

2010-11 Tasmanian Cruise Ship Survey

SUMMARY

- There were 60,600 cruise ship passengers and crew that visited Tasmania in the 2010-11 cruise ship season, a 24% decrease in visitor numbers compared with the 2009-10 season.
- Nineteen vessels visited the state for a total of 47 visits during the 2010-11 Tasmanian cruise ship season. This was one less vessel and a total of 8 fewer visits than in the 2009-10 cruise ship season.
- The estimated expenditure of cruise ship visitors was \$5.8 million, a 39% decrease on the expenditure estimate from the 2009-10 cruise ship season.

2010-11 TASMANIAN CRUISE SHIP SEASON

- This report relies on the following definitions:
 - Visitor = all passengers and crew
 - Passengers = non-crew or paying passengers/traveller
 - Crew = staff and crew of the cruise-line.
- The 2010-11 Tasmanian cruise ship season commenced in late September 2010 and finished mid-March 2011.
- According to numbers supplied by TasPorts approximately 68% of cruise ship visitors were passengers and 32% were crew members.
- Of the visitors surveyed by Tourism Tasmania, 66% were from overseas and 34% from interstate. Of those 33% were from the United States of America (USA) and 7% from the United Kingdom (including Ireland).

NUMBER OF SHIP VISITS¹

- During the 2010-11 Tasmanian cruise ship season 19 vessels visited the State for a total of 47 visits. This was one less vessel and a total of 8 fewer visits than in the 2009-10 cruise ship season.

NUMBER OF VISITORS²

- During the 2010-11 cruise ship season 60,600 cruise ship passengers and crew visited Tasmania, a decrease of 24% or 19,000 fewer visitors than the 2009-10 cruise ship season (Table 1).

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

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

Table 1. Total Visitor Numbers

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%
2010-2011	20,900	39,800	60,600	↓ -24%

Visitor expenditure³

- Total spend by cruise ship passengers and crew (who came ashore) in Tasmania during 2010-11 is estimated at \$5.8 million (was \$9.5 million in 2009-10). This represents a 39% decrease or \$3.7 million dollars less than the 2009-10 season (Table 2).
- The estimated average spend for all visitors - passengers and crew (who came ashore) was \$95, a 20% decrease or \$24 less than the 2009-10 season (Table 2).
- The average spend for all cruise passengers was \$102; a 23% decrease on last season (was \$132) (Table 3).
- The average spend for all crew who came ashore was \$123⁴; a 17% increase on last season (was \$105) (Table 3).
- The average spend for all visitors (passengers and crew) from overseas was \$91; a 20% decrease on last year. Interstate visitor (passenger and crew) spend was \$103; a 20% decrease on last season.
- A minority of visitors spent little or nothing at all, while a few visitors spent large amounts, with the largest total spend reported as over \$5,400. The median spend for all visitors was approximately \$60.

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

⁴ Averaged expenditure for all crew is \$61 although as only 50% of crew have shore leave the average expenditure is weighted to \$123 average expenditure per crew member.

Table 2. Total Visitor Expenditure (\$million)

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
2010-2011	\$2.2	\$3.6	\$5.8	\$95

Table 3. Expenditure in Tasmania 2010/2011

Type of Expenditure	Average Spend Per Passenger	Passenger Spend ('000s)	Average Spend Per Crew Member*	Crew Spend ('000s)	Total Spend('000s)
Meals	\$14	\$686	\$28	\$81	\$767
Food	\$1	\$64	\$7	\$8	\$72
Organised Tours	\$43	\$2,172	\$2	\$258	\$2,430
Entertainment	\$1	\$34	\$0	\$4	\$38
Shopping	\$37	\$1,881	\$76	\$223	\$2,104
Transport	\$4	\$208	\$1	\$25	\$233
Other	\$2	\$115	\$9	\$14	\$129
TOTAL	\$102	\$5,160	\$123	\$612	\$5,772

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 2010-11 season, 57% of all cruise ship visitors arrived during the summer months December, January and February (Table 4).

Table 4. Month of Visit

Month of Visit	Number of Vessels	Number of Visitors	% Total
September	1	2,700	3%
November	8	13,800	16%
December	11	17,300	21%
January	7	13,900	17%
February	12	16,600	20%
March	8	19,700	23%
Total	47		

ORIGIN OF PASSENGERS AND CREW

- Of the visitors surveyed by Tourism Tasmania, 66% were from overseas and 34% from interstate.
- Of those visitors, 33% were from the United States of America (USA) and 7% from the United Kingdom (including Ireland).
- 12% of visitors were from NSW, followed by 10% from Victoria, Queensland 6%, Western Australia 3%, South Australia 2% and ACT 1% (Table 5).

Table 5. Origin of Visitors

	Burnie	% Burnie	Burnie	Burnie	Hobart	Hobart	Hobart	Hobart		
Country/State	Crew	Crew	Passengers	% Passengers	Crew	% Crew	Passengers	% Passengers	Total	% Total
U.S.A.	370	8%	6870	29%	560	10%	12320	45%	20,130	33%
United Kingdom (inc Ireland)	370	8%	1050	4%	560	10%	2540	9%	4,520	7%
Other Overseas	2,290	52%	1240	5%	2,420	43%	1180	4%	7,120	12%
Canada	120	3%	1420	6%	120	2%	1300	5%	2,970	5%
Philippines	870	20%	-	-	1,300	23%	-	-	2,230	4%
Germany	-	-	870	4%	-	-	680	3%	1,610	3%
N.Z	-	-	370	2%	-	-	500	2%	930	2%
China	-	-	-	-	-	-	-	-	250	0%
Total Overseas	4,210	96%	11950	51%	5,020	90%	18580	68%	39,750	66%
N.S.W.	120	3%	4710	20%	370	7%	2040	8%	7,250	12%
QLD	-	-	2110	9%	-	-	1800	7%	3,900	6%
S.A.	-	-	310	1%	-	-	990	4%	1,360	2%
VIC	-	-	3410	15%	-	-	2720	10%	6,190	10%
WA	-	-	870	4%	120	2%	620	2%	1,610	3%
N.T.	-	-	-	-	-	-	-	-	-	-
TAS	-	-	-	-	-	-	120	-	120	-
ACT	-	-	120	1%	-	-	250	1%	370	1%
Total Interstate	190	4%	11520	49%	560	10%	8610	32%	20,870	34%
Grand Total	4,400		23470		5,570		27180		60,620	

ACTIVITIES UNDERTAKEN IN TASMANIA

- The most popular activities undertaken in Tasmania by cruise ship visitors during the 2010-11 season were visiting a historic site/attraction and visiting a craft shop (both 20% of all visitors).
- 11% of all cruise ship visitors purchased Tasmanian arts and craft; while 17% of all visitors viewed wildlife in a park/zoo (Table 6).

Table 6. Total Visitor Numbers

Activities	Passengers	Crew	Total
Buy Tasmanian art/craft	12%	3%	11%
Visit craft shops	23%	5%	20%
Visit historic sites/attractions	22%	5%	20%
Browse at the markets	10%	3%	8%
Visit galleries	13%	4%	12%
Visit museums	16%	3%	14%
Visit local food producer	16%	9%	14%
Tour by taxi or hire car	5%	1%	4%
View wildlife IN a wildlife park/zoo	20%	3%	17%
View wildlife NOT IN a wildlife park/zoo	5%	1%	4%

Organised tours

- 45% of cruise ship passengers went on an organised tour during their visit to Tasmania. Of the passengers that went on an organised tour:
 - 36% booked before they commenced their cruise
 - 33% booked while on board
 - 8% booked after they got off the ship
 - 4% booked direct with a local tour operator
 - 18% booked through the Visitor Information Centre.
- 74% of organised tours taken were a half-day in duration, 26% were full-day duration.

Ports Visited⁵

- 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 2010-11 season with 29 visits. This was followed by Burnie with 11 visits.

⁵ Some vessels visited more than one port during a single visit to Tasmania.

Table 7. Ports Visited

Ports Visited	Number of Visits	Total Passengers	Total Crew	Total Visitors
BURNIE	11	18,100	7300	25400
COLES BAY	2	3,500	1200	4800
HOBART	29	32,900	16100	49000
PORT ARTHUR	3	3,100	1400	4500
PORT HUON	1	100	100	200
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 2010-11 Cruise Ship Survey conducted by Tourism Tasmania.

Nineteen of the 47 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.

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 providing, 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 2010-11 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 with the exception of Table 4 Month of Visit and Table 7 Ports Visited.

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:

Research Unit, Tourism Tasmania, Email: statistics@tourism.tas.gov.au, Ph: (03) 6237 6436