

2023/2024

TASMANIAN CRUISE SHIP SURVEY



Aerial view of Hobart
© Events Tasmania and Alastair Bett

TASMANIA
COME DOWN FOR AIR





 Providore Place
Sunday Market, Devonport
© S. Group

The 2023-24 Tasmanian Cruise Ship Survey was conducted from November 2023 – March 2024. The aim of the project was to profile holiday makers that arrived by cruise ship to Hobart, Port Arthur and Burnie. This includes information on their origin, expenditure and activities while onshore, along with their overall experience, social media habits and likelihood of returning to Tasmania.

Overall, there were 143 port calls across the state last season, including Hobart (83), Burnie (33) and Port Arthur (19), along with a further eight calls in regional ports.

There were 352,156 passengers and crew visits during the season, with direct onshore passenger and crew expenditure growing to an estimated \$31 million.



Survey Approach

Cruise ship passengers and crew were interviewed after completing their onshore visits at Hobart, Port Arthur and Burnie.

In total, 1,538 passengers and crew were interviewed, from 32 selected cruise ships visiting Tasmania between November 2023 and March 2024. This included 1,417 passengers and 121 crew.

	Total	Burnie	Hobart	Port Arthur
Passengers	1417	163	940	314
Crew	121	19	86	16
	1538	182	1026	330

At each port, the cruise ship schedule was analysed for the cruise ship types. Ships were selected to provide a representative sample of total cruise ship visitation to Tasmania during the 2023–24 season.

The sample considered the ship profile, port visited (Hobart, Port Arthur and Burnie) and time of visit. Surveyed passenger numbers varied between ship type, including expedition (26 passengers), small luxury (280), economy mid-large (155), premium mid-large (802) and very large ships (275).



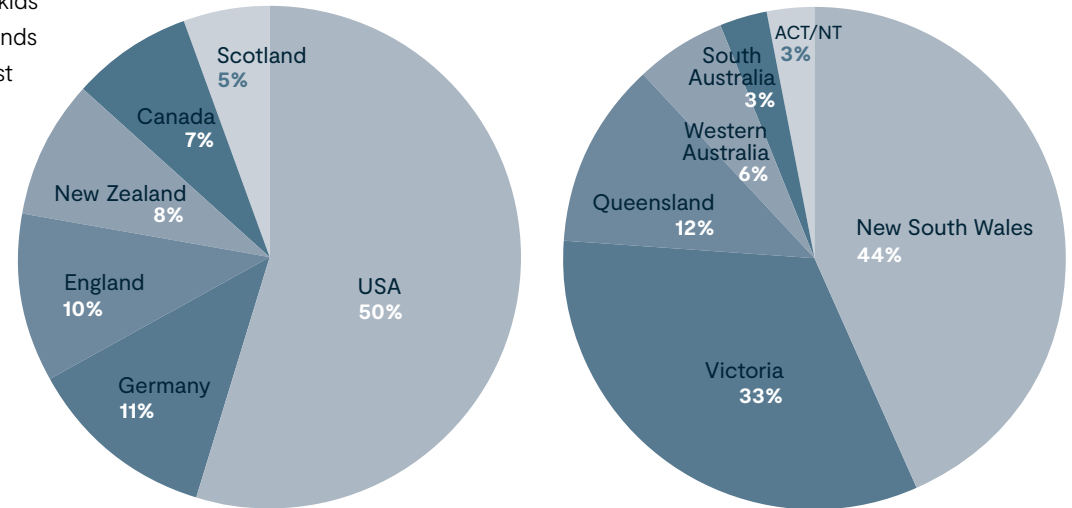
Port Arthur Historic Site © Dearnna Bond

Findings

Demographic

- Passengers were more likely to be female (60%).
- Approximately 38 per cent of all passengers were aged 65 and over and 53 per cent were aged between 35 and 64 years.
- More than 70 per cent of all passengers were Australian visitors, with most coming from New South Wales (44%) and Victoria (33%). Of the remaining international visitors, exactly half (50%) of came from the USA (see chart on the right).
- While Hobart and Port Arthur followed these trends, Burnie welcomed more overseas passengers (see table below).
- More than three quarters (76%) travelled without kids as a couple, or with friends or family. While the most common travel party size was two people (55%), the average party was four people.

Most popular country and Australian state of origin:



	Total passengers (%)	Burnie (%)	Hobart (%)	Port Arthur (%)
Australian passenger	71	44	81	72
Overseas passengers	29	56	19	28

Onshore spending

- On-shore expenditure by passengers and crew is estimated at \$30.97 Million across the whole season
 - this includes \$26.59M from passengers and \$4.38M from crew.
- Total average individual spend per passenger was \$130.55 and per crew was \$105.02

	Food and drink	Organised tours	Entertainment/ attractions	Shopping	Transport	Accommodation	Other items	Total average spend (pp)
% of passengers who spent	69%	37%	11%	61%	19%	0.3%	3%	-
% of crew who spent	65%	10%	5%	59%	9%	-	1%	-
Average spend per passenger*	\$33.23	\$111.51	\$36.28	\$66.20	\$46.33	\$177.50	\$42.86	\$130.87**
Average spend per crew*	\$42.59	\$108.71	\$46.89	\$73.40	\$35.81	-	\$135.00	\$109.91**
Total spend passengers and crew	\$6.5M	\$9.7M	\$988,541	\$11.2M	\$2.1M	\$138,167	\$312,058	\$30.97M

	Total average spend (pp)
Average spend per passenger – Hobart	\$139.93
Average spend per passenger – Port Arthur	\$101.39
Average spend per passenger – Burnie	\$116.53
Average spend per passenger – domestic	\$127.64
Average spend per passenger – international	\$136.38

*Average calculated only among those reporting any spend per item

** Total average per person spent across all items, and all passengers/crew including those who spent \$0

Burnie © Oscar Sloane



Tours and activities

- Approximately 41 per cent of passengers participated in an onshore organised tour while in port, with passengers in Hobart (47%) and those on small luxury ships (68%) most likely to go on tours than other ports or ship types.

Participated in organised tour	% of Total Passengers	% at Hobart	% at Port Arthur	% at Burnie
Yes	41	47	30	26
No	59	53	70	74

TOUR PURCHASED THROUGH	%
Independent walk-up on the day	38
Cruise company prior to departure	26
Independent internet booking	15
Cruise company while on board	13
In the MAC 2 Cruise Terminal	5

PASSENGERS TAKING TOURS BY SHIP CATEGORY	%
Expedition	38
Small luxury	68
Economy mid large	45
Premium mid large	34
Very large	41

Salamanca Market © Tourism Australia



- Of those who participated in an organised tour ashore, the most popular tour destinations for each port were:

BURNIE	%
Wildlife Park	29
Northern coast (Stanley)	10
Hop on hop off bus tour	5
Tasting tour	5
Cradle Mountain	4

HOBART	%
Hop on hop off bus tour	35
kunanyi / Mt Wellington	20
Richmond	19
Hobart City Tour	15
Bonorong Wildlife Park	14

PORT ARTHUR	%
Behind the scenes at Port Arthur	35
Lavender Park	28
Region/ geological features	25
Wine/whiskey tour	11
Tasman Island Cruise	11

Drift Cafe Restaurant S. Group



- Almost three quarters (73%) of all passengers went sightseeing on foot, while 58 per cent said they dined at local cafes or restaurants. The main type of activities undertaken onshore by cruise ship passengers were:

ACTIVITY	%
Sight-seeing on foot	73
Dining at a local restaurant or cafe	58
Visiting a historic site or attraction	46
Shopping in the city centre or town	46
Shopping for other items or supplies	40
Buying Tasmanian arts or crafts	27

NAVIGATED BY	%
Mobile device	40
City signage	24
Local assistance	21
Map supplied at terminal or wharf	21
Map supplied on shuttle bus	21
Local visitor information centre	20

Bonorong Wildlife Sanctuary
© Rob Burnett



Port Arthur Lavender
© Tourism Australia



Crater Lake, Cradle Mountain
© Jason Charles Hill



Visitor Experience

- More than half (52%) of passengers and crew were visiting Tasmania for the first time. Of those that had visited the state before, 53 per cent had done so 2–5 times.
- 21 per cent said that visiting Tasmania was the most important reason for booking the cruise, 43 per cent cited the cruise ship or the cruise line as the reason.

REASON FOR BOOKING CRUISE

	%
Cruise ship or cruise line	43
Visiting Tasmania	21
Visiting other Australian states	12
Good deal/cruise price	9
In the MAC 2 Cruise Terminal	5

- The overall shore-based experience rated highly at each port for both passengers and crew, with all respondents rating their experience above 95 per cent positive.
- The most common areas of satisfaction across each port were local friendliness, volunteer help, tours and attractions.

Likelihood of return visit

- Despite 79 per cent of passengers saying visiting Tasmanian was not the most important reason to book their cruise, on average more than two thirds (70%) of all surveyed passengers across the Hobart, Port Arthur and Burnie ports plan to return to Tasmania at some point in the future (see table below).
- Of those passengers who expect to return to Tasmania, on average, 35 per cent said they would visit again within 12 months. Additionally, on average 65 per cent indicated they would return in more than a year's time.

Hobart passengers	Likely/very likely (%)	When (%)
Return to Hobart/other parts of Tasmania	82	Next 12 months: 27
		More than a year: 73

Port Arthur passengers	Likely/very likely (%)	When (%)
Return to Port Arthur/other parts of Tasmania	67	Next 12 months: 29
		More than a year: 71

Burnie passengers	Likely/very likely (%)	When (%)
Return to Burnie/other parts of Tasmania	62	Next 12 months: 48
		More than a year: 52

Visitor nights

- Most international (61%) and Australian (81%) passengers 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 5.2 nights, with NSW/ACT the most popular location at 65 per cent, followed by Victoria (27%) and Queensland (13%). Eight per cent spent extra nights in Tasmania.

EXTRA NIGHT LOCATIONS	%
NSW/ACT	65
Victoria	27
Queensland	13
South Australia	9
Tasmania	8
Western Australia	4
Northern Territory	2

Survey Methodology

The survey was conducted by Roy Morgan Research for Tourism Tasmania from November 2023 to March 2024.

The research for the 2023–24 cruise ship season was designed to provide timely, relevant, and statistically robust feedback from cruise ship passengers and crew relating to their onshore experience, activities, spend and likelihood to return to Tasmania.

Prior to surveying, TasPorts provided a list of all the expected port calls being made during the cruise season. These were categorised into ship types and sizes (expedition, small luxury, economy mid-large, premium mid-large and very large).

Cruise ships were selected for the survey to provide a representative sample of the total cruise ship visits booked to Tasmania (155 ships) during the 2023–24 cruise season. Some ships were unable to visit for various reasons, including weather so the total number actual port calls was 143 by the end of the season – 135 of these took place in Hobart, Burnie or Port Arthur.

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

A proportional number of ships were surveyed to be representative of the total number of that ship type calling for each port (see table to the right). The proportional number was based on the need to achieve a statistically robust sample of passengers and crew for each ship type and for each port.

SURVEYED SHIPS BY TYPE	PASSENGERS SURVEYED
Expedition	26
Small luxury	280
Economy mid-large	155
Premium mid-large	802
Very large	275

Different boarding and interviewing circumstances meant that intercepting passengers was easier in some ports than others. For example, Hobart was boarded through a market place within the cruise terminal, which allowed for an environment where passengers were happy to stop and talk.

In Burnie, the placement of interviewers at the wharf meant that passengers were generally coming straight off the shuttle bus from town and were keen to board the ship straight away, which reduced the number of successful approaches leading to a full survey. The achieved sample size was robust for all ports, and for all ship types except for expedition ships (n=26), which had the smallest passenger capacity and making the fewest boardings from Tasmanian ports.

The project drew from learnings from the Tasmanian Visitor Survey, with the questionnaire modelled on the National Cruise Survey framework. It retained key questions from the national cruise survey questionnaire and previous cruise studies undertaken by Tourism Tasmania.

While 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 Myriad Research for Tourism Tasmania in 2016–17.

Total actual passenger and crew numbers were obtained from TasPorts at the end of the season. 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. However, a nationally accepted formula has been applied to passenger and crew spend calculations as applied by Australian Cruise Association and Cruise Line International Association in their 2023–24 Economic Impact Assessment of Cruise Tourism in Australia.

Visitor numbers quoted represent all passengers and crew that arrived on each ship at each port. Spend has been adjusted to 95 per cent of passengers and 45 per cent of crew disembarkation in Hobart and Burnie as alongside transit ports, and 85 per cent of passengers and 10 per cent of crew in Port Arthur as a tender-based transit port. Therefore, total expenditure is based on estimated total number of passengers going ashore.

The expenditure estimates only include spending on shore by the passengers and crew 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. Therefore, it is likely tour expenditure is an underestimate of the actual tour expenditure. Expenditure estimates do not include providing, fuel, port charges, shipping services, provisioning 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: statistics@tourism.tas.gov.au

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