

Tasmanian Tourism Snapshot

Year ending December 2010

Total Visitation to Tasmania (Tasmanian Visitor Survey)

Key Results:

- The TVS has reported a decline of 1% in total visitors to Tasmania on scheduled air and sea services. For the year ending December 2010 there were 904,000 visitors, down from 912,100 for the previous year.
- Total nights decreased by 3% to 8.30 million.
- Visitor expenditure increased by 4% to \$1.53 billion.
- The number of interstate visitors to Tasmania remained steady at 779,900 (was 781,600), with growth from Queensland (6%) and the non-core markets of South Australia (2%), Western Australia (6%), Northern Territory (35%), and the ACT (39%) helping to offset declines in visitors from Victoria (-4%) and NSW (-4%).
- Holiday visitors decreased by 8% for the year to December 2010 along with holiday expenditure (-1%) while holiday nights remained steady.
- Visitors visiting friends or relatives (VFR) increased 8% for the year ending December 2010. The number of nights VFR visitors spent in Tasmania increased 10% while expenditure increased 16%.
- A decline in holiday visitors has occurred over each of the past five quarters to December 2010.

TVS SUMMARY

- The total number of visitors to Tasmania for the year ending December 2010 was 904,000, down 1% from 912,100 the previous year (Table 1). After eight years of growth, this has been the second consecutive 12-month period to record a decline in visitor numbers.
- The total number of nights spent by visitors to Tasmania for the year ending December 2010 was 8.30 million, down 3% from the previous year (was 8.57 million) (Table 2).
- Visitor expenditure was \$1.53 billion¹, up 4% from the previous year (was \$1.47 billion) (Table 2).
- Of all visitors, 385,500 (-8%) were on holiday, 260,600 (+8%) were VFR, 170,900 (+3%) were on business, and 32,500 (-5%) were travelling to attend a conference or convention (Table 2).
- For the year ending December 2010, the five marketing zones reported the following changes in visitor numbers: Launceston, Tamar Valley & North, +6%; North West, +5%; East Coast, +2%; Western Wilderness, -3%; and Hobart & Surrounds, -4% (Table 2).
- For the year ending December 2010, 85% of all visitors to Tasmania travelled by scheduled air services, down from 86% the previous year. Visitors travelling by sea made up 15% of all visitors to the State, up from 14% for the year ending December 2009.

¹One billion = one thousand million or 1,000,000,000

Interstate Visitation to Tasmania (Tasmanian Visitor Survey)

Key Results:

- The total number of interstate visitors to Tasmania for the year ending December 2010 was 779,900, showing no significant change (0%) from 781,600 the previous year (Table 3).
- The total number of nights spent by interstate visitors to Tasmania for the year ending December 2010 was 6.53 million, down 1% compared to the previous year (was 6.62 million) (Table 3).
- Of all interstate visitors, 304,800 (-9%) were on holiday, 238,500 (+11%) were VFR, 159,900 (+2%) were on business, and 29,900 (-3%) were travelling to attend a conference or convention (Table 3).
- Interstate visitor expenditure was \$1,294 million, up 3% from the previous year (was \$1,259 million) (Table 3).
- For the year, changes in visitor numbers to Tasmania from the key interstate markets were as follows: Queensland, +6% to 112,900; N.S.W., -4% to 184,000; and Victoria, -4% to 343,000. Together, these markets account for 82% of interstate visitation (Table 4).

Summary:

- The number of interstate visitors to Tasmania remained steady at 779,900 (was 781,600), with growth from Queensland (6%) and the non-core markets of South Australia (2%), Western Australia (6%), Northern Territory (35%), and the ACT (39%) helping to offset declines in visitors from Victoria (-4%) and NSW (-4%) (Table 4).
- The number of interstate visitors on holiday declined 9%, while VFR increased 11%. Business or employment visitors from interstate have increased by 2% while convention/conference visitors decreased 3% for the year (Table 3).
- The improving trend toward travel on the Spirit of Tasmania by interstate visitors has continued with an increase of 9% to 127,100 for the year to December 2010. Interstate visitors departing by air declined 2% to 652,800 visitors (Table 3).
- In terms of interstate visitors, the North West Coast (+6%) and the Launceston, Tamar Valley and the North Zone (+6%) were the only zones to record increases. Hobart and Surrounds (-5%), East Coast (-1%) and Western Wilderness (-5%) all declined in the year ending December 2010 (Table 3).

International Visitation (International Visitor Survey)

Key Results:

- 5.44 million international travellers visited Australia in the year ending December 2010, up 5% from the previous year (Table 5).
- The changes in visitor numbers in each of the major sectors were as follows: education, +5%; holiday, +4%; and VFR, +2% (Table 5).
- Visitor nights spent in Australia increased 6% to 187.2 million. Average length of stay remained stable at 34.4 nights (Table 5). The change in visitor nights in each sector was as follows: VFR, +13%; education, 5%; employment, +8%; and holiday, -1%.
- Total expenditure in Australia for the year ending December 2010 increased 4% to \$17.8 billion² (including package expenditure).
- For the three largest source markets, the following changes to visitor numbers to Australia were recorded: New Zealand, +5%; United Kingdom, -3%; and USA, -2% (Table 7).
- Across Australia, the following changes to international visitor numbers to the states/territories were recorded: Victoria, +8%; New South Wales, +5%; Queensland, +4%; Tasmania, +2%; South Australia, +1%;

² Expenditure for Total Australia (not modelled) includes small amounts that cannot be allocated to a particular state/territory

Western Australia, -1%; and Northern Territory, -11%. The Australian Capital Territory showed no significant change (Table 6).

Summary – Tasmania

- Tasmania received 142,000 international visitors during the year ending December 2010, up 2% from the previous year (Table 5). This represents the first positive growth in annual international visitation to Tasmania after eleven straight quarters of decline since the year ending March 2008.
- Tasmania's share of all international visitors to Australia was down from 2.7% for the year ending December 2009 to 2.6% for the year ending December 2010 (Table 6).
- Changes to visitor numbers in each of the major sectors were as follows: education, +4%; VFR, +4%; and holiday, -2% (Table 5).
- Visitor nights increased 13% to 2.98 million and the average length of stay for international visitors in Tasmania increased from 18.9 to 21.0 nights (Table 5). In each sector, change to nights was as follows: education, +22%; holiday, -2%; and VFR, -13%.
- Expenditure by international visitors in Tasmania increased 2% to \$279 million (including package expenditure) (Table 5).
- The average spend per international visitor (including package expenditure) in Tasmania remained steady at \$1,965 (was \$1,964) during the year ending December 2010, while spend per night decreased to \$94 (was \$104) (Table 5).
- In contrast to the growth in holiday visitation nationally, holiday visitation to Tasmania declined by 2% to 96,500 visitors. This decline was largely due to fewer holiday visitors arriving in Tasmania from the UK (-7%), Germany (-25%) and Canada (-22%).

Intrastate Visitation³ (National Visitor Survey)

Key Results:

- For Tasmania, overnight intrastate activity increased 3% to just over a million trips compared to the previous year. The number of overnight intrastate holiday trips increased 2% and VFR increased 9% while overnight business visits decreased 7% in the year ending December 2010 (Table 8).
- Nationally, the number of residents undertaking day trips in their home state has increased (+5%) to 143 million over the year, while for Tasmania this has decreased 4% to 4.3 million trips (Table 9).
- Total spend by overnight intrastate visitors increased 2% to \$296 million for the year ending December 2010 (Table 8).
- In contrast, total day travel expenditure decreased 3% to \$422 million for the year ending December 2010 when compared to the year ending December 2009 (Table 9).

Cruise and Navy Ship Visitation

Key Results:

- During the year to December 2010, 76,200 people visited Tasmania via cruise and navy ships, compared to 103,300 in the previous year representing a decline of 26% (Table 1).

³ Travel undertaken by a visitor in their home state

Total Visitors to Tasmania

Table I. Total visitors to Tasmania from all sources			
	Jan 2009 - Dec 2009	Jan 2010 - Dec 2010	% change
<i>Visitors</i>			
Cruise ship visitors	101,000	75,200	↓ -26%
Navy ship visitors	2,300	990	↓ -57%
Visitors on scheduled air and sea services	912,100	904,000	↓ -1%
Total visitors to Tasmania from all sources	1,015,400	980,190	↓ -3%

Note: Due to enhanced procedures some Tasmanian Visitor Survey estimates (to Dec 2009) have been subject to revision to ensure comparability.

Table 2. Total visitors to Tasmania on scheduled air and sea services

	Jan 2009 - Dec 2009	Jan 2010 - Dec 2010		% change
Visitors				
Day visitors	18,800	23,400	↑	25%
Overnight visitors	893,300	880,600	↓	-1%
Total visitors	912,100	904,000	↓	-1%
Nights				
Nights (million)	8.57	8.30	↓	-3%
Average length of stay (nights)	9.4	9.2	↓	-2%
Expenditure				
Expenditure (\$million)	\$1,470	\$1,526	↑	4%
Average spend per visitor	\$1,612	\$1,688	↑	5%
Average spend per night	\$172	\$184	↑	7%
Holiday spend (\$million)	\$995	\$988	↓	-1%
Purpose				
Holiday	419,400	385,500	↓	-8%
Visit friends or relatives (VFR)	240,200	260,600	↑	8%
Total leisure (Holiday+VFR)	659,600	646,200	↓	-2%
Business or employment	165,500	170,900	↑	3%
Convention/conference/seminar	34,200	32,500	↓	-5%
Zones Visited*				
Hobart & Surrounds	746,600	717,200	↓	-4%
Launceston, Tamar Valley & North	521,000	551,100	↑	6%
Western Wilderness	269,100	261,100	↓	-3%
North West	371,400	390,600	↑	5%
East Coast	290,400	297,100	↑	2%
Mode of departure				
Air visitors	784,600	768,800	↓	-2%
Sea visitors	127,500	135,200	↑	6%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

* Zones are based on Tourism Tasmania's Zone Marketing Strategy

Note: Due to enhanced procedures some Tasmanian Visitor Survey estimates (to Dec 2009) have been subject to revision to ensure comparability.

Interstate Visitors to Tasmania

Table 3. Interstate visitors to Tasmania on scheduled air and sea services				
	Jan 2009 - Dec 2009	Jan 2010 - Dec 2010		% change
Visitors				
Day visitors	18,200	23,100	↑	26%
Overnight visitors	763,400	756,800	↓	-1%
Total visitors	781,600	779,900	→	0%
Nights				
Nights (million)	6.62	6.53	↓	-1%
Average length of stay (nights)	8.5	8.4	↓	-1%
Expenditure				
Expenditure (\$million)	\$1,259	\$1,294	↑	3%
Average spend per visitor	\$1,611	\$1,660	↑	3%
Average spend per night	\$190	\$198	↑	4%
Holiday spend (\$million)	\$840	\$817	↓	-3%
Purpose				
Holiday	336,100	304,800	↓	-9%
Visit friends or relatives (VFR)	214,400	238,500	↑	11%
Total leisure (Holiday+VFR)	550,500	543,300	↓	-1%
Business or employment	156,700	159,900	↑	2%
Convention/conference/seminar	30,700	29,900	↓	-3%
Zones Visited*				
Hobart & Surrounds	628,800	600,300	↓	-5%
Launceston, Tamar Valley & North	442,200	467,000	↑	6%
Western Wilderness	213,100	202,000	↓	-5%
North West	316,200	336,000	↑	6%
East Coast	231,700	229,500	↓	-1%
Mode of departure				
Air visitors	664,500	652,800	↓	-2%
Sea visitors	117,100	127,100	↑	9%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

* Zones are based on Tourism Tasmania's Zone Marketing Strategy

Note: Due to enhanced procedures some Tasmanian Visitor Survey estimates (to Dec 2009) have been subject to revision to ensure comparability.

Table 4. Origin of interstate visitors to Tasmania

	Jan 2009 - Dec 2009	Jan 2010 - Dec 2010		% change
Victoria	357,400	343,000	↓	-4%
N.S.W.	190,900	184,000	↓	-4%
Queensland	106,600	112,900	↑	6%
South Australia	49,600	50,500	↑	2%
Western Australia	40,100	42,700	↑	6%
A.C.T.	17,900	24,900	↑	39%
N.T.	6,600	9,000	↑	35%
Total interstate visitors	781,600	779,900	→	0%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

Note: Due to enhanced procedures some Tasmanian Visitor Survey estimates (to Dec 2009) have been subject to revision to ensure comparability.

International Visitors to Tasmania

	to Tasmania			to Australia		
	YE Dec 2009	YE Dec 2010	% change	YE Dec 2009	YE Dec 2010	% change
Visitors						
International visitors	139,500	142,000	↑ 2%	5,174,700	5,440,900	↑ 5%
Nights						
Nights ('000s)	2,639	2,980	↑ 13%	177,128	187,192	↑ 6%
Average length of stay (nights)	18.9	21.0	↑ 11%	34.2	34.4	↑ 1%
Expenditure*						
Expenditure (\$million)*	\$274	\$279	↑ 2%	\$17,112	\$17,607	↑ 3%
Average spend per visitor	\$1,964	\$1,965	→ 0%	\$3,307	\$3,236	↓ -2%
Average spend per night	\$104	\$94	↓ -10%	\$97	\$94	↓ -3%
Holiday spend (\$million)	\$113	\$102	↓ -10%	\$6,601	\$6,246	↓ -5%
Purpose**						
Holiday	98,800	96,500	↓ -2%	2,398,200	2,488,600	↑ 4%
Visit friends or relatives (VFR)	28,200	29,300	↑ 4%	1,293,800	1,325,900	↑ 2%
Business	9,600	9,900	↑ 3%	756,100	868,100	↑ 15%
Education	8,400	8,800	↑ 4%	411,300	431,300	↑ 5%
Employment	2,200	3,300	↑ 49%	116,500	122,200	↑ 5%
Other Reason	2,600	3,800	↑ 43%	199,000	204,700	↑ 3%
Total	139,500	142,000	↑ 2%	5,174,700	5,440,900	↑ 5%

Source: International Visitor Survey (IVS), Tourism Research Australia

* Modelled expenditure including package expenditure does not include small amounts which cannot be allocated to a particular State/Territory

** The sum of the reasons for visiting Tasmania may be greater than the total as a visitor can give more than one reason for their visit.

State/Territory visited	YE Dec 2009	YE Dec 2010	% change	YE Dec 2009	YE Dec 2010	% point difference
	Visitors			Market Share		
New South Wales	2,711,000	2,838,600	↑ 5%	52.4%	52.2%	↓ -0.2%
Victoria	1,530,600	1,649,300	↑ 8%	29.6%	30.3%	↑ 0.7%
Queensland	1,968,200	2,048,200	↑ 4%	38.0%	37.6%	↓ -0.4%
South Australia	360,700	362,800	↑ 1%	7.0%	6.7%	↓ -0.3%
Western Australia	694,100	689,500	↓ -1%	13.4%	12.7%	↓ -0.7%
Tasmania	139,500	142,000	↑ 2%	2.7%	2.6%	↓ -0.1%
Northern Territory	336,100	299,600	↓ -11%	6.5%	5.5%	↓ -1.0%
Australia Capital Territory	155,300	154,800	→ 0%	3.0%	2.8%	↓ -0.2%
Total visitors to Australia	5,174,700	5,440,900	↑ 5%	100%	100%	

Source: International Visitor Survey (IVS), Tourism Research Australia

TABLE 7: Origin of international visitors to Australia

	YE Dec 2009	YE Dec 2010	% Change	YE Dec 2009	YE Dec 2010	% Change	Average Stay 2009	Average Stay
Country of origin	Visitors			Nights ("000")			Average Stay (nights)	
New Zealand	1,005,500	1,053,900	↑ 5%	13,471	14,253	↑ 6%	13.4	13.5
Japan	332,400	368,100	↑ 11%	7,253	8,178	↑ 13%	21.8	22.2
Hong Kong (SAR of China)	142,800	149,400	↑ 5%	4,627	5,301	↑ 15%	32.4	35.5
Singapore	249,800	269,900	↑ 8%	5,713	5,746	↑ 1%	22.9	21.3
Malaysia	192,400	213,000	↑ 11%	6,776	6,957	↑ 3%	35.2	32.7
Indonesia	97,000	111,900	↑ 15%	3,886	4,966	↑ 28%	40.1	44.4
Taiwan	92,400	80,500	↓ -13%	4,303	4,623	↑ 7%	46.6	57.4
Thailand	76,400	78,300	↑ 2%	4,028	4,113	↑ 2%	52.7	52.5
Korea	168,300	198,500	↑ 18%	11,957	12,356	↑ 3%	71.0	62.2
China (excludes SARs and Taiwan Province)	350,800	431,400	↑ 23%	19,177	24,022	↑ 25%	54.7	55.7
India	117,500	130,400	↑ 11%	7,149	8,278	↑ 16%	60.8	63.5
Other Asia	131,900	142,100	↑ 8%	7,442	8,576	↑ 15%	56.4	60.4
USA	450,400	440,200	↓ -2%	9,913	9,591	↓ -3%	22.0	21.8
Canada	117,300	115,300	↓ -2%	4,724	4,520	↓ -4%	40.3	39.2
United Kingdom	625,000	608,900	↓ -3%	22,577	21,929	↓ -3%	36.1	36.0
Germany	156,000	155,300	→ 0%	7,178	6,701	↓ -7%	46.0	43.1
Scandinavia	80,800	82,900	↑ 3%	3,318	3,406	↑ 3%	41.1	41.1
France	89,000	91,900	↑ 3%	4,759	4,915	↑ 3%	53.5	53.5
Italy	52,900	54,500	↑ 3%	2,389	2,388	→ 0%	45.2	43.8
Netherlands	49,200	47,600	↓ -3%	2,150	1,896	↓ -12%	43.7	39.8
Switzerland	40,700	42,200	↑ 4%	1,546	1,534	↓ -1%	38.0	36.3
Other Europe	179,100	173,400	↓ -3%	8,867	7,917	↓ -11%	49.5	45.7
Other Countries	377,100	401,200	↑ 6%	13,926	15,026	↑ 8%	36.9	37.5
Total	5,174,700	5,440,900	↑ 5%	177,128	187,192	↑ 6%	34.2	34.4

Source: International Visitor Survey, Tourism Research Australia

Intrastate Visitors

Table 8. Intrastate OVERNIGHT Travel

	Tasmania			Australia		
	Year ending December 2009	Year ending December 2010	% change	Year ending December 2009	Year ending December 2010	% change
<i>Visitors</i>						
Overnight visitors ('000s)	978	1,011	↑ 3%	43,779	44,496	↑ 2%
<i>Nights</i>						
Nights ('000s)	2,439	2,581	↑ 6%	140,232	142,033	↑ 1%
Average length of stay (nights)	2.5	2.6	↑ 2%	3.2	3.2	→ 0%
<i>Expenditure*</i>						
Expenditure (\$million)	\$290	\$296	↑ 2%	\$17,411	\$17,629	↑ 1%
Average spend per visitor	\$297	\$293	↓ -1%	\$398	\$396	→ 0%
Average spend per night	\$119	\$115	↓ -4%	\$124	\$124	→ 0%
<i>Purpose('000s)</i>						
Holiday	499	511	↑ 2%	20,984	20,736	↓ -1%
Visit friends &/or relatives (VFR)	256	278	↑ 9%	14,637	14,757	↑ 1%
Business	175	163	↓ -7%	6,296	6,886	↑ 9%
Other reason	46	62	↑ 35%	2,372	2,605	↑ 10%
Total overnight intrastate visitors	978	1,011	↑ 3%	43,779	44,496	↑ 2%

Source: National Visitor Survey (NVS), Tourism Research Australia

Figures may not add to the total due to rounding.

*Modelled expenditure (excludes major purchases such as motor vehicles). Modelled expenditure for Australia includes small amounts that cannot be allocated to a particular State/Territory.

Table 9. Intrastate DAY Travel

	Tasmania			Australia		
	Jan 2009 - Dec 2009	Jan 2010 - Dec 2010	% change	Jan 2009 - Dec 2009	Jan 2010 - Dec 2010	% change
<i>Visitor</i>						
Day visitors ('000s)	4,476	4,298	↓ -4%	137,074	143,275	↑ 5%
Total intrastate Day+Overnight visitors ('000s)	5,454	5,309	↓ -3%	180,853	187,771	↑ 4%
<i>Expenditure*</i>						
Expenditure (\$million)	\$434	\$422	↓ -3%	\$14,683	\$14,969	↑ 2%
Average spend per visitor	\$97	\$98	↑ 1%	\$107	\$104	↓ -2%
<i>Purpose('000s)</i>						
Holiday	2,433	2,317	↓ -5%	70,067	69,759	→ 0%
Visit friends &/or relatives (VFR)	1,064	1,017	↓ -4%	39,289	42,132	↑ 7%
Business	445	398	↓ -11%	13,066	14,214	↑ 9%
Other reason	534	566	↑ 6%	14,653	17,169	↑ 17%
Total day intrastate visitors	4,476	4,298	↓ -4%	137,074	143,275	↑ 5%

Source: National Visitor Survey (NVS), Tourism Research Australia

Figures may not add to the total due to rounding.

*Modelled expenditure (excludes major purchases such as motor vehicles). Modelled expenditure for Australia includes small amounts that cannot be allocated to a particular State/Territory.

Where do the statistics come from?

The primary sources of information on visitors to Tasmania published in this document are:

- Tasmanian Visitor Survey (Tourism Tasmania) for total and interstate visitor figures. Note: while the NVS provides valuable data on interstate travel at the national level, the Tasmanian Visitor Survey (TVS), conducted by Tourism Tasmania, continues to be the key source of detailed information about interstate visitation to Tasmania
- International Visitor Survey (Tourism Research Australia) for international visitor figures
- National Visitor Survey (Tourism Research Australia) for intrastate visitor figures (travel by Tasmanians in Tasmania)
- Holiday Tracking Survey (Roy Morgan Research) for information on Tasmania's marketing performance and preference and intention of Australians to visit Tasmania
- Tasmanian Ports Corporation for cruise ship visitor figures
- Navy Head Quarters Tasmania for navy ship visitor figures

For further information please contact:

Research Unit, Tourism Tasmania, Email: statistics@tourism.tas.gov.au, Ph: (03) 6230 8231