Cruise Tourism to Ireland Research Report - 2010

Fāilte Ireland
National Tourism Development Authority

1/31/2012

CONTENTS

EXECUTIVE SUMMARY

Fáilte Ireland commissioned Red C Research Ltd to conduct interviews with international cruise visitors and operators during 2010. This report examines the key findings from the various surveys and interviews conducted. Published industry reports are also used to support the findings where relevant.

In 2010, there were 202 calls by cruise ships to Irish ports carrying 204,489 passengers. Direct spend from passengers and crew who disembarked at Irish ports, including port charges, was estimated at €20.3 million. According to Cruise Lines International Association this sector of the tourism economy offers tremendous potential as the cruise industry continues to be the fastest growing sector in the travel and leisure industry.

Cruise operators indicate that while Ireland is a well defined cruise destination the cost and appearance of the ports can be a drawback for them. Cruise operators also highlight that revenue, cost, guest satisfaction, excursions and port facilities are key considerations for them when planning their itineraries. In order to increase its attractiveness as an international cruise destination, Ireland should establish itself within key routes by collaborating with a number of countries. Such collaboration would allow member ports to set service levels and market themselves under the one brand to cruise operators.

Though Ireland was viewed as an established cruise destination amongst operators, passenger's impressions were still dominated by 'whiskey and castles' imagery. Ireland will need to promote a contemporary view of what the island has to offer in order to attract the younger, higher spending cruise passengers to the country.

Cruise operators prefer to limit familiarisation trips for new destinations. Where familiarisation trips are offered, they need to be well coordinated and structured with inputs from tourism representatives, port and local authorities. Offering familiarisation trips to those selling excursion on board cruise ships represents an opportunity for Ireland to increase its presence amongst sales staff.

Tendering in a port is unpopular all round with operators, guests and staff. Operators are only inclined to tender if there is a compelling reason to do so or if guests are of a younger profile.

For passengers planning and booking a cruise, the travel agent / tour operator was a key figure in the sales chain. Passengers placed considerable importance on the experience of an accredited advisor when booking their cruise.

Ireland was seen as an important destination on the itinerary for more than four out of every five passengers and the majority of those that disembarked had already made the decision to do so before they reach an Irish port. Destination flyers and local tourism information points at ports were particularly important in encouraging passengers to disembark at less well known ports. The proximity of the town, interesting tourist sites, availability of a shuttle service and the look of the port were considered important to passengers in their decision to disembark.

Overall, passengers were satisfied with the time they spent disembarked at Irish ports noting particular satisfaction with shuttle services, tours and tourist attractions. While high levels of satisfaction were reported with the look of the port in respect of Cork, Dublin and Waterford may need to improve their port appearance to sustain growth in cruise tourism. Cruise operators themselves prefer a dedicated cruise berth in keeping with the luxury experience the cruise liner is creating.

Though passengers reported high levels of satisfaction with the tours on offer in Ireland, a gap still exists between the variety of tours offered by ground handlers and those acquired by cruise operators. Operators tend to lean towards the tried and tested tours despite requesting and being offered new and innovative tours by ground handlers.

Given the growth potential of this sector and its current value of €20.3 million in direct spend; Ireland should focus on attracting shorter cruises and those in the middle stage of their itinerary which offer the greatest value. It will be necessary for Ireland to develop both the port and on-shore services to maximise its appeal to international operators and cruise passengers in the future.

INTRODUCTION

While figures have been declining in the tourism industry overall, cruise tourism has experienced year on year growth since 1990. This segment of the tourism market provides destinations with potential to attract high spending visitors to their shores. Cruise ship expenditure not only contributes to the immediate port area but also to the hinterland economies of the ports. Despite the recent recession, cruise operators remain optimistic regarding the sector's prospects. Continued growth in the area has lead operators to invest in capacity expansion and to continually seek new destinations and excursions to satisfy guest's experiences.

International cruise vessels have visited the island of Ireland since the late 1960's. Initially arriving at Dublin and Cork, the attractiveness of the island of Ireland as a cruise destination grew to include other Irish ports such as Waterford and Galway and more recently, since 1995, cruise operators have also included Belfast and Derry in their itineraries.

Recognising the potential for growth, a number of ports along with tourism authorities, ground handling agents and ship agents came together in 1994 and formed the all-Ireland marketing cooperative, Cruise Ireland. Since the launch of Cruise Ireland, the island of Ireland has enjoyed significant success in the cruise sector with the number of ships increasing from 61 in 1994 to 202 in 2010 and passenger numbers increasing by over 200%.

In recognition of the importance of cruise tourism to the sector, Fáilte Ireland commissioned Red C Research Ltd to conduct interviews with passengers and international cruise operators during 2010. Interviews with passengers aimed to identify the profile of cruise passengers to Ireland and why they choose to come to here, how satisfied passengers are with their experience at Irish ports and their level of expenditure while disembarked. Interviews held with operators looked to establish what criteria cruise ship companies consider important in planning itineraries and examine how Ireland might attract more cruise ship calls to the island.

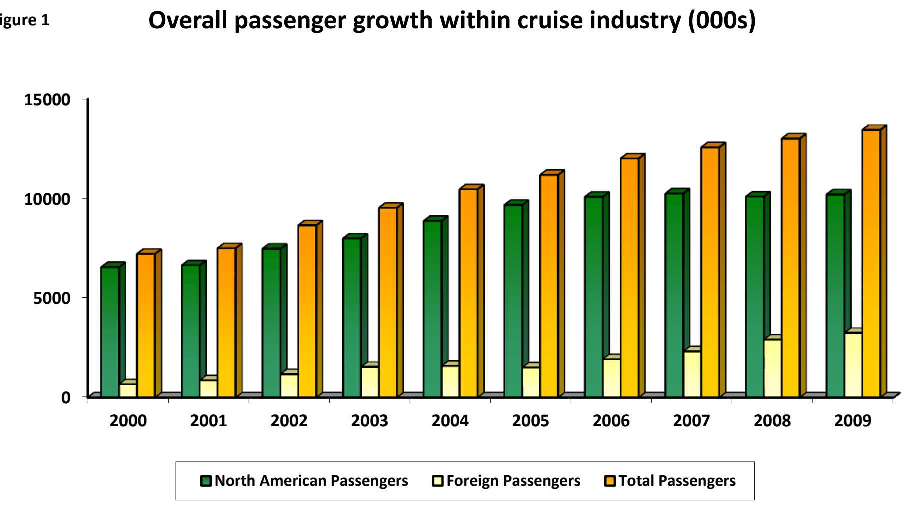
This report examines the key findings from the various surveys and interviews conducted. Findings are also supported by published industry reports. The report concludes by providing key recommendations and examining areas for improvement that are necessary for Ireland to capitalise on the growth within the cruise tourism sector.

OVERVIEW OF CRUISE INDUSTRY

GLOBAL CRUISE TOURISM INDUSTRY

While figures have been declining in the tourism industry overall, cruise tourism has experienced year on year growth since 1990. According to the Cruise Lines International Association[1] an average annual passenger growth rate of 7.2% per annum has been reported over the last two decades. From 1980-2009, over 176 million passengers have taken a deep-water cruise (2+ days). Of this number, 68% of the total passengers have been generated in the past 10 years. Forty percent of total passengers have been generated in the past five years alone. Cruise Liners International Association carried a record 13.4 million passengers in 2009 and it was forecast to set another record in 2010 by carrying 14.3 million passengers, 6.4% more than 2009.

Figure 1



Source: Cruise Lines International Association

In 2009 the worldwide cruise market was estimated to be worth $26.9 billion. While this showed a 1.4% decline from 2008, due to the downturn in the global economy, this market is expected to recover, and earlier upward trends are projected to continue.

Growth is being driven partly by the arrival of new ships. In an article published in the USATODAY in January 2010 by Gene Sloan[2], Royal Caribbean, Norwegian Cruise and

[1] Cruise Lines International Association, INC, 2010 CLIA cruise market overview, Statistical cruise industry data through 2009

[2] Sloan, Gene (2010), http://travel.usatoday.com/cruises/post/2010/01/cruise-industry-says-passenger-counts-will-hit-a-new-record-in-2010/15895/1

Cunard were due to collectively spend $6.5 billion in 2010 to debut 12 new vessels. In addition, the combination of attractive pricing, innovative ship designs and the surge in non-US passengers have bolstered the growth in cruise tourism.

The industry is projected to expand significantly due to new 'mega-ships' vessels, lower cost of sailing per passenger and new and upcoming markets (Asia and Europe). A report published by Koncept Analytics in February 2010[3] showed positive signs in the growth of cruise tourism. This report summarised that the Asia-Pacific region holds long term growth for the cruise industry, with Australia and Singapore among the preferred destinations for cruising. The cruise passengers in the Asia-Pacific region are expected to grow by more than 40% from 1.07 million in 2005 to 1.5 million by 2010.

EUROPEAN CRUISE TOURISM INDUSTRY

Figures released by the European Cruise Council in March 2010[4] showed that nearly 4.95 million passengers took a cruise holiday in Europe, a 12% increase on the previous year. The majority of European cruise passengers reside in the UK, however German interest in cruise holidays has been growing steadily and reported over a million Germans taking a cruise holiday in 2009.

In recent years Europe has become a significant player in the industry. Europe is the second largest cruise market, following North America, and accounts for more than 25% of global cruise revenues. The European market is growing at a notably faster rate, representing an increase of 165% in cruise passengers since 1998.

CRUISE TOURISM IN IRELAND

The growth of the international cruise tourism sector has increased demand for additional destinations for cruise line operators. Ireland, with its strong tourist product close to its main ports of call has therefore capitalised on the worldwide increase in cruise holidays. Typically Ireland is viewed as a port of call for the Northern European and Baltic Seas cruises. Historically, the majority of Irelands principal cruise traffic was North American passengers on US based vessels. In recent years there has been a marked increase on the number of European, and in particular, British operators including Ireland in their itineraries. Over three out of every five cruise ships calling to Irish ports are part of Carnival Corporation which highlights the importance of this group to Ireland.

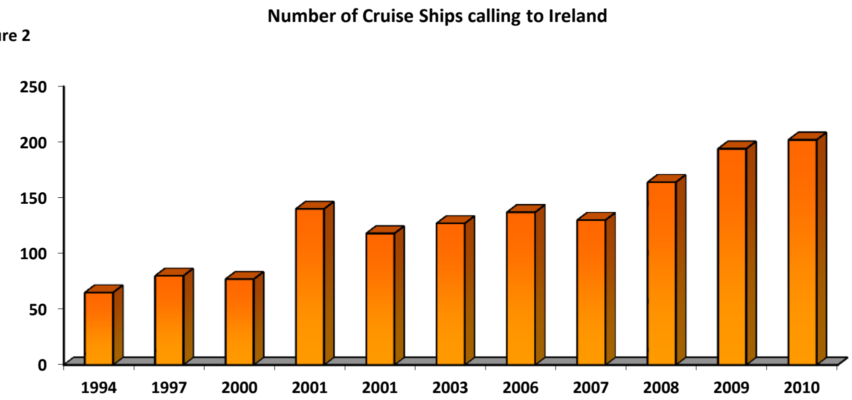
---

[3] Koncept Analytics (2010), Analysis of the global cruise market

[4] http://www.latecruisenews.com/tag/european-cruise-council-ecc

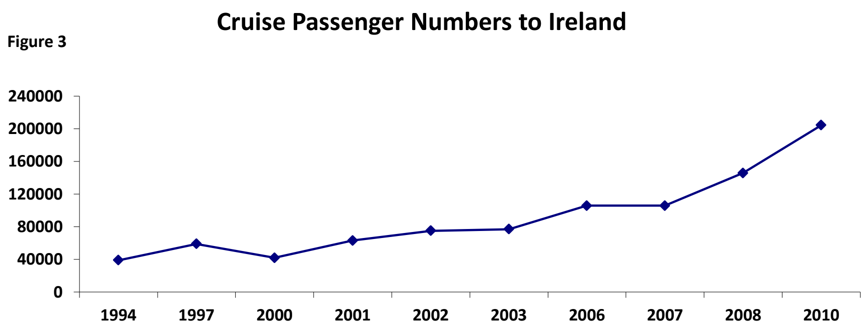
In 1994, Ireland received 65 cruise calls. By 2010 his figure had increased to 202 calls. The majority of cruise liners visiting Ireland spend one day anchored in port.

Figure 2



The number of cruise ship passenger and crew travelling to Ireland has increase by over 200% in the last decade from 64,376 to 204,489. This growth has come about through both an increase in the number of cruise ship visits and in the number of vessels with a higher passenger capacity. If future trends reflect recent experiences, the Irish cruise market has potential for substantial growth in the coming years.

Figure 3



CRUISE LINER RESEARCH

RESEARCH OBJECTIVES

- To provide up to date profile information on the origins and experiences of international cruise visitors to Ireland.

Formatted: Bulleted + Level: 1 + Aligned at: 0.63 cm + Tab after: 1.27 cm + Indent at: 1.27 cm

- To identify the main reasons why cruise visitors come to Ireland and/or a given port in Ireland, their opinions of specific attractions, facilities and services at Irish ports, as well as their particular likes/dislikes, needs or requirements.
- To establish the factors which determine how and why cruise ship companies choose the ports on cruise routes and how Ireland might attract more cruise ship calls.
- To estimate the revenue generated from this market segment and to explain how this revenue was generated by categorising it in terms of the goods and services purchased.

METHODOLOGY

Red C Research Ltd was commissioned on behalf of Fáilte Ireland to conduct the fieldwork on this project. The research consisted of three stages.

Stage 1 – Quantitative

- Face to face interviews were conducted with 720 disembarked passengers and crew. On ships where language difficulty prevented administered face to face interviews, a self-completion questionnaire in the respondents' first language was provided.

Formatted: Bulleted + Level: 1 + Aligned at: 0.63 cm + Tab after: 1.27 cm + Indent at: 1.27 cm

- Interviews were conducted with passengers in two primary locations for each port:
  - At the port as passengers returned to the ship from tours or independent exploration

Formatted: Bulleted + Level: 2 + Aligned at: 1.9 cm + Tab after: 2.54 cm + Indent at: 2.54 cm

  - In the town / city at the pick-up point for shuttle buses / train stations.
- Final data was weighted to ensure each ship in the sample was adequately represented based on passenger and crew numbers.

Formatted: Bulleted + Level: 1 + Aligned at: 0.63 cm + Tab after: 1.27 cm + Indent at: 1.27 cm

- Fieldwork was conducted from 30th July – 26th September 2010.

Stage 2 – Industry Workshops

Two workshops were held on the 20th and 23rd September. The workshops were attended by ground handlers, shipping agents, port personnel and tourism representatives. These provided industry members with the opportunity to contribute to an understanding of the current cruise market, challenges it faces and how the cruise line business can be developed in the future. Information gathered at this stage was used to structure an interview guide for in-depth telephone interviews with cruise operators in the third stage of the research.

Stage 3 – In-depth telephone interviews with Cruise Operators

Tele-depth interviews with a number of key decision makers in the cruise Industry were conducted worldwide to ascertain their perceptions of Ireland as a cruise destination and to assist in the build of a plan of action to promote brand Ireland as a port of call for cruise Ships. These interviews were conducted with a number of key personnel within the cruise industry.

- ***A series of individual Depth Interviews were conducted via telephone with the following***
    - ***Silver Sea*** – Darius Mehta
    - ***Fred Olsen*** - Matt Grimes
    - ***RCI / Azamara / Celebrity*** - Chris Allen
    - ***Aida*** - Kay Uwe Maroß
    - ***Crystal*** – Capt Birger Vorland
    - ***St John's Newfoundland*** – Mayor Dennis O'Keeffe

Fieldwork took place between 4th and 16th November 2010

Formatted: Bulleted + Level: 1 + Aligned at: 0.63 cm + Tab after: 1.27 cm + Indent at: 1.27 cm

Formatted: Bulleted + Level: 2 + Aligned at: 1.9 cm + Tab after: 2.54 cm + Indent at: 2.54 cm

DETAILED ANALYSIS OF RESULTS

QUALITATIVE RESEARCH

Though interviews held with cruise operators formed the third stage of the research process, the findings are presented at this stage given the insight they provide into the operations and requirements of the industry.

VIEWS OF CRUISE OPERATORS

Telephone interviews were held with five cruise operators and the chair of the Cruise St. John's Committee and the Cruise Association of Newfoundland and Labrador. It is their views that are expressed in the commentary below.

PERFORMANCE OF THE INDUSTRY

Though cruise operators reported a tough year in 2009, they view the industry as performing well and expect further modest growth in the coming years. Operators believe the growth is due to the fact that cruise holidays offer a good value proposition and an opportunity to see many places economically and in comfort. Operators however are reluctant to be over-confident and are aware of the need to stay competitive. The guest profile on board ships is increasingly diverse and operators need to keep a watchful eye on guest requirements. Repeat guests are very important to operators, however there is a need to continuously recruit new guests.

As guests expectations evolve, cruise operators are adapting their offering to meet their needs. Many operators have invested heavily in larger or extended ships. These larger ships allow for operators to put in place a cost effective business model and also offer greater economies of scale. Savings achieved from economies of scale allow ships to attract passengers through reduced prices. While there are significant advantages to ships with higher capacity, they are not without their challenges. More effort is required to fill the ships, particularly in the winter time. Operators often have to offer short cruises so as to maximise the ships availability. Larger ships are also restricted in the ports they can visit due to their size.

The industry also faces many challenges in terms of the environmental regulations and requirements that have been put in place internationally. These regulations contribute to continuing increases in fuel prices and may well result to changes in itineraries and port calls due to reductions in cruising speeds and distances covered.

CONSUMER TRENDS

Many cruise liners promote cruises as a value proposition. Cruise liners provide additional add-ons to packages in order to attract passengers such as free airfares which may be included in the price. Consumers appreciate the all-inclusive elements of a cruise however this can also deter passengers from purchasing extras and may save on shore excursions.

Cruise liners differ on the market segments they attract and even within a cruise liner's fleet, various ships will appeal to different segments. Aida ships are predominantly German passengers aged in their forties while Fred Olsen appeals to the more mature over 65 market. A new feature offered by cruise liners is cruises which appeal to the more adventurous passengers. Operators also provide 'sampler cruises' of 3 or 4 nights which allow novices to experience cruise holidays. These changes are driven by both consumer interest and operators delivering interesting and varied packages.

DESTINATIONS

Destinations on a cruise itinerary are crucial to guests selecting a holiday offer. Different areas have certain appeal and draws attached to them. Europe is perceived as a growth market and is especially useful for operators when they want to offer a short and varied cruise. The Baltic region is intriguing to many travellers given that it was cut off to most westerners for many decades. Travelling on a cruise ship to this region allows passengers to by-pass visa difficulties. The VAT free area and professionalism of ports in the Baltic region also enhance the appeal for operators. Indeed, the profitability of the Baltic region has resulted in some operators such as RCI scheduling fewer British Isles cruises.

As well as concentrating on established cruise destinations, operators are always on the lookout for new ports or destinations which may appeal to their consumers. Countries such as Quatar and Japan have recently approached operators in order to attract cruise tourism to their regions.

PORTS INCLUDED IN AN ITINERARY

In a practical sense, cruise companies regard the world as a series of sectors that meet various market needs. For the largest brands, this outlook allows companies to configure operations to take account of seasonality, weather patterns and optimum conditions for cruising, sales and marketing, and supply and service of ships.

Once a cruise company has decided to place a ship in a particular area there are many factors they take into consideration when deciding on ports to include in an itinerary:

- Revenue
- Costs and any cooperation that may exist between ports to reduce costs
- Time / distance between ports
- Appeal to guests
- Port facilities
- Ground handlers / tours

Formatted: Bulleted + Level: 1 + Aligned at: 0.63 cm + Indent at: 1.27 cm

Once a cruise operator has established marquee ports on their itinerary they will look for secondary or 'fill in' ports to complete the itinerary.

REQUIREMENTS OF A PORT

Cruise companies require the ports to provide a pleasant, clean landing area for guests. Dedicated cruise berths are operator's preference as they are in line with the luxury experience the cruise company in attempting to create. Given the increase in cruise ship sizes, ports which offer access to all ship sizes appeal to operators. Access to towns and places of interest is also key to operators when deciding on a destination as is a warm welcome for passengers at the port. Operators commend Cobh in particular at being successful in achieving this warm welcome. On a practical level, wheelchair access is a basic requirement of cruise companies at the port.

At larger ports, a cruise terminal would be welcomed by operators. The terminal would not need to be complex or sophisticated but rather a large covered area with heating / air-conditioning with desks, Wi-Fi, a welcome centre and a shop that provides sundries for guests and staff.

EXCURSIONS

Excursions are a key part of the revenue for operators and a part of the guest appeal and experience. All key tourist sites tend to be regularly offered within the mix of tours operators provide to their guests. Repeat guests tend to look for something different as do younger guests. Cruise operators also seek creative and new excursions to ensure repeat guests will disembark from the ship. While ground handlers strive to provide operators with new and innovative excursions for their guests, findings from the workshop revealed that operators often return to the tried and trusted tours to minimise risk.

Indeed, while repeat guest may not disembark due to familiarity with a port, newer guests may avoid formal excursions altogether in order to save money, especially if they have bought a cruise on a value proposition.

Some excursions are such a significant draw that cruise sailing times are structured around it. A visit to Moscow from St. Petersburg requires an overnight on land, Israel requires a stay of two days for the land excursions to be satisfied and operators are happy to start or end a cruise in Venice so guests can spend a number of days in the city.

FAMILIARISATION TRIPS

While familiarisation tours are regularly offered so that operators can experience first-hand what is on offer in a destination, they are usually only of interest to operators if they relate to a new destination and reflect a coordinated approach. Indeed one operator noted:

> *'If I went on every fam trip I was offered I'd be away all year – I just take one or maybe two a year and only if it is somewhere new.'*

Where familiarisation trips are offered, it is necessary that a structured approach is taken which includes input from tourism representatives, port and local authorities. One familiarisation trip commended by operators was that organised by Japan. Seminars were organised and appointments were set up with port authorities in the one area allowing for a very efficient and effective use of time. In contrast, while Quatar attracted cruise operators, customs and passport controls proved to be over bureaucratic and most pulled out after only one season.

While operators limit their familiarisation trips, an opportunity may exists by offering familiarisation trips to those selling excursions on board cruise ships. Crew members act as ambassadors for destinations and their experience of a destination help to promote it on board the cruise ships.

IRELAND AS A DESTINATION

Cruise operators have many positive perceptions of Ireland as a destination. The friendliness of the Irish people and the warm welcome are particularly noted. American passengers have a strong affiliation with the destination due to family links. The improved road and transport infrastructure in Ireland means that the country is seen as more accessible.

Many believe that Ireland portrays an image of 'whiskey and castles' and operators feel that other aspects of Ireland need to be highlighted to attract younger European guests. Promoting outdoor activities such as hiking and kayaking are key to attracting younger guests as well as emphasising the food heritage that Ireland has to offer.

IRELAND AS A CRUISE DESTINATION

Operators believe that Ireland is a well defined cruise destination offering a depth of onshore excursions. Its geographical location allows it to be included in both British Isles and transatlantic cruises. The proximity of ports within Ireland also provides optimum cruising distances.

On the negative side, operators find Irish ports to be expensive, especially with unfavourable exchange rates. The appearance of the ports can vary significantly with some ports providing cargo or heavy container berths and others providing more cruise-friendly surroundings for passengers. Operators believe local ports need to work together in order to provide a consistent service across all ports. Ports which are members of Cruise Baltic have set in place minimum service standards which ensure operators and guests will receive the same high standards, no matter which harbour they visit. Cruise Baltic has made its service standards its unique stamp of quality[5].

[5] Service standards ensure good cruise experiences, January 2007, www. cruisebaltic.com/composite-381.htm

IRISH PORTS

Dublin is seen as an essential port due to its status as capital city, Cobh however is viewed by many operators as the 'real star'. Cobh offers a great welcome and exposure to Irish friendliness. The port itself is picturesque and also provides access to scenic surrounding areas. Great efforts are made by the port of cork to foster positive working relations with operators by visiting them two to three times a year. Waterford is perceived to be undergoing a 'resurrection' but it needs to work hard to compete with Cobh. Belfast is liked by operators for their proactivity and friendless but the port itself requires work to improve its attractiveness. Killybegs is seen as a lone concrete pier and operators feel it is unsuitable for cruise calls.

Tendering in a port is unpopular all round with operators, guests and staff. Operators are only inclined to tender if there is a compelling reason to stop or if guests are of a younger profile.

Turnarounds for Irish ports would be an option but possibly only on a small scale. Ireland does not have enough of a local cruise going population to attract a large volume of turnarounds. Specific terminals would also be required to cater for boarding. The pre-clearance option available at Dublin / Shannon is attractive for US passengers but it only applies after the cruise is over so it is difficult for operators to pre-sell this advantage.

The option to increase bed nights in Ireland is also limited due to the fact the transport infrastructure on land allows sights to be reached more easily and most guest on a cruise prefer to overnight on the ship and not incur additional accommodation expenses.

SWOT ANALYSIS

Table 1

Strengths - Positive well established image - Depth of on-shore offer - Friendly people	**Weaknesses** - Inconsistent offer in ports - Not really proactive – expect Cobh - Unfavourable exchange rates - Poor landing facilities in some ports
Opportunities - More coordinated activity from ports - Better dedicated cruise berths - Better welcome at berth - Capitalise on the friendly image - On board tourism representatives	**Threats** - Activity by other destinations who really see the value of cruises - Better value elsewhere

Formatted: Bulleted + Level: 1 + Aligned at: 1.27 cm + Indent at: 1.9 cm

Formatted: Bulleted + Level: 1 + Aligned at: 1.27 cm + Indent at: 1.9 cm

Formatted: Indent: Left: 1.27 cm, Hanging: 0.63 cm, Bulleted + Level: 1 + Aligned at: 1.27 cm + Indent at: 1.9 cm

Formatted: Bulleted + Level: 1 + Aligned at: 1.27 cm + Indent at: 1.9 cm

Formatted: Bulleted + Level: 1 + Aligned at: 1.27 cm + Indent at: 1.9 cm

WHAT CAN IRELAND LEARN FROM NEWFOUNDLAND?

A healthy fifty five percent increase was reflected in cruise traffic figures to Newfoundland in 2010. The cruise schedule included 27 ships, making 176 port calls throughout the province bringing 84,000 passengers and crew[6]. Mayor Dennis O' Keefe of St. John's Newfoundland is chair of the Cruise St. John's Committee and the Cruise Association of Newfoundland and Labrador. Mayor O'Keefe has been active in the development of the cruise ship industry in the province and shared his views as part of this research on what contributes to the success of St. John's as a cruising destination and what learnings Ireland can apply to the industry here.

It is felt that the success of the Newfoundland experience in the cruise industry is attributed to a number of actions taken locally. Coordinated thinking and action has been the mainstay of the industry both locally and state wide. This has resulted in agreed policies for the cruise industry and shared responsibility in implementing these policies. Costs are shared by relevant bodies and even local city tourism is active in welcoming and paying for facilities for cruise ships. Port authorities have developed the port areas and shared the cost with the city where possible. The Cruise Association also extend

[6] http://www.cruiseindustrynews.com/cruise-news/3702-22210-cruise-newfoundland-and-labrador-has-a-brand-new--edge.html

their engagement with operators beyond one annual visit, sometimes visiting operators up to three times a year in order to foster positive personal relations.

Newfoundland strive to make the guest's experience memorable every time a cruise ship calls to their ports. A coordinated welcome of music, children and even the Newfoundland dog all add to the charm for the passengers. Local tourism representatives are present on board at all ports. The association have been instrumental in agreeing a set price for taxi tours with taxi operators. Freedom of the port is also presented to a first time ship/ captain in front of guest creating a sense of occasion. The ports are interested in receiving feedback from guests and so distribute an onboard survey which can be completed and posted back.

While these measures have been successful to Newfoundland they are not location specific and Mayor O' Keefe states:

> *'The one thing that comes through every time on the guests surveys is that they love the friendly welcome, the people. And the Irish have that too so you could use it more.'*

As well as coordinating the experiences at port, Newfoundland has established itself within certain routes by collaborating with a number of countries. These collaborations ensure its inclusion in the North Atlantic island cruises (Iceland, Greenland and Canada) and the Viking Trail to America. Collaboration between ports has also been successful for Cruise Baltic[7]. Founded in 2004 as a three year project, its aim was to jointly improve the member destination's facilities and to coordinate international marketing of the Baltic cruise project. By the time the project finished in 2007 it had achieved an average 20% increase in the number of cruise ship passengers visiting the region. Indeed, workshops held as part of this research with port authorities and ground handlers highlights that Ireland recognises the benefits of port collaboration and proposed setting up a Celtic link between Northern Spain, Northern France, Ireland and Scotland.

Mayor O' Keefe believes Ireland could conceivably be part of the Viking Trail routing allowing for a start or finish here with the possibility of bed nights. Coordinated thinking and active courting of the operators is necessary to optimise on Ireland's cruise potential.

[7] Lemmetyinen, A (2009), The coordination of cooperation in strategic business networks – The Cruise Baltic case, Scandinavian Journal of Hospitality and Tourism, Vol. 9, issue 4, pg 366-386

QUANTITATIVE RESEARCH

In addition to speaking with cruise operators, passengers and crew were interviewed during their time disembarked at Irish ports. In total 720 interviews were conducted in total (560 passengers and 160 crew). Face to face interviews were conducted as passengers and crew were returning to the cruise ship on either the shuttle bus or at the port before they re-boarded the ship. The following analysis is based on the responses of passengers and crew interviewed.

PROFILE OF CRUISE SHIPS AND PASSENGERS ARRIVING IN IRELAND

Three out of every five cruise ships arriving in Ireland originated in Britain. A further 24% of ships commenced their cruise in Northern Europe and 11% in Germany. Over half the cruise ships arriving to our shores have capacity for over 2,000 passengers and are of a 4 - 4.5 star rating. Four out of five cruises are in the early to middle stage of their itinerary when they arrive at Ireland with the majority of cruises lasting 8-12 nights.

Given that the majority of cruises to Ireland originate in Britain, it is not surprising that the country of residence of over a third of passengers is British. North Americans account for 37% of passengers to Ireland with the majority of these on a fly-cruise originating in Britain. German passengers also account for a significant proportion of passengers to Ireland at 12% with the remainder of passengers arriving from other Europe or rest of world.

While 55% of passengers are aged 60+, cruise ships have also started to attract a younger age profile and this is reflected in the fact that almost one in five passengers arriving on cruise ships to Ireland are under 44 years of age.

The average number of cruises taken by passengers to Ireland is 4.3 cruises. Only 14% of respondents are on their first cruise with almost one in five respondents having taken over 10 previous cruises. Repeat cruise passengers are very committed to this style of holiday. Carnival UK noted in 2010[8] that more than one in four of their passengers would reduce their other expenditure to ensure they still take their main cruise holiday, while more than one in three would rather pay less than they would normally budget for a cruise than not book one at all. Those with a propensity to have more than the average of four cruises tend to be North Americans, over 70 years of age travelling on 5 star cruises. Of repeat cruise passengers, almost half had taken their last cruise within the past 12 months and a third had taken a cruise between 1-2 years ago.

[8] Carnival UK, The Cruise Report 2010, Trends and innovations in the UK cruise market

For seven out of ten passengers, it is their first trip to Ireland. Those who have visited Ireland before tend to be over 70 years of age, have taken a number of cruises in the past and are on cruises originating in Germany. In line with holidaymakers to Ireland arriving by air or ferry[9], almost a quarter of passengers have ancestral ties to Ireland and one in five has friends or family living here.

BOOKING THE CRUISE

LEAD TIME

Over fifty percent of passengers booked their cruise to Ireland six months before their cruise commenced with a total of 15% booking over a year in advance. These passengers tend to be North American with 3+ persons in their party. Passengers who have a lead time of less than 3 months (17%) are more likely to be travelling on their own and on ships originating from Germany. Indeed, industry reports from 2010 indicated that there has been a sharp fall in late bookings with just one in six made within three months of departure compared with more than in four in 2008 and nearly one in two in 2001[10].

PLANNING

Consulting with a tour agent / travel agent is a key source of information for 44% of cruise passengers prior to booking a cruise. The importance of a travel agent to cruise passengers in planning their trip is emphasised by the fact that only 19% of holidaymakers to Ireland arriving by air or ferry in 2009 consulted with a travel agent at this stage of their trip[11].

As well as consulting with travel agents, over a third of passengers visit a cruise liner's website for information, one in five source information from brochures/ pamphlets / guide books and 11% of passengers speak to friends or family before booking a cruise.

BOOKING

Over two-thirds of passenger prefer to use the traditional booking methods of the phone or face-to-face when actually purchasing their cruise. This compares favourably with figures issued by the UK Cruise survey 2009[12] which indicate 80% of cruise passengers book by phone or face-to-face. A total of 56% of passengers on a cruise to Ireland either booked in-person or over the phone at a travel agent emphasising the important working

[9] Fáilte Ireland, 2009 Fact Card
[10] Passenger Shipping Association,The Cruise Review, May 2010, p11
[11] Fáilte Ireland, 2009 Fact Card
[12] Passenger Shipping Association,The Cruise Review, May 2010, p11

relationship the cruise industry has with travel agents. According to the 2010 CLIS Cruise Market Overview[13] a number of cruise training programs and certifications are on offer to travel agents. Cruise travellers recognise the importance of an accredited cruise expert as over two-thirds find it to be extremely or very important in booking their cruise.

While online bookings of a cruise are low, it still provides a booking channel for 30% of passengers. Micky Arison, chairman and chief executive officer of Carnival Corporation suggest that while far fewer actually book cruises directly online, any travel agent without online booking capability is going to lose out[14].

REASONS FOR TAKING CURRENT CRUISE

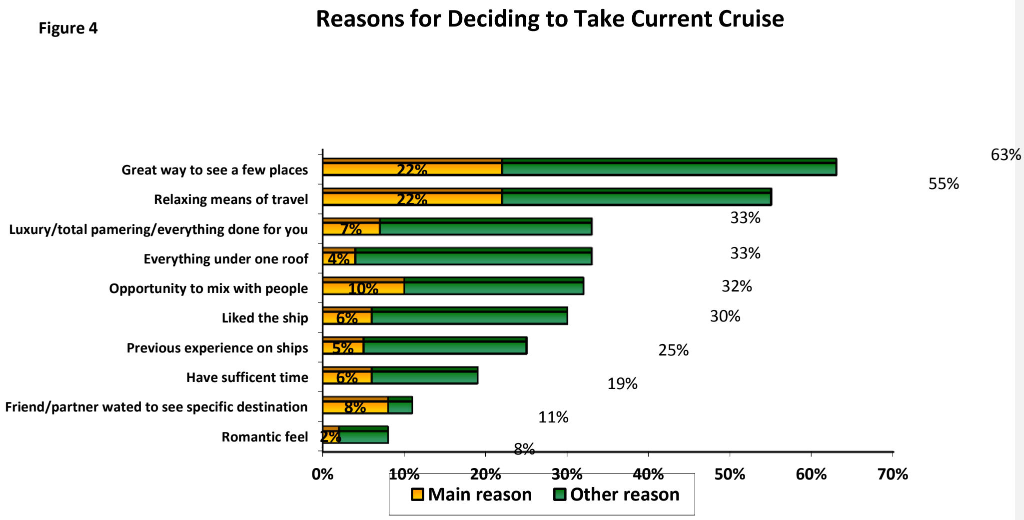
The key reason cited by passengers for taking their current cruise is that they find it a great way to see a few places (63%). A large proportion also finds it a relaxing means of travel (55%). A third of passenger opted for the cruise as they view it as a pampering / luxury holiday and a similar number enjoy having everything under one roof.

For the majority of passengers the experience of the ship and the destinations on the itinerary are an equal draw to them. For one-fifth of passengers the cruise ship itself is the primary pull factor and for just over a quarter it is the destinations on the itinerary that attract the passengers. Those attracted primarily by the destinations tend to be German and travelling on ships of less than 1,000 passengers.

For almost half the passengers, Ireland as a destination on their itinerary was very important to their booking decision. For a further 33% of passengers it was quite important. North American passengers particularly note the importance of Ireland on their itinerary when choosing their cruise. While the destinations listed on an itinerary are a key attractor for Germans, Ireland is not a priority destination for them. One in five German passengers do not rate stopping in Ireland as important when booking their cruise.

[13] Cruise Lines International Association, INC, 2010 CLIA cruise market overview, Statistical cruise industry data through 2009
[14] Carnival UK, The Cruise Report 2010, Trends and innovations in the UK cruise market

Figure 4



ENCOURAGEMENTS TO DISEMBARK

INTENTIONS TO DISEMBARK

On average, passengers and crew disembark or intend to disembark at 77% of the ports on their itinerary. British passengers have the highest tendency to disembark (80%) followed by North American passengers (77%). Indeed, German passengers only intend to disembark at 67% of the ports on their itinerary.

Of passengers who disembark at Irish ports, eight out of ten have already decided to do so before they reach the port. Passengers arriving into Cork show the earliest intention to disembark at the port with 70% deciding to disembark there when booking their cruise compared to an average of 61%. German passengers are more likely to delay their decision to disembark until they are actually on the cruise ship (26%). A quarter of passengers who disembarked at Northern Irish Ports decided to do so after arriving at the actual port.

Table 2

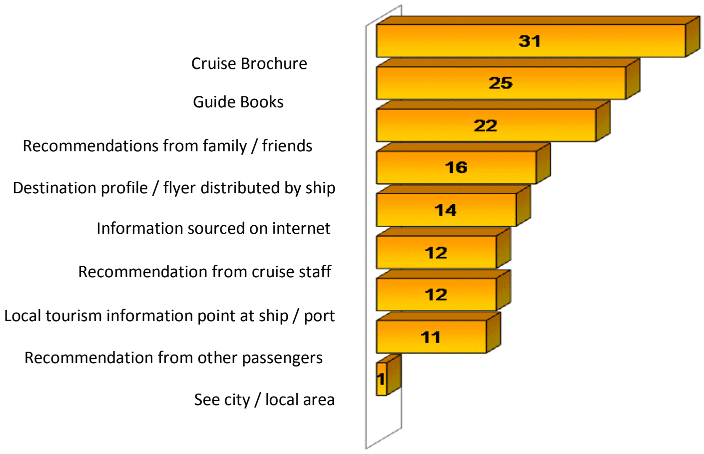
When did you decide to disembark at Irish Port?	
When booking a cruise	61%
After booking cruise but before departing	6%
When on cruise	14%
On arrival at port	15%
Don't know	4%

INFORMATION WHICH ENCOURAGED PASSENGERS TO DISEMBARK

The key source of information which influences a passenger's decision to disembark is a cruise liner's cruise brochure (31%). Guide books and recommendations from family and friends also significantly encourage passengers to disembark, however these sources are used less for visitors to Northern Irish ports. Destination profile flyers distributed on board cruise ships tend to encourage passengers to disembark (16%), particularly at lesser known ports such as Waterford (38%). Recommendations from cruise staff also influence passengers to disembark at ports (12%), these recommendations are particularly taken on board by passengers to Northern Ireland. Ole Andersen of the Baltic Cruise Project[15] notes that crew members are ambassadors for destinations and their experience of a destination can promote it on board the cruise ships. Tourism stands on board ships also encourage passengers to disembark (12%). For almost a third of passengers disembarking at Northern Irish ports, a tourism stand on board the ship at the port encouraged them to disembark.

[15] Service standards ensure good cruise experiences, January 2007, www.cruisebaltic.com/composite-381.htm

Figure 5 **Information which Encouraged Passengers to Disembark**



Where Were Passengers Interviewed			
Dublin (167) %	Any Cork (216) %	Any Waterford (65) %	Any NI (112) %
26	31	36	35
33	27	27	14
28	21	22	16
8	21	38	7
23	10	17	11
10	12	5	17
5	4	8	31
12	6	14	16
-	2	7	-

IMPORTANCE OF ELEMENTS WHICH ENCOURAGE PASSENGERS TO DISEMBARK

Passengers place greatest emphasis on the proximity of the town / city / tourist sites to the port (81%) and good weather conditions (80%) in encouraging them to disembark. These factors are key to all passengers disembarking at the various ports around Ireland. Over two-thirds of passengers find having interesting tourist attractions important to them. This is particularly so for those visiting ports in Northern Ireland where almost nine out of ten passengers rate having interesting tourist attractions as an element which encouraged them to disembark. Three out of five passengers overall rate the look of the port as an attractor to disembarking passengers. In Cork, 89% of disembarking passengers rate the look of the port as important. This contrasts significantly with Dublin port where 28% of disembarking passengers say it was an important factor in encouraging them to disembark. More than three out of five passengers note that a shuttle service is important to their decision to disembark. This importance increases to 85% for passengers at Dublin port. While accessibility to shopping is important to passengers (58%), seven out of ten crew members are encouraged to disembark if there is easy access to shopping areas. Lesser importance is placed on the availability of tours, however for the 29% of passengers who engage in a tour this importance increases significantly to 76%.

Table 3 Importance of Elements which Encourage Passengers to Disembark

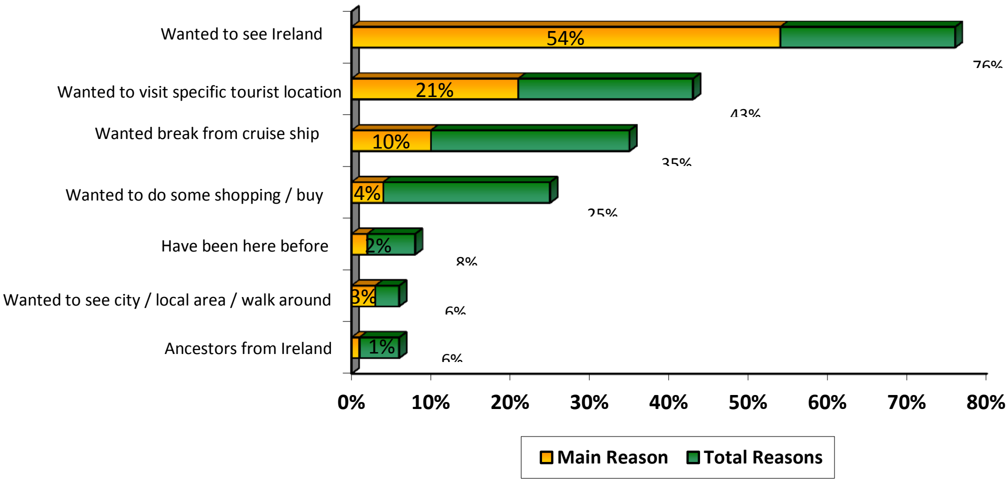
(Excluding DK)	Total		Dublin	Any Cork	Any Waterford	Any NI
Close proximity to town / city / tourist sites	81%		80%	77%	81%	89%
Good weather	80%		68%	92%	65%	78%
Interesting museums / tourist attractions	69%		72%	60%	61%	87%
Shuttle service available	65%		85%	48%	64%	74%
The look of the port	63%		28%	89%	45%	60%
Free shuttle service	61%		70%	49%	61%	72%
Accessibility to shopping	58%		63%	52%	45%	68%
Tours available (general)	51%		51%	40%	32%	78%
Recommendation from friends / family	50%		61%	49%	45%	45%
Accessibility to activities	46%		59%	29%	38%	65%
Availability of half day tours	45%		47%	36%	33%	64%
Availability of full day tours	35%		38%	24%	18%	59%
Poor weather	19%		29%	15%	12%	19%

REASON FOR DECIDING TO DISEMBARK

The main reasons passengers cite for disembarking at an Irish port are to see Ireland (76%). Passengers disembarking at Cork are more likely to cite this as a key reason for disembarking (80%) Two out of every five passengers disembark so they can visit a specific tourist location (43%). Visitors to Northern Irish ports are almost twice as likely to mention this as a reason for disembarking. Given that Ireland is less of a priority destination for German passengers, it is not surprising that they are less likely to mention wanting to see Ireland or visit a specific tourist attraction as a main reason for disembarking at Irish ports. A third of passengers simply want a break from the ship and 25% of passengers disembark specifically do some shopping.

Reasons for Disembarking

Figure 6



DISEMBARKED EXPERIENCE

PREFERRED DESTINATION

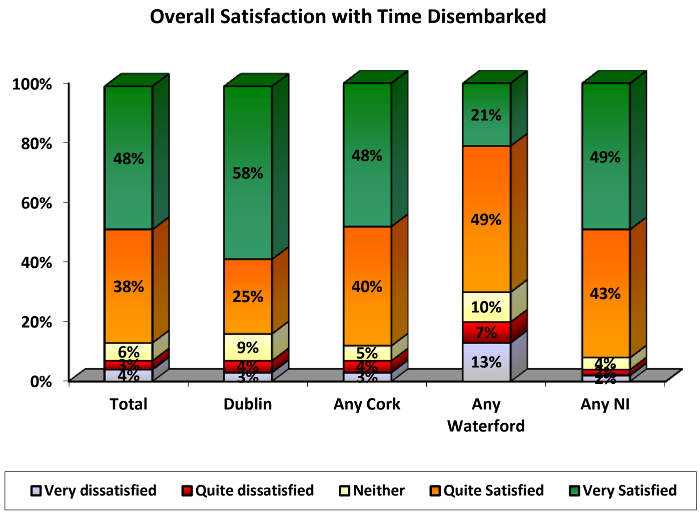
Almost two-thirds of passengers and crew that disembarked at Irish ports state Ireland has been their preferred destination of disembarkation on their trip so far. This compares to one in five passengers mentioning England or Wales as their preferred destination and 13% mentioning Scotland.

Of passengers that disembarked at Cork, 63% said it was their favourite destination out of those they had disembarked at during their current trip. Almost one in ten passengers disembarking at Dublin mentions it as their favourite port while 28% of passengers to Waterford make the same statement. For 12% of passengers to Belfast it is their favourite visited port on their itinerary.

OVERALL SATISFACTION WITH TIME DISEMBARKED

In general, high levels of satisfaction are reported with the time passengers spend at Irish ports (86%). Passengers to Northern Irish ports report the highest level of satisfaction with their time at port (92%) followed by passengers to Cork (88%) and Dublin (83%). Only one in five passengers however attributes top-box scores to Waterford resulting in a lower satisfaction rating (70%). British and North American passengers are most satisfied with their time disembarked 89% and 87% respectively with German passengers reporting an 82% satisfaction rating. Passengers who participated in a tour are more satisfied with their disembarked time (90%) than those who did not engage in a tour (83%). Where passengers felt Ireland offered good value for money, passengers were more satisfied with their time in Ireland (92%) compared to those that did not (82%).

Figure 7



For almost one third of passengers to Irish ports their expectations were exceeded. Passengers visiting cork reported the greatest incidence of having their expectations exceeded (36%) followed by those to Northern Irish ports (32%) and Dublin (28%). In Waterford, 19% of the passengers had their expectations exceeded with three out of five reporting that their expectations were matched. While both British and North American passengers report high levels of having their expectations exceeded (38% and 33% respectively), only 12% of German passengers felt their expectations of Ireland were exceeded. For passengers where Ireland was an important destination on their cruise itinerary, 34% of passengers said their expectations were exceeded compared to 19% for passengers that felt Ireland was not an important destination on their itinerary.

SATISFACTION WITH ELEMENTS AT PORT

The key element passengers are most satisfied with during their time at port is the availability of a shuttle service (92%). This satisfaction however declines to 52% for passengers disembarking at Waterford. Nine out of every ten passengers are satisfied with the ports proximity to towns / city / tourist sites. This satisfaction declines slightly for visitors to Northern Ireland.

While passengers are generally satisfied with the proximity of the port to the city / town, satisfaction with the look of the port varies significantly across the different locations. Half of passengers disembarking at Dublin port are satisfied with the look of the port, this compares to a 94% satisfaction rating in Cork. Four out of five passengers are satisfied with the look of ports in Northern Ireland. While satisfaction with the look of the port in Waterford is lower than average, it still fairs marginally higher than Dublin at

60%. Given cruise operators note that a pleasant landing area that is clean and prepared for guests is preferable for berthing, Irish ports will need to take a strong look at the aesthetics of the cruise berths on offer.

Passengers are satisfied with the availability of tours on offer (half day tours 81% and full day tours 71%). However, this satisfaction drops significantly for passengers disembarking at Waterford where less than half the passengers are satisfied with the availability of tours. Accessibility to activities is also a concern, particularly for passengers visiting Cork where only 30% of passengers were satisfied with the accessibility to activities in the area. Passengers disembarking in Northern Ireland (82%) and Dublin (78%) are most satisfied with the accessibility to activities they have there.

Table 4 Satisfaction of Elements at Disembarking Port

(Excluding DK)	Total	Dublin	Any Cork	Any Waterford	Any NI
Shuttle service available	92%	87%	88%	52%	85%
Close proximity to town / city / tourist sites	91%	92%	93%	91%	86%
Availability of half day tours	81%	80%	90%	45%	88%
Tours available (general)	80%	72%	84%	56%	95%
Interesting museums / tourist attractions	78%	84%	66%	76%	93%
The weather	77%	52%	87%	92%	80%
The look of the port	76%	50%	94%	60%	79%
Availability of full day tours	71%	64%	79%	38%	85%
Accessibility to shopping	69%	82%	54%	49%	89%
Accessibility to activities	58%	78%	30%	55%	82%

ACTIVITIES / SERVICES AVAILED OF WHILE AT PORT

Shopping is the most popular activity of passengers disembarked at Irish ports (41%). Crew members are particularly avid shoppers with almost two-thirds of them engaging in shopping during their time at port. Almost one in ten passengers just like to spend their time walking around having coffee / lunch (2%) or going to a pub and having a Guinness (1%).

Over a quarter of passengers visited monuments or tourist sites. Visiting heritage centres and historic houses / castles is popular with 18% of disembarked passengers.

Shuttle buses and train services are heavily used where available. Where shuttle buses are available, 71% of passengers and 87% of crew used them. In Cork where the train is the main link between the port and the city, 72% of passengers use it. Only 4% of crew use the train indicating that they may tend to say local around Cobh rather than heading into the city.

TOURS

Almost three in ten passengers (29%) engaged in a tour while disembarked. Passengers who tend to book a tour consider Ireland an important destination on their itinerary (33%). North American passengers are also more likely to book a tour (30%) with the majority aged between 60-67 (33%). Tours taken by passengers are organised by the cruise ship in 85% of the cases and an Irish guide generally accompanies the passengers on their tour (88%).

High satisfaction ratings are recorded with all aspects of an organised tour from language available (93%), tour content (92%), timings (92%) and tour guide (88%).

PAYMENTS AND EXPENDITURE

PREPAYMENTS

Of passengers who disembark at Irish ports, 30% have made some form of advanced payment which covers their disembarked time in Ireland. Of those who make an advanced payment, almost two-thirds make the payment to the cruise company with a further 30% making a payment to a local travel agency in their home country. The average prepayment made by these passengers was €116. North American passengers tend to make the largest prepayment €122 followed by British passengers €117. Mainland Europeans make an average prepayment of €109. A large proportion of the prepayment made covers transport (83%) and a tour guide (79%). For almost two-thirds of passengers entry to attractions is included in their prepayment and a quarter of prepayments include food and beverage.

EXPENDITURE WHILE DISEMBARKED

On average, passengers spend €71 during their time disembarked at Irish ports. Expenditure by crew is also significant considering those that disembark spend an average of €48. This compares to an average per diem expenditure of €72 for holidaymakers who have arrived by air or ferry to Ireland[16]. While the two expenditure figures appear quite similar, the per diem expenditure for holidaymakers includes spend on accommodation. Passengers who have been identified as the bigger spenders include those aged 18-44 (€99) and those travelling in family parties (€118). Passengers on shorter cruises (€97) and who are at the middle stage of their cruise itinerary (€89) also tend to spend more.

Expenditure is highest amongst passengers disembarking at Dublin, spending on average €100 during their time at port. Passengers at Cork have the next highest expenditure at €68 followed by those to Waterford €60 and Northern Ireland €52. North American passengers report the highest expenditure levels during their time at port (€75). British passengers have a marginally lower expenditure at €74 and German passengers spend an average of €49 at Irish ports.

Passengers and crew spend the greatest proportion of their expenditure on clothing (30%), followed by food and beverage (20%) and local craft and souvenirs (20%). Expenditure on other retail items such as jewellery and watches accounts for 14% of expenditure and money spent on taxis and ground transport accounts for a further 6%.

Some regional differences are evident across spending categories with those disembarking at Northern Irish ports more biased towards clothing while Waterford's proportional spend is higher in local craft and souvenirs.

[16] Fáilte Ireland, 2009, Tourism Revenue 2009 by Purpose

Table 5 Spend by Category

Based on all spend (self and other) for passengers & crew	Total	Dublin	Any Cork	Any Waterford	Any NI
Food & beverage	20%	14%	20%	25%	29%
Local craft / souvenirs	20%	15%	24%	30%	19%
Clothing (retail)	30%	30%	28%	23%	39%
Taxi's / ground transport	6%	1%	12%	11%	1%
Museums / art galleries	1%	3%	1%	1%	0%
Other retail (inc jewellery / watches)	14%	20%	13%	9%	7%
Any other spend (inc entertainment)	8%	17%	1%	5%	5%

DIRECT SPEND

Market estimations for direct spend take into account all cruise ships visiting Ireland in 2010, not only those sampled during the research period of the fieldwork. A disembarkation proportion of 75% for all passengers and 50% for all crew is applied based on 2009 EU Tourist Facilities in Ports report[17]. All data is based on total spend averages reported and assumed as similar across the year. While Shannon / Foynes was not interviewed during the research, and assumed average spend has been included.

The direct spend from passengers and crew disembarked at Irish Ports, including port charges, is estimated at €20.3 million.

This calculation is made up of:

- Spend by passengers and crew disembarked €14.7m
- Port charges (excluding provisions) €3.2m
- Advanced payments repatriated to Ireland €2.4m

Formatted: Bulleted + Level: 1 + Aligned at: 0.63 cm + Indent at: 1.27 cm

[17] European Commission 2009, Tourist Facilities in Ports, The Economic Factor Facilities in Ports

Direct spend at each of the ports is calculated at:

Table 6 Spend by Port

€	Pax spend while disembarked	Pax advanced payments repatriated	Crew Spend	Port charges (ex provisions)	Total
Dublin	6,537,731	1,127,922	1,231,169	1,328,447	10,225,269
Cork	3,717,753	373,491	561,776	1,087,725	5,740,746
Waterford	367,518	86,836	18,652	150,157	623,164
Any NI	1,579,958	807,437	610,045	602,980	3,600,421
Total*	12,302,960	2,421,643	2,395,687	3,169,309	20,319,662

*includes estimation for Shannon / Foynes

VALUE FOR MONEY

Over half of all disembarking passengers consider Ireland good value for money. North American passengers are most satisfied with the value for money on offer (71%) with German passengers indicating they are least satisfied (33%). Those disembarking at Northern Irish ports believe it offers the best value for money (81%).

LIKELIHOOD TO RETURN

Four out of every five passengers say they would be likely to return to Ireland for a holiday in future. Passengers who have disembarked at Northern Irish ports (87%) and Dublin port (84%) are the most likely to return. Passengers over 70 years of age are the least keen to return to Ireland (77%) with those aged 45-59 most enthusiastic about coming back (85%). Given that Ireland is not a priority destination for German passengers, it is not surprising that they are the least likely to return to Ireland for a holiday (62%). In contrast 87% of British and 85% of North American passengers say they are likely to return in future.

Almost one in five passengers who plan to return say they will be back within the next 12 months and almost a third of passengers report that they would return in 1-2 years.

Of passengers who are likely to return to Ireland, 36% would return on a cruise. North American passengers would be most likely to return on a cruise (57%) while only 17% of German passengers who say they would come back would return on a cruise.

CONCLUSION

The number of passengers taking a cruise has experienced sustained growth in the past two decades. Europe is now the second largest cruise market, following North America, and accounts for more than 25% of global cruise revenue. Given the value and volume attached to the cruise industry, Ireland needs to be proactive in attracting and growing its share of the market.

In-depth interviews held with cruise operators provide an insight into the operations and requirements of the industry. While operators view Ireland as a well defined cruise destination, the cost and appearance of the ports can be a drawback. Cruise operators also highlight key considerations in their itinerary planning such as revenue, cost, guest satisfaction, excursions and port facilities. It is felt that Ireland could greatly benefit by establishing itself within certain routes by collaborating with a number of countries. Such collaboration would allow member destinations to set service levels and market themselves under the one brand.

The quantitative research confirms the fact that while the majority of cruise passengers to Ireland are over 60 years of age, we are also attracting a significant proportion of younger cruise passengers. Given the more senior profile of the majority of cruise passengers, it is not surprising that the travel agent / tour operator is key to both the planning and booking stages of the cruise. This emphasizes the importance of the travel agent / tour operator in the sales chain of cruise holidays.

For almost half the passengers, Ireland as a destination on their itinerary was important to their booking decision. German passengers however are less inclined to rate Ireland as priority destination. Indeed, German passenger’s perception of Ireland are not contemporary regarding what Ireland has to offer. This perception may act as a barrier to attracting Ireland as a cruise destination for potential German passengers.

Eight out of ten passengers have already decided to disembark at Irish ports before they have arrived at their destination. Local tourism information points on the ship or at the port, particularly in less well known ports, are key to influencing those who have not made a decision to disembark to do so. The proximity of the town, interesting tourist sites, availability of a shuttle service and the look of the port are particularly important to passengers in their decision to disembark.

Overall, passengers are satisfied with the time they spend disembarked at Irish ports noting particular satisfaction with shuttle services, tours and tourist attractions. While high levels of satisfaction are reported with the look of the port in Cork, Dublin and Waterford may need to examine their port appearance.

The direct spend from passengers and crew disembarking at Irish ports, including port charges is estimated at €20.3 million. It is estimated that passengers and crew spend €14.7 million while disembarked, port charges (excluding provisions) contribute €3.2 million, and advance payments which are repatriated to Ireland add €2.4 million to direct spend. Considering the overall contribution of direct spend cruise tourism injects to the Irish economy, it is worth investing time and effort to grow this sector of the tourism industry.

While cruise tourism has a positive economic impact on the economy, it also leaves lasting impressions with passengers who visit Ireland with four out of every five saying they would be likely to return for a holiday in future. In order for Ireland to capitalise on the growth within cruise tourism it will be necessary to develop both the services at ports and on-shore to meet operator and customer requirements.

RECOMMENDATIONS

The following recommendations are based on the results from the qualitative interviews conducted with cruise operators and the quantitative research conducted with passengers and crew.

- Unify the activity of different ports – work together to present a picture of Ireland which capitalises on the personality and friendliness, as well as professionalism.
- Convey a unified interest in the cruise industry – activity on a more regular basis that just an annual visit. At least 2 or 3 times a year to foster personal relations.
- Improve the berthing arrangements for passengers – clean welcoming surroundings; possibility of a personal welcome (music / people). Turnarounds require a purpose built facility – not overly complex, but large and with flexibility in its layout.
- Develop the image of Ireland beyond 'whiskey and castles' to encourage passengers to disembark and experience the locality.
- Collaboration between ports to establish service levels and savings. Market cruising in Ireland as part of a wider group. Consider the expansion of route

Formatted: Bulleted + Level: 1 + Aligned at: 1.27 cm + Indent at: 1.9 cm to include North Atlantic islands – this offers the possibility of turnarounds and use of west coast ports.

- Excursions are a key source of revenue to cruise operators and are continuously seeking new and creative tours in order to encourage passengers to avail of them. Ground handlers provide operators with an array of tours every year but feel they always revert to the tried and tested. Ground handlers need to encourage operators to broaden the portfolio of tours on offer to passengers.
- Given the importance of travel agents in cruise bookings, it is necessary to strengthen the relationship with travel agents both at home and abroad in order to increase the number of cruises to Ireland.
- German passengers present a challenge to the Irish cruise industry. This is a market that Ireland will need to target with clear communications of what the country has to offer.
- Local tourism stands at ports or on the ships should be present at all ports given the impact they have on disembarkation rates. Likewise, destination profiles which are distributed on ships should continuously be updated and made available to all passengers in all ports. Availability of this information is particularly relevant to less well-known ports such as Waterford.
- Where ports are not accessible to the town / city, it is necessary to have a shuttle service available. Close proximity to the town / city is cited as the most important element to encourage passengers to disembark. It is therefore necessary to provide a seamless link between the port and the city if one does not exist.
- Satisfaction with accessibility to activities recorded a very low score from passengers. This indicates room for improving the awareness of activities and the availability of transport to and from the wide array of activities that are available in Ireland. While transport links in Ireland have improved greatly and any activity is very accessible, this has not yet transferred to passenger perception or awareness.

When targeting cruise companies, shorter cruises and cruises in the middle of the itinerary are the ones Ireland should focus on attracting as these provide the greatest value. Furthermore, promoting activities / culture that appeals to 18-44 year olds and families should be considered in attracting these cruise passengers to Ireland.