

Cruising Defined¹

Cruising can be interpreted in many different ways and can include many different types of vessels. The notion of cruising is best explained by reference to the definition of a cruise ship: a vessel undertaking scheduled, deep water cruises of two days or more with a passenger capacity of 100 persons or more.



Project Objective

Tourism Queensland commissioned the Cruise Ship Passenger Research in 2003. The primary objective of the research was to construct a profile of the 'general' cruise ship passenger visiting Brisbane. The research sought to provide an understanding of past cruise history, details of travel before and after the current cruise, and activities, expenditure and opinions of Brisbane.

Methodology

In January and February 2003 face-to-face interviews were undertaken with 286 passengers of three cruise ships that docked in Brisbane. Passengers were approached as they returned to the ship from tours and day trips, between the hours of approximately 11.00am and 5.00pm (or until the ship departed).

For each ship, broad quotas were placed on gender and whether passengers had been on a tour organised by the ship, to ensure that the mix of people interviewed reflected the actual mix onboard each ship. Results have been weighted to reflect the actual number of passengers onboard each ship and the proportion of those who participated in a tour organised by the ship.

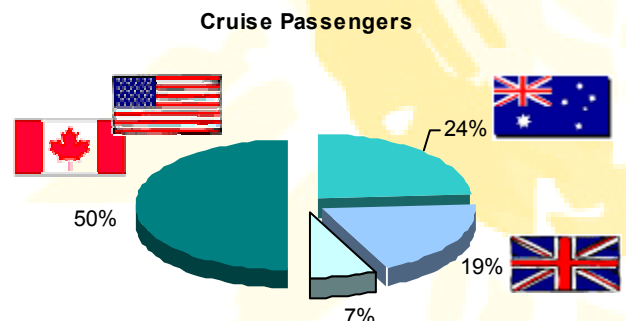
Profile of Cruise Ship Passengers

A consistent passenger profile was evident across the three cruise ships, with the majority of passengers being retired couples aged 55 years or older. In general, the cruise ships contained equal proportions of males (47%) and females (53%).

Eighty-nine percent (89%) of passengers were aged 55 years or more. Approximately half (54%) of passengers were retired couples, with a further 18% retired singles and 16% older working couples. One-third (34%) of cruise passengers had an annual average household income of more than AUD\$120,000.

Half (50%) of cruise passengers were from North America, while one-quarter (24%) were from Australia. A further 19% were from the United Kingdom while 7% originated in other countries including Europe, Asia and New Zealand.

FIGURE 1 – CRUISE PASSENGER ORIGIN



Cruising History

For many passengers, a cruise is not a once in a lifetime activity. Ninety percent (90%) of passengers had been on more than one cruise, with 61% have been on five or more cruises.

Australian Cruising Destinations

While most passengers had been on a number of cruises, this was the first time many of them have cruised to Australia (74% of international cruise passengers). Within Australia, Sydney (94%) was the most commonly visited cruise destination, followed by Melbourne (35%), Hobart (25%) and Cairns (22%).

International Cruising Destinations

Cruise passengers had visited a broad range of international destinations, with the Caribbean (57%) and Mediterranean (53%) the most commonly visited. Other popular destinations included New Zealand (43%), the Pacific Islands (40%) and the United States of America's West Coast (39%).

Current Cruise

Travel in Australia

One quarter (25%) of passengers travelled Australia prior to boarding their current cruise, while 15% planned to travel after the cruise. Sydney was the most popular pre-cruise destination (visited by 78% of cruise passengers), followed by Melbourne (16%).

Following their current cruise, 15% of passengers intended to undertake further travel in Australia. Darwin was the most popular post-cruise location amongst these passengers (visited by 43% of cruise passengers who intended to undertake further travel), with Queensland (excluding Brisbane) being the second most popular (24%). Other popular Australian destinations were the Northern Territory (excluding Darwin, 20%), Adelaide (19%) and Uluru/Ayers Rock (18%).

The opportunity to see new destinations (and Australia specifically) was a key driver for choice of cruise ship. Previous experience with the cruise line, its reputation and recommendations were also influential in choice of ship.

FIGURE 2 – AUSTRALIAN CRUISING DESTINATIONS VISITED

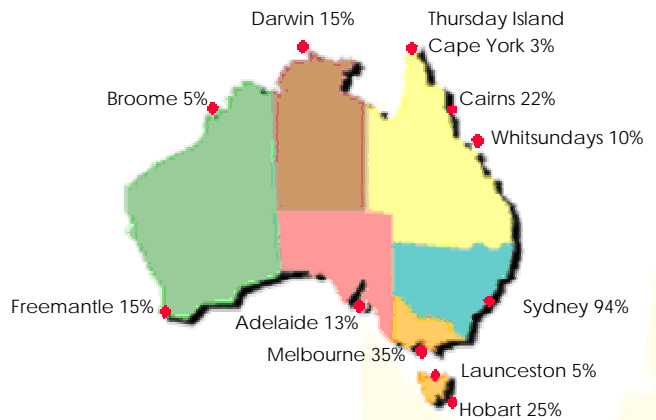
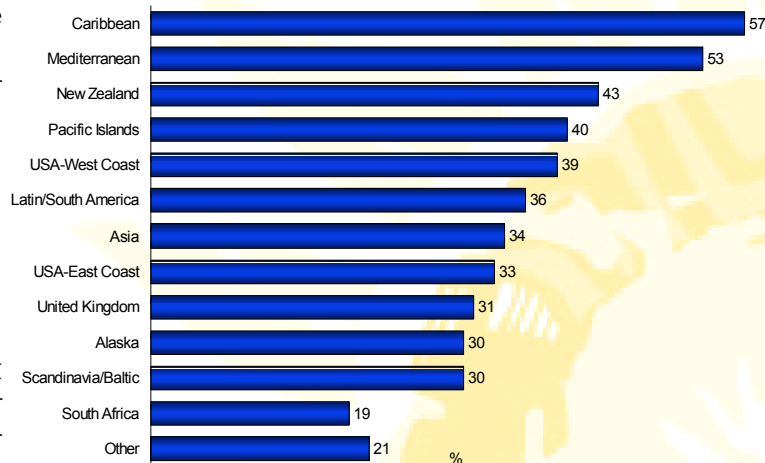


FIGURE 3 – INTERNATIONAL CRUISING DESTINATIONS VISITED



Length of Stay in Australia

Nineteen percent (19%) of passengers indicated staying in Australia for up to one week, 37% indicated a one to two week stay, 28% indicated two to three weeks and 14% indicated more than three weeks.

The majority (89%) of cruise ship passengers stayed in Queensland for one week or less.

Travel Party

Two-thirds (67%) of cruise passengers travelled as a couple, while 13% travel alone and 11% travel with friends or relatives (without children).

Brisbane Activities

Half (53%) of passengers participated in a Brisbane tour organised by the ship. The City Highlights bus tour and Lone Pine Sanctuary were popular tours (respectively participated in by 34% and 19% of passengers). Other popular Brisbane activities included shopping (37%), dining (20%) and visiting the market stalls at the wharf (21%).

Expenditure

Overall, cruise ship passengers spent an average of \$81 per person during their stopover in Brisbane. Thirty-one percent (31%) of cruise passengers spent up to \$25, 28% spent between \$26 and \$100 and 24% spent over \$100.

Food, shopping and souvenirs are the main items purchased in Brisbane. One quarter (26%) of passengers purchased goods from the market stalls, including souvenirs, clothing and accessories.

Satisfaction

Overall, 93% of cruise passengers were satisfied with their Brisbane stopover.

Passenger satisfaction of Brisbane was measured on a five-point scale where one equalled very dissatisfied and five equalled very satisfied.

Brisbane's average rating for *ease of finding way around, retail and shopping options, range of food and dining options and range of tours and attractions* were all rated high.

FIGURE 4 – TOTAL DAYS IN AUSTRALIA

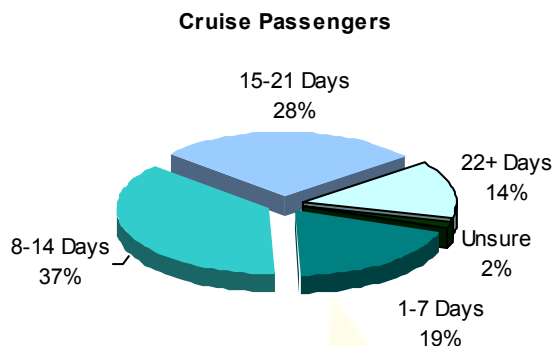


TABLE 1 – SATISFACTION WITH BRISBANE

Feature	Average Rating
Ease of finding way around Brisbane	4.38
Retail/shopping options in Brisbane	4.33
Range of food/dining options in Brisbane	4.18
Range tours/attractions in Brisbane	4.16
Info on things to see/do in Brisbane before arrival	4.14
Quality of welcome entertainment at wharf	4.00
Info on things to see/do in Brisbane at wharf	3.84
Number of wharf market stalls	3.76
Range of products at wharf market stalls	3.73
Overall satisfaction with Brisbane	4.55

(Scale: 1=Very Dissatisfied, 5=Very Satisfied)

Perceptions

Visitors view Brisbane very positively. It is seen to be a clean and attractive city, with the buildings, parks and river all mentioned as appealing aspects. The people of Brisbane were also seen to be an appealing aspect of the city.

Seeing native wildlife and visiting Mount Coot-tha were the most memorable experiences for visitors to Brisbane.

Queensland

Sixty percent (60%) of cruise passengers said they were likely to return to Queensland in the next five years. For those unlikely to return, reasons focus on passengers' age and distance from home, rather than anything negative about Queensland itself.

Meet and Greet Program

The 'Meet and Greet' program is generally viewed positively, although there is an indication that it should be promoted more both on and off the ships.

Further Information

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TABLE 2 – TOP 5 APPEALING FEATURES

Feature	Percent of Passengers
Clean/tidy City	31%
The people	22%
Architecture/buildings landscaping	18%
Attractive/beautiful/unique city	16%
Flora and Fauna/greenery/parks	14%

TABLE 3 – TOP 5 MEMORBLE FEATURES

Feature	Percent of Passengers
Kangaroos, koalas, wildlife	15%
Mt Coot-tha	10%
City overall – attractive, quiet	8%
The people	8%
Architecture/buildings	7%