinations.



What are the barriers for going on a cruise?



Has Covid-19 affected Nordic travelers' desire to go on a cruise?



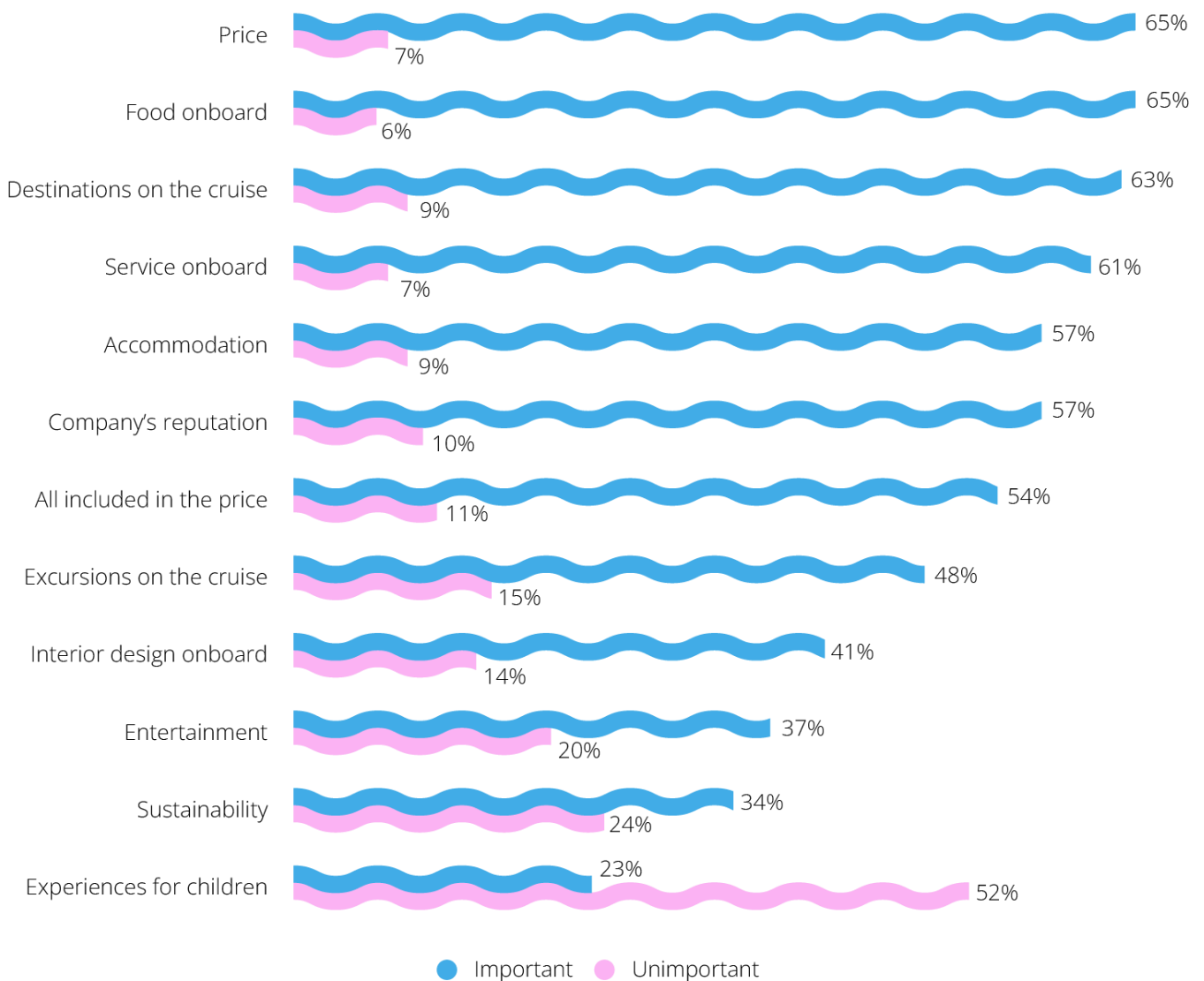
While a majority of Nordic travelers' desires to go on a cruise remain unaffected by the pandemic, there's still a significant portion (almost half) that have become more hesitant. This highlights the importance for cruise operators to address health and safety concerns, as well as to adapt to changing traveler behaviors and preferences in the post-Covid era.

Cruise Preferences

'Price', 'Food onboard', 'Destinations on the cruise', and 'Service onboard' are the top factors that most Nordic people consider important, making them key areas for cruise companies to focus on.

Factors like 'Accommodation', 'Company's reputation', and 'All included in the price' have moderate levels of importance. However, many Nordic travelers still consider these factors to be important

Experiences for children is the only factor that a majority find unimportant, indicating a potential niche market for family-friendly cruises or an area to downplay when targeting a general audience.



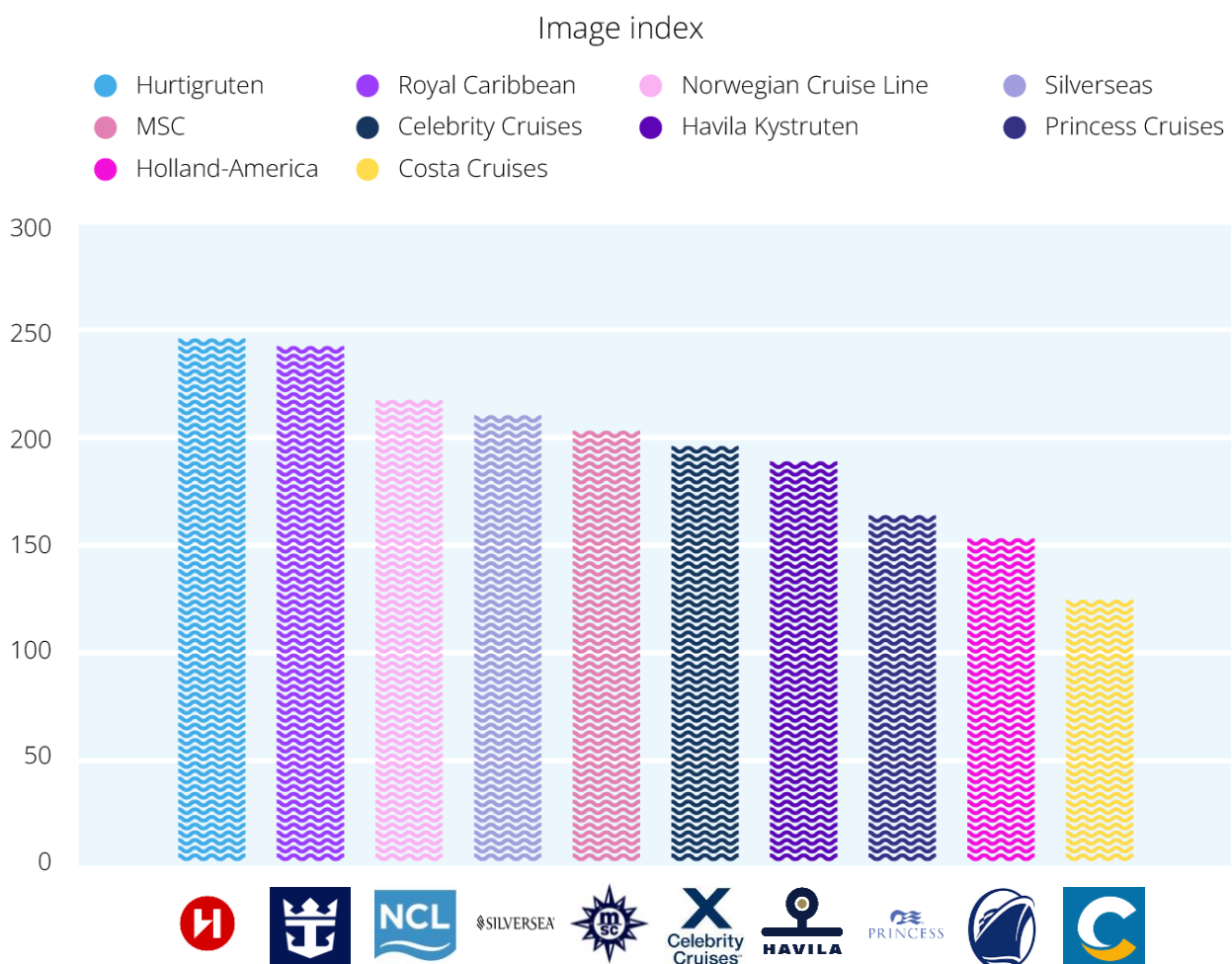
We have developed unique rankings to help you understand cruise operators' position in the market regarding image, experience, awareness, and perception.

Image rank is based on a comprehensive algorithm with three dimensions as points of reference: awareness, perception, and experience. Each of these three metrics has been analyzed separately and together they make up the overall image ranking.

Awareness rank relates to how much the travelers know about the cruise line.

Experience rank is all about how the cruise line is perceived by travelers who have already visited.

Perception rank relates to how the cruise line is perceived by travelers who have not tried the cruise line yet.

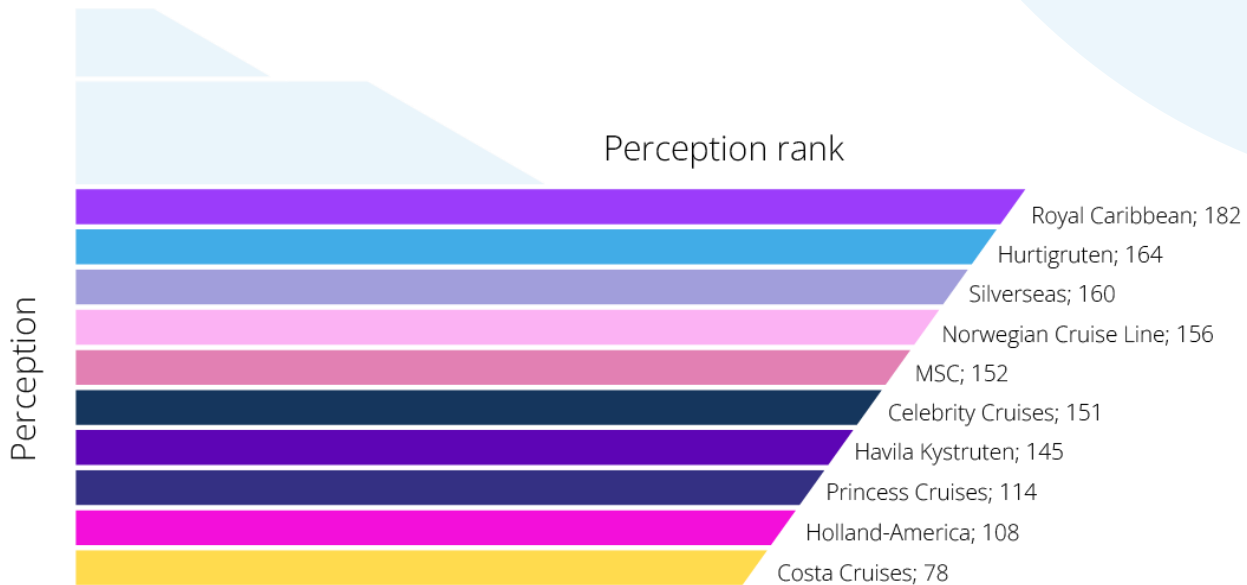


Hurtigruten is ranked **#1 out of 10** cruise lines, followed by Royal Caribbean and Norwegian Cruise Line. Hurtigruten is well-positioned in the current market, closely followed by especially Royal Caribbean.

As the image is comprised of awareness, experience, and perception, the image can be improved through improvements in these aspects.

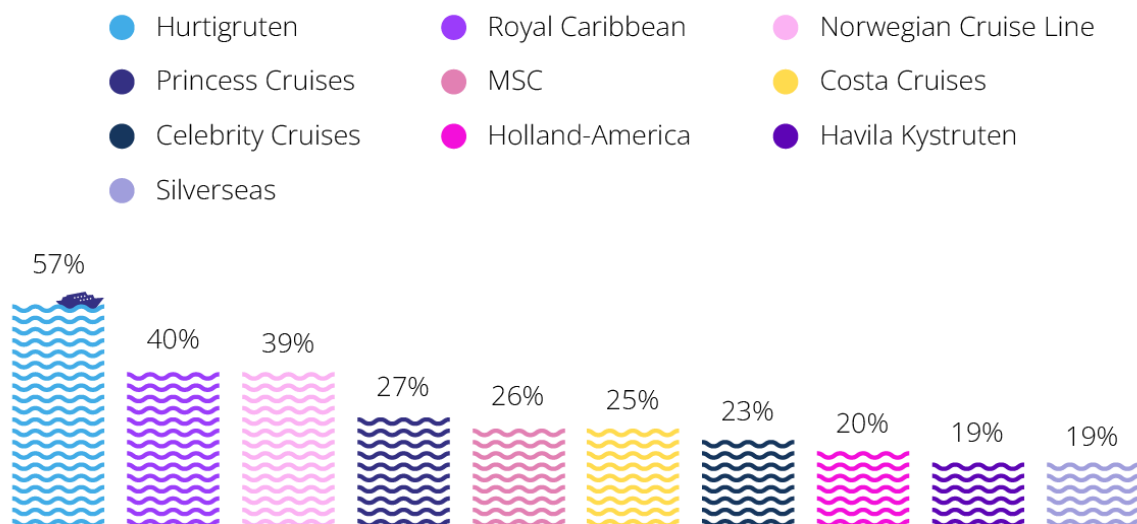
The image rank spans from a score of 124 on the image index to a score of 247, showing a great variance in image performance among these cruise lines.

Across the Nordic markets, there is substantial room for improvement for certain cruise lines that exhibit inferior performance relative to their close competitors..



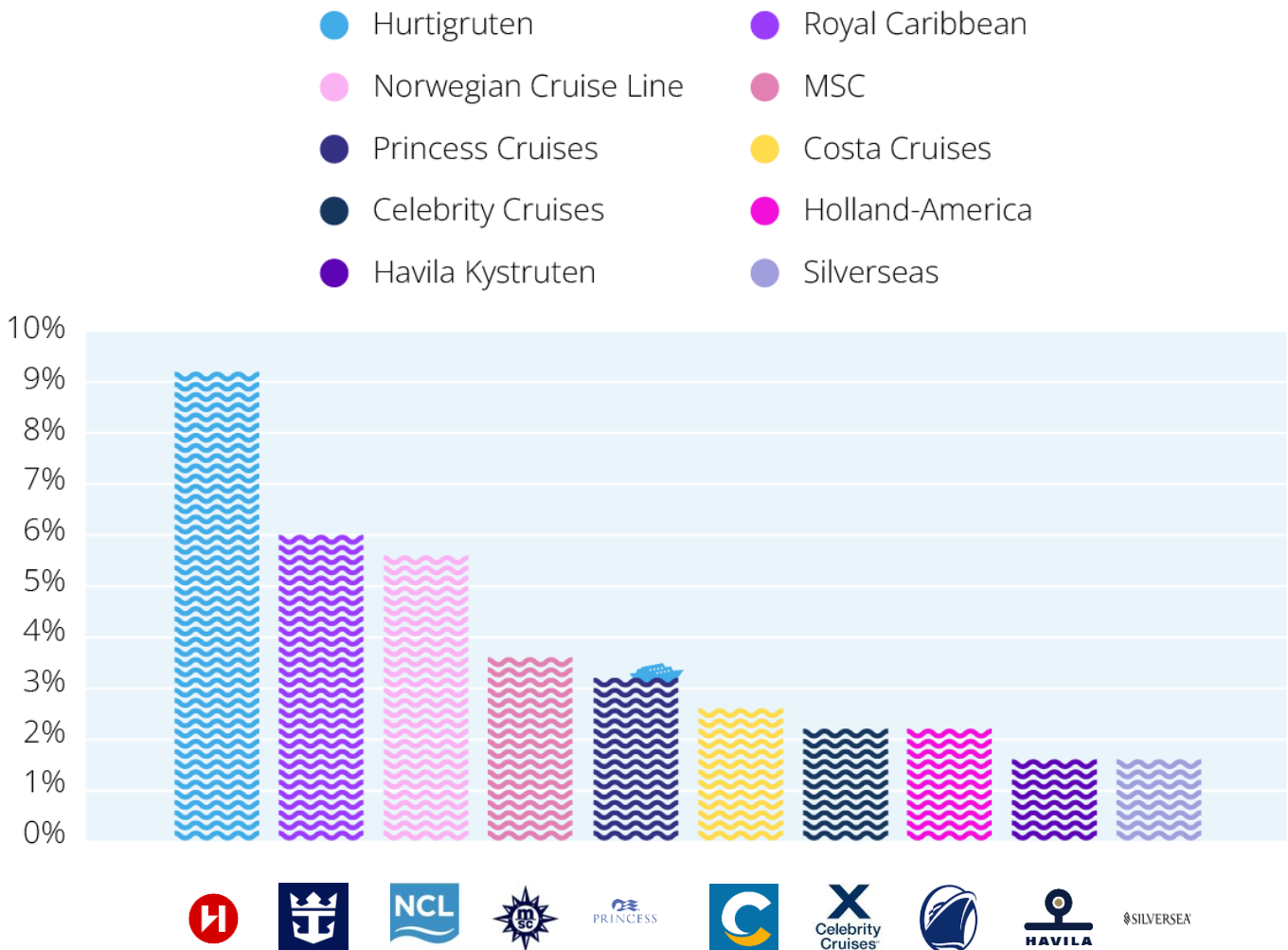
Perception is all about how Nordic travelers perceive the different cruise lines. It is evident that Royal Caribbean is held in high esteem by travelers from the Nordic regions. Notably, the competition amongst cruise lines is notably fierce, with many entities closely contending for superior perception. For instance, Hurtigruten secures the second position with a perception score of 164, demonstrating its favorable standing within this demographic. Conversely, Celebrity Cruises, albeit positioned sixth, trails not far behind with a score of 151, indicating a commendable perception likewise.

Awareness



Awareness relates to how much Nordic travelers are aware of the different cruise lines. Our data show that 57% of all Nordic travelers are aware of Hurtigruten, while 40% of Nordic travelers know of Royal Caribbean's offerings. There are several cruise lines with an awareness below 30%, and these cruise lines should focus on increasing their awareness in the market to capture market share.

Experience



Experience relates to the number of Nordic travelers who have tried a specific cruise line. As illustrated above, Hurtigruten emerges as the cruise line with which most Nordic travelers have had experience with, whereas Havila and Silverseas are the cruise lines with which the fewest travelers have had engagements. It seems that Nordic travelers have yet to explore the majority of cruise lines, a phenomenon potentially correlated to the perception of cruise tourism as a specialized or niche part of the tourism industry.

Since a significant portion of Nordic travelers remain unacquainted with a broad array of cruise lines, we see a unique potential and many opportunities to capture market shares.



Concluding remarks

Our study reveals a strong inclination among Nordic travelers to embark on a cruise holiday within the foreseeable future—specifically, the next 2-3 years. This willingness suggests that cruise holidays have significant appeal among this demographic, potentially offering a lucrative market for cruise operators.

Preferred Destinations

When it comes to preferred destinations, the Mediterranean Sea emerges as a clear favorite among Nordic travelers. This is followed by the Caribbean and Northern Europe, indicating a diverse set of preferences that range from the culturally rich and sunny Mediterranean to the scenic beauty and cooler climates of Northern Europe.

Key Factors in Decision-Making

Price stands out as the most critical factor affecting the decision to go on a cruise. This is closely followed by the quality of food onboard and the destinations visited during the cruise. These factors underscore the importance of cost, comfort, and experience in influencing consumer choices. On the other end of the spectrum, experiences tailored for children appear to be of lesser importance, suggesting that Nordic travelers may not primarily view cruise holidays as family-oriented experiences.

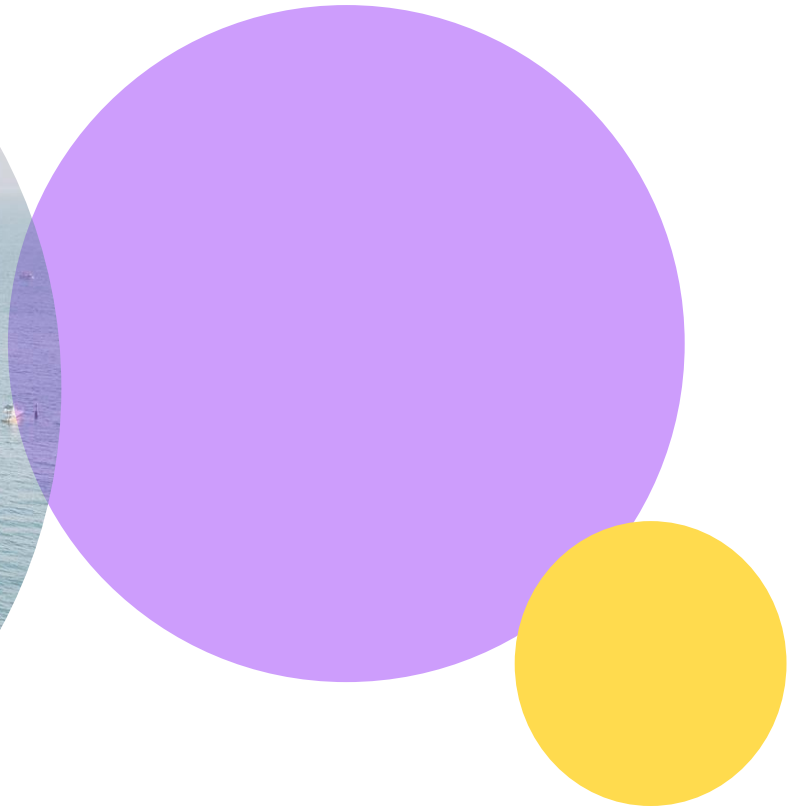
Barriers to Cruising

Despite the general willingness to go on a cruise, the study identifies affordability as a significant barrier, confirming the importance of price as a double-edged sword in the decision-making process. Another notable barrier is a general dislike for the type of holiday that a cruise represents, which could be attributed to personal preferences, or past experiences.

Final Thoughts

In summary, the Nordic market shows promising potential for the cruise industry, driven by a strong willingness to travel and diverse destination preferences. However, operators must be attuned to the key factors and barriers affecting consumer choices. Affordability, in particular, emerges as both a motivator and a barrier, highlighting the need for a balanced value proposition. Finally, the lack of knowledge about cruise holidays among Danes offers a specific avenue for market development, pointing towards the need for educational initiatives in this segment.

By addressing these insights, cruise operators can tailor their offerings and marketing strategies to better align with the needs and preferences of Nordic travelers.



Methods

In this study, we employed a cross-sectional survey to collect quantitative data. While this approach is effective for identifying patterns between variables, it may lack nuanced insights.

The survey was conducted among an international panel of consumers from Denmark, Sweden, Norway, and Finland. The panel consists of more than 200,000 randomly selected individuals. Data collection was conducted via a self-administered online questionnaire

All individuals aged 18 or above were eligible to participate

Data collection was conducted in Q1, 2023.

Data has been weighted by gender, age, and geography to ensure that the sample's composition mathematically matches the distribution found in the respective populations

N=2,013, DK=505, SE=501, NO=504, FI=503

Please note

Respondents have **been asked about their perception of “cruise” as a travel form.**

We have **not defined the word “cruise”**, and we have not been able to ask about their understanding of the word, due to the limits of quantitative surveys.

When looking at the data (i.e., cruise being very known in Finland compared to other markets) it **seems like many travelers also perceive 1-day ferry cruises as cruise trips** – and have taken both ferry cruises and voyage cruises into consideration, when answering the survey.

This should of course **be taken into consideration** when looking at the data (considerations are being made to specify/adapt the wording in coming surveys).

However, the **current data does reflect the market**; and it’s valuable to keep in mind when talking about cruises in the market.

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