

# Tasmanian Tourism Snapshot

## Year ending June 2008

### Tourism Outlook

Confidence in Tasmanian travel by the aviation industry continues with recent announcements of new services to the State. Following the delivery of its new A319 Airbuses, Tiger Airways will commence flying between Hobart and Adelaide four times per week from 1 March 2009. In addition to this, Jetstar announced they will begin to ply the Hobart - Sydney route twice daily from 26 October 2008.

At the other end of the State, Launceston will welcome the start of Virgin's new seasonal service direct to Brisbane. This service will commence the daily flight from 15 December with one of its new EMBRAER E-Jet. These are smaller capacity, more fuel efficient aircraft that underpin Virgin's 'right sizing' strategy to match aircraft capacity with demand, not only for specific routes, but for specific days and even particular times of the day and night.

Consumer confidence across Australia increased at the end of August in anticipation of the first interest rate cut delivered by the Reserve Bank in almost 7 years<sup>1</sup>. The good news from the Reserve Bank was quickly followed by cuts to interest rates by most of the major lenders. Taken together, the increased air capacity and the lift in consumer confidence bode well for the upcoming peak travel season.

### Total Visitation

According to the Tasmanian Visitor Survey (TVS), visitor numbers to Tasmania continued to grow steadily in the year to June 2008, with 849,700 people visiting the State on scheduled air and sea services, an increase of three per cent on the previous financial year. Total visitor nights decreased marginally (-1%) over the period, with 7.17 million nights spent in Tasmania, while expenditure grew by five per cent to reach \$1.39 billion in the year ending June 2008.

Interstate visitation continued to dominate tourist activity in Tasmania in terms of expenditure (\$1.23 billion) and the number of nights (6.06 million) spent in the State. Intrastate visitors took the greatest number of trips, with an estimated 5.3 million day and overnight trips taken by Tasmanians in their home state over the period, down three per cent (National Visitor Survey). Interstate visitation grew by five per cent to 744,300 visitors (TVS), while international visitation remained stable with little change (-1%) on the previous financial year (International Visitor Survey). In addition, there were 83,000 cruise ship visitors (+42%) and 4,000 navy ship visitors to Tasmania over the financial year (Tasmanian Ports Corporation, Navy HQ Tasmania).

### Interstate Visitation (Tasmanian Visitor Survey)

While the number of interstate visitors (744,300) and the number of nights they stayed in Tasmania (6.06 million nights) increased on the previous financial year, the average length of stay of interstate visitors in Tasmania remained largely stable at 8.2 nights (was 8.1 nights). Expenditure by interstate visitors continues to grow strongly, with an increase of eight per cent to \$1.23 billion during the year ending June 2008. Tasmania maintained its market share of all interstate overnight trips in Australia (4%), all interstate visitor nights in Australia (5%), and all interstate overnight expenditure (5%) in Australia over the year to June 2008. Most of the growth in interstate visitors to Tasmania was from the holiday (+6%), visiting friends and relative (+7%), and business markets (+12%), while the convention/conference (-6%) and event/festival markets (-39%) decreased over the year.

### International Visitation (International Visitor Survey)

International visitation remained relatively stable at both the State (-1% to 155,900) and national level. In spite of steady visitor numbers and a drop in visitor nights spent in Tasmania (-8%), international visitor spending in Tasmania continued to grow, increasing six per cent to \$245 million. Nationally, the number of international visitors and visitor nights spent in Australia remained relatively flat during the year, while total expenditure in Australia by international visitors grew by nine per cent on the previous year. Tasmania's market share of all international visitors (3%), nights (2%) and expenditure (2%) remained unchanged for the year to June 2008 compared with 2007.

1. Murdoch, S. Reserve Bank cuts rates, retail banks follow. <http://www.theaustralian.news.com.au/story/0,25197,24282156-643,00.html> Accessed 18 Sept 2008. Roy Morgan Research. As Australians anticipate interest rate cut by Roy Morgan Consumer Confidence Rating up 9.2 to 99.3. <http://www.roymorgan.com/news/polls/2008/793/> Accessed 18 Sept 2008.



### **Intrastate Visitation (National Visitor Survey)**

Tasmanians took 5.3 million overnight and day trips in their home state in the year ending June 2008, a three per cent decrease compared with the year ending June 2007. Of the 5.3 million intrastate trips taken in Tasmania, 78 per cent were day trips and the remaining 22 per cent were overnight trips. Whilst Tasmanians undertake more day travel in their home state than overnight travel, the number of day trips fell by five per cent over the period while overnight trips increased six per cent on the previous year. Total spend by overnight intrastate visitors increased by 12 per cent to reach \$318 million. Just under half of all overnight intrastate travel (570,000 visitors) was for holiday purposes, followed by 30 per cent of travel to visit friends and relatives.

### **Cruise and Navy Ship Visitation (TasPorts, Navy Headquarters – Tasmania)**

The number of cruise ship visitors to Tasmania in the year ending June 2008 grew by 44 per cent to 83,000 visitors, whilst the number of navy ship visitors increased from 1,900 visitors to 4,000 visitors over the same period.

### **Marketing Performance (Holiday Tracking Survey)**

Without any prompting on advertising (read, seen or heard) for holidays and travel, 18 per cent of Australians in the year ending June 2008 were aware of Tasmania as a holiday destination, a three percentage point increase compared to the same period last year. Tasmania had the second highest level of prompted advertising awareness for the year at 32 per cent, following Queensland (56%). When asked where you would like to go on holidays in the next two years, 17 per cent of Australians had a preference to travel to Tasmania, whilst five per cent of Australians intended to travel to the State in the next two years.

## INTERSTATE VISITORS TO TASMANIA

INTERSTATE VISITATION – SUMMARY			
	12 months ending June 07	12 months ending June 08	% Change
<b>Interstate Visitors</b>			
Day Visitors	17,700	17,200	-3
Overnight Visitors	693,000	727,200	5
Total Visitors	710,600	744,300	5
<b>Interstate Nights</b>			
Total Nights	5,862,200	6,055,300	3
Average Length of Stay (nights)	8.2	8.1	
<b>Interstate Expenditure (\$'000s)</b>			
	\$1,135,200	\$1,225,800	8
<b>Interstate Market Share *</b>			
Visitors	4.0%	3.7%	
Nights	5.0%	4.8%	
Expenditure	4.8%	5.1%	
<b>Interstate Mode of departure</b>			
Air	593,000	630,100	6
Sea	117,700	114,200	-3
Total	710,600	744,300	5
<b>Interstate Purpose of visit</b>			
Holiday	308,700	327,900	6
Visit friends or relatives	200,400	213,500	7
Business or employment	127,000	142,300	12
Convention / conference / seminar	25,300	23,900	-6
Event / festival (incl sporting event)	37,500	22,900	-39
Other (incl medical and education)	4,100	5,000	22
No Response	7,600	8,800	16
<b>Total Interstate Visitors</b>	<b>710,600</b>	<b>744,300</b>	<b>5</b>

Source: Tasmanian Visitor Survey, Tourism Tasmania

\* Source: National Visitor Survey, Tourism Research Australia

INTERSTATE VISITORS TO TASMANIA – ORIGIN OF VISITOR						
State/territory of residence	ALL VISITORS			LEISURE VISITORS*		
	12 months ending June 07	12 months ending June 08	% Change	12 months ending June 07	12 months ending June 08	% Change
Victoria	318,500	338,100	6	220,700	238,700	8
N.S.W.	157,600	133,900	-15	120,500	102,700	-15
Queensland	110,300	115,500	5	86,500	92,900	7
South Australia	39,800	61,500	55	27,800	47,400	71
Western Australia	39,500	51,500	30	29,600	39,000	32
A.C.T.	20,600	19,900	-3	13,300	12,300	-8
N.T.	6,800	5,000	-26	5,500	3,900	-29
Australia - no state given	17,500	19,000	9	5,200	4,400	-15
<b>Total Australia</b>	<b>710,600</b>	<b>744,300</b>	<b>5</b>	<b>509,100</b>	<b>541,400</b>	<b>6</b>

Source: Tasmanian Visitor Survey, Tourism Tasmania

\* Leisure Visitors: Visitors whose main purpose of visit is for a holiday or to visit friends and relatives

### INTERSTATE VISITOR NIGHTS SPENT IN TASMANIA – ORIGIN OF VISITOR

State/territory of residence	ALL NIGHTS			LEISURE VISITOR* NIGHTS		
	12 months ending June 07	12 months ending June 08	% Change	12 months ending June 07	12 months ending June 08	% Change
Victoria	1,859,700	2,209,100	19	1,404,600	1,557,100	11
N.S.W.	1,460,400	1,115,100	-24	1,101,900	931,600	-15
Queensland	1,274,000	1,254,700	-2	1,054,500	1,045,400	-1
South Australia	374,600	527,900	41	265,000	426,100	61
Western Australia	527,200	569,900	8	369,800	468,600	27
A.C.T.	147,200	141,300	-4	115,400	109,200	-5
N.T.	69,000	58,000	-16	61,200	48,700	-20
Australia - no state given	150,200	179,400	19	42,900	56,600	32
<b>Total Australia</b>	<b>5,862,200</b>	<b>6,055,300</b>	<b>3</b>	<b>4,415,400</b>	<b>4,643,200</b>	<b>5</b>
Average Stay (nights)	8.2	8.1		8.7	8.6	

Source: Tasmanian Visitor Survey, Tourism Tasmania

\* Leisure Visitors: Visitors whose main purpose of visit is for a holiday or to visit friends and relatives

### INTERSTATE VISITOR EXPENDITURE IN TASMANIA – ORIGIN OF VISITOR

State/territory of residence	ALL EXPENDITURE (\$'000s)			LEISURE VISITOR* EXPENDITURE (\$'000s)		
	12 months ending June 07	12 months ending June 08	% Change	12 months ending June 07	12 months ending June 08	% Change
Victoria	\$386,500	\$436,400	13	\$311,000	\$356,600	15
N.S.W.	\$287,000	\$243,300	-15	\$242,800	\$210,400	-13
Queensland	\$236,200	\$271,000	15	\$202,000	\$224,000	11
South Australia	\$79,300	\$90,800	15	\$61,100	\$78,800	29
Western Australia	\$97,300	\$128,600	32	\$75,500	\$104,300	38
A.C.T.	\$26,100	\$27,200	4	\$19,300	\$22,400	16
N.T.	\$12,000	\$9,400	-22	\$10,700	\$8,100	-24
Australia - no state given	\$10,700	\$19,200	79	\$3,900	\$6,500	67
<b>Total Australia</b>	<b>\$1,135,200</b>	<b>\$1,225,800</b>	<b>8</b>	<b>\$926,300</b>	<b>\$1,011,000</b>	<b>9</b>
Average spend per visitor	\$1,598	\$1,647		\$1,819	\$1,867	
Average spend per night	\$194	\$202		\$210	\$218	

Source: Tasmanian Visitor Survey, Tourism Tasmania

\* Leisure Visitors: Visitors whose main purpose of visit is for a holiday or to visit friends and relatives

## INTERNATIONAL VISITORS TO TASMANIA

INTERNATIONAL VISITATION – SUMMARY			
	12 months ending June 07	12 months ending June 08	% Change
<b>International Visitors</b>	157,400	155,900	-1
<b>International Nights</b>	3,322,500	3,057,400	-8
Average Length of Stay (nights)	21.1	19.6	-7
<b>International expenditure *</b>	\$231 million	\$245 million	6
<b>International Market Share</b>			
Visitors	3%	3%	
Nights	2%	2%	
Expenditure	2%	2%	
<b>International Purpose of visit</b>			
Holiday	108,200	106,500	-2
Visit friends or relatives	29,500	32,200	9
Business	17,700	19,400	10
Education	9,400	9,200	-2
Employment	2,500	1,900	-24
Other reason	1,600	1,000	-38
<b>Total international visitors</b>	<b>157,400</b>	<b>155,900</b>	<b>-1</b>

Source: International Visitor Survey, Tourism Research Australia

\*Modelled expenditure excluding package expenditure.

INTERNATIONAL VISITORS TO TASMANIA – ORIGIN OF VISITOR			
VISITORS			
Country of residence	12 months ending June 07	12 months ending June 08	% Change
United Kingdom	28,700	27,100	-6
New Zealand	16,100	14,700	-9
<b>Total Asia</b>	<b>47,500</b>	<b>43,200</b>	<b>-9</b>
<i>Japan</i>	9,200	8,800	-4
<i>Other Asia</i>	38,300	34,400	-10
<b>North America</b>	<b>27,800</b>	<b>30,100</b>	<b>8</b>
<i>USA</i>	21,600	20,500	-5
<i>Canada</i>	6,200	9,500	53
<b>Total Europe</b>	<b>31,600</b>	<b>32,800</b>	<b>4</b>
<i>Germany</i>	9,700	8,800	-9
<i>Other Europe</i>	21,900	24,000	10
<b>Other Countries</b>	<b>5,600</b>	<b>8,100</b>	<b>45</b>
<b>Total international visitors</b>	<b>157,400</b>	<b>155,900</b>	<b>-1</b>

Source: International Visitor Survey, Tourism Research Australia

## INTERNATIONAL VISITOR NIGHTS SPENT IN TASMANIA – ORIGIN OF VISITOR

Country of residence	NIGHTS ('000s)			
	12 months ending June 07	12 months ending June 08	% Change	Average length of stay (nights) - June 08
United Kingdom	336	363	8	13.4
New Zealand	288	147	-49	10.0
Total Asia	1,426	1,480	4	34.3
<i>Japan</i>	255	303	19	34.5
<i>Other Asia</i>	1,171	1,177	1	34.2
North America	361	309	-14	10.3
<i>USA</i>	295	180	-39	8.8
<i>Canada</i>	66	129	95	13.6
Total Europe	723	529	-27	16.1
<i>Germany</i>	221	168	-24	19.1
<i>Other Europe</i>	502	361	-28	15.0
Other Countries	189	230	22	28.4
Total international nights	3,323	3,058	-8	19.6

Source: International Visitor Survey, Tourism Research Australia

## INTERNATIONAL VISITOR EXPENDITURE IN TASMANIA – ORIGIN OF VISITOR

Country of residence	EXPENDITURE (\$million)				
	12 mths ending Jun 07 (\$million)	12 mths ending Jun 08 (\$million)	% Change	Average spend per visitor - Jun 08	Average spend per night - Jun 08
United Kingdom	\$25	\$26	4	\$958	\$72
New Zealand	\$18	\$16	-11	\$1,091	\$109
Total Asia	np	np	np	np	np
<i>Japan</i>	\$16	\$14	-13	\$1,582	\$46
<i>Other Asia</i>	np	np	np	np	np
North America	\$30	\$28	-7	\$931	\$91
<i>USA</i>	\$24	\$18	-25	\$876	\$100
<i>Canada</i>	\$6	\$10	67	\$1,050	\$78
Total Europe	np	np	np	np	np
<i>Germany</i>	\$18	\$11	-39	\$1,249	\$65
<i>Other Europe</i>	np	np	np	np	np
Other Countries	11	19	73	\$2,352	\$83
Total international expenditure	\$231	\$245	6	\$1,571	\$80

Source: International Visitor Survey, Tourism Research Australia

n.p. not published due to data reliability

\*Modelled expenditure excluding package expenditure.

## INTRASTATE TRAVEL IN TASMANIA

INTRASTATE TRAVEL * – SUMMARY			
	12 months ending June 07	12 months ending June 08	% Change
<b>Intrastate Visitors ('000s)</b>			
Day Visitors	4,362	4,125	-5
Overnight Visitors	1,092	1,160	6
Total Visitors (day + overnight visitors)	5,454	5,285	-3
<b>Intrastate Nights ('000s)</b>			
Total Nights	2,850	2,980	5
Average Length of Stay (nights)	2.6	2.6	
<b>Intrastate Expenditure</b>			
Overnight intrastate expenditure	\$285 million	\$318 million	12
Average spend per overnight visitor	\$261	\$274	
Average spend per night	\$100	\$107	
<b>Overnight Intrastate Market Share</b>			
Visitors	2.2%	2.3%	
Nights	1.8%	1.9%	
Expenditure	1.7%	1.7%	
<b>Purpose of Overnight Trip ('000s)</b>			
Holiday	578	570	-1
Visit friends or relatives	306	343	12
Business	154	178	16
Other	65	74	14
<b>Total Overnight Intrastate Visitors</b>	<b>1,092</b>	<b>1,160</b>	<b>6</b>

Source: National Visitor Survey, Tourism Research Australia

\* Intrastate travel refers to travel undertaken by Tasmanian residents in Tasmania.

## CRUISE & NAVY SHIP VISITORS TO TASMANIA

CRUISE AND NAVY SHIP VISITORS TO TASMANIA – SUMMARY			
	12 months ending June 07	12 months ending June 08	% Change
Cruise ship visitors (passengers and crew)*	57,600	83,000	44
Navy ship visitors**	1,900	4,000	111

\*Source: Tasmanian Ports Corporation

\*\*Source: Navy Headquarters - Tasmania

MARKETING PERFORMANCE SUMMARY			
	12 months ending June 07	12 months ending June 08	% Point Change
	per cent	per cent	
<sup>1</sup> Advertising Awareness (Unprompted)	14.8	18.0	3.2
<sup>1</sup> Advertising Awareness (Prompted)	29.5	32.2	2.7
<sup>2</sup> Preference to visit Tasmania	17.2	17.2	0.0
<sup>3</sup> Intention to visit Tasmania	4.5	4.7	0.2
<sup>4</sup> Behaviour	4.6	4.8	0.2
<sup>5</sup> Tagline Awareness - 'Island of Inspiration'	n.a.	13.2	n.a.

Source: *Holiday Tracking Survey, Roy Morgan Research*

<sup>1</sup> Advertising Awareness - Percentage of Australians with un-prompted & prompted advertising awareness for holidays in Tasmania.

<sup>2</sup> Preference - Percentage of Australians that would like to visit Tasmania in the next 2 years.

<sup>3</sup> Intention - Percentage of Australians planning or intending to visit Tasmania on their next trip.

<sup>4</sup> Behaviour - Percentage of Australians that visited Tasmania in the last 12 months.

<sup>5</sup> Tagline Awareness - Percentage of Australians with an awareness of Tasmania's advertising tagline 'Island of Inspiration' launched in January 2007.

### 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 interstate visitor figures;
- 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](mailto:statistics@tourism.tas.gov.au)