

Tasmanian Tourism Snapshot

Year ending March 2014

Introduction

The Tasmanian Tourism Snapshot is published every quarter, using the latest figures from the Tasmanian Visitor Survey, the International Visitor Survey and the National Visitor Survey, to provide you with a statistical overview about international and interstate visitors to Tasmania, as well as intrastate travel by Tasmanians. Information about these three surveys is contained at the back of the Snapshot. A commentary on the data is provided as a separate document on Tourism Tasmania's website.

While the Tasmanian Tourism Snapshot provides a useful overview of visitors to Tasmania, more detailed statistics are available at Tourism Tasmania's corporate website at <http://www.tourismtasmania.com.au/research/tvs>. The TVS database service provides you with easy online access to a range of other useful statistics and tables about our visitors which you can investigate and print for your own use.

Total Visitation to Tasmania (Source: Tasmanian Visitor Survey)

Key Results:

- For the year ending March 2014, there were 1.06 million (1 059 500) visitors, up 14 per cent from 931,100 for the previous year.
- Total nights spent by visitors in the state increased by 12 per cent to 9.14 million.
- Visitor expenditure increased by 17 per cent to \$1.675 billion.
- The number of interstate visitors to Tasmania increased by 13 per cent to 917,300 (was 809,200).

Summary:

- In terms of visitor numbers from Tasmania's key markets, Victoria increased by 8 per cent, New South Wales increased by 24 per cent, and Queensland increased by 23 per cent.
- Holiday visitors increased by 24 per cent for the year ending March 2014, holiday nights increased by 16 per cent and holiday expenditure increased by 29 per cent.
- Those who came to visit friends and relatives (VFR) increased by 13 per cent for the year. The number of nights VFR visitors spent in Tasmania increased by 3 per cent while VFR expenditure increased by 15 per cent.
- The total number of visitors holidaying in Tasmania during the year ending March 2014 was 460,000, up 24 per cent compared to the previous year (was 370,000).
- The total number of nights spent by holiday visitors to Tasmania for the year ending March 2014 was 4.2 million, up 16 per cent from the previous year (was 3.6 million).
- Holiday visitor expenditure for the year was up 29 per cent to \$1 billion (was \$810 million).
- Of all visitors, 188,000 (up 1 per cent) were on business while 36,000 (up 16 per cent) were travelling to attend a conference or convention.
- For the year ending March 2014, data from the TVS for the four tourism regions reported the following changes in visitor numbers: Southern, up 13 per cent; East Coast, up 20 per cent; Northern, up 12 per cent; Cradle Coast, up 10 per cent.
- For the year ending March 2014, 89 per cent of all visitors to Tasmania travelled by scheduled air services and 10 per cent travelled by sea. The total number of visitors travelling by scheduled air was up 14 per cent and sea services was up 9 per cent from the previous year.

Interstate Visitation to Tasmania (Source: Tasmanian Visitor Survey)

- The total number of interstate visitors to Tasmania for the year ending March 2014 was 917,300, up 13 per cent from 809,200 the previous year.
- The total number of nights spent by interstate visitors to Tasmania for the year ending March 2014 was 7.08 million, up 13 per cent from the previous year (was 6.26 million).
- Interstate visitor expenditure increased by 15 per cent to \$1.39 billion (was \$1.21 billion in the year ending March 2013).
- Of all interstate visitors, 361,400 were on holiday (up 21 per cent), 290,500 were visiting friends or relatives (up 14 per cent), 177,000 were on business (up 1 per cent), and 33,300 were travelling to attend a conference or convention (up 22 per cent).
- In terms of visitation to Tasmania from the key interstate markets, Victoria increased by 8 per cent to 399,400, NSW increased by 24 per cent to 238,300, and Queensland increased by 23 per cent to 142,600. Together, these markets accounted for 85 per cent of interstate visitation in the year ending March 2014.

International Visitation (Source: International Visitor Survey)

Summary – Australia

- A total of 6 million international visitors came to Australia in the year ending March 2014, up 6 per cent from the year ending March 2013.
- Holiday visitors to Australia increased by 9 per cent to 2.71 million, while VFR visitors increased by 11 per cent to 1.64 million.
- International visitor nights spent in Australia increased by 1 per cent to 214 million.
- Total expenditure by international visitors in Australia for the year ending March 2014 increased by 3 per cent to \$19 billion¹ (including package expenditure). Holiday spend was \$7 billion (including package expenditure) for the year, increased by 8 per cent from the year ending March 2013.
- For Australia's largest source markets, the following changes to visitor numbers to Australia were recorded: New Zealand, up 1 per cent; China, up 14 per cent; United Kingdom, up 9 per cent and the USA, up 7 per cent.

Summary – Tasmania

- Tasmania received 154,100 international visitors during the year ending March 2014, down 2 per cent from 157,100 the previous year.
- The number of nights international visitors spent in Tasmania decreased by 24 per cent to 2.47 million, and the average length of stay decreased by 23 per cent to 16 nights.
- Expenditure by international visitors decreased by 21 per cent to \$213 million².
- Holiday visitors to Tasmania increased by 8 per cent to 115,400, while VFR visitors decreased by 8 per cent to 28,800.
- Holiday nights decreased by 16 per cent to 1.21 million, while the average length of stay for holiday visitors decreased by 22 per cent to 10 nights.
- Total expenditure by international holiday visitors decreased by 1 per cent to \$126 million.

¹ Expenditure for Total Australia (not modelled) includes small amounts that cannot be allocated to a particular state/territory

² Modelled expenditure (includes package expenditure)

- For Tasmania's largest source markets, the following changes to visitor numbers to the State were recorded: China, up 47 per cent; United Kingdom, down 7 per cent; the USA, up 1 per cent; New Zealand, down 3 per cent; Hong Kong, down 25 per cent.
- Tasmania's share of all international visitors to Australia for the year ending March 2014 was 2.6 per cent, showing no significant change compared with 2.8 per cent for the year ending March 2013.

Intrastate Visitation³ (National Visitor Survey)

- The number of overnight intrastate holiday trips in Tasmania remained steady, VFR decreased by 5 per cent, and overnight business trips increased by 28 per cent in the year ending March 2014.
- In the year ending March 2014, the number of intrastate day trips in Tasmania decreased by 4 per cent to 4.72 million, whilst intrastate overnight trips increased by 1 per cent to 1.1 million compared to the year ending March 2013.
- Total spend by overnight intrastate visitors in Tasmania increased by 10 per cent to \$364 million for the year ending March 2014.

³ Travel undertaken by a visitor in their home state

Total Visitors to Tasmania

	YE Mar 2013	YE Mar 2014	% change	
<i>Visitors</i>				
Visitors on scheduled air and sea services	931,100	1,059,500	↑	14%

	YE Mar 2013	YE Mar 2014	% change	
<i>Visitors</i>				
Day visitors	28,000	19,900	↓	-29%
Overnight visitors	903,100	1,039,700	↑	15%
Total visitors	931,100	1,059,500	↑	14%
<i>Nights</i>				
Nights (million)	8.14	9.14	↑	12%
Average length of stay (nights)	8.7	8.6	↓	-1%
<i>Expenditure</i>				
Expenditure (\$million)	\$1,427	\$1,675	↑	17%
Average spend per visitor	\$1,533	\$1,581	↑	3%
Average spend per night	\$175	\$183	↑	5%
Holiday spend (\$million)	\$810	\$1,048	↑	29%
<i>Purpose of Visit</i>				
Holiday	370,000	460,000	↑	24%
Visit friends or relatives (VFR)	279,900	317,400	↑	13%
Total leisure (Holiday+VFR)	649,900	777,400	↑	20%
Business or employment	186,500	188,000	↑	1%
Convention/conference/seminar	31,200	36,000	↑	16%
<i>Regions Visited</i>				
Southern	738,900	832,500	↑	13%
East Coast	225,200	270,500	↑	20%
Northern	495,900	557,500	↑	12%
Cradle Coast	376,700	412,500	↑	10%
<i>Mode of departure</i>				
Air visitors	828,600	947,800	↑	14%
Sea visitors	102,400	111,700	↑	9%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

Interstate Visitors to Tasmania

Table 3. Interstate visitors to Tasmania on scheduled air and sea services				
	YE Mar 2013	YE Mar 2014		% change
Visitors				
Day visitors	27,700	19,600	↓	-29%
Overnight visitors	781,500	897,700	↑	15%
Total visitors	809,200	917,300	↑	13%
Nights				
Nights (million)	6.26	7.08	↑	13%
Average length of stay (nights)	7.7	7.7	→	0%
Expenditure				
Expenditure (\$million)	\$1,207	\$1,394	↑	15%
Average spend per visitor	\$1,492	\$1,520	↑	2%
Average spend per night	\$193	\$197	↑	2%
Holiday spend (\$million)	\$676	\$848	↑	25%
Purpose of Visit				
Holiday	297,500	361,400	↑	21%
Visit friends or relatives (VFR)	254,800	290,500	↑	14%
Total leisure (Holiday+VFR)	552,200	651,900	↑	18%
Business or employment	174,700	177,000	↑	1%
Convention/conference/seminar	27,300	33,300	↑	22%
Regions Visited				
Southern	634,000	698,700	↑	10%
East Coast	178,600	202,800	↑	13%
Northern	428,400	469,600	↑	10%
Cradle Coast	320,700	341,400	↑	6%
Mode of departure				
Air visitors	714,000	813,500	↑	14%
Sea visitors	95,200	103,800	↑	9%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

	YE Mar 2013	YE Mar 2014	% change	
Victoria	371,200	399,400	↑	8%
N.S.W.	191,700	238,300	↑	24%
Queensland	116,400	142,600	↑	23%
South Australia	44,500	45,000	↑	1%
Western Australia	50,000	55,700	↑	11%
A.C.T.	22,100	23,400	↑	6%
N.T.	7,700	6,100	↓	-21%
Total interstate visitors	809,200	917,300	↑	13%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

International Visitors to Tasmania

	to Tasmania			to Australia		
	YE Mar 2013	YE Mar 2014	% Change	YE Mar 2013	YE Mar 2014	% Change
Visitors						
International visitors	157,100	154,100	↓ -2%	5,661,200	6,019,200	↑ 6%
Nights						
Nights ('000s)	3,249	2,465	↓ -24%	213,137	214,229	↑ 1%
Average length of stay (nights)	21	16	↓ -23%	38	36	↓ -5%
Expenditure						
Expenditure (\$million)	\$270	\$213	↓ -21%	\$18,852	\$19,462	↑ 3%
Average spend per visitor	\$1,721	\$1,383	↓ -20%	\$3,330	\$3,233	↓ -3%
Average spend per night	\$83	\$86	↑ 4%	\$88	\$91	↑ 3%
Holiday spend (\$million)	\$128	\$126	↓ -1%	\$6,550	\$7,064	↑ 8%
Purpose of Visit						
Holiday	106,700	115,400	↑ 8%	2,497,100	2,710,300	↑ 9%
Visit friends or relatives (VFR)	31,400	28,800	↓ -8%	1,485,800	1,643,900	↑ 11%
Business	14,900	10,600	↓ -29%	813,100	824,000	↑ 1%
Education	7,100	3,900	↓ -44%	364,800	361,500	↓ -1%
Employment	3,600	3,100	↓ -13%	239,100	222,400	↓ -7%
Other Reason	1,100	800	↓ -31%	261,100	257,100	↓ -2%
Total	157,100	154,100	↓ -2%	5,661,200	6,019,200	↑ 6%

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

* Modelled expenditure including package expenditure. The total expenditure in Australia does not include small amounts that cannot be allocated to a particular purpose.

** 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.

	YE Mar 2013	YE Mar 2014	% Change	YE Mar 2013	YE Mar 2014	% Point difference
<i>State/territory visited</i>	<i>Visitors</i>			<i>Market Share</i>		
New South Wales	2,880,000	3,061,000	↑ 6%	51%	51%	⇒ 0%
Victoria	1,814,900	1,996,700	↑ 10%	32%	33%	↑ 1%
Queensland	2,036,000	2,048,000	↑ 1%	36%	34%	↓ -2%
South Australia	353,900	381,400	↑ 8%	6%	6%	⇒ 0%
Western Australia	744,400	776,500	↑ 4%	13%	13%	⇒ 0%
Tasmania	157,100	154,100	↓ -2%	3%	3%	⇒ 0%
Northern Territory	257,700	263,700	↑ 2%	5%	4%	⇒ 0%
Australia Capital Territory	174,600	179,800	↑ 3%	3%	3%	⇒ 0%
Total visitors to Australia	5,661,200	6,019,200	↑ 6%	100%	100%	⇒ 0%

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

% point difference - the difference between two percentages (i.e. the difference between 3% and 3.5% is 0.5 percentage points)

Country of origin	YE Mar 2013	YE Mar 2014	% Change	YE Mar 2013	YE Mar 2014	% Point difference
	Visitors			National Market Share		
New Zealand	15,500	15,000	↓ -3%	1%	1%	⇒ 0%
Japan	4,400	5,400	↑ 21%	1%	2%	⇒ 0%
Hong Kong	16,200	12,300	↓ -25%	11%	7%	↓ -3%
Singapore	4,400	7,600	↑ 75%	2%	2%	↑ 1%
Malaysia	5,900	7,700	↑ 31%	3%	3%	⇒ 0%
Indonesia	1,100	300	↓ -69%	1%	0%	↓ -1%
Taiwan	2,900	3,300	↑ 12%	3%	3%	⇒ 0%
Thailand	1,700	1,400	↓ -13%	3%	2%	↓ -1%
Korea	1,900	1,500	↓ -18%	1%	1%	⇒ 0%
China	12,800	18,900	↑ 47%	2%	3%	↑ 1%
India	2,900	2,500	↓ -15%	2%	2%	⇒ 0%
Other Asia	3,600	2,600	↓ -27%	2%	1%	↓ -1%
USA includes Hawaii	18,100	18,300	↑ 1%	4%	4%	⇒ 0%
Canada	5,000	4,000	↓ -20%	4%	3%	↓ -1%
United Kingdom	19,700	18,400	↓ -7%	3%	3%	↓ -1%
Germany	8,400	7,700	↓ -9%	5%	5%	↓ -1%
Scandinavia	4,000	1,700	↓ -57%	5%	2%	↓ -3%
France	6,100	5,300	↓ -13%	6%	5%	↓ -1%
Italy	2,400	2,000	↓ -18%	4%	3%	↓ -1%
Netherlands	2,100	1,800	↓ -12%	5%	4%	↓ -1%
Switzerland	3,700	3,400	↓ -9%	8%	7%	↓ -1%
Other Europe	8,600	6,500	↓ -24%	4%	3%	↓ -1%
Other Countries	5,800	6,500	↑ 14%	1%	2%	⇒ 0%
Total	157,100	154,100	↓ -2%	3%	3%	⇒ 0%

Source: International Visitor Survey, Tourism Research Australia

np - not published as the sample size is too small to be reliable.

% point difference - the difference between two percentages (i.e. the difference between 3% and 3.5% is 0.5 percentage points)

Intrastate Visitors

	Tasmania			Australia		
	YE Mar 2013	YE Mar 2014	% change	YE Mar 2013	YE Mar 2014	% change
Visitors						
Overnight visitors ('000s)	1,127	1,141	↑ 1%	50,242	52,728	↑ 5%
Nights						
Nights ('000s)	2,744	2,786	↑ 2%	159,084	165,680	↑ 4%
Average length of stay (nights)	2.4	2.4	⇒ 0%	3.2	3.1	↓ -1%
Expenditure						
Expenditure (\$million)	\$330	\$364	↑ 10%	\$20,865	\$21,892	↑ 5%
Spend per visitor	\$293	\$319	↑ 9%	\$415	\$415	⇒ 0%
Spend per night	\$120	\$131	↑ 9%	\$131	\$132	↑ 1%
Purpose('000s)						
Holiday	568	570	⇒ 0%	22,999	23,683	↑ 3%
Visit friends &/or relatives (VFR)	330	315	↓ -5%	17,843	18,653	↑ 5%
Business	152	194	↑ 28%	7,203	7,929	↑ 10%
Other reason	83	67	↓ -19%	2,835	3,035	↑ 7%
Total overnight intrastate visitors	1,127	1,141	↑ 1%	50,242	52,728	↑ 5%

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

	Tasmania			Australia		
	YE Mar 2013	YE Mar 2014	% change	YE Mar 2013	YE Mar 2014	% change
Visitor						
Day visitors ('000s)	4,764	4,724	↓ -1%	162,757	155,441	↓ -4%
Total intrastate Day+Overnight visitors ('000s)	5,891	5,865	⇒ 0%	212,999	208,169	↓ -2%
Expenditure						
Expenditure (\$million)	\$515	\$496	↓ -4%	\$18,107	\$18,177	⇒ 0%
Spend per visitor	\$108	\$105	↓ -3%	\$111	\$117	↑ 5%
Purpose('000s)						
Holiday	2,336	2,430	↑ 4%	77,783	72,200	↓ -7%
Visit friends &/or relatives (VFR)	1,197	1,136	↓ -5%	48,996	48,073	↓ -2%
Business	524	455	↓ -13%	16,198	15,450	↓ -5%
Other reason	707	703	↓ -1%	19,781	19,719	⇒ 0%
Total day intrastate visitors	4,764	4,724	↓ -1%	162,757	155,441	↓ -4%

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

Quarter ending March 2014

The TVS reports the following key findings for visitors during the January-March 2014 quarter.

- The total number of visitors to Tasmania for the March quarter 2014 was 345,500, up 8 per cent from 319,600 the previous year (Fig. 1).
- The total number of nights spent by visitors to Tasmania for the March quarter 2014 increased by 6 per cent to 3.42 million (was 3.23 million) (Fig. 2).
- Visitor expenditure was \$647 million, up 17 per cent from the same quarter of the previous year (was \$554.3 million) (Fig. 3).
- Of all visitors for the quarter, 176,300 (up 16 per cent) were on holiday, 97,700 (up 9 per cent) were visiting friends or relatives, 44,100 (down 8 per cent) were on business, and 7,900 (up 57 per cent) were travelling to attend a conference or convention (Fig. 4).

Fig. 1. Total Visitors to Tasmania by Quarter*

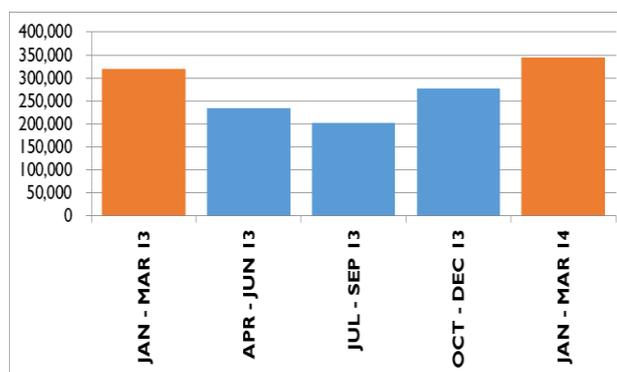


Fig. 2. Total Nights by Quarter*

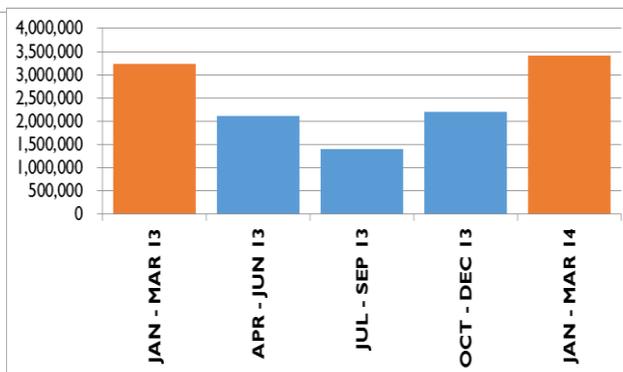


Fig. 3. Total Expenditure (\$ millions) by Quarter*

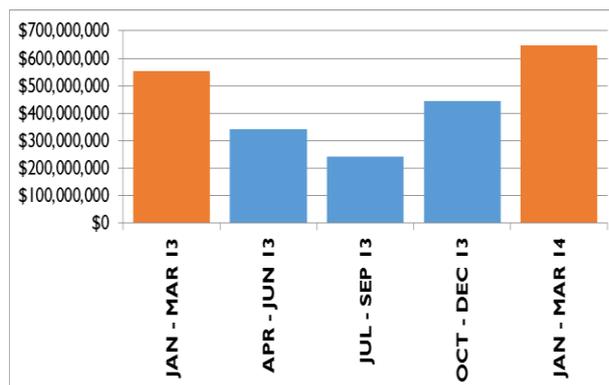
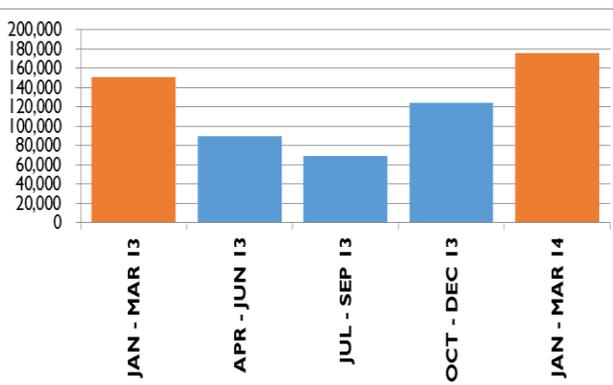


Fig. 4. Total Holiday Visitors by Quarter*



* Graphs present data for every quarter for the last five years, on visitors travelling to Tasmania via scheduled services. Data source: Tasmanian Visitor Survey.

Where do the statistics come from?

Tasmanian Visitor Survey (TVS)

The TVS is an exit survey designed to provide a profile of the characteristics, travel behaviour and expenditure of international and domestic visitors to Tasmania. It is nationally acknowledged as the most reliable source of statistical data about visitors to Tasmania, being based on a sample of more than 9,000 visitors per year. As an island, Tasmania has a natural advantage over other destinations when it comes to surveys of this type, because visitors can be more accurately counted as they depart via air and sea ports.

More detailed statistics from the TVS are also available through Tourism Tasmania's corporate website at <http://www.tourismtasmania.com.au/research>. The TVS Analyser service provides you with easy online access to a range of other useful visitor statistics and tables from the TVS which you can investigate and print for your own use.

International Visitor Survey (IVS)

The IVS is administered by Tourism Research Australia. The IVS is the most comprehensive source of information on international visitors to Australia. The survey gathers information from visitors about, among other things; the number of nights they stayed in Australia, travel arrangements, reasons for visiting, places visited, information sources they used to find out about Australia prior to leaving home, impressions of aspects of Australia, income earned and expenditure on the trip. The IVS samples 40,000 departing, short-term international travellers in the departure lounges of eight international airports across Australia - Sydney, Melbourne, Brisbane, Cairns, Perth, Adelaide, Darwin and the Gold Coast.

National Visitor Survey (NVS)

The NVS is also administered by Tourism Research Australia. The NVS measures the characteristics and travel patterns of domestic tourists within Australia, including intrastate day and overnight travel. The survey results come from telephone interviews conducted with an annual sample of 120,000 Australian residents. The survey collects details about their recent travel for day trips, trips involving overnight stays and overseas travel. The NVS provides the only source of information about day and overnight travel by Tasmanians in their own state.

Why the TVS and IVS figures don't match up

Each survey is conducted by a different organisation which uses different sampling and 'weighting' methods to determine total numbers. As a result, the statistics from each survey will give differing results for identical subjects and are unlikely to tally if added together.

Caution: You are advised to exercise care when interpreting figures contained in this report or TVS Analyser. These figures are collected from a sample of visitors. They may be different from the real figure if data from 100% of all visitors could have been collected. Therefore, these estimates may be subject to chance variation, or sampling error. Smaller estimates under 1000 must be treated with greater caution.