



Destination Visitor Survey Strategic Regional Research – Western Australia: Evaluating the WA cruise visitor experience

Introduction

This study was commissioned by Tourism Research Australia (TRA) in partnership with Tourism Western Australia (Tourism WA) to gain a better understanding of cruise travel in Western Australia and passengers' experiences at ports and destinations in the region.

Cruise travel is an important contributor to the tourism industry in Western Australia with solid growth potential, despite only attracting a small proportion of the global and national cruises. Cruise travel meets Tourism WA's key objectives of distributing visitation and passenger expenditure into regional WA.

It is recognised that to grow the WA cruise industry and to increase WA's share of the cruise market, gaps in the product offering and services at ports and destinations need to be addressed and prioritised.

The objectives of this research were to:

- evaluate cruise passengers' decision-making processes and visitor experiences
- identify product gaps and opportunities for improvement at key ports in Western Australia
- Inform product development, marketing communications and improvements to the passenger experience.

Research approach

A face-to-face survey was conducted between February and April 2012 with 430 cruise passengers from 10 cruise ships at the following ports:

- Fremantle
- Broome
- Geraldton
- Bunbury.

Passengers were interviewed in each port town either as they returned to their ship or, in some cases, within the town as they toured around. Some ships stopped at more than one of the selected ports during their journey so care was taken to ensure a passenger was only interviewed at one destination for this survey.

Ships were selected based on passenger capacity, with the majority being mega ships (i.e. a capacity of 2,000 passengers or more). The sampled ships visited a range of international and domestic ports prior to docking at the selected WA port and, as a result, passengers appeared to draw on significant experience when evaluating the ports and destinations (discussed in further detail in the findings).



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Key findings

Passenger profile

- Mega cruise ship passengers typically lived outside of WA, travelled as a couple and were aged 60 years or over.
- The majority of cruise passengers (92%) were experienced in cruising, having taken at least one other cruise before, particularly international passengers (96%).
- International passengers were predominately from the USA (33%) and UK (30%).

Cruise decision making

- The inclusion of the specific WA destination had some impact on passengers' decisions to book the cruise, predominately those cruise ships visiting Broome.
- The main factor driving the decision to visit was the general appeal and 'always wanting to visit the destination'.
- Passengers seek information about port destinations at multiple times – once on shore, prior to, and (most commonly) during the cruise.
- Given the impact Broome has on itinerary selection, it is not surprising that Broome attracts the most interest pre-cruise (61%) compared to other WA ports (Fremantle, 31%; Bunbury, 46%; and Geraldton, 51%).
- Information sources used most frequently during planning activities for the day were the cruise operator (36%); travel book, guide or brochure (33%); or the cruise tour desk (32%).

WA port experiences and evaluation

- Overall, the performance of ports in catering to passengers' needs was consistent across WA ports, with performance rated as 'high' across all ports and Fremantle and Geraldton rated the highest.
- Personal safety and security was an important factor, however, other influential factors that can improve the overall experience for passengers are the signage, availability of information, and facilities at the port (i.e. seating, shopping/food/drink options).
- Based on feedback from respondents, Fremantle was the strongest performer on the majority of port features while Broome was the weakest on most aspects.
- Key areas for focus for all ports include improving the toilet facilities and providing a larger range of food and shopping options.

WA destination experiences and evaluation

- Fremantle and Bunbury both achieved very high ratings for the overall experience, while Broome's scores were more variable.
- Key areas for improvement suggested by respondents were consistent across destinations including extending or being more flexible with opening hours to accommodate ship docking, and increasing the tourism product generally (i.e. the number of things to see and do).
- The overall atmosphere of the town had the most influence on the destination rating.
- Specific factors of importance were access from the port to the city and product diversity (i.e. day tours, excursions and attractions available, range of shopping).
- The bigger cities of Bunbury and Fremantle performed consistently higher on destination features, while Broome performed lower on the majority of destination features, including general atmosphere of the town/city.
- Key areas of improvement suggested by respondents for all ports were access and availability of day tours, excursions and attractions, and providing a range of shopping and food and beverages.
- Just over 60% of passengers were interested in an Indigenous experience at each of the ports. These passengers tended to be more engaged and active while on shore, with the majority already having participated in organised tours or visiting a local attraction.

Passenger expenditure

- WA cruise passengers spent on average \$63 per stopover. Shopping was the highest driver of expenditure across all passengers. Passengers spent the least amount in Geraldton, likely driven by missed opportunity due to public holiday closures.
- Cruise passenger expenditure on organised tours was relatively low at \$17 per stopover and was influenced by a low take-up of organised tours (24% of all cruise passengers).

Conclusions and recommendations

Regional summaries

- **Broome** was the WA port that most influenced the selection of a cruise, which indicates a strong desire to see the town and area. However, the passenger experience at the port and destination was the lowest of all four ports. This suggests that investment in port services and facilities is important to improving the passenger experience as well as managing passenger expectations. Broome had the strongest potential to generate a return on investment with the highest passenger expenditure.
- **Fremantle** had less influence on the choice of a cruise and was the least researched by passengers, which suggests that passengers may be overlooking possibilities. Fremantle rated the highest in terms of passenger experience through having strong infrastructure and a range of passenger activities. A focus area for Fremantle is to reach more passengers prior to their arrival and to lift its profile as a destination with much to offer.
- Knowledge and awareness of **Geraldton** as a destination was low with the cruise passengers surveyed. To grow visits and passenger expenditure, there is scope for increasing Geraldton's profile by providing information both pre-cruise and during the cruise. Although port and destination performance was in line with the state average, it would be ideal to coordinate shop opening times with ship arrival or provide alternatives (e.g. markets, pop-up shops) on non-trading days (i.e. Sunday, public holidays).
- Similar to Geraldton, knowledge and awareness of **Bunbury** as a destination was low with the cruise passengers surveyed. There is scope for increasing Bunbury's profile by providing information both pre-cruise and during the cruise. As a destination, Bunbury performed well. However, transport links are a key area to address, as the high cost of the shuttle—and no alternative—was an area of dissatisfaction for some passengers.

State-wide recommendations

- Destinations need to recognise how cruise passengers access information to maximise the visibility of tourism product and to manage/build expectations. Key opportunities for promotion are:
 - Pre-cruise: Destination websites
 - During cruise: Cruise desks and in-cruise destination content
 - On shore: Visitor centre and travel guide
- Working with cruise operators to increase the amount of local content and product information available during the cruise is critical to increase destination profiles, particularly given the high usage of cruise operators and cruise desks as information sources and the captive audience available.
- Cruise passengers' low expenditure per stop and low participation in paid tours suggests there is room to increase passenger expenditure. Promotional materials that are more specific can be used before and during the cruise to drive awareness and booking of tours and attractions.
- Although improving port experiences and facilities is an important driver of visitor satisfaction, it is not a key driver of expenditure. To increase passenger expenditure, product and service delivery also needs to be improved and this can be achieved through information services (particularly during the cruise) and quality service delivery.
- To capitalise on the window of opportunity, destinations can better coordinate the retail offering with docking or provide specific offerings (e.g. markets, pop-up shops) given shopping is the highest driver of passenger expenditure.

- Businesses and operators should be encouraged to deliver high quality product and services, especially access to and availability of organised tours and improved shopping and food/beverage experiences. This will take advantage of the economic benefit that the cruise sector provides for local areas.
- Port infrastructure investment should consider critical areas of seating, shade and any possibility for retail and/or food/beverage offerings at the port.
- Any improvements, product development or promotion should consider the profile of the typical mega cruise passenger – over 60 years of age, from outside WA (UK and US) and very experienced cruisers.

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Image: Cruise ship in Bunbury Harbour

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