

# Tasmanian Cruise Ship Results

## 2008-09

The 2008-09 Tasmanian cruise ship season commenced at the start of November 2008 and finished in early April 2009. During that time there were over 105,400 cruise ship passengers and crew who visited the state. This represents approximately 10% (102,400) of all visitors to the State (1,003,500) in the year ending March 2009. Approximately 70% of cruise ship visitors were passengers and 30% were crew members according to numbers supplied by TasPorts. Of the visitors surveyed 75% were from overseas of which 36% were from the USA and 12% from the United Kingdom (inc Ireland).

### Number of ship visits<sup>1</sup>

During the 2008-09 Tasmanian cruise ship season 21 vessels visited the State for a total of 66 visits being 4 more vessels and 16 more visits than the 2007-08 cruise ship season.

### Number of visitors<sup>2</sup>

During 2008-09 cruise ship season 105,400 cruise ship passengers and crew visited Tasmania, an increase of 27% or 22,400 more visitors than the 2007-08 cruise ship season.

Cruise Ship Season	Total Visitor Numbers			
	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%

<sup>1</sup> Some vessels visited more than one port during a single visit to Tasmania.

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

### Visitor expenditure<sup>3</sup>

Total spend by cruise ship passengers and crew (who came ashore) in Tasmania in 2008-09 was an estimated \$11.3 million. This represents a 27% increase or \$2.4 million dollars when compared to the 2007-08 Cruise ship season.

Cruise Ship Season	Total Visitor Expenditure (\$ millions)			Total Average Spend (per person)
	Australian	Overseas	Total Visitors	
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

The estimated average spend for all passengers was \$108 which is \$17 less than the 2007-08 season. The average spend for overseas visitors was \$112 (down from \$113 last year). Interstate visitors are spending less than overseas visitors at \$92 (down from \$131 last year). The average spend of crew who came ashore was \$102. A minority of visitors spent little or nothing at all, while a few visitors spent large amounts, sometimes over \$2,000. The median spend for all visitors was approximately \$70.

Table 3 Expenditure in Tasmania 2008/2009					
Type of Expenditure	Passenger Spend		Crew Spend		Total Spend
	Average Spend Per Passenger	Passenger Spend ('000s)	Average Spend Per Crew Member	Crew ('000s)	Total ('000s)
Meals	\$12	\$997	\$11	\$210	\$1,207
Food	\$3	\$238	\$2	\$50	\$288
Organised Tours	\$28	\$2,420	\$16	\$508	\$2,928
Entertainment	\$2	\$150	\$1	\$32	\$182
Shopping	\$54	\$4,665	\$65	\$980	\$5,645
Transport	\$5	\$423	\$3	\$89	\$512
Other	\$5	\$423	\$5	\$89	\$512
<b>TOTAL</b>	<b>\$108</b>	<b>\$9,317</b>	<b>\$102</b>	<b>\$1,958</b>	<b>\$11,275</b>

<sup>1</sup> 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.

<sup>2</sup> Variation in the individual totals is due to rounding.

<sup>3</sup> Other includes food to take home or on board (incl. alcohol), entertainment, and spending on other items.

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

NOTE: Not all cruise ships to Tasmania were surveyed in the 2008-09 cruise ship survey. See survey methodology for further information.

## Month of visit

In the 2008-09 season, 76% of total cruise ship visitors arrived during December, January and February.

Month of Visit	Number of vessels	Number of visitors	% Total
November	5	11,200	11%
December	10	20,200	21%
January	9	23,300	19%
February	17	34,100	36%
March	5	13,600	11%
April	1	3,000	2%
<b>Grand Total</b>	<b>47</b>	<b>105,400</b>	<b>100%</b>

## Origin of passengers and crew

In 2008-09 cruise ship season, 75% of cruise ship visitors were from overseas and 25% from interstate.

The highest number of passengers were from the USA (36%), the United Kingdom (including Ireland) (12%), NSW (9%) and QLD (8).

Country/State	Burnie Crew	% Burnie Crew	Burnie Passengers	% Burnie Passengers	Hobart Crew	% Hobart Crew	Hobart Passengers	% Hobart Passengers	Total	% Total
USA	900	9%	14,620	44%	320	4%	21,930	42%	37,770	36%
UK (inc Ireland)	1,220	12%	3,080	9%	960	11%	7,630	14%	12,890	12%
Other Overseas	1,800	18%	1,280	4%	2,500	28%	2,570	5%	8,140	8%
Canada	260	3%	2,950	9%	130	1%	3,270	6%	6,610	6%
Philippines	2,820	28%	-	-	3,400	38%	-	-	6,220	6%
NZ	130	1%	320	1%	130	1%	1,860	4%	2,440	2%
Indonesia	1,920	19%	-	-	260	3%	-	-	2,180	2%
Germany	130	1%	130	0%	130	1%	1,350	3%	1,730	2%
India	380	4%	-	-	900	10%	-	-	1,280	1%
<b>Total Overseas</b>	<b>9,560</b>	<b>94%</b>	<b>22,380</b>	<b>67%</b>	<b>8,720</b>	<b>97%</b>	<b>38,610</b>	<b>73%</b>	<b>79,270</b>	<b>75%</b>
NSW	380	4%	4,810	14%	190	2%	4,490	9%	9,880	9%
QLD	130	1%	2,570	8%	-	-	5,710	11%	8,400	8%
VIC	-	-	1,410	4%	-	-	1,480	3%	2,890	3%
WA	-	-	900	3%	60	1%	1,350	3%	2,310	2%
SA	130	1%	960	3%	-	-	710	1%	1,800	2%
TAS	-	-	190	1%	-	-	320	1%	510	0%
NT	-	-	190	1%	-	-	-	-	190	0%
ACT	-	-	130	0%	-	-	-	-	130	0%
<b>Total Interstate</b>	<b>640</b>	<b>6%</b>	<b>11,160</b>	<b>33%</b>	<b>260</b>	<b>3%</b>	<b>14,050</b>	<b>27%</b>	<b>26,100</b>	<b>25%</b>

## Activities undertaken in Tasmania

The most popular activities undertaken were visiting historic sites/attractions (35%) and visiting craft shops (22%). Twelve percent of cruise ship visitors purchased Tasmanian arts and craft; while a further 21% of all visitors experienced wildlife in a park/zoo.

Activities	Passengers	Crew	Total
Buy Tasmanian art/craft	12%	10%	11%
Visit craft shops	22%	19%	22%
Visit historic sites/attractions	35%	26%	33%
Browse at the markets	10%	8%	10%
Visit galleries	17%	11%	16%
Visit museums	17%	14%	17%
Visit local food producer	11%	7%	11%
Tour by taxi or hire car	6%	6%	6%
View wildlife IN a wildlife park/zoo	21%	18%	21%
View wildlife NOT IN a wildlife park/zoo	6%	5%	6%

## Organised tours

Forty-four percent of passengers went on an organised tour during their visit to Tasmania. Of the passengers that went on an organised tour 41% booked it before they commenced their cruise, 25% booked their tour while aboard ship and 22% made their bookings once ashore in Tasmania. The majority of organised tours (73%) taken were a half day in duration.

## Ports visited<sup>3</sup>

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.

Ports Visited	Number of Visits	Total Passengers	Total Crew	Total Visitors
Burnie	24	39,600	14,700	54,300
Coles Bay	2	3,700	1,500	5,200
Devonport	1	400	200	600
Hobart	35	52,100	24,900	77,000
King Island	1	100	100	200
Port Arthur	3	5,700	2,300	8,000

<sup>4</sup> Some vessels visited more than one port during a single visit to Tasmania.

## Survey method

This report is based on data collected from passengers and crew who participated in the 2008-09 Cruise Ship Survey conducted by Tourism Tasmania.

All cruise ship visits were surveyed, with the exception of 5, where information from similar ships was used as a guide to estimate data calculations for these visits, 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. These totals were used to “weight” the sampled interviews to the total number of passengers and crew.

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

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  $\times 0.5$ .

Interviewing was conducted for a period of 3-4 hours, in the mid to late afternoon prior to the ships 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.

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

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 the cruise in Tasmania were excluded from the 2008-09 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.