

Tourism Tasmania



Flinders Island Visitor Survey Report

Year Ending June 2009



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Background and Methodology

During the first six months of 2009, Tourism Tasmania in cooperation with the Flinders Council has undertaken research to deliver the 2008-09 Flinders Island Visitor Survey results and report. A reliable estimate of visitation to Flinders Island had not been possible since the 1996 study was completed by Tourism Tasmania. Subsequent studies were undertaken in 2000 and 2003 although airline failures midstream and the unavailability of passenger data meant it was not possible to deliver reliable survey results.

The main objectives of the 2009 survey are to provide reliable estimates of the number of visitors to the island, including the number of nights and expenditure, as well as visitor behaviour and demographic information. The main outcomes of the survey are to provide information to support the ongoing development and promotion of Flinders Island as a holiday destination.

After analysis of data gathered from the recent Flinders Island Community Survey (commissioned by Tourism Research Australia), Flinders Island businesses and from the Whitemark airport, it is estimated that the regular airline service (Airlines of Tasmania) accounts for 85 – 90 per cent of the travel activity to and from Flinders Island.

Through consultation with an independent research statistician, Tourism Tasmania developed an exit strategy survey targeting passengers departing the island via the regular air service. Face-to-face interviewing of passengers was undertaken within the Whitemark Airport departure lounge during the 6 months to June 2009, where over 400 visitors were interviewed and completed the questionnaire provided. This included approximately 45 questionnaires that were made available at a display in the departure terminal for voluntary completion. The survey responses have been weighted to be reflective of all passengers who travelled via the main airline during the 12 months ending in June 2009. The survey results are therefore exclusive of visitors who exited the island via other methods, such as private or charter aircraft or via sea transport.

Total Visitation to Flinders Island

A total of 8,680 passengers departed Flinders Island on the scheduled airline service during the 12 months to June 2009. Of these, an estimated 4,319 or approximately 50 per cent were visitors aged 14 years or older. The remaining 50 per cent were residents of Flinders Island. Less than 5 per cent of visitors were aged under 14 years.

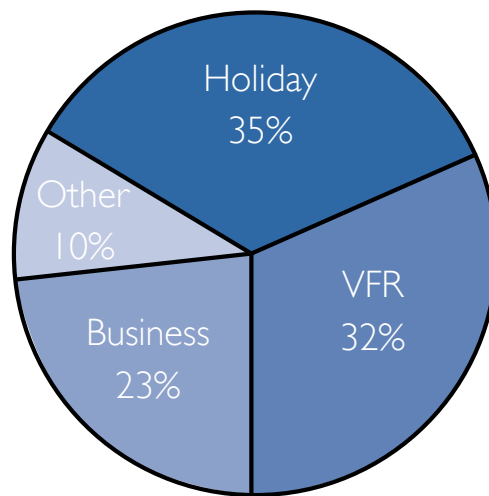


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Purpose of Visit

- Holidaying was the most common reason people visited Flinders Island. An estimated 35 per cent or over 1,500 adult visitors travelled to Flinders Island for a holiday during the 12 months to June 2009 (Figure 1).
- Visitors travelling for business or employment engagements on the island were the next most popular reason for travel, at an estimated 32 per cent of all visitors.
- An estimated 23 per cent of all visitors came to spend time with family or friends who are residents of Flinders Island. A small number of trips (less than 10%) to Flinders Island were made by people pursuing a special interest or for some other reason such as volunteer weed removalist, missionary workers, and some specific recreational pursuits such as hunting.

Figure 1: Purpose of visit to Flinders Island



Total Nights and Length of Stay

Visitors spent approximately 25,000 nights on Flinders Island during the year ending in June 2009. Holiday visitors and those visiting friends or relatives (VFR) shared the majority of all nights spent at 35 per cent and 36 per cent respectively (Table 1). The average length of stay of holiday visitors at 5.2 nights was less than VFR at 8.3 nights per trip. Business or employment trips tended to be shorter, at an average of just over 3 nights.

Table 1: Estimated Visitors and Nights, Purpose of Visit to Flinders Island					
Year Ending June 2009	Holiday	Visit friends/relatives	Business/employment	Special Interest	Total Visitors
Estimated Visitors (aged 14+)	1,519	998	1,402	400	4,319
% Share of Total Visitors	35%	23%	32%	9%	
Estimated Visitor Nights	8,800	8,850	5,155	2,032	24,827
Average Length of Stay (Nights)	5.2	8.3	3.1	4.5	6.0
% Share of Total Nights	35%	36%	21%	8%	

Note: Special Interest visitors include volunteer weed removalist, missionary workers, and some specific recreational pursuits such as hunting.

Origin of Visitors

It is estimated that 59 per cent or 2,540 visitors during the 12 months to June 2009 were residents of Tasmania's main island. The next most frequent visitors were residents of Victoria, representing 25 per cent or around 1080 visitors.

Origin of Holiday Visitors

Of the estimated 1,500 holiday visitors to Flinders Island, those travelling from both Tasmania and Victoria hold the majority of the share at 47 and 35 per cent respectively (Table 2). Significantly, almost half (49%) of all visitors from Victoria were on a holiday, compared to only 28 per cent of visitors from Tasmania.

State of Residence	Estimated Number of Visitors	Percentage of Total Visitors	Number of Holiday Visitors	Percentage of Holiday Visitors
Tasmania Tasmania	2,543	59%	712	47%
Victoria	1,080	25%	525	35%
N.S.W.	296	7%	111	7%
Queensland	124	3%	26	2%
South Australia	104	2%	104	7%
Western Australia	64	1%	13	1%
A.C.T	8	0%	0	0%
Northern Territory	11	0%	0	0%
Overseas	88	2%	26	2%
Total Visitors	4,319		1,519	

Visitor Expenditure

Total expenditure by visitors to Flinders Island during the year to June 2009 is estimated at almost \$4.9 million dollars (including airfares to and from Flinders Island). Over 50 per cent of all expenditure was spent by Holiday visitors (\$2.5 million), who spent approximately \$1,600 per person during their trip (Table 3). When looking at the total visitors (all purposes, not just holiday visitors) it was found that those who departed Flinders Island to Essendon, have a higher average spend per person, compared to those travelling to Launceston at an estimated \$1,600 and \$900 per person respectively. This is due in part to the higher cost of airfares from Victoria as well as a larger proportion of higher spending Holiday visitors from Victoria and mainland Australia. Airfares accounted for an estimated 35 per cent of total visitor expenditure.

	Average Spend per Visitor	Total Expenditure	Share of Expenditure
Total Visitor Spend	\$1,128	\$4,873,672	
By purpose of visit:			
Holiday	\$1,635	\$2,483,825	51%
Visit friends/relatives	\$999	\$996,842	20%
Business/employment	\$639	\$896,060	18%
Special Interest	\$1,145	\$457,840	9%
By Destination:			
Essendon	\$1,591	\$1,887,786	39%
Launceston	\$915	\$2,866,787	59%

Visitor expenditure estimates excluding airfares came to a total of just over \$3 million dollars for the year (Table 4). Visitors spent an average of \$706 each on Flinders Island, on items such as car hire, accommodation or other expenses including activities, food and drink. Holiday visitors contributed approximately \$1.8 million during the year ending June 2009 and have by far the highest average spend per person at \$1171 each. Adult visitors departing for Essendon (represented only 27 per cent of all visitors) accounted for approximately 43 per cent of expenditure on Flinders Island (excluding airfares). Essendon bound visitors were higher yielding than visitors departing on flights to Launceston.

Table 4: Visitor Expenditure Excluding Airfares			
	Average Spend per Visitor	Total Expenditure	Share of Expenditure
Total Visitor Spend	\$706	\$3,051,071	
By purpose of visit:			
Holiday	\$1,171	\$1,778,486	58%
Visit friends/relatives	\$540	\$538,888	18%
Business/employment	\$292	\$409,721	13%
Special Interest	\$787	\$314,760	10%
By Destination:			
Essendon	\$1,104	\$1,309,817	43%
Launceston	\$523	\$1,638,795	54%

First Time and Repeat Visitation

An estimated 37 per cent of all visitors to Flinders Island were first time visitors during the 12 months to June 2009, and 34 per cent stated they had visited within the past 12 months (Table 5). Significantly, the majority of Holiday visitors were on their first visit (57 per cent), while 23 per cent of Holiday visitors had been to Flinders Island two or more years previously. Typically, VFR travellers had a high repeat visitation with 40 per cent coming to the island within the previous 12 months. Those who made trips for Business or Employment also have a high repeat trip estimate of more than 60 per cent within the past 12 months.

Table 5: Previous Visitation				
Have you previously visited Flinders Island?	No	Yes, within 12 months	Yes, between 1 and 2 years ago	Yes, more than 2 years ago
Average of Total Visitors	37%	34%	10%	19%
By purpose of visit:				
Holiday	57%	14%	6%	23%
Visit friends/relatives	25%	40%	14%	21%
Business/employment	21%	61%	7%	11%
By Destination:				
Essendon	44%	23%	13%	20%
Launceston	35%	37%	9%	19%

Future Visitation

Visitor responses to the question 'Do you think you will return to Flinders Island' were dominated by positive results, with over 71 per cent of all visitors stating they intend to return within one year (Table 6). This included 58 per cent of Holiday visitors intending to return during the next 12 months, a strong indication that these visitors consider Flinders Island to be a fulfilling holiday destination. Despite this positive indication, only 14 per cent of Holiday visitors had returned within the past year (Table 5), indicating there is a leakage in converting intentions for a repeat visit to the island.

Table 6: Future Visitation

<i>Do you think you will return to Flinders Island?</i>	Don't know	Yes, within 1 year	Yes, in more than 2 years time
Average of Total Visitors	18%	71%	12%
By purpose of visit:			
Holiday Total	29%	58%	13%
Visit friends/relatives Total	11%	76%	13%
Business/employment Total	8%	84%	8%

Types of Accommodation Used

The number of nights spent in the homes of Friends or Relatives on Flinders Island represents the largest share of total visitor nights due to the tendency for VFR trips to be longer in duration than visits for other purposes (Table 7). Of the commercial accommodation establishments, hotels / motels were the highest, followed by bed & breakfasts and holiday units respectively.

Table 7: Type of Accommodation Used

Accommodation Type	Percentage of Total Nights	Estimated Number of Nights
Friend's/Relative's place	32%	7,475
Hotel/Motel	24%	6,261
Guest house/B&B	18%	4,344
Holiday flat/unit	17%	4,236
Camping	5%	1,413
Cabin	5%	1,097
Total Nights		24,827



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Main Form of Transport Used

Forty six percent of all visitors used rental vehicles to move around the island. Visitors on a Holiday or Business related trip in particular relied on a rental vehicle (Table 8). Typically visitors with friends or relatives on the island made use of their vehicle during their stay.

Table 8: Main Form of Transport Used			
<i>Which form of transport did you use for the greatest length of time?</i>	Friend or Relatives	Rental car	Other
Average of Total Visitors	31%	46%	23%
By purpose of visit:			
Leisure/holiday Total	19%	56%	25%
Visit friends/relatives Total	77%	15%	8%
Business/employment Total	21%	48%	31%

Activities and Places Visited

Outdoor activities have proved popular among visitors, with recreational walks and bushwalking enjoyed by 41 per cent and 28 per cent respectively (Table 9). The pursuit of fishing was found to be undertaken by 35 per cent of visitors. While the majority of visitors spent time in the town centres of Whitemark and Lady Barron, many of the more recreational locations were also well represented, suggesting visitors are interested in seeing and exploring different areas of the island.

Table 9: Activities Undertaken and Places Visited			
<i>Did you do any of the following during your stay?</i>	Percentage of Total Visitors	<i>Which of the following places did you visit?</i>	Percentage of Total Visitors
Recreational Walks	41%	Whitemark	93%
Fishing	35%	Lady Barron	76%
Bushwalking	28%	Killiecrankie	57%
Swimming / time at the beach	27%	Trousers Pt Beach	53%
Boating/sailing	14%	North East River	37%
Off road tours	13%	Wybalenna	34%
Hunting	9%	Mt Strezleki	30%
Gem Fossicking	7%	Walkers lookout	26%
Diving/Snorkelling	6%	Furneaux lookout	25%
Bus tours	4%	The Museum	21%
Organised Sport	3%	Other Places	22%
Other activities	32%		

Demographics of Visitors

Overall, male visitors were more common than female visitors, with this trend continuing among the visitors on holiday (Table 10). When aggregated, the age groups between 50 and 64 years represented 43 per cent of all visitors to the island. This was more dominant among holiday visitors, where three quarters were aged 50 years or more. Travel group sizes remained small, with an average of 2.6 people per group, slightly higher for holiday visitors. The majority of visitors were married or in defacto relationships, with 75 per cent of all holiday visitors in a marriage relationship.

Table 10: Visitor Demographics		
	Total Visitors	Holiday Visitors
Gender:		
Male Visitors	63%	59%
Female Visitors	37%	41%
Age Group:		
14-19	3%	4%
20-24	5%	2%
25-29	7%	4%
30-34	6%	1%
35-39	6%	3%
40-44	9%	6%
45-49	8%	6%
50-54	17%	18%
55-59	15%	15%
60-64	11%	17%
65-69	5%	10%
70+	8%	13%
Travel Group Size:	2.6 people	3.1 people
Marital Status:		
Married	61%	75%
Defacto	13%	np
Single (never married)	17%	np

np = Not publishable due to small sample size



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Profile of Visitors

The majority of visitors were either employed or retired from work (Table 11), coinciding with the dominance of visitors in older age groups. Most of the main income earners relating to the household of each respondent were professionals. Of the holiday visitors, 46 per cent were in full time work while almost a third had retired from work. For holiday visitors, the main income earners salary tended toward the lower end of the range by comparison to the overall results, with almost 40 per cent of holiday visitors indicating the \$30 - \$39 thousand salary range which may be due to the high number of retirees.

Table 11: Visitor Profile		
	Total Visitors	Holiday Visitors
Employment of Respondent:		
Yes, work full time	57%	46%
No, retired	19%	31%
Yes, work part time	14%	16%
No, student	3%	3%
No, do not work	3%	4%
No, looking for work	3%	np
No, home duties	2%	np
Main Income Earners Occupation:		
Professional	42%	np
Skilled manual worker	15%	np
Owner of small business	8%	np
Sales	6%	np
Semi-professional	5%	np
Manager, large business owner	5%	np
Semi-skilled worker	3%	np
Farm owner	3%	np
Retired	2%	np
Clerk, typist	1%	np
Farm worker	1%	np
Unskilled (e.g. farm-worker)	1%	np
No occupation or other	10%	np
Main Earners Income:		
20K to 29K	9%	9%
30K to 39K	11%	39%
40 to 49K	15%	12%
50 to 59k	20%	14%
60 to 79k	26%	18%
80 to 99k	19%	9%

np = Not publishable due to small sample size

Information Sources and Booking Methods

More than half of visitor to Flinders Island (53 per cent) sought suggestion's from friends or relatives to assist in the planning of their visit (Table 12), which is indicative of strong 'word of mouth' promotion by previous visitors. Travel agents and travel literature (maps/books/brochures) were also used by between 20 – 25 per cent of visitors. Typically holiday visitors were the most active in seeking information, using both travel agents and literature at a higher proportion than other visitors. This trend continued among Website usage results, with an estimated 29 per cent of holiday visitors had used the visit-flinders-island website and this was the most popular on-line information source used by holiday visitors.

The internet was also the most popular method for making reservations by visitors, with almost 40 per cent of visitors to make a booking over the internet (results include airline bookings). The traditional methods of telephone and making a face-to-face booking were used by up to a third of visitors. These findings were very similar for holiday visitors.

		Total Visitors	Holiday Visitors
Information Sources:	Friend or relative suggestion	53%	48%
	Travel agent	12%	22%
	Maps/books/brochures	17%	24%
	Motoring association	1%	0%
	Tasmanian Travelways	2%	6%
	TV Shows	1%	1%
	Websites:	visitflindersisland.com.au	16%
	discovertasmania.com.au	4%	6%
	flinders adventures	3%	4%
	flinders is executive tours	0%	0%
	other sources	20%	9%
Booking Methods:	Internet/website	39%	39%
	Telephone	32%	26%
	In person	22%	24%
	Email	9%	16%
	SMS/Text Message	1%	1%
	other sources	17%	14%

Visitor Feedback

Overall, visitor's held very positive impressions of the services and experiences they enjoyed on Flinders Island, particularly the customer service and the attractions and activities (Table 13). Lower ratings were recorded for the availability of general services as well as the availability of flights to and from Flinders Island. The total collection of comments will be made available as a separate document to this report.

How do you rate the following aspects of Flinders Is?	Very Good	Good	Average	Poor	Very Poor
Customer Service	52%	41%	6%	1%	0%
Attractions & Activities	51%	42%	7%	1%	
Quality of Accommodation	42%	44%	13%	1%	
Availability of services	30%	46%	22%	2%	0%
Availability of Transport to/from Flinders Island	29%	43%	20%	5%	3%

2008-09 Results Compared with Previous Study's

- The previous study completed in the year 2000 found 59 per cent of all passengers interviewed departing Flinders Island were visitors, compared with 50 per cent during the year to June 2009. (Due to a number of interruptions to passenger services during the 2000 survey, a total visitor estimate was not possible as actual passenger numbers could not be obtained from airlines).
- The most recent reliable visitor estimate from the 1996 survey found 4,500 visitors came to Flinders Island during the 12 months to December 1996, marginally higher than the most recent estimate to June 2009. The small difference between 1996 and the year 2009 visitor estimates could be as a result of a reduction of commercial flight services to Flinders Island.

Flinders Island Community Survey – Travel Method Supplement Questions

In a survey of Flinders Island residents undertaken by Tourism Research Australia in November 2008, Tourism Tasmania took the opportunity to add some questions regarding the types of transport used to access the island by Flinders Island residents. Specifically, residents of Flinders Island were asked about whether or not they (or other members of their household) had travelled to and from the island in the past 6 months. Of those that responded (n=198), 86.4 per cent had undertaken such travel. Table 14 shows the percentage share of transport types used by residents with 77 per cent relying on the scheduled airline service. Transport by sea was found to be the least popular means of transport used for as little as 3 per cent of trips.

Transport type	Residents
Airlines of Tasmania	77%
Other charter plane	11%
Privately owned plane	9%
Sea Transport	3%

Conclusion

This report provides indicative data for visitation levels to Flinders Island. Caution should be taken in the application of the survey findings given the relatively low number of estimated visitors. The survey there were an estimated 4,319 visitors age 14 or over during the 12 months to June 2009. Visitors had an average length of stay of 6 nights, totalling to just under 25,000 nights and spent an average of \$706 per person, excluding airfares to the island. Visitors on a holiday represented 35 per cent of all visitors and visitor nights, whilst accounting for 58 per cent of total visitor expenditure (excluding airfares). Feedback from survey respondents found the majority enjoyed positive experiences during their trip and hold a desire to return to Flinders Island in the near future, indicating a strong appreciation for Flinders Island as a travel destination.

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