

# 2012-13 Tasmanian Cruise Ship Survey

## Introduction

The 2012 – 13 Tasmanian Cruise Ship survey was conducted between November 2012 and March 2013. The aim of the survey was to build a profile of holiday-makers who arrive by cruise ship and provide information not only about expenditure, origin and activities undertaken while ashore, but also their overall experience and propensity to visit again.

This document sets out key facts and figures from the survey, details on how the survey was conducted, and some points of interest that may assist tourism operators and others in the industry who wish to be involved with the cruise sector.

Overall, cruise ship arrivals, passenger and crew numbers, and expenditure for the season have returned to similar levels recorded before the Global Financial Crisis. While the number of ship visits was on par with last season, the size and capacity of vessels has increased significantly and this has naturally had an impact on total visitor numbers in this season compared to last.

## Survey approach

- A sample of 20 'ship visits' was selected for the survey. Fifteen ships were included in the sample, with five of them being sampled twice on different visits to the ports.
- 1,648 passengers who went ashore at a Tasmanian port were interviewed (1,512 at Hobart and 136 at Burnie). While counted in total visitor numbers, no crew were surveyed. In the 2010 – 2011 survey both passengers and crew were surveyed.

## Key findings

- There were 104,700 visitors<sup>1</sup> (passengers and crew) who visited Tasmania on cruise ships in the 2012-13 cruise ship season, a 41% increase in visitor numbers compared with the 2011-12 season. Of these, 85,720 were passengers.
- The average number of passengers and crew per ship was 2,630, compared to 1,600 in the previous season.
- Twenty-one vessels visited the main ports of Hobart and Burnie for a total of 44<sup>2</sup> visits during the 2012-13 Tasmanian cruise ship season. This compares with 22 vessels and 42 visits in the 2011 – 2012 season.
- The estimated expenditure of cruise ship passengers was \$10.1 million<sup>3</sup>.
- Of the passengers surveyed, 46% were from interstate and 54% were from overseas. 24% per cent of all visitors were from the United States of America (USA), 13% from the United Kingdom (including Ireland) and 18% from New South Wales.

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<sup>1</sup> The number of unique passengers and crew aboard each ship to visit Tasmania based on figures supplied by TasPorts. If a passenger travelled on a ship that docked at more than one location in Tasmania, they are counted only once.

<sup>2</sup> Number of ship visits excludes visits to ports other than Burnie & Hobart. Total number of all cruise ships to all Tasmanian locations during 2012-13 was 54. Some vessels stopped at more than one port during a single visit to Tasmania.

<sup>3</sup> The calculation for expenditure assumes all passengers spent time ashore at each port.

## Points of interest

- Although the number of ship visits was on par with last season, the size and capacity of vessels were significantly larger. During 2011-12, there were 19 ship visits containing less than 1000 visitors, while there were only 5 ships in this category during 2012-13.
- The average number of people per ship increased from 1,600 to 2,630. The majority of these were passengers (as opposed to crew).
- A decade ago (2002-2003 cruise season) 92% of cruise visitors (passengers and crew) were from overseas. In 2012-13 the mix of cruise ship passengers has changed significantly: 54% of passengers were from overseas and 46% were Australian (domestic) passengers.
- The change in the mix of international and Australian cruise ship passengers means that those providing shore excursions and other services may need to consider their varying requirements. For example, more structured tours with all inclusions for international passengers, or less structured moments and experiences for interstate passengers who may be more familiar with Tasmania.
- The majority of overseas cruise passengers are from the traditional markets of North America and the United Kingdom.
- The growth in cruise passenger numbers also presents a significant opportunity to attract passengers back to Tasmania for a longer holiday, especially Australian passengers.
- Overall passengers' experience of Tasmania was positive, with 48% of passengers surveyed rating it "excellent" and 38% rating it "very good".
- 91% of Australian passengers surveyed indicated they intended to visit Tasmania again for a holiday. In comparison, 58% of overseas passengers surveyed indicated they intended to visit again.
- Activities on shore were reflective of the most popular activities undertaken by visitors to Tasmania generally, with some interesting observations to be made:
  - ❖ 73% of passengers went sightseeing on foot. This suggests interpretation of the city sights could add value to the visitor experience along with more / or themed walking tours, and self-guided interpretation through digital apps or hard-copy collateral.
  - ❖ Dining at local restaurants and cafés, as well as shopping (retail and art/craft) remain popular with cruise passengers. This shows that other sectors also benefit from cruise ship visits and may benefit from ongoing promotion and improvements to the retail and hospitality experience in port.
  - ❖ Organised tours remain popular with passengers, of the 44% who indicated they undertook an organised tour, the majority (61%) went on a shore excursion offered by the cruise ship. This reinforces the need to continue working with the cruise lines and shore excursion companies to develop new shore experiences.

## NUMBER OF VISITORS

- During the 2012-13 cruise ship season 104,700 cruise ship passengers and crew visited Tasmania, an increase of 41% or 30,700 more visitors than the 2011-12 cruise ship season (Table 1).

Table 1: Total Visitor Numbers

| Cruise Ship Season | Total Visitors<br>(Passengers and Crew) | % Change |   |
|--------------------|-----------------------------------------|----------|---|
| 2001-2002          | 47,200                                  | NA       |   |
| 2002-2003          | 43,100                                  | -9%      | ↓ |
| 2003-2004          | 36,000                                  | -16%     | ↓ |
| 2004-2005          | 30,700                                  | -15%     | ↓ |
| 2005-2006          | 51,100                                  | 66%      | ↑ |
| 2006-2007          | 57,600                                  | 13%      | ↑ |
| 2007-2008          | 83,000                                  | 44%      | ↑ |
| 2008-2009          | 105,400                                 | 27%      | ↑ |
| 2009-2010          | 79,600                                  | -24%     | ↓ |
| 2010-2011          | 60,600                                  | -24%     | ↓ |
| 2011-2012          | 74,000                                  | 22%      | ↑ |
| 2012-2013          | 104,700                                 | 41%      | ↑ |

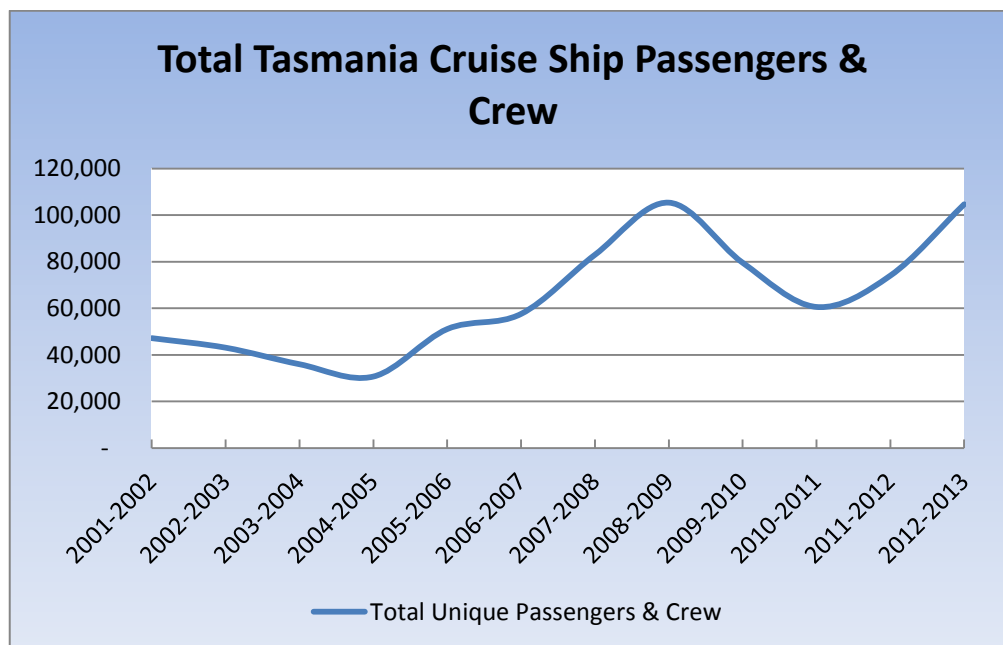


Table 2: Total Passenger Numbers

| Cruise Ship Season | 2012-2013 | %    |
|--------------------|-----------|------|
| Australian         | 39,800    | 46%  |
| Overseas           | 45,920    | 54%  |
| Total Passengers   | 85,720    | 100% |

#### PASSENGER EXPENDITURE

- For the 2012-2013 Cruise Ship season expenditure was only collected for passengers while in previous surveys expenditure was collected for both passengers and crew.
- Total spend by cruise ship passengers in Tasmania during 2012-13 was estimated at \$10.1 million (Table 3).
- The estimated average amount spent by passengers who came ashore was \$118.
- The average amount spent by passengers from overseas was \$125 and by interstate passengers was \$110.

Table 3: Total Visitor Expenditure

| Cruise Ship Season | Australian Visitors \$million   | Overseas Visitors \$million   | Total Visitors \$million   | Total Average Spend (passenger and crew) |
|--------------------|---------------------------------|-------------------------------|----------------------------|------------------------------------------|
| 2001-2002          | \$0.3                           | \$5.7                         | \$6.0                      | \$127                                    |
| 2002-2003          | \$0.4                           | \$3.8                         | \$4.2                      | \$97                                     |
| 2003-2004          | \$0.5                           | \$2.0                         | \$2.5                      | \$69                                     |
| 2004-2005          | \$0.2                           | \$2.7                         | \$2.9                      | \$94                                     |
| 2005-2006          | \$1.1                           | \$4.5                         | \$5.6                      | \$110                                    |
| 2006-2007          | \$1.0                           | \$5.5                         | \$6.5                      | \$113                                    |
| 2007-2008          | \$2.0                           | \$6.9                         | \$8.9                      | \$107                                    |
| 2008-2009          | \$2.4                           | \$8.9                         | \$11.3                     | \$107                                    |
| 2009-2010          | \$3.7                           | \$5.8                         | \$9.5                      | \$119                                    |
| 2010-2011          | \$2.2                           | \$3.6                         | \$5.8                      | \$95                                     |
| Cruise Ship Season | Australian Passengers \$million | Overseas Passengers \$million | Total Passengers \$million | Total Average Spend per passenger        |
| 2012-2013          | \$4.4                           | \$5.7                         | \$10.1                     | \$118                                    |

## MONTH OF VISIT

- For the 2012-13 season, all ships visited Hobart and Burnie between October 2012 and April 2013 (Table 4).
- 68% of all passengers arrived between January and March 2013.
- March saw the largest number of passengers visiting Tasmania (28% of all 2012-2013 cruise ship season passengers).

Table 4. Month of Visit

| Month of Visit | Number of Ship Visits | % of Visits | Number of Passengers | % of Passengers |
|----------------|-----------------------|-------------|----------------------|-----------------|
| October 2012   | 1                     | 2%          | 1,810                | 2%              |
| November 2012  | 5                     | 11%         | 9,310                | 11%             |
| December 2012  | 5                     | 11%         | 10,600               | 12%             |
| January 2013   | 10                    | 23%         | 17,800               | 21%             |
| February 2013  | 9                     | 19%         | 16,800               | 20%             |
| March 2013     | 11                    | 28%         | 23,600               | 27%             |
| April 2013     | 3                     | 6%          | 5,800                | 7%              |
| <b>TOTAL</b>   | <b>44</b>             | <b>100%</b> | <b>85,720</b>        | <b>100%</b>     |

## ORIGIN OF PASSENGERS

- Of the passengers surveyed for the 2012-2013 Cruise Ship survey, 54% were from overseas and 46% from interstate.
- Twenty-four percent of all passengers were from the United States of America (USA), 13% from the United Kingdom (including Ireland), 7% from Canada and 4% from New Zealand.
- Eighteen percent of passengers were from NSW, followed by 9% from Queensland, Western Australia 8%, Victoria 7%, South Australia 3% and ACT 1% (Table 5).

Table 5: Origin of Passengers

| Country / State         | Total         | % Total     | Hobart        | % Hobart    | Burnie        | % Burnie    |
|-------------------------|---------------|-------------|---------------|-------------|---------------|-------------|
| U.S.A.                  | 20,290        | 24%         | 15,580        | 21%         | 4,710         | 39%         |
| UK (incl. Ireland)      | 11,130        | 13%         | 10,700        | 15%         | 440           | 4%          |
| Canada                  | 6,170         | 7%          | 4,250         | 6%          | 1,920         | 16%         |
| New Zealand             | 3,390         | 4%          | 3,130         | 4%          | 260           | 2%          |
| Germany                 | 490           | 1%          | 490           | 1%          | -             | -           |
| Hong Kong               | 380           | *           | 290           | *           | 90            | 1%          |
| Netherlands             | 290           | *           | 290           | *           | -             | -           |
| Middle East             | 240           | *           | 240           | *           | -             | -           |
| Italy                   | 140           | *           | 50            | *           | 90            | 1%          |
| Other Overseas          | 3,400         | 4%          | 2,780         | 4%          | 610           | 5%          |
| <b>Total Overseas</b>   | <b>45,920</b> | <b>54%</b>  | <b>37,800</b> | <b>51%</b>  | <b>8,120</b>  | <b>68%</b>  |
|                         |               |             |               |             |               |             |
| N.S.W.                  | 15,320        | 18%         | 13,920        | 19%         | 1,390         | 12%         |
| Queensland              | 8,090         | 9%          | 7,130         | 10%         | 960           | 8%          |
| W.A.                    | 6,420         | 8%          | 5,810         | 8%          | 610           | 5%          |
| Victoria                | 5,890         | 7%          | 5,280         | 7%          | 610           | 5%          |
| S.A.                    | 2,920         | 3%          | 2,830         | 4%          | 90            | 1%          |
| A.C.T.                  | 1,060         | 1%          | 980           | 1%          | 90            | 1%          |
| Tasmania                | 100           | *           | 100           | *           | -             | -           |
| N.T.                    | -             | -           | -             | -           | -             | -           |
| <b>Total Interstate</b> | <b>39,800</b> | <b>46%</b>  | <b>36,050</b> | <b>49%</b>  | <b>3,750</b>  | <b>32%</b>  |
|                         |               |             |               |             |               |             |
| <b>Grand Total</b>      | <b>85,720</b> | <b>100%</b> | <b>73,850</b> | <b>100%</b> | <b>11,870</b> | <b>100%</b> |

- indicates a zero response and \* indicates percentages greater than zero and less than 0.5%.

## ACTIVITIES UNDERTAKEN IN TASMANIA

- The most popular activities undertaken in Tasmania by cruise ship passengers during the 2012-13 season were sight-seeing on foot (73%), dining at a local restaurant or café (50%) followed by visiting a historic site/attraction (45%) (Table 6).

Table 6: Activities Done Onshore

| ONSHORE ACTIVITIES                        | 2012-13 | 2010-11 |
|-------------------------------------------|---------|---------|
| Sight-Seeing On Foot                      | 73%     | NA      |
| Dine At A Local Restaurant Or Café        | 50%     | NA      |
| Visit Historic Site Or Attractions        | 45%     | 22%     |
| Shopped For Other Items/Supplies          | 44%     | NA      |
| Visit Craft Shops                         | NA      | 23%     |
| Buy Tasmanian Art/Craft                   | 21%     | 12%     |
| View Wildlife In A Wildlife Park/Zoo      | 17%     | 20%     |
| Visit Museums                             | 16%     | 16%     |
| Visit Local Food Producer                 | NA      | 16%     |
| Visit Galleries                           | 13%     | 13%     |
| Tour By Taxi Or Hire Car                  | 11%     | 5%      |
| Browse at the Markets                     | NA      | 10%     |
| Use Wireless Internet                     | 9%      | NA      |
| Visit Vineyard Or Specialty Food Producer | 7%      | NA      |
| Use An Internet Café                      | 4%      | NA      |
| View wildlife NOT in a wildlife park/zoo  | NA      | 5%      |

NA indicates this activity was not asked in that year

## ORGANISED TOURS

- Forty-four percent of cruise ship passengers surveyed were on an organised tour during their visit to Tasmania<sup>4</sup>. Of the passengers that went on an organised tour:
  - 61% went on a shore excursion offered by the cruise ship;
  - 39% booked their tour (either via the cruise ship or independently) before they commenced their cruise;
  - 31% booked while on board;
  - 29% booked after they got off the ship;
  - 14% booked direct with a local tour operator;
  - 16% booked through the Visitor Information Centre; and
  - 9% booked through a travel booking agent or site.

<sup>4</sup>The proportion of passengers surveyed who were on an organised tour should not be interpreted as the proportion of all passengers who went on an organised tour. Due to the survey methodology it is likely that the number of passengers who went on an organised tour may be under or over represented in this sample.

- 88% of visitors who had been on an organised tour indicated they went on a half-day tour while 12% indicated they went on a full-day tour.

## PORTS VISITED<sup>5</sup>

- The data below includes all vessels and passenger visits to the main ports of Hobart and Burnie (Table 7).
- Hobart received the greatest number of cruise ship visits in the 2012-13 season with 35 visits from 19 ships. There were 9 visits to Burnie from 8 ships.

Table 7: Ports Visited

| Port   | Total Passengers | %    |
|--------|------------------|------|
| Hobart | 73,850           | 86%  |
| Burnie | 11,870           | 14%  |
| Total  | 85,720           | 100% |

## FUTURE TRIPS

- 91% of Australian passengers surveyed indicated they intended to visit Tasmania again for a holiday. In comparison, 58% of overseas passengers surveyed indicated they intended to visit again.
- Of all the passengers surveyed (Australian and overseas visitors), 73% indicated they intended to visit Tasmania again for a holiday.

## OVERALL EXPERIENCE

- 86% of visitors had a positive experience, with 48% having rated their overall experience in Tasmania as 'excellent' and 38% as 'very good'; and
- Only 2% of visitors rated their overall experience in Tasmania as 'fair' or 'poor'.

## SURVEY METHODOLOGY

The following definitions have been used in this report.

- Visitors = all passengers and crew aboard each ship at each port
- Passengers = non-crew or paying passengers/traveller
- Crew = staff and crew of the cruise-line.

This report is based on data collected from passengers who participated in the 2012-13 Cruise Ship Survey conducted by Tourism Tasmania.

<sup>5</sup> Some vessels visited more than one port during a single visit to Tasmania.



A sample of 20 'ship visits' was selected for the survey. Fifteen ships were included in the sample, with five of them being sampled twice on different visits to the ports.

Data was collected on-shore by interviewers using Computer Aided Personal Interviews, in locations near the ships berths. Interviewing was conducted for a period of 3-4 hours, in the mid to late afternoon prior to the ship's departure. This was judged to be the best time to interview, as many visitors would have completed their day's activities. Interviewing was stopped 40-60 minutes before a ship's departure so as not to interfere with its departure routine. Interviewers conducted as many interviews as possible during that time.

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 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, paid for on the day or on board the ship before it arrives in port. Some visitors pay for organised tours when the cruise is initially booked 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 package.

All Antarctic expedition/touring vessels as well as vessels commencing a cruise in Tasmania were excluded from the 2012-13 Cruise Ship Survey. Most visitors travelling on these ships arrived and departed Tasmania via regular passenger services, and therefore would be represented in the Tasmanian Visitor Survey.

## WHERE THE STATISTICS COME FROM

The Tasmanian Ports Corporation (TasPorts) was the primary source of data relating to ship movements and the number of passengers and crew they carried.

Survey estimates are indicative only.

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

[statistics@tourism.tas.gov.au](mailto:statistics@tourism.tas.gov.au)

For further information about cruise ship tourism please go to:

[http://www.tourismtasmania.com.au/industry/cruise\\_tourism](http://www.tourismtasmania.com.au/industry/cruise_tourism)