

An aerial photograph of a deep fjord in New Zealand. The water is a deep blue, and the surrounding mountains and islands are covered in dense green forest. A small white boat is visible in the lower right corner, leaving a white wake behind it. The sky is clear and blue.

2006/07 CRUISE RESEARCH

Tourism New Zealand

Understanding the New Zealand cruise
experience



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EXECUTIVE SUMMARY

This research, the first to formally investigate the experience cruise passengers have in and around New Zealand, reveals some very interesting insights into the New Zealand cruise experience. Overall, cruise visitors find New Zealand a highly satisfying cruise experience, which allows them to visit a number of New Zealand regions. Most cruise visitors leave New Zealand intending to either recommend the cruise to others, or return themselves in the future.

Satisfaction

Cruise visitors leave New Zealand highly satisfied with their cruise experience:

- 93% of all respondents were either extremely satisfied or very satisfied with their New Zealand cruise experience
- 94% were either extremely likely or very likely to recommend New Zealand to others as a cruise destination
- 35% said that their cruise was better than others previously experienced and 61% said that it was as good as others experienced
- 68% said that they would return to New Zealand (the majority indicated this would not be on a cruise)

These were ratings from experienced cruise travellers who, on average, had taken at least three other cruise holidays.

Cruise visitors indicated the most satisfying aspects of New Zealand (as a destination) were natural landscapes/scenery, friendly local people and the sense of safety.

Cruising in Milford Sound/Fiordland was clearly the highlight for most passengers, while weather and limited time were the most frequently mentioned disappointments

Shore excursions

Most passengers took a shore excursion during their New Zealand cruise. 90% took at least one organised shore excursion. The average number of organised shore excursions taken was 3.7. Fewer passengers however took an independently arranged shore excursion (47%), with the average number of excursions in this case being 2.7.

Half-day excursions were the most popular, but many also took full day excursions beyond the port city. The average satisfaction rating for excursions (including organised and independent) was 4.4 out of a possible score of 5, with excursions from Tauranga to Rotorua being the most frequently recommended.

Cruise passengers

New Zealand cruise passengers tend to be older than the “typical” holiday visitor to New Zealand, with 72% aged between 55–74 years. Only 5% of cruise passengers were aged under 40.

The majority of New Zealand cruises are organised and booked through travel agents, with cruise company brochures being used extensively.

BACKGROUND

The cruise industry in New Zealand has shown strong growth in recent years, from 27 cruises catering for 19,400 passengers in the 1996/97 season, to 69 cruises catering for 65,400 passengers in 2006/07.

In recent years the cruise market has been comprised of four main market groups, the United States of America, Australia, the United Kingdom and New Zealand. Table 1 shows the relative breakdown over the last two seasons.

Table 1 Breakdown of Main Cruise Markets

Source: Economic Impacts of the 2006/07 NZ Cruise Ship Season, Market Economics

MAIN MARKETS FOR CRUISE PASSENGERS		
	2005/06	2006/07
USA	36%	35%
UK	10%	15%
Australia	23%	16%
New Zealand	19%	16%
Other	8%	12%
Canada	4%	5%
%age Overseas Visitors	81%	84%

New Zealand and the South Pacific are considered safe destinations, which means that New Zealand can expect to welcome more cruise ship visits over the coming years. The projections to date for 2007/08 suggest that there could be up to 100,000 cruise passengers in our waters over that season.*

While the cruise ships make an important contribution to New Zealand tourism, with more than 50,000 overseas travellers per season visiting New Zealand, there has until now been a lack of detailed information about the market, and in particular, the type of experiences cruise visitors have in New Zealand. This research project aimed to address this by gathering information directly from overseas cruise passengers visiting New Zealand.

The project was requested by a number of parties, including Cruise New Zealand (CNZ), Tourism New Zealand (TNZ), several Regional Tourism Organisations (RTOs) and others stakeholders in the New Zealand cruise industry.

* Economic Impacts of the 2006/07 NZ Cruise Ship Season, Market Economics

Objectives

The primary objective of this research was to develop an understanding of how New Zealand delivers as a cruise destination. By incorporating aspects of visitor behaviour, characteristics and subsequent visitor satisfaction and recommendation, this research will provide a snapshot of the current New Zealand cruise experience, and suggest opportunities to further enhance and capitalise on this important visitor market.

This research has purposefully been design to compliment the more economically focused research conducted by Market Economics*, by specifically concentrating on passengers experiences while cruising in New Zealand.

Methodology

Cruise passengers might seem to be an easy option for market research – lots of passengers in a relatively closed environment. In reality, however, it is difficult to access cruise passengers while on their voyage as cruise companies prefer not to have their passengers' tight schedule interrupted in any way. The last thing they (and tour operators) want is for a coach load of passengers setting off for a shore excursion to be delayed by someone asking a lot of questions.

Rather than attempt face-to-face interviews Tourism New Zealand opted to develop a web-based survey and to collect names and email addresses of cruise passengers while they were in New Zealand. These were collected at two locations, the Port of Tauranga and the Port of Auckland.

A special promotional flyer was produced outlining the research programme. This was handed directly to independent passengers on the wharf in Tauranga and Auckland. To cover those on organised shore excursions (but prevent any possible disruptions) the flyer was also placed on board tour coaches prior to passenger loading.

Passengers were asked to complete a response card with their name, email address and home return date and hand this to the Cruise Ambassadors in Tauranga or the Tourism New Zealand employee in Auckland. Alternatively, passengers could email these details to a special Tourism New Zealand email address.

Later in the programme, to supplement numbers names and contacts were also collected at a transit hotel in Auckland. The Hotel Manager on board the Statendam also agreed to collect contacts for this project and provide details to Tourism New Zealand.

Those passengers who agreed to participate in the research programme were sent a follow-up email on their return home. This email message contained a link to the special website survey.

Throughout the programme Tourism New Zealand went to great lengths to bring cruise companies and tour operators on board the research project and to prevent

* Economic Impacts of the 2006/07 NZ Cruise Ship Season, Market Economics

disruptions to organised activities. Despite this, some cruise companies still refused to allow access to their passengers.

From the outset a decision was made to concentrate on vessels with a regular cruise programme to New Zealand. Vessels with a one-off, one port visit to New Zealand were specifically excluded from the research. Additionally, in view of the resources available, no attempt was made to collect data from vessels where English was not the first language of passengers. To do otherwise would have required multi-lingual promotional material and survey websites.

Field work for the research programme was conducted during the second half of the cruise season in New Zealand, between the months of January to April 2007. At the end of the field work nearly 1,500 overseas contacts had been collected. As the programme was designed to find out about overseas visitors, no contacts for New Zealand residents were collected. A total of **555** respondents went on to complete the online questionnaire, which aligned with the initial projections for the desired sample size.

The methodology employed directed the research towards vessels regularly visiting a number of New Zealand ports. While this can be said to bias the results towards two main cruise vessels, the Statendam and the Sapphire Princess, it would be fair to say that these two vessels provided the majority of cruise visitors to New Zealand during this time.

The Statendam can carry 1,258 passengers and the Sapphire Princess can accommodate up to 2,670 passengers. Each vessel made a total of 9 cruise voyages around New Zealand during the 2006/07 season, giving the potential for them to bring up to 11,000 and 24,000 visitors respectively.

No other cruise vessels can match this combination of passenger complement, regular schedule and number of ports visited. While other cruise vessels made several voyages around New Zealand during the same season, for example the Clipper Odyssey and the Oceanic Discoverer, the former carries a maximum of 128 passengers and the latter carries 72. Many of the other cruise vessels carried between 400 and 600 passengers.

The Queen Mary 2 can carry up to 3,000 passengers and made her first visit to New Zealand in February 2007. While this visit generated extensive media publicity at the time, it should be noted that the Queen Mary 2 visited only one port (Auckland) during the entire 2006/07 season. A number of other vessels also visited only one New Zealand port and were excluded from the survey for this reason.

Consequently 77% of all respondents in this survey were passengers on the Sapphire Princess and 16% were aboard the Statendam. Other vessels to feature in the responses were the QE 2, the Pacific Princess, the Clipper Odyssey, the Silver Shadow and the Europa, but only with very small numbers.

DEMOGRAPHICS

Origin

The majority of respondents in this research came from four main markets; the USA (60%), Australia (18%), the UK (10%) and Canada (10%). The remaining visitors came from other markets, including the Netherlands, Germany, Italy, Spain, Brazil, South Africa and Japan.

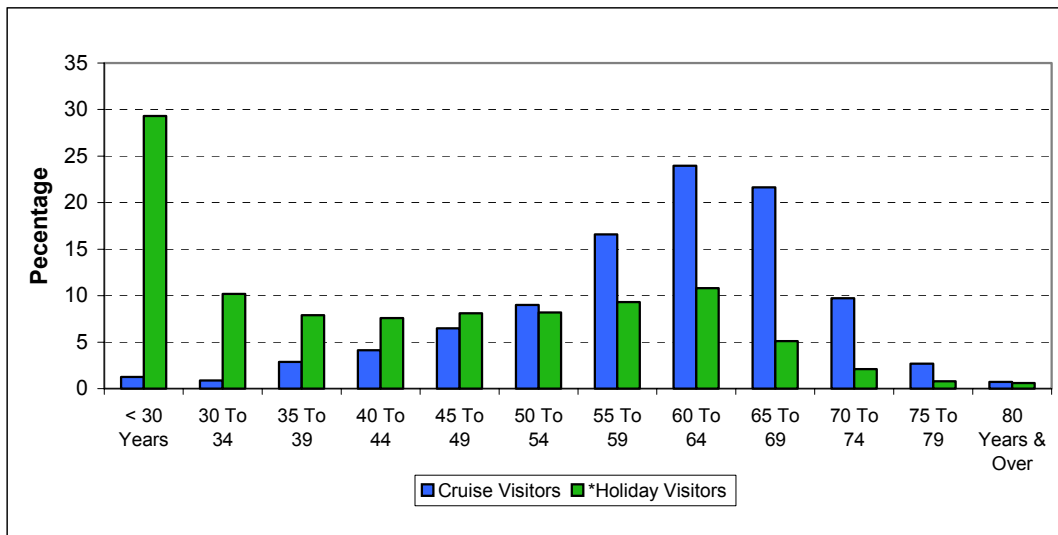
The majority of cruise visitors were on their first visit to New Zealand (81%).

Age

Cruise passengers travelling to New Zealand tend to be older than the typical overseas visitor who travels here for a holiday. Overall, 72% of all respondents were aged between 55 - 74 years while only 5% were under the age of 40.

In contrast, nearly half of New Zealand's holiday visitors (non cruise) were under 40 years of age (47%) and there was a relatively even spread across the years from 40 to 64.

Chart 1 Age of Cruise Visitors vs Holiday Travellers to New Zealand



*Holiday visitors: International Visitor Arrivals survey (IVA) – YE March 2007

Gender

Cruise passengers were not more inclined to be any one gender, with 54% of all cruise survey respondents being female; 46% male. Males tended to be slightly older, with 82% aged 55 years or more compared with only 70% of all females in this group. 62% of female respondents were aged between 45 – 64 years while only 49% of males were in this younger age bracket.

Occupation

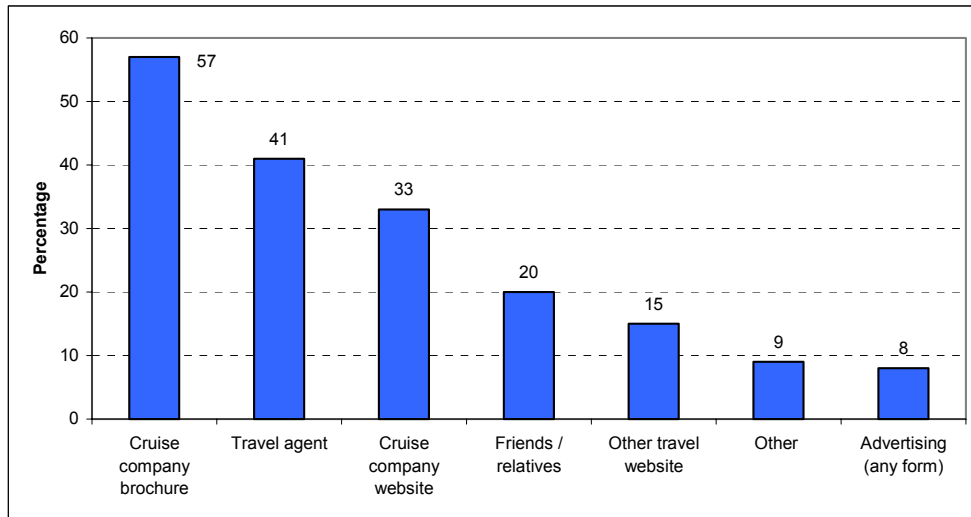
Professionals or managers made up 37% of respondents, while 34% were either retired or not working. Relatively few said that they worked in a sales position (7%), while 6% said they worked from home.

CRUISE PLANNING AND BOOKING

Information sources

Respondents were asked to indicate how they sourced information about their New Zealand cruise and how they made their reservations.

Chart 2 Sources of Information Used for New Zealand Cruise

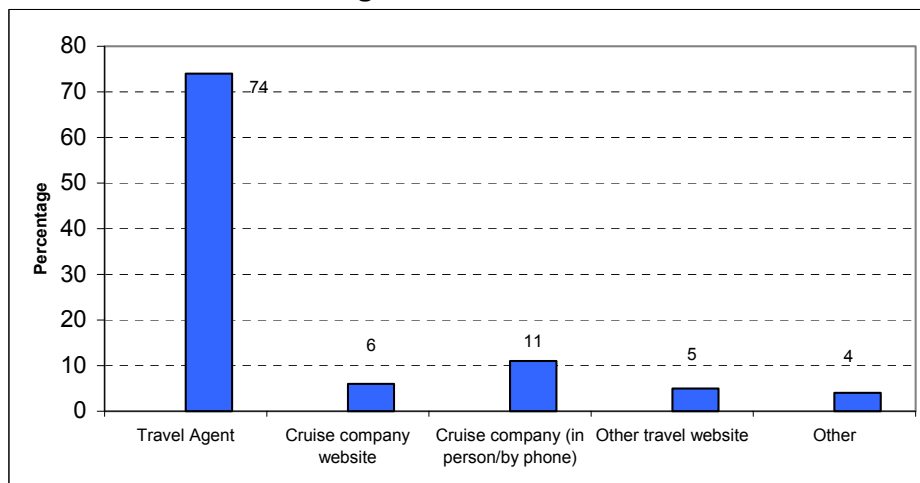


As Chart 2 shows, cruise passengers use a combination of options to gather information, including cruise company brochures (57%), cruise company websites (33%), their travel agent (41%) and friends (20%). A cruise company’s glossy brochure is still a primary source of information.

Booking

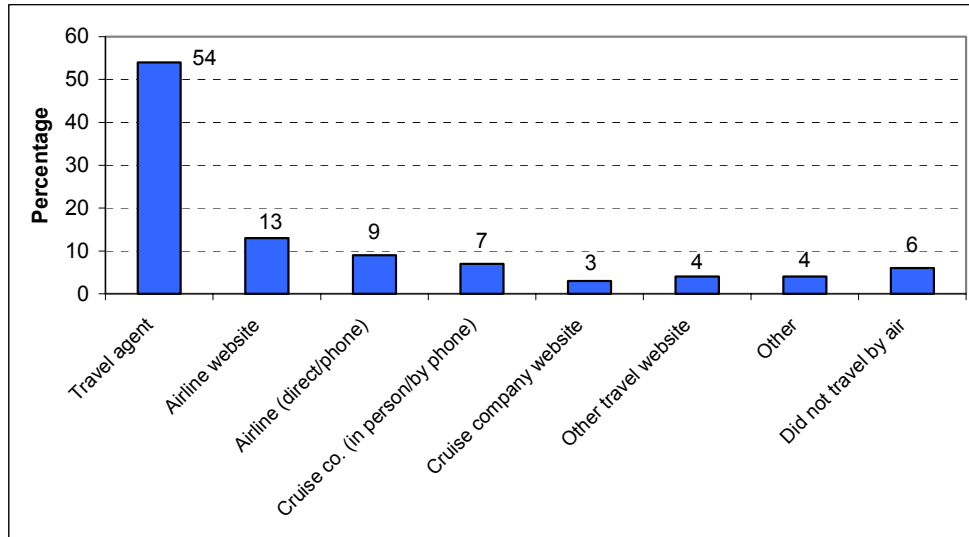
The majority of cruise passengers (74%) booked their New Zealand cruise through their travel agent. Only 17% said that they made their cruise reservation directly with the cruise company, either by phone, in person or via their website.

Chart 3 Methods of Booking a New Zealand Cruise



Half of airline reservations to New Zealand (54%) were reserved through a travel agent while another 22% booked directly with the airline (either by phone or via the carrier's website). 10% made flight reservations with their cruise company.

Chart 4 Methods of Booking New Zealand Flights



Travel Websites

Respondents who indicated that they had used a travel website (other than a cruise company or airline website) were asked to identify which one they preferred, either for information or reservations.

While fewer than 100 respondents completed this question, and people do not always recall the correct name for a website, the replies suggested that 15% identified www.newzealand.com as a travel website which they used. Others to be identified included *expedia* (8%), *cruise critic* (8%), *vacationstogo* (8%) and *frommers*, *travelocity* and *tripadvisor* - all at 3%.

Despite the rising popularity of the internet, both as a source for information and as a reservation service, it is clear from the above results that in the case of the cruise market the role of the travel agent cannot be overlooked.

VISITOR BEHAVIOUR

Arrival into New Zealand

59% of all respondents arrived in New Zealand by sea while 41% arrived by air. The majority joined their cruise in Sydney (59%) while 34% joined in Auckland. This would conform to typical cruise voyages being sold either as a Sydney – Auckland or as an Auckland – Sydney itinerary. Both Holland America Lines and Princess Cruises, which provided the largest number of voyages in 2006/07, offered these cruise options.

The majority of Australian passengers, 76%, stated that they arrived in New Zealand by ship. Only 24% flew to New Zealand to join their cruise.

43% of US visitors travelled to New Zealand by air while the remaining 57% of the US respondents arrived here by ship. Given the length of time to sail across the Pacific Ocean, it is highly likely that these travellers flew to Australia and joined their cruise in either Sydney or Melbourne. This would fit with the cruise itineraries which often include both countries.

Like most US visitors, 59% of UK respondents arrived by ship, with most joining their cruise in Sydney. Within the four main markets, only the Canadian respondents differed slightly, with 53% arriving in New Zealand by air.

A small number of Americans joined the Sapphire Princess in Singapore and remained aboard her around the coastline of Australia and for her initial voyage to New Zealand in 2007. Some respondents said that they joined the cruise in Southampton, or in the United States of America, suggesting a round the world cruise on the QE2, but these were very much in the minority.

New Zealand arrival point

The most common arrival points for cruise travellers were Auckland (43%), Dunedin (32%) and Fiordland (10%). The latter two represent arrivals by cruise ship, most commonly a vessel crossing the Tasman from Australia.

Travel companions

Cruise travellers also seem to differ markedly from “typical” holiday travellers to New Zealand in their choice of holiday companions. A New Zealand cruise appears very much a holiday with a partner, family or friends.

95% of all survey respondents travelled with a partner, family or friends and only 2% travelled alone. This is very different from the results for holiday travellers participating in the International Visitors Survey where 24% travelled alone and only 59% travelled with partners, family or friends.

Table 2 Travel Companions on Cruise & On Holiday in New Zealand

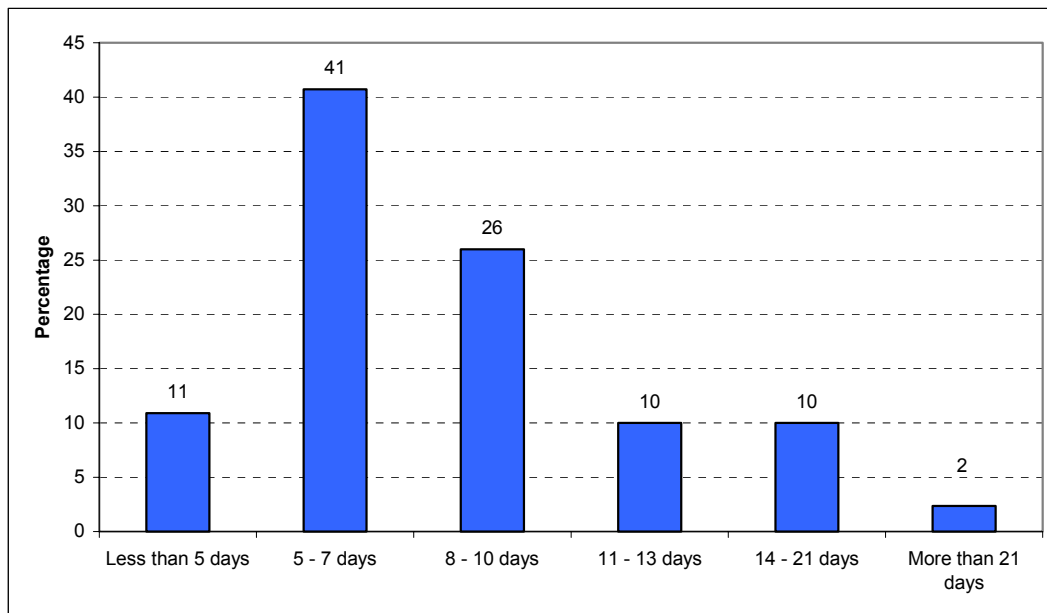
TRAVEL COMPANIONS IN NEW ZEALAND		
	Cruise visitors	*Holiday visitors
	Percentage	
Travelled Alone	2%	24%
Partner/Spouse	71%	37%
Family	12%	11%
Friends	12%	11%
Tour Group	1%	12%
Other	2%	5%

*Holiday visitors: International Visitor Survey (IVS) – YE March 2007

Length of stay

The average length of stay in New Zealand for all respondents was 8.8 days. The great majority of respondents (88%) spent less than two weeks in New Zealand and 67% spent between 5 and 10 days here. Only 12% stayed in New Zealand for more than two weeks.

Chart 5 Length of Stay in New Zealand



Ports visited on cruise

The vast majority of respondents visited Christchurch (Lyttelton) 96%, Milford/Fiordland 96%, Tauranga 95% and Dunedin (Port Chalmers) 81%. This aligns with the cruise itineraries for the Statendam and the Sapphire Princess which visited these ports on their regular cruise programme in 2006/07.

There is then a distinct drop to Wellington, Napier and the Marlborough Sounds (24%, 20% and 17% respectively) all of which were included in the Statendam's itinerary.

Other countries visited

The majority of New Zealand cruise passengers visit Australia as part of their overall holiday (77% - excluding those from Australia). As one might expect, most US travellers (76%), Canadians (77%) and UK visitors (88%) said that they also visited Australia as part of their overall holiday. The only other country to register a result of any significance was Singapore which was visited by 34% of UK respondents.

Table 3 Comparison of Dual Destination Travel

DUAL DESTINATION TRAVEL (with Australia)		
	Cruise visitors	*Holiday visitors
	Percentage	
United States of America	76%	50%
Canada	77%	66%
United Kingdom	88%	61%

*Holiday visitors: International Visitor Survey (IVS) – YE March 2007

SHORE EXCURSIONS

One of the key aims was to gather information on the type and number of shore excursions visitors undertook while on a cruise in New Zealand. Given the range of excursion options available in each port (for example, there can be up to 20 organised shore excursion options in Dunedin alone) generic questions were used to examine the type of shore excursions taken. The generic terms used were:

- Half-day excursion
- Full day city excursion
- Full day excursion – beyond port city
- Overnight excursion between ports
- Other

This section examined both shore excursions sold on board (or via website) to passengers by the cruise companies and also excursions arranged independently by passengers when they went ashore. In the case of independent excursions, an additional choice “hired a cab for sightseeing” was added to the list of options.

Note: respondents could tick more than one option in each of the sections asking about shore excursions.

Organised Shore Excursions

The vast majority of respondents said that they took one or more shore excursions organised by the cruise company. Only 10% did not take any of the organised excursions.

The half-day shore excursions proved most popular, with 63% of the respondents taking one or more of these options. Full day excursions beyond just the port city itself were the next most popular (56%) while 32% said they took a full day city excursions.

There were several overnight excursions available in 2006/07, generally between Dunedin or Christchurch and Milford Sound, or vice versa. Only a relatively small number, however, just 3% of respondents said that they took one of these options. The prices for these longer overnight excursions, which often included either Queenstown or Mount Cook en route, generally started at the cost of US\$569 per person (NZ\$816 approximately at exchange rates during the cruise season).

The majority of those people who took an organised excursion did more than just one. 29% took three excursions, 22% took four excursions while 27% took five or more. The average number of organised excursions taken per respondent was 3.7.

Independent Excursions

Given the number of respondents who took organised excursions, and the relatively high number each took, it is perhaps not surprising that fewer people organised their own excursions while ashore. Only 47% of respondents said that they organised their own excursion while ashore. Once again, the most popular option in this category was a half-day excursion (21%). 14% said that they arranged their own full

day excursion beyond the port city, 7% took a full day city excursion and 10% hired a cab for some form of sightseeing. Only 2 respondents, out of the 555 surveyed said they independently arranged an overnight excursion between two ports.

Respondents making independent arrangements also took fewer excursions. Only 17% took five or more independent excursions and a much higher percentage, 57%, took just one or two such trips.

Chart 6 Types of Shore Excursions taken by Cruise Passengers

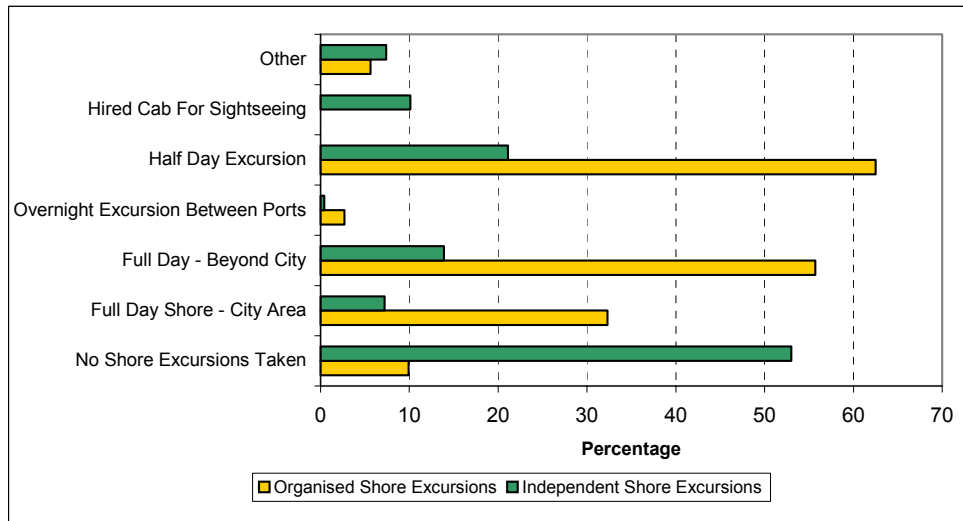
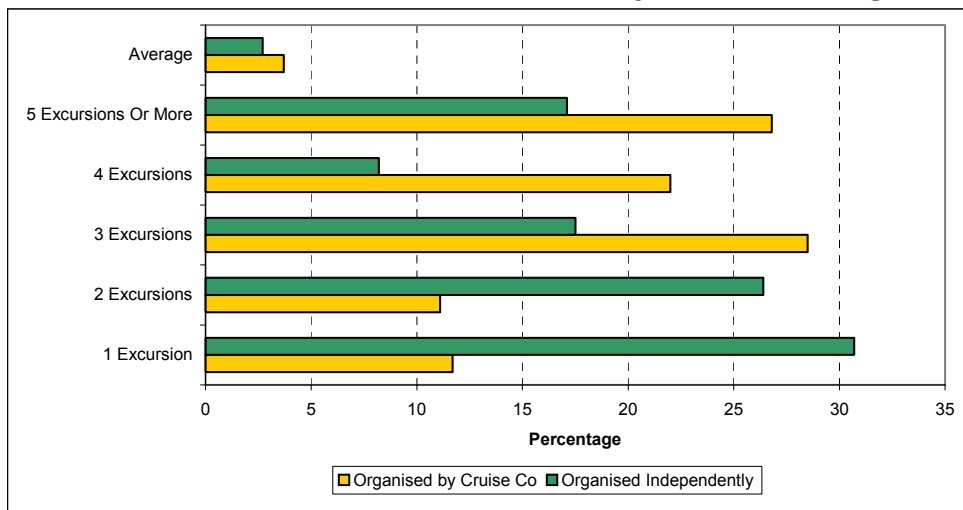


Chart 7 Number of Shore Excursions taken by Cruise Passengers



Excursion highlights

This section also asked passengers to state which, if any, excursions they would recommend to others. This was requested to see if any particular excursions stood out above the others.

The question allowed for a free text answer which resulted in a very wide range of responses from “all of them” to “wouldn’t recommend any”. The diverse range of opinions made it impossible to accurately quantify results, with the aim instead being to group similar responses and provide some indicative guidelines.

One of the main points to emerge was that around 28% of those who responded to this question said that they would recommend a day excursion from Tauranga to Rotorua.

There were several such options available from Tauranga including, for example, a “Rotorua Maori Experience” tour, a “Wai-O-Tapu Thermal Wonderland” tour and a “Waimangu Volcanic Valley” tour. Many respondents simply said “Tauranga – Rotorua” while others were more specific and listed the actual name of their excursion. The figure of 28% represents a combination of all the responses for a day excursion from Tauranga to Rotorua.

Other recommendations of note included Christchurch city tours, with 14% of respondents mentioning a variety of options there. “Tauranga”, or Tauranga day trips received recommendations from 9%, to which can be added Tauranga Maori Experience, 5% and Tauranga Kiwi Farm/Jetboat, 5%.

7% of respondents recommended the Taieri Gorge rail excursion from Dunedin while 7% mentioned Dunedin city houses (Olveston) or Larnach Castle and another 5% recommended the Otago Peninsula tour.

There were many enthusiastic recommendations, including for example:

“I did a pub tour in Christchurch that was wonderful. The pub served us wonderful warm New Zealand breads and cheeses along with a fine assortment of New Zealand beers. It was a chance to mingle with the locals in a group.”

Satisfaction with excursions

When asked to rate shore excursions for satisfaction, 87% of all respondents were either extremely satisfied or very satisfied with their excursions. The average rating, out of a possible top score of five, was 4.4.

SATISFACTION AND RECOMMENDATION

The overall New Zealand cruise experience

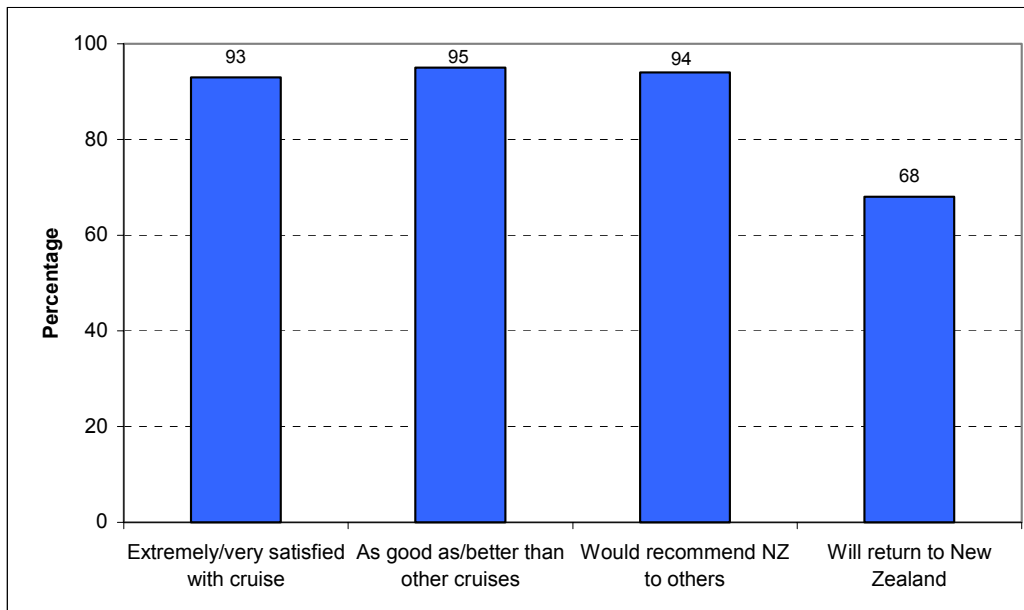
Respondents were asked a series of questions to assess how satisfied they were with their New Zealand visit, how their cruise compared with previous cruise holidays, whether they would recommend New Zealand to others and if they would return to New Zealand.

Overall, 93% of all respondents said that they were with extremely satisfied, or very satisfied with their cruise.* Only 3% indicated they were not satisfied with their New Zealand experience.

Approximately one third (35%) of cruise passengers said that their New Zealand cruise experience was better than other cruises they had taken, while 61% said that their New Zealand cruise was as good as other cruises.

When asked if they would recommend New Zealand as a cruise destination to others, 94% said that they would. Similarly positive, 68% said that they would return to New Zealand again (however, most would not take a cruise on their return visit).

Chart 8 Overall New Zealand cruise experience



It is important to note that these statements are from “experienced cruisers”. On average respondents had previously taken at least three cruises. 66% had taken a cruise to the Caribbean, 53% had cruised to Alaska and 42% had taken a Mediterranean cruise. They are therefore making these judgments with the benefit of having a number of cruise experiences.

* Top two boxes of a five point satisfaction scale

In this sense cruise visitors are not unlike most long haul holiday visitors to New Zealand. Generally our long haul visitors are relatively experienced travellers who have “cut their teeth” traveling to other destinations.

Of interest, however, and great opportunity, is the number of respondents who indicated that they would return to New Zealand. The fact that 68% said they would return suggests that having sampled New Zealand, they would very much like to return to explore our country in greater depth. This, perhaps more than anything, represents a huge opportunity for repeat business for New Zealand.

It is very easy for people to say that they will return to New Zealand, but is this practicable? An examination of the age groups of respondents revealed that 69% who said they would return were in the 45 - 64 age bracket. While some respondents may, in fact, never return (health or other problems may prevent this) those in this younger age group certainly offer excellent potential for a repeat visit.

Aspects of New Zealand

Along with providing an overall rating of their New Zealand cruise experience, respondents were asked to rate satisfaction with a range of New Zealand attributes:

- Value for money
- Relaxing destination
- Uncrowded spaces
- Clean, unpolluted environment
- Adventure and excitement
- Natural landscapes and scenery
- Unique history and culture
- Vibrant urban atmosphere
- Availability of good food
- Weather
- Sense of Safety

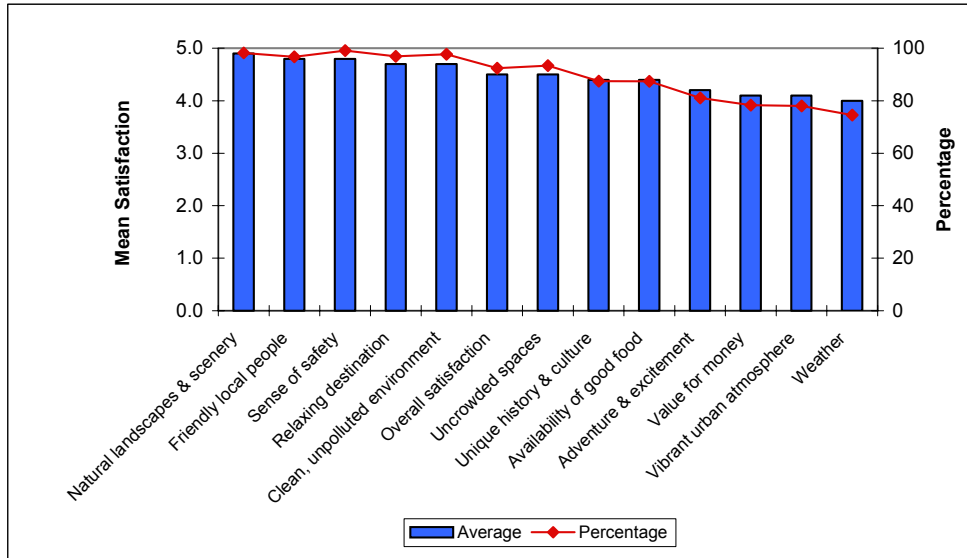
The rating system ranged from 1 to 5, where a score of 5 meant extremely satisfied and 1 represented being not at all satisfied.

The average rating for all these attributes was 4.5, which suggests that New Zealand is providing a very good level of satisfaction. There were, however, differences across the range and New Zealand scored highest in areas such as friendly local people, clean unpolluted environment, safety and natural landscape and scenery.

Uncrowded spaces, unique history and culture and good food fell into the middle of the range while weather, value for money and vibrant urban atmosphere received the lowest average scores.

The results are presented schematically in the following chart. The percentage figures shown represent the combination of the ratings for 5 and 4 (extremely satisfied and very satisfied).

Chart 9 Satisfaction with Aspects of New Zealand



Cruise highlights

396 respondents entered replies to this free text question with by far the most frequent answer being Fiordland/Milford Sound. 41% of respondents rated visiting this area as the highlight of their New Zealand experience.

There were a very large number of diverse comments; the most significant have been grouped below:

- Beauty/beautiful scenery (general enthusiasm for the beauty of New Zealand) – 6%
- Everything was wonderful / “all too good to identify just one” – 6%
- References to Christchurch and Tauranga - 5%
- References to friendly people and the friendliness they experienced in New Zealand – 4%,
- References to Auckland, Rotorua, Maori culture and Farm visits – each at 3%.

Disappointments

The main disappointment from the 524 respondents who answered this question were related to weather 13%, and lack of time in New Zealand, 7%.

The disappointment with weather resulted mainly from a storm which prevented one sailing from calling at Dunedin. Although this was entirely beyond the control of the cruise company, it elicited a number of comments expressing disappointment that passengers were not able to visit Dunedin.

The reference to lack of time relates both to not enough time in a port to see all the local attractions, and to New Zealand itself where respondents could not cover all the places they wanted to see.

Generally each vessel spends 10 – 12 hours in each port and the arrival and departure times are clearly shown on cruise company websites. Moving large numbers of people onto and off shore excursions presents logistical challenges almost everywhere, but clearly some visitors felt that they should have been given more time to really explore the stopover ports. Given the fixed nature of cruise itineraries, it is difficult to see how this problem can be easily resolved.

There were complaints about some specific attractions, about poor tour guides and about some of the ports visited, for example:

- “We couldn’t understand the accent of the tour guide on our half day city tour”
- “Some of the ports had an unattractive approach – piles of logs and wood chips”

MARKET DIFFERENCES

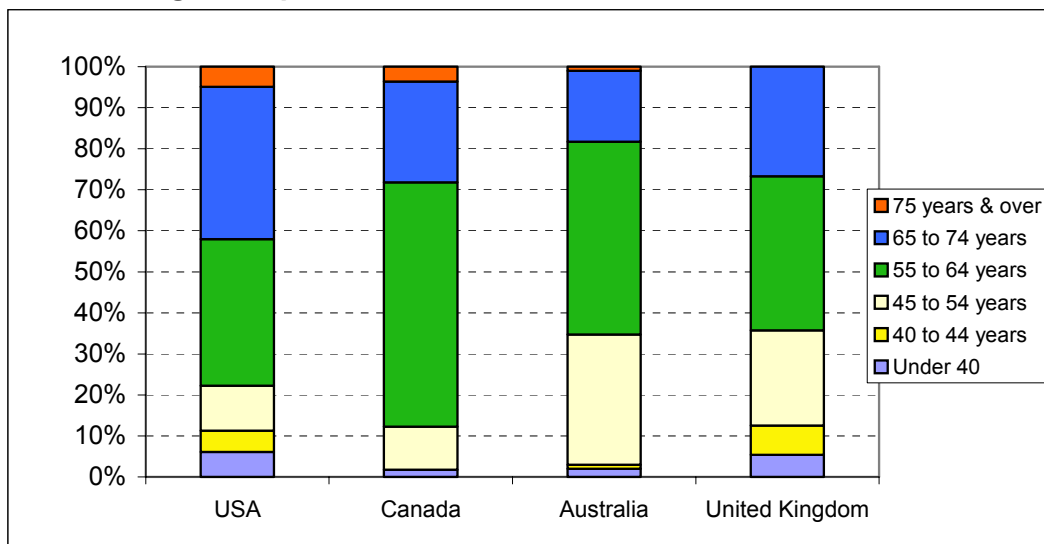
Differences between survey respondents from the four main markets; USA, Australia, Canada and the United Kingdom, tended to be relatively small, but were apparent in the following areas:

Age

Australian respondents tended to be younger than those from the USA, the United Kingdom and Canada.

13% of Australians were aged between 45 – 49 years, 18% were between 50 – 54 years and 41% were between 55 and 64 years old. Altogether 71% of Australians were aged between 45 and 64 years, compared with only 59% of American respondents, 54% of Canadians and 66% of the respondents from the United Kingdom.

Chart 10 Age Comparisons: USA, Australia, the UK and Canada



Gender

65% of Australian respondents were female. This is more than 10 percentage points ahead of the USA (54%), the United Kingdom (47%) or Canada (40%). In this case it must be noted, however, that these figures refer to respondents who completed the survey. It does not necessarily follow that the gender of cruise travellers exactly followed this pattern.

Occupation

Australians were less likely than others to be retired or not employed. Only 18% of Australian respondents were in this category compared with over 30% for all other respondents.

Length of stay

Australians had the highest length of stay of all main markets – 9.5 days. Canadians stayed for almost the same length of time, visitors from the USA stayed a day less while respondents from the United Kingdom stayed for the shortest time, only 7.5 days on average. The UK market is usually one of our longer stay markets, with holiday visitors staying on average 23 days in New Zealand.

Table 4 Average Length of Stay for Main Markets

Length of Stay in New Zealand	USA	Canada	Australia	UK
Average Length Of Stay per Person	8.6	9.4	9.5	7.5

Shore excursions

Australians, perhaps because of their greater familiarity with New Zealand, were more independent and took fewer organised shore excursions. While at least 90% of all US and Canadian respondents took an organised shore excursion of some sort, only 80% of Australian and UK respondents did so. Overall, the Australian respondents were less likely to do any of the organised tours.

Conversely, nearly 60% of Australians organised their own shore excursions, compared with 49% of Canadians, 46% of the UK respondents and 42% of all US travellers.

Visits to New Zealand

41% of all Australian respondents had never previously visited New Zealand, compared with 84% from the UK, 86% from Canada and 93% from the USA. Obviously proximity to New Zealand was a factor here, as in the case of return visits. In this case 86% of Australian respondents said that they would return, compared with 82% from the UK, our most distant market. Over 60% from the USA and Canada indicated that they would return.

Table 5 First & Return Visits – Main Markets

First & Return Visit Results	USA	Canada	Australia	UK
First Visit to New Zealand	93%	86%	41%	84%
Will Visit New Zealand Again	61%	65%	86%	82%

Overall New Zealand cruise experience

Australian respondents were more likely than others to rate their cruise as better than any others previously experienced. 44% of Australians rated their New Zealand cruise as better than others, 10 percentage points more than other respondents from the main markets.

To some extent this may reflect the lower level of cruising undertaken by Australians. 18% had never previously taken a cruise and of those who had, 58% had taken another Pacific cruise. In contrast at least 77% of all US, UK and Canadian

respondents had taken a cruise to the Caribbean and 40% had cruised in the Mediterranean.

60% of all US respondents said they were extremely satisfied with their New Zealand cruise, a slightly higher percentage than recorded for the other main markets. When, however, the extremely satisfied and very satisfied scores were combined, the results for all four markets were very similar, ranging from 89% for the UK to 94% for the USA.

Aspects of New Zealand

The satisfaction ratings (again combining extremely satisfied and very satisfied) were very similar for all markets across the following five New Zealand attributes:

- Relaxing destination
- Clean, unpolluted environment
- Natural landscapes and scenery
- Availability of good food
- Sense of Safety

In the case of the other six, however, there was some difference between markets which can be summarised as follows:

- Uncrowded Spaces – Australians less satisfied
- Value for Money – UK rated higher
- Adventure and Excitement – Both Canada and Australia rated New Zealand lower on this attribute
- Unique History and Culture - UK respondents rated New Zealand lower
- Vibrant Urban Atmosphere - UK and Australian respondents rated us lower on this attribute
- Weather - New Zealand scored lowest with UK respondents in this area.