

2009-10 Tasmanian Cruise Ship Survey

Summary

- There were 79,600 cruise ship passengers and crew that visited Tasmania in the 2009-10 cruise ship season, a 24% decrease in visitor numbers compared with the 2008-09 season.
- Early indications are that a similar downturn in cruise ship passenger numbers has been experienced at a national level, particularly at Australia's south eastern ports.
- Nineteen vessels visited the state for a total of 55 visits during the 2009-10 Tasmanian cruise ship season. This was two fewer vessels and 11 fewer visits than in the 2008-09 cruise ship season.
- The estimated expenditure of cruise ship visitors was \$9.5 million, a 16% decrease on the expenditure estimate from the 2008-09 cruise ship season.

2009-10 Tasmanian Cruise Ship Season

- This report relies on the following definition:
 - Visitor = all passengers and crew
 - Passengers = non crew or paying passengers/ traveller
 - Crew = staff and crew of the cruise-line.
- The 2009-10 Tasmanian cruise ship season commenced at the start of November 2009 and finished in early April 2010.
- According to numbers supplied by TasPorts approximately 69% of cruise ship visitors were passengers and 31% were crew members.
- Of the visitors surveyed by Tourism Tasmania, 64% were from overseas and 36% from interstate. Of those visitors from overseas, 30% were from the United States of America (USA) and 8% from the United Kingdom (including Ireland) (UK).

Number of ship visits¹

- During the 2009-10 Tasmanian cruise ship season 19 vessels visited the State for a total of 55 visits. This was a decrease of 2 vessels and a decrease of 11 visits compared with the 2008/09 cruise ship season.

¹ Some vessels visited more than one port during a single visit to Tasmania.

Number of visitors²

- During the 2009-10 cruise ship season 79,600 cruise ship passengers and crew visited Tasmania, a decrease of 24% or 25,800 less visitors than the 2008-09 cruise ship season. (Table 1)

Cruise Ship Season	Australian	Overseas	Total Visitors	% Change
2001-2002	3,800	43,400	47,200	na
2002-2003	3,600	39,500	43,100 ↓	-9%
2003-2004	6,700	29,300	36,000 ↓	-16%
2004-2005	2,100	28,600	30,700 ↓	-15%
2005-2006	12,700	38,400	51,100 ↑	66%
2006-2007	13,600	44,000	57,600 ↑	13%
2007-2008	19,100	63,900	83,000 ↑	44%
2008-2009	26,100	79,300	105,400 ↑	27%
2009-2010	28,400	51,200	79,600 ↓	-24%

Visitor expenditure³

- Total spend by cruise ship passengers and crew (who came ashore) in Tasmania in 2009-10 was estimated at \$9.5 million (was \$11.3 million in 2008-09). This represents a 16% decrease or \$1.8 million dollars less than the 2008-09 season (Table 2).
- The estimated average spend for all visitors - passengers and crew (who came ashore) was \$119, an 11% increase or \$12 more than the 2008-09 season (Table 2).
- The average spend for all cruise passengers was \$132; a 22% increase on last season (was \$108) (Table 3).
- The average spend for all crew who came ashore was \$105; a 49% decrease on last season (was \$204) (Table 3).
- The average spend for all visitors (passengers and crew) from overseas was \$114; a 2% increase on last year. Interstate visitor (passenger and crew) spend was \$129; a 42% increase or an extra \$37 on last season (was \$92).
- A minority of visitors spent little or nothing at all, while a few visitors spent large amounts, some over \$1,900. The median spend for all visitors was approximately \$76.

Cruise Ship Season	Australian	Overseas	Total Visitors	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

² Visitors to Tasmania are only counted once, even if they visited more than one port during their visit.

³ Expenditure is estimated for all visits to all ports during a visitor's trip.

Type of Expenditure	Passenger Spend		Crew Spend		Total Spend
	Average Spend Per Passenger	Passenger Spend ('000s)	Average Spend		Total ('000s)
			Per Crew Member*	Crew ('000s)	
Meals	\$15	\$1,005	\$16	\$77	\$1,082
Food	\$2	\$152	\$13	\$12	\$164
Organised Tours	\$43	\$2,873	\$5	\$219	\$3,092
Entertainment	\$1	\$59	\$2	\$4	\$63
Shopping	\$57	\$3,813	\$54	\$291	\$4,104
Transport	\$8	\$509	\$1	\$39	\$548
Other	\$6	\$403	\$14	\$31	\$434
TOTAL	\$132	\$8,813	\$105	\$673	\$9,486

1. These figures only include spending on shore by the visitors themselves. It does not include provisioning, fuel, port charges or other charges incurred by the owners of the vessels. Includes organised tours, mainly coach tours, these can be paid for on the day or on board the ship before it arrives in port. Some visitors pay for organised tours when the whole cruise is initially booked.
 2. Variation in the individual totals is due to rounding.
 3. 'Other' includes food to take home or on board (incl. alcohol), entertainment, and spending on other items.
- * Per crew member who came ashore

Month of visit

- In the 2009-10 season, over 66% of total cruise ship visitors arrived during December, January and February (Table 4).

Month of Visit	Number of Vessels	Number of Visitors	% Total
November	4	8,300	10%
December	8	20,400	26%
January	6	12,100	15%
February	8	20,200	25%
March	9	18,600	23%
Total	35	79,600	100%

Origin of passengers and crew

- 64% of cruise ship visitors that came to Tasmania in the 2009-10 season were from overseas, while the remainder, or 36%, were from interstate.
- 30% of overseas visitors were from USA, followed by 8% from the UK and 6% from Canada.
- 15% of interstate visitors were from NSW, followed by 6% from QLD, 6% from SA, 5% from Victoria and 3% from WA (Table 5).

Country/State	Burnie		% Burnie		Hobart		% Hobart		Total	% Total
	Crew	Passengers	Crew	Passengers	Crew	Passengers	Crew	Passengers		
USA	490	7,520	7%	26%	590	15,330	10%	40%	23,930	30%
United Kingdom (inc Ireland)	400	2,770	6%	10%	400	2,970	6%	8%	6,530	8%
Other Overseas	1,380	1,090	21%	4%	2,370	1,380	39%	4%	6,230	8%
Canada	400	1,290	6%	4%	400	2,870	6%	8%	4,940	6%
Philippines	2,470	-	37%	-	1,090	-	18%	-	3,560	4%
NZ	-	590	-	-	100	1,480	2%	4%	2,180	3%
India	590	-	9%	-	890	100	15%	-	1,580	2%
Germany	200	990	3%	3%	-	200	-	1%	1,380	2%
Indonesia	690	100	10%	-	100	-	2%	-	890	1%
Total Overseas	6,630	14,340	99%	47%	5,930	24,330	97%	64%	51,220	64%
NSW	100	6,330	1%	22%	100	5,140	2%	14%	11,670	15%
QLD	-	1,190	-	4%	-	3,660	-	10%	4,850	6%
SA	-	2,080	-	7%	-	2,370	-	6%	4,450	6%
VIC	-	3,070	-	11%	100	1,090	2%	3%	4,250	5%
WA	-	1,580	-	5%	-	790	-	2%	2,370	3%
NT	-	200	-	1%	-	200	-	1%	400	0%
TAS	-	100	-	0%	-	200	-	-	300	0%
ACT	-	-	-	-	-	100	-	-	100	0%
Total Interstate	100	14,540	1%	50%	200	13,550	3%	35%	28,380	36%
Grand Total	6,720	28,870			6,130	37,870			79,600	

Activities undertaken in Tasmania

- The most popular activities undertaken in Tasmania by cruise ship visitors during the 2009-10 season were to visit a historic site/attraction (30% of all visitors) and to visit a craft shop (22% of all visitors).
- 13% of all cruise ship visitors purchased Tasmanian arts and craft; while 16% of all visitors experienced wildlife in a park/zoo (Table 6).

Activities	Passengers	Crew	Total
Buy Tasmanian art/craft	15%	2%	13%
Visit craft shops	25%	6%	22%
Visit historic sites/attractions	35%	4%	30%
Browse at the markets	17%	17%	17%
Visit galleries	15%	2%	13%
Visit museums	17%	1%	14%
Visit local food producer	16%	7%	15%
Tour by taxi or hire car	9%	1%	8%
View wildlife IN a wildlife park/zoo	19%	4%	16%
View wildlife NOT IN a wildlife park/zoo	6%	1%	5%

Organised tours

- 42% of cruise ship passengers went on an organised tour during their visit to Tasmania. Of the passengers that went on an organised tour:
 - 34% booked before they commenced their cruise
 - 36% booked while on board your ship
 - 9% booked after they got off the ship
 - 2% booked direct with a local tour operator
 - 19% booked through the Visitor Information Centre
- 76% of organised tours taken were a half day in duration, 24% were full day duration.

Ports Visited⁴

- The data below includes all vessels and visits to each port in Tasmania, for the overall purpose of this report these passengers and crew were only counted once (Table 7).
- Hobart received the greatest number of cruise ship visits in the 2009-10 season with 28 visits. This was followed by Burnie with 18 visits.

Ports Visited	Number of Visits	Total Passengers	Total Crew	Total Visitors
BURNIE	18	27,700	12,200	39,900
COLES BAY	3	3,700	1,500	5,200
HOBART	28	43,500	19,500	63,000
PORT ARTHUR	5	6,300	2,600	8,900
WINEGLASS BAY	1	100	100	200

Survey methodology

This report relies on the following definition:

- Visitor = all passengers and crew
- Passengers = non crew or paying passengers/ traveller
- Crew = staff and crew of the cruise-line.

This report is based on data collected from passengers and crew who participated in the 2009-10 Cruise Ship Survey conducted by Tourism Tasmania.

Twenty three of the 35 cruise ships in scope were surveyed. Information from similar ships was used as a guide to estimate data calculations for the cruise ships not surveyed. Some cruise ships visited more than one port during a single visit to Tasmania; these ships were surveyed at the final port visited prior to departing Tasmania.

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 and crew.

⁴ Some vessels visited more than one port during a single visit to Tasmania.

TasPorts were not able to provide actual passenger and crew numbers for 9 vessels to the port of Burnie. For 6 of these vessels known proxy data was used from the same vessel on a different date in the 2009-10 cruise season. For the other three vessels expected passenger numbers provided by the shipping agent were used for the vessel on the actual date.

Not all crew disembark while their vessel is in port. Therefore, crew who stay aboard ship were not captured by this survey. As such, total crew spend was adjusted to account for the large proportion (estimated to be 50%) of crew who stayed aboard. Thus, the total spend by crew was estimated to be the weighted spend of the crew surveyed x 0.5.

Data was collected by face to face interviews conducted on-shore, close to where the ships tie up to the docks. 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.

Visitors often estimated expenditure in \$US, £UK or other currency and expenditure estimates were re-calculated to Australian dollars using the currency exchange rates at the date of interview. Visitors often estimated expenditure for their whole travel party. All expenditure estimates were later re-calculated to a per-person estimate.

The expenditure figures only include spending on shore by the visitors themselves. It does 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. It does include 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 whole cruise is initially booked these are not included in this report.

All Antarctic expedition/touring vessels as well as vessels commencing a cruise in Tasmania were excluded from the 2009-10 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.

Visitors are only counted once even if they visited more than one port during their visit.

Where do 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.

Note

Figures in the text may vary from figures in the tables due to rounding.

For further information please contact:

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