



Fáilte Ireland

Cruise ship passenger Expenditure Survey

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RESEARCH
& INSIGHT



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Research Methodology

Research Methodology

- Fieldwork for this study was conducted from 25th April – 24th May 2019.
- Survey data collection was ‘face-to-face’ interviewing via CAPI (Computer Aided Personal Interviewing).
- All interviews were administered at Dublin and Cork Ports as passengers and crew boarded the cruise ships.
- 1,142 respondents were interviewed in total.
- The total sample was split across Dublin and Cork Ports, Port calls and Turnarounds, Passengers and Crew (the sample size by cohort has been detailed overleaf).
- Respondent demographics were allowed to fall out naturally.



Research Methodology

- Weighting has been applied to the data on ship size (defined by number of passengers) to ensure that the data is representative of all cruise ships docked in port during the fieldwork period.
- Margin of error on a sample size of 1,142 is +/- 3.2% pts. For smaller sub samples the margin will be greater.
- Significance testing to 95% confidence has been applied to the data and is highlighted throughout the report. In tables, green highlighting = significantly higher result than total results, while red highlighting = significantly lower result than the total.





Visitor & Cruise Ship Profile

Sample Size

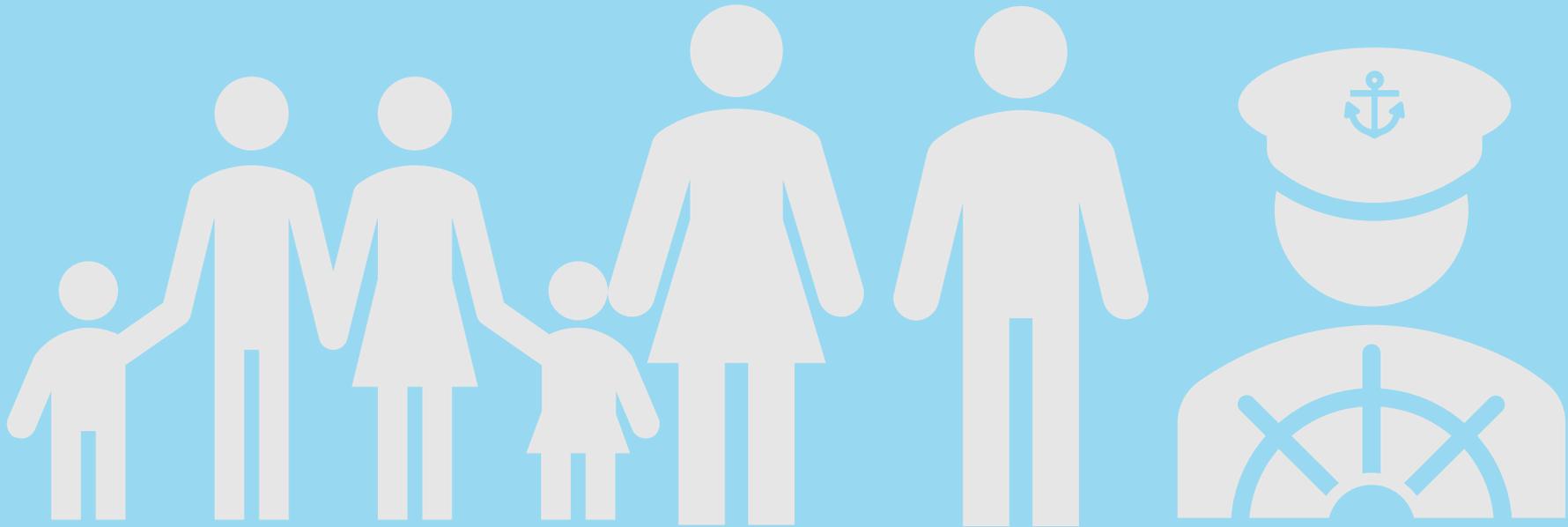
A total of 1,143 respondents were interviewed in total.

	Dublin	Cork	Total
Port calls	443	470	913
Turnaround	230	0	230
Passengers	623	452	1,075
Crew	50	18	68
Total	673	470	1,143



No turnaround cruise ships docked in Cork Port during the fieldwork period.

Profile of sample



92% of all survey respondents were passengers, while 8% were crew members.

Respondents over index on 65+ age group (51%), ABC1 (54%), retirees (59%) & from USA/Canada (53%).

They are also most likely to be travelling as a couple (73%).

74% were first time visitors to Ireland

Respondent profile was allowed to fall out naturally.

Profile of cruise ships

Ship size

Defined by number of PAX

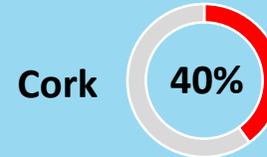


Time in port

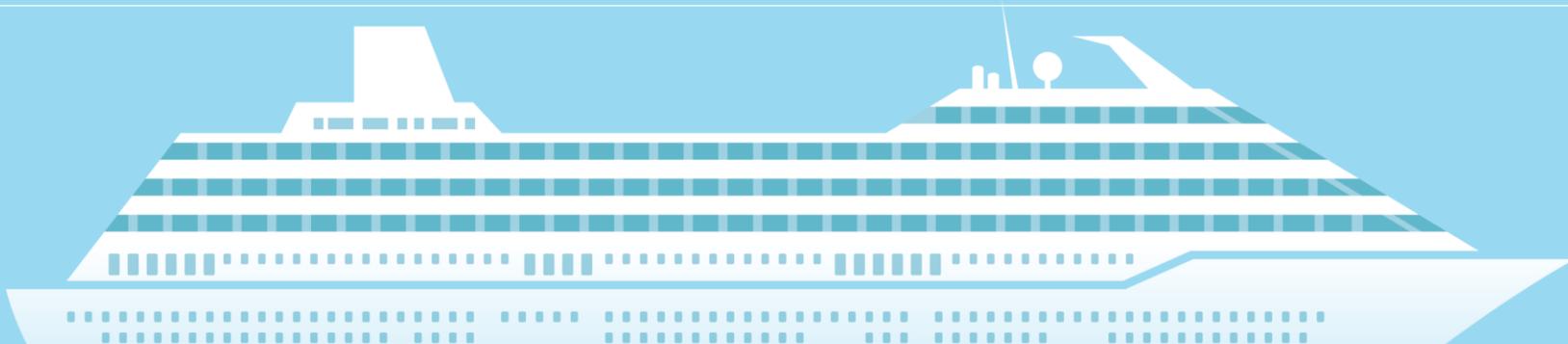


Bigger ships are more likely to dock for longer & dock in both Dublin & Cork

Location



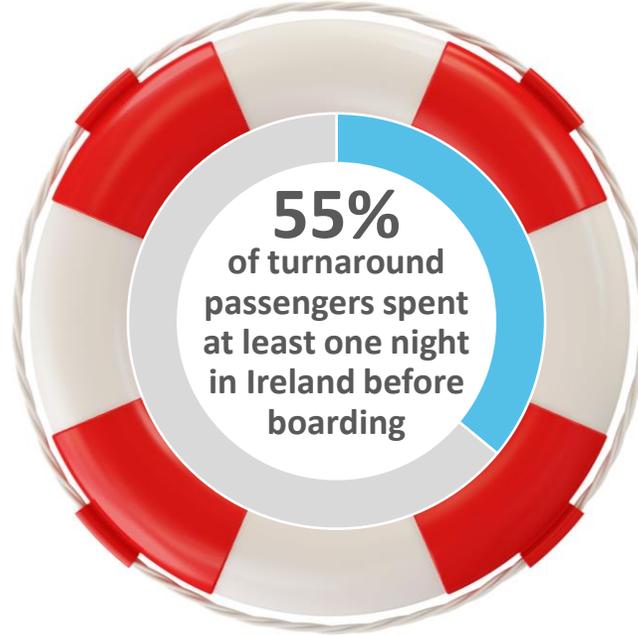
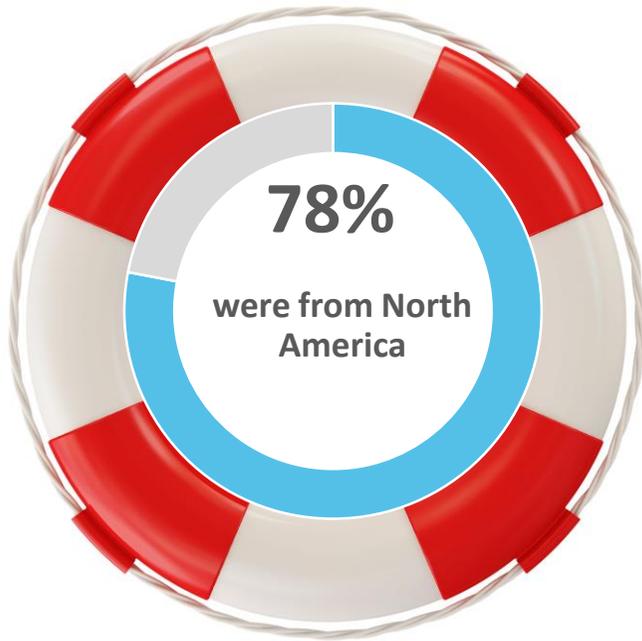
Percentage of turnaround boats (during fieldwork)



This profile is important as these characteristics strongly correlate with levels of expenditure

Turnaround passengers

Base: All turnaround passengers & crew n - 229

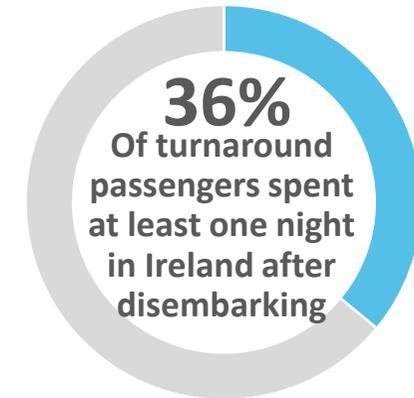
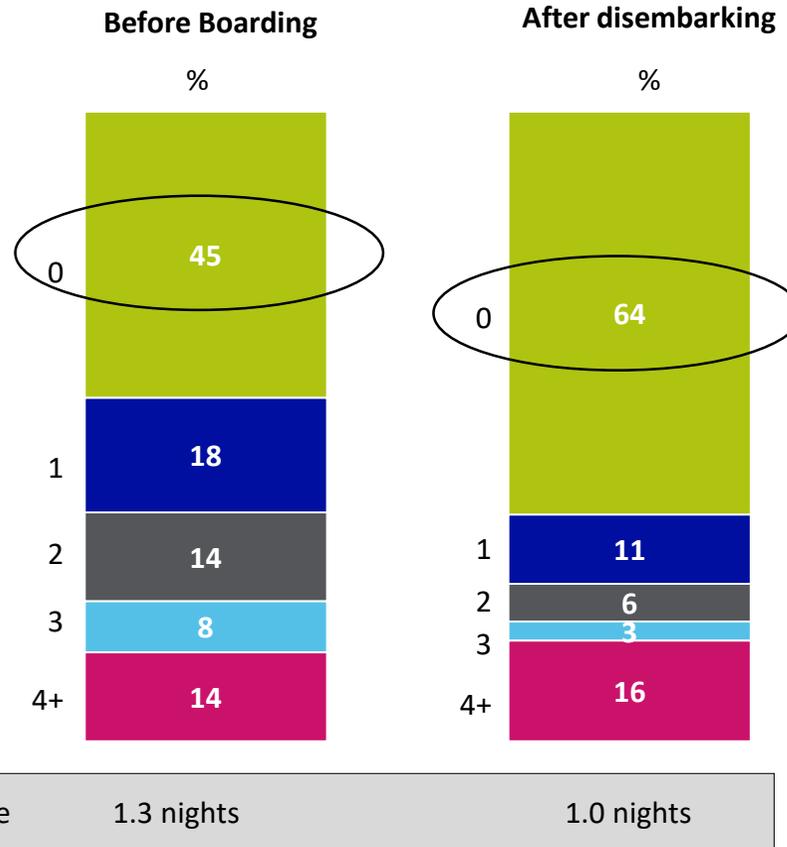
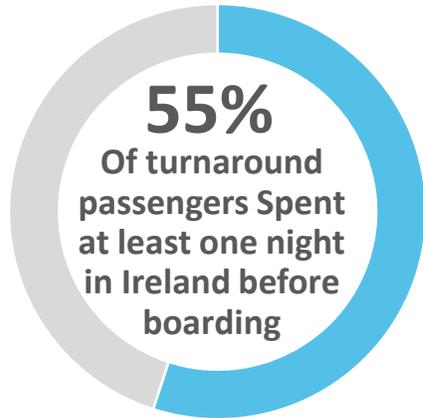


27% stayed both before & after
64% stayed either before or after

Turnaround passengers are a key cohort— as we'll see expenditure levels are higher for these visitors.

Number of nights spent in Ireland

Base: All turnaround passengers & crew n - 229



On average turnaround passengers spent one night in Ireland before boarding & one night in Ireland after disembarking the cruise ship.

Q.1bt How many nights did you spend in Ireland before boarding this cruise ship?

Q.1ct And how many nights do you plan to spend in Ireland when you disembark the Cruise ship at the end of your holiday - the total number of nights from the time you arrive back in port to the time you leave Ireland?

** Caution small base

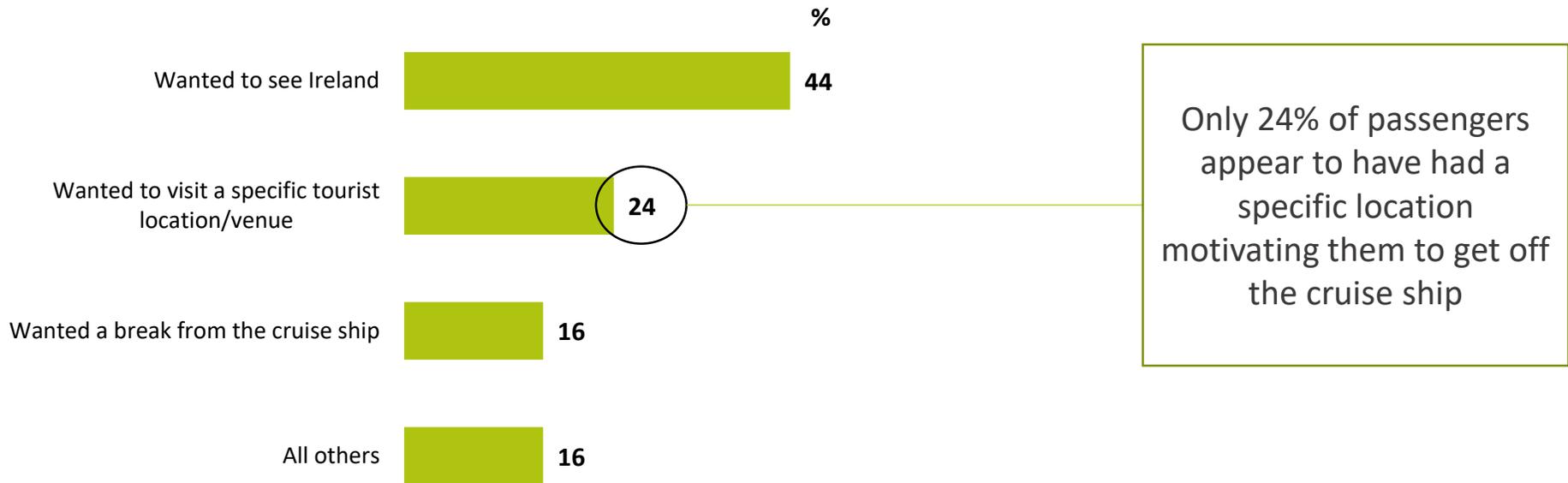




Motivations and satisfaction

Primary motivation for disembarking: Top 3 reasons

Base: All passengers & crew n – 1,142

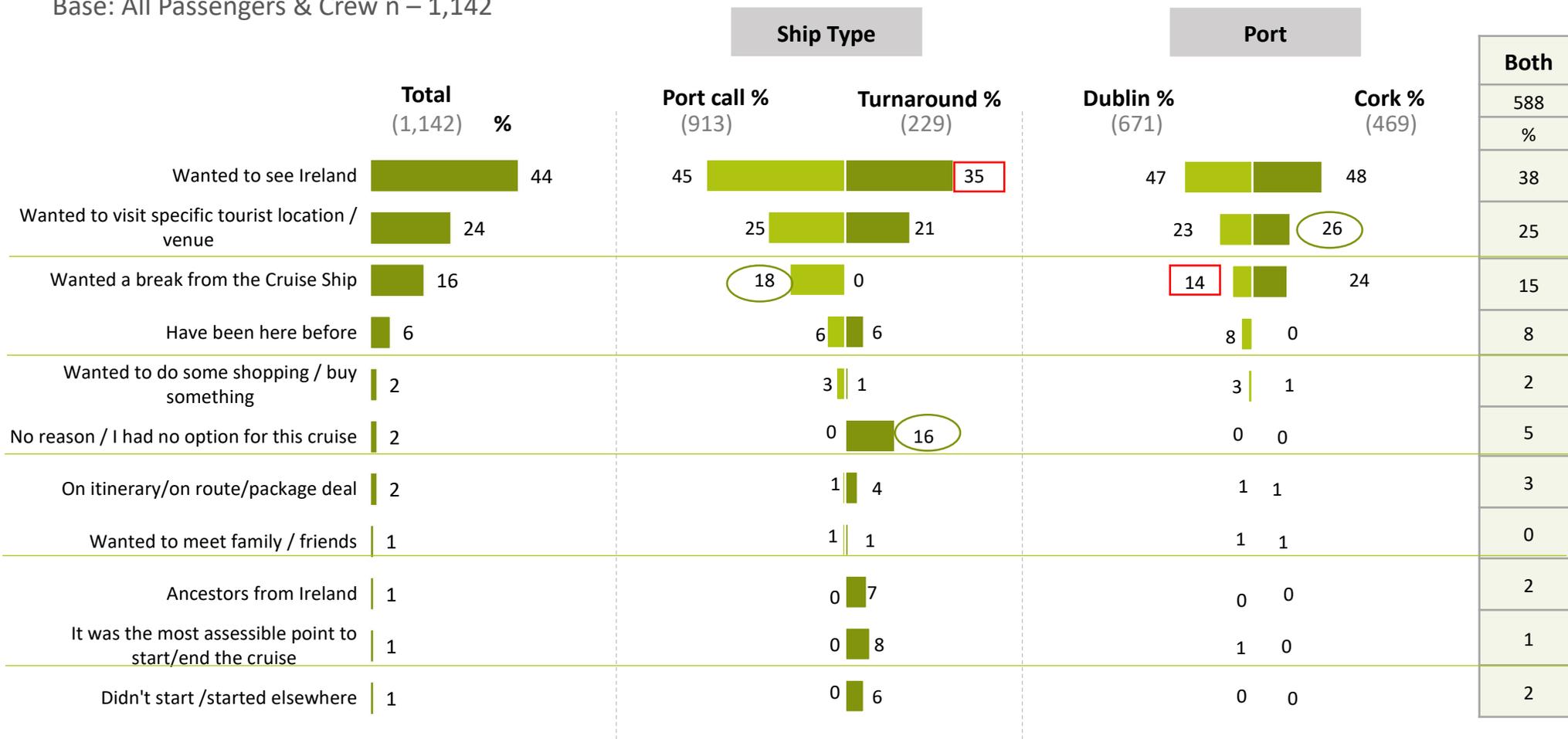


Wanting to see Ireland was the main primary reason for disembarking/starting or ending their cruise in Ireland, driven by port calls. Turnaround passengers were more limited in their starting/ending destination options. Wanting a break from the ship was more of a factor in Cork versus Dublin.

Reason for disembarking / starting or ending cruise in Port - Primary reason X ship



Base: All Passengers & Crew n – 1,142

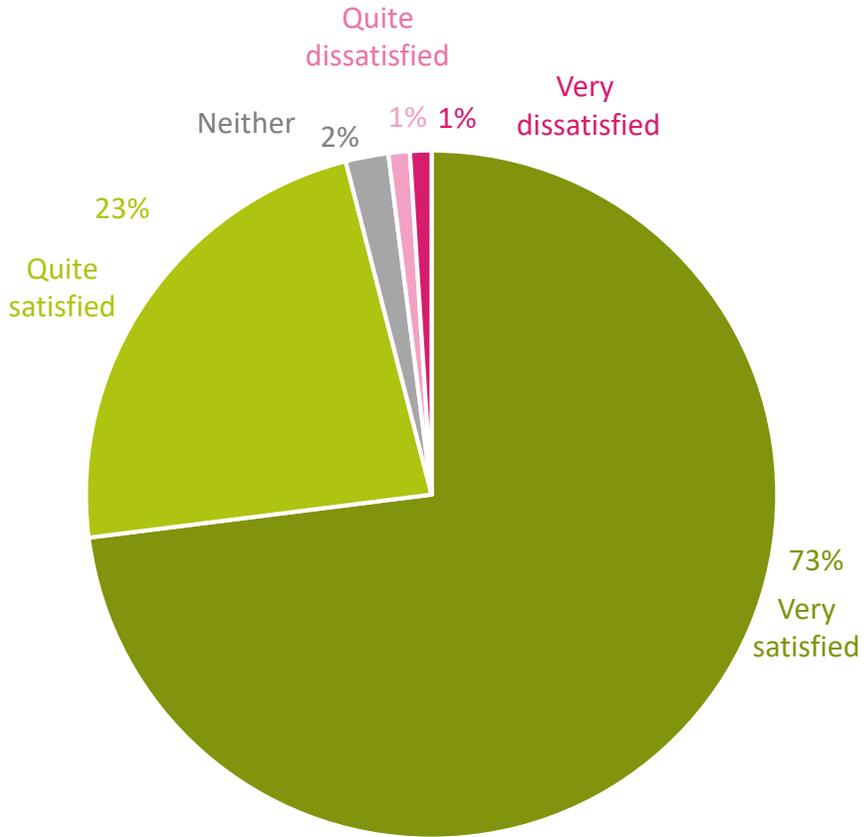


Wanting to see Ireland was the main primary reason for disembarking/starting or ending cruise in Ireland, driven by port calls. Turnaround passengers were more limited in their starting/ending destination options. Wanting a break from the ship was more of a factor in Cork versus Dublin.

Q.2a What was your primary reason for deciding to disembark at port today?
Q.2b What other reasons, if any, did you have for disembark at port today?

Satisfaction with visit to Ireland

Base: all passengers & crew n – 1,142



Passengers docked for longer in port claim a higher level of top box satisfaction (83% for those docked for 2 days)



Higher satisfaction in Dublin (77%) - exceeding Cork levels (67%)



Little difference in very satisfied levels by nationality North America (75%) vs All others (71%)

High satisfaction 73%



Expenditure - Prepayment



19% of all passengers made a prepayment - Incidence of making a prepayment increases with age (56+ years) & among North Americans.



€70 is the average prepayment per person



62% of the average prepayment related to tour/tour guides



Only 13% goes to Irish tour guide companies – significant variation by port Dublin (12%), Cork (37%)



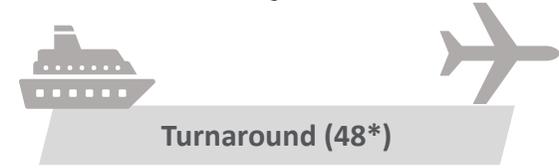
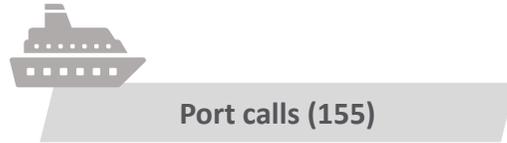
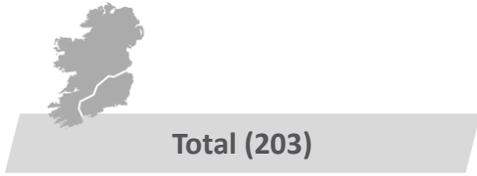
63% goes to the cruise ship



24% to travel agent in home country

Average prepayment expenditure

Base: All who made advanced payments n – 203



Turnaround passengers prepayment is c. four times the value of port call passengers.

Prepayment expenditure x category

Base: all who made a prepayment n - 203



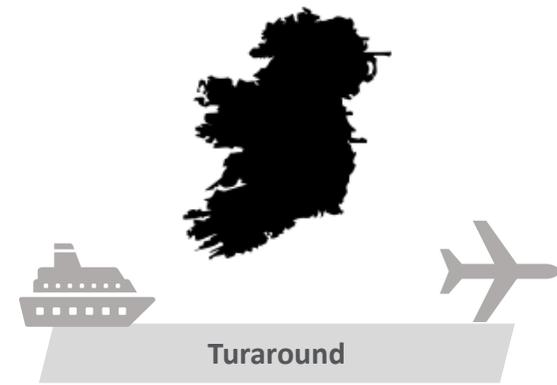
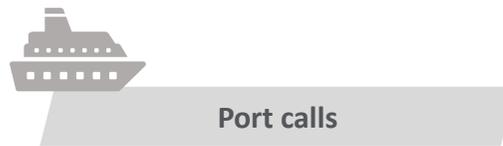
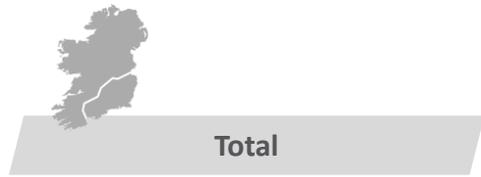
Percentage Share	
	%
Accommodation	10
Tour/tour guide	62
Entry into attractions	4
Bus/transport	3
Food/beverages	2
Other	19
Total prepayment	100



Expenditure - In Port

Average spend while in port*

Base: All passengers & crew n – 1,142



Turnaround passengers are worth over three times the value of port call passengers while in port.

*Excludes prepayment

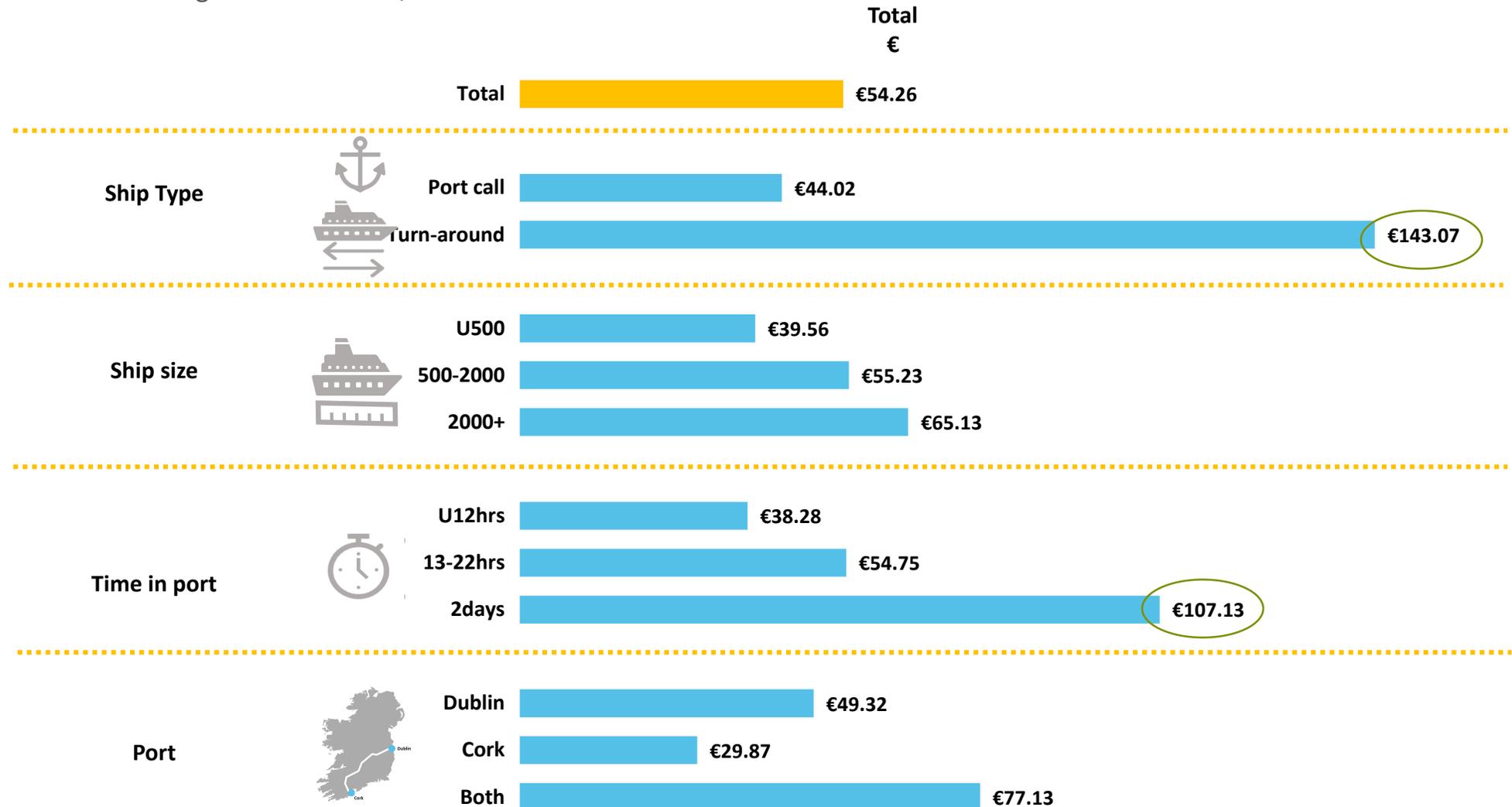
Expenditure while in port: Share of spend

Base: All passengers & crew n – 1,142

		 Share of Spend
	Food & beverages at shops, restaurants & bars	28%
	Taxi/ground transportation: (excluding cost of prepayed sight seeing tour)	6%
	Retail purchases of watches & jewellery	6%
	Retail purchases of clothing	15%
	Local crafts & souvenirs	17%
	Entertainment/Nightclubs/Casinos etc.	1%
	Tour/Tour guide/Museums/Galleries etc	9%
	Any other retail purchases	1%
	Any other expenditure	5%
	Accommodation (not including pre-booked accommodation)	10%
	Total	100%

Average spend while in port

Base: All Passengers & Crew n – 1,142



The most valuable cruise ships are those which are bigger, spend longer in port, visit both Dublin and Cork and contain Turnaround Passengers.

Average spend while in port - Indexed

Base: All Passengers & Crew n – 1,142

Total
% of value per person

Total 100

Ship Type



Port call 81

Turn-around 264

Ship size



U500 73

500-2000 102

2000+ 120

Time in port



U12hrs 71

13-22hrs 101

2days 197

Port



Dublin 91

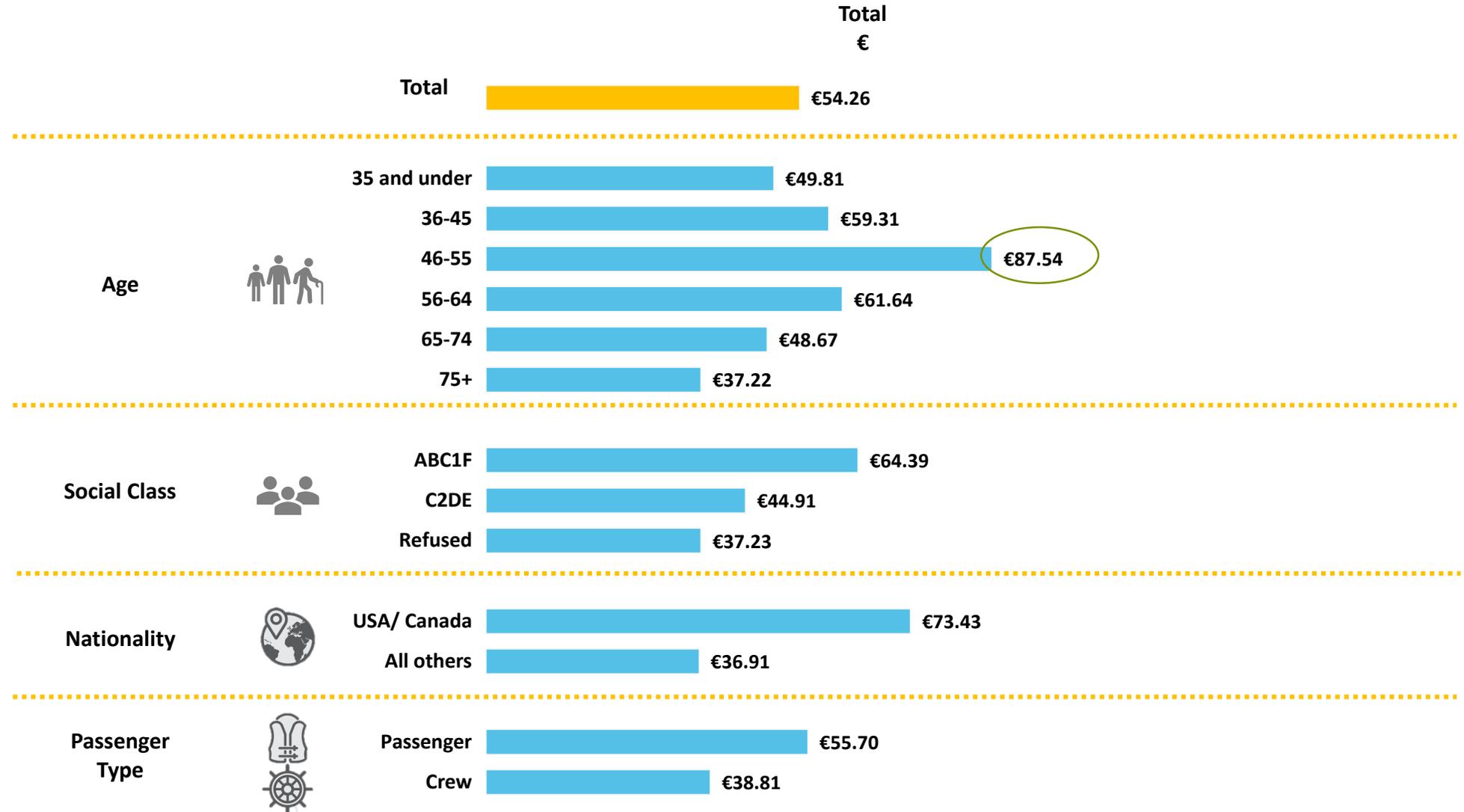
Cork 55

Both 142



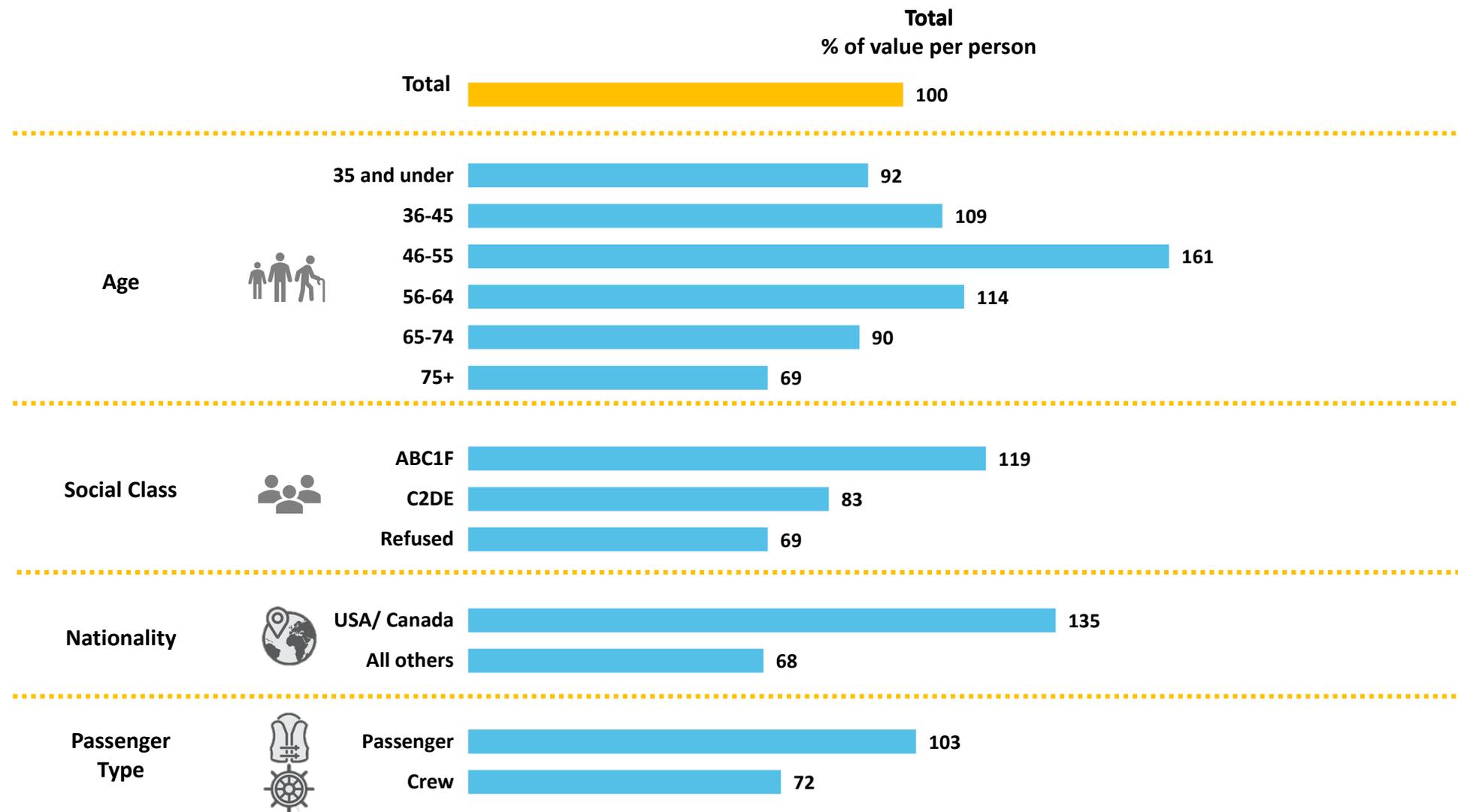
Average spend while in port x demographics

Base: All Passengers & Crew n – 1,142



Average spend while in port x demographics - indexed

Base: All Passengers & Crew n – 1,142

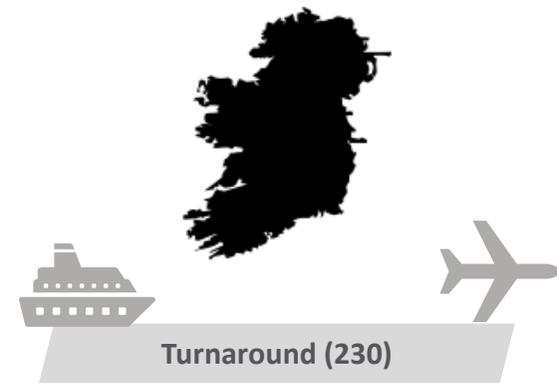
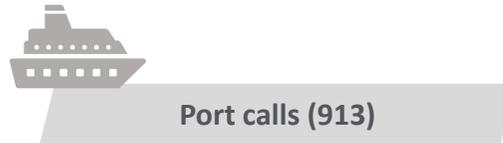
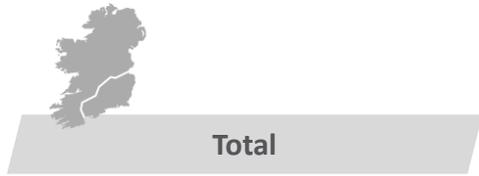




**Expenditure - Total expenditure
(Prepayment & in port)**

Total average spend*

Base: All passengers & crew n – 1,142



Turnaround passengers total value is over three times the value of port call passengers while in port.

*Total spend while in Ireland (assumes only one port call)

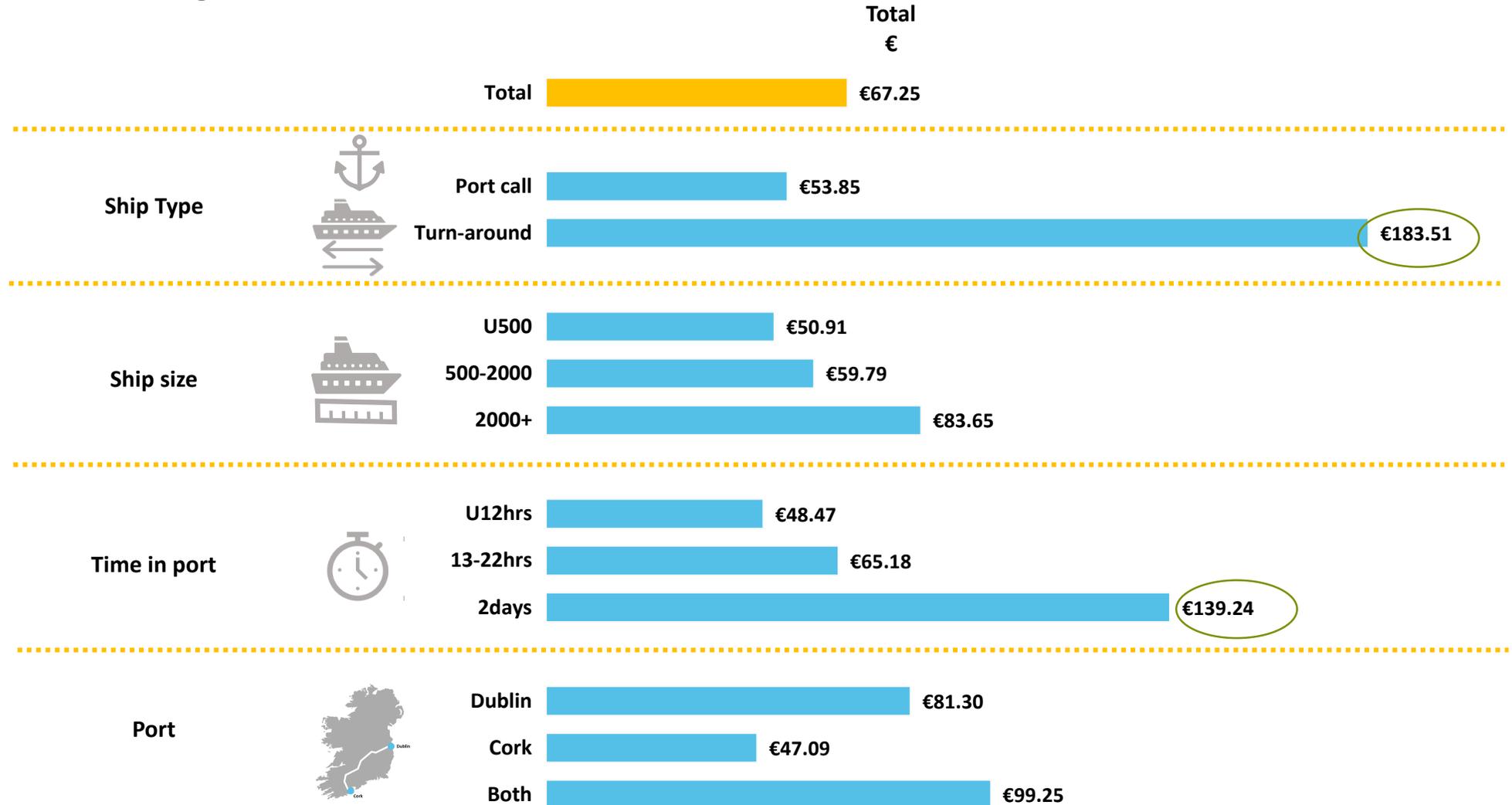
Total expenditure: Share of spend

Base: All passengers & crew n – 1,142

		 Share of Spend
	Food & beverages at shops, restaurants & bars	23%
	Taxi/ground transportation: (excluding cost of sight seeing tour)	6%
	Retail purchases of watches & jewellery	5%
	Retail purchases of clothing	12%
	Local crafts & souvenirs	14%
	Entertainment/Nightclubs/Casinos etc.	1%
	Tour/Tour guide/Museums/Galleries etc	21%
	Any other retail purchases	1%
	Any other expenditure	7%
	Accommodation	10%
	Total	100%

Average total spend

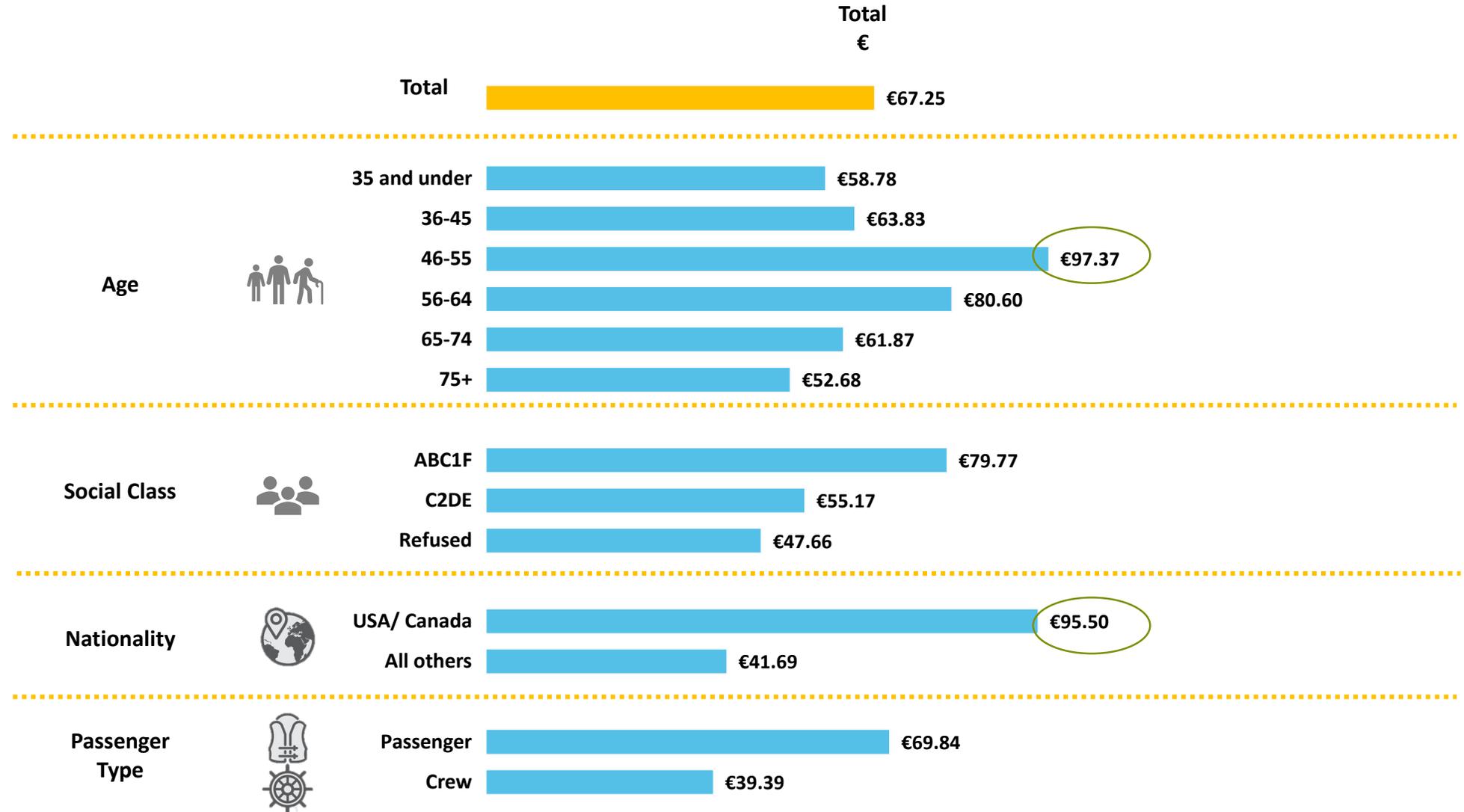
Base: All Passengers & Crew n – 1,142



With regards to total spend (prepayment & in port), bigger, longer in port, visit both Dublin and Cork and Turnaround ships are the most valuable. Importantly, all of these criteria are often interlinked into one bullseye target.

Average total spend x demographics

Base: All Passengers & Crew n – 1,142





Summary & Conclusions





- This survey will feed into a larger **economic study**, however the data highlights key areas for consideration:
 - **64% of turnaround passengers spent at least one night in Ireland** before boarding or after disembarking.
 - Is there an opportunity to encourage more turnaround passengers to stay overnight in Ireland?
 - Turnaround passengers are over three times the value of port call passengers when in port.
- **Only 24% said ‘visiting a specific tourist attraction/venue’ was their main motivation** for disembarking in Ireland.
 - Motivation to disembark in Ireland is therefore typically vague. The communication of key attractions /events in close proximity to the port may prove fruitful.
- **19% made a prepayment, only 13% of this went directly to Irish tour companies (higher in Cork (37%).**
 - Can Irish tour companies attract a higher proportion of prepayment?
- **Satisfaction with time in Ireland is high (95%),** with those staying longer in port and Dublin respondents claiming a higher level of top box satisfaction:
 - Encourage cruise companies to stay longer in port.
- **Spend levels are highly correlated with ship type**
 - The key cruise ship type to target is bigger, long stay, multi port visiting, turnaround rich ships.

Thank you.



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Delve Deeper

Appendix

