

Tasmanian Cruise Ship Passenger Survey

December 2016 – April 2017

Introduction

The 2016-17 Tasmanian Cruise Ship Survey was conducted from December 2016 to April 2017. The aim of the project was to build a profile of holiday makers who arrive by cruise ship including information on their expenditure, origin and activities undertaken while onshore as well as their overall experience, social media habits and propensity to visit Tasmania again.

Overall, cruise ship visits, passenger and crew numbers and expenditure for the season have grown considerably, by approximately 45 per cent, well ahead of the national growth rates of 21 per cent.

Survey Approach

The research involved face to face interviews with cruise ship passengers and crew after they had completed their onshore visit. The interviews were conducted at cruise ship terminals in Hobart, Port Arthur and Burnie.

Over 1 000 passengers and crew were interviewed, comprising approximately 50 respondents for each of 19 selected cruise ships visiting Tasmania in 2016-17. This included a minimum of 100 crew members, representing 10 per cent of the total sample.

	Total	Burnie	Hobart	Port Arthur
Passengers	942	181	505	256
Crew	139	21	82	36
	1081	202	587	292

At each port, cruise ships were selected to provide a representative sample of total cruise ship visitation to the State for the 2016-17 season.

The sample took into account the ship profile, port visited (Hobart, Port Arthur and Burnie) and time of visit.



Findings

- A total of 236 794 cruise ship visitor days were spent in Tasmania during the 2016-17 cruise season (166 351 passenger days and 70 443 crew days).
- This represents an increase of 45 per cent on the previous season of 163 238 cruise ship visitor days.
- Direct on-shore passenger and crew expenditure of the season is estimated to total \$25.14 million over the season. This is made up of a \$22.46 million passenger spend and a further \$2.68 million spent onshore by the crew.
- A total of 95 port calls were made across the season, including 49 in Hobart, 17 in Burnie, 22 in Port Arthur, 6 in Wineglass Bay and 1 on Flinders Island.
- At the time of the survey, 138 port calls had been booked for the 2017-18 season.



- The average number of passengers per ship was 1 751, down from 1 975 the previous year. This was influenced by an increase in visits of the sub-1 000 passenger luxury class ships.
- Almost 68 per cent of passengers and 44 per cent of crew members were visiting Tasmania for the first time. This percentage was higher for passengers at Burnie (71%) and Hobart (76%).
- Around 50 per cent of passengers surveyed at Port Arthur were on their first visit to the state.
- Most international passengers (84%) spent additional nights in Australia before or after their cruise. The average number of extra nights these passengers spent in Australia before or after their cruise was 4.5 nights.
- One out of every six domestic passengers reported spending additional nights away from home. Those that did, spent on average an extra 2.4 nights away from home.



Hellyers Road Distillery



Demographic

- Passengers were more likely to be female (61 per cent of total) and crew were more likely to be male (80 per cent).
- The average age of passengers was 59 years and 34 years for crew.
- The average age of international passengers was 62 years, with 85 per cent being aged 50 years and over.
- The average age of Australian passengers was 55 years, with 34 per cent being aged under 50 years.
- The number of Australian and overseas passengers on the cruises were evenly split, however there were differences between the three main ports. See *table below*.
- The survey showed that the majority (61%) of international passengers at Burnie were from the USA. Forty-four per cent of international passengers at Hobart were also from the USA. Germany and the UK comprised 12 per cent of international passengers.
- The majority (66%) of Australian passengers at Hobart were from NSW. Eighty per cent of the Australian passengers at Port Arthur came from NSW and Victoria.
- Most crew members (94%) were from overseas, with one in three from the Philippines.
- The average group size for Australians travelling on a cruise ship was 3.7 people, compared with 2.8 for international passengers. A large number of intergenerational groups were observed.
- The average travel group size varied across the ports; Port Arthur (3.9 people), Hobart (3.2 people) and Burnie (2 people).



Salamanca Market

	Total passengers (%)	Burnie (%)	Hobart (%)	Port Arthur (%)
Australian passengers	49.6	26.5	37.8	89.1
Overseas passengers	50.4	73.5	62.2	10.9



Spending Ashore

	Average spend ashore (\$)
Burnie Passengers	138
Hobart Passengers	172
Port Arthur Passengers	106
Australian Passengers	117
International Passengers	164
TOTAL Passengers	140
TOTAL Crew	42

(Average spend is calculated by dividing the total spend on food/drink, shopping, tours, entertainment and transport by the total number of respondents within each passenger segment above)



Launceston City Centre

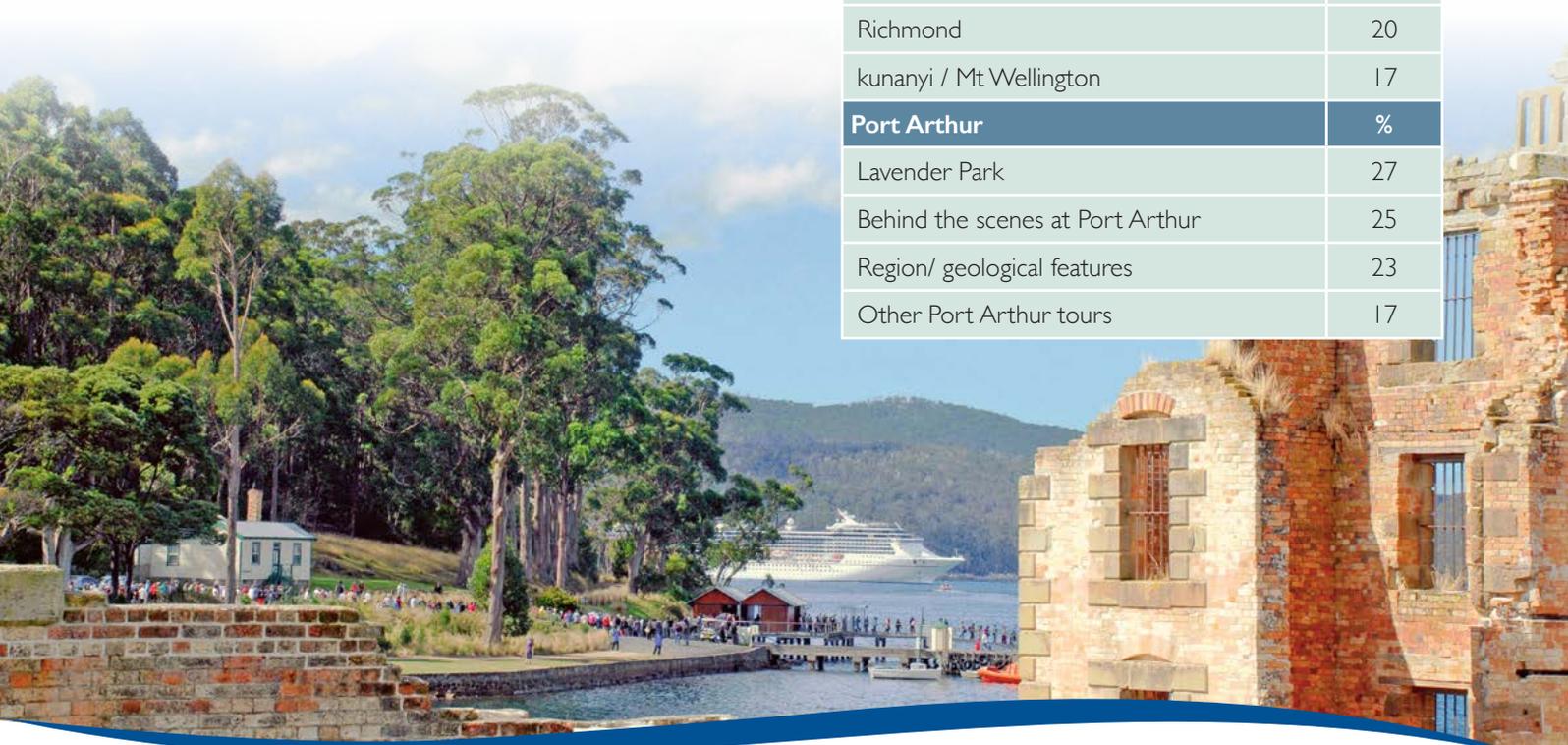
Tours

- Around 43 per cent of cruise passengers participated in an organised tour while they were in port. This participation rate varied between ports.

Participated in organised tour	% of Total Passengers	% at Burnie	% at Hobart	% at Port Arthur
Yes	43	60	45	29
No	57	40	55	71

- Even though just 29 per cent of Port Arthur passengers reported going on an organised tour, site entry to the Port Arthur Historic Site was included in their cruise fare.
- Of those who participated in an organised tour ashore, the most popular tour destinations for each port were:

Burnie	%
Wings Wildlife Park	50
3-hour Burnie highlights tour	14
Devonport highlights tour	13
Gunns Plains tour	12
Penguin	12
Hobart	%
Hobart City Tour	31
Bonorong Wildlife Park	30
Richmond	20
kunanyi / Mt Wellington	17
Port Arthur	%
Lavender Park	27
Behind the scenes at Port Arthur	25
Region/ geological features	23
Other Port Arthur tours	17





Activities

- The main type of activities undertaken ashore by cruise ship passengers were:

Activity	%
Sight-seeing on foot	63
Visiting a historic site or attraction	42
Dining at a local restaurant or cafe	37
Shopping in the city centre	30
Using wireless internet	27
Shopping for other items/supplies	27
Visiting museums	26
Buying Tasmanian art/craft	23

Social Media

- Half of all passengers said they expected to or had already shared their shore experience in Tasmania on social media. This result was similar across the three ports.
- Seventy per cent of crew members said they expected to or had already shared their experience on social media.

Visitor Experience

- The overall shore-based experience rated very highly at each port for both passengers and crew – with all respondents rating their experience above 90 per cent positive.
- A total of 48 per cent of passengers and 57 per cent of crew were unable to nominate any area for improvement.
- For those that did, the main issue identified by passengers and crew was the available time onshore.

Propensity for return visit

- Around half of the passengers expect to return to Tasmania for a holiday. This percentage was higher for Australian passengers (76%).
- Approximately 23 per cent of international passengers expect to return to the state for a holiday in the future, with a further 35 per cent unsure.
- Port Arthur recorded a higher propensity for return visits due to their higher Australian passenger numbers. Burnie recorded a lower propensity for return visits due to their higher international passenger numbers.
- Of those passengers who expect to return to Tasmania, 53 per cent indicated they expect to do so within the next two years.



Survey Methodology

The survey was conducted by Myriad Research for Tourism Tasmania in partnership with the Australian Cruise Association, Hobart City Council, Burnie City Council and the Port Arthur Historic Site Management Authority.

The research for the 2016-17 cruise ship season was designed to provide timely, relevant and statistically robust feedback from cruise ship passengers and crew in relation to their onshore experience, activities, spend and likelihood to return to the State.

Cruise ships were selected for the survey to provide a representative sample of the total cruise ship visits to Tasmania (95 ships) during the 2016-17 cruise season.

The sample took into account the ship profile, port visited (Hobart, Port Arthur and Burnie) and time of visit, and excluded visits where the onshore experience would be likely affected by major events, festivals, public holidays and overnight stays.

The survey was based on Tourism Tasmania's 2012-13 questionnaire. Further input was provided by survey partners and research consultants to maximise engagement with respondents.

The survey was programmed and hosted by Decibel Research and conducted by Myriad Research interviewers via face to face random intercept interviewing (next available person) at approved locations within the cruise ship terminal precincts using CAPI enabled iPads.

All fieldwork was completed in accordance with the relevant quality assurance and privacy protocols for face to face survey – ISO 20252 and the AMSRO Privacy Code.

Whilst personal information wasn't collected at the interview, the QA and privacy protocols ensure that all survey responses were treated in a strictly confidential manner at all stages of the research process;

The last major survey of cruise ship passengers to Tasmania was conducted by Roy Morgan Research for Tourism Tasmania in 2012-13.

Total passenger and crew numbers were obtained from Tasmanian Ports Corporation (TasPorts). These totals were used to 'weight' the sampled interviews to the total number of passengers. Passengers who stayed aboard ship were not captured by this survey.

Visitor numbers quoted represent all passengers and crew that arrived on each ship at each port. No adjustment has been made for the small number of visitors that did not go ashore. Therefore the total expenditure is based on all passengers going ashore and is likely to over-estimate the actual total expenditure.

The expenditure estimates only include spending on shore by the passengers themselves. This includes organised tours that are pre-paid, paid for on the day or on board the ship before it arrives in port. Some visitors pay for organised tours as an inclusion of their cruise these are not included in this report. Expenditure estimates do not include provisioning, fuel, port charges or other charges incurred by the owners of the vessels or organised tours included in the overall cruise packages.

For further information about this survey or other research services please contact:

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For further information about cruise ship tourism please go to: www.tourismtasmania.com.au/industry/cruise_tourism

