

Tasmanian Tourism Snapshot

Year ending September 2011

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.

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 www.tourismtasmania.com.au/research/webreporter. The webreporter 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 September 2011 there were 861,900 visitors, down 6% from 912,800 for the previous year.
- Total nights decreased by 8% to 7.74 million.
- Visitor expenditure decreased by 2% to \$1.496 billion.
- The number of interstate visitors to Tasmania decreased by 6% to 743,400 (was 793,900).

Summary:

- In terms of visitor numbers from Tasmania's key markets, Victoria decreased by 6%, New South Wales decreased by 6%, and Queensland increased by 3%.
- Holiday visitors decreased by 7% for the year ending September 2011, holiday nights decreased by 4% and holiday expenditure decreased by 2%.
- VFR visitors decreased by 5% for the year. The number of nights VFR visitors spent in Tasmania decreased by 3% while VFR expenditure decreased by 8%.
- The total number of visitors holidaying in Tasmania during the year ending September 2011 was 364,100, down 7% compared to the previous year (was 390,100).
- The total number of nights spent by holiday visitors to Tasmania for the year ending September 2011 was 3.7 million, down 4% from the previous year (was 3.8 million).
- Holiday visitor expenditure decreased by 2% to \$989.00 million (was \$1.00 billion).
- Of all visitors, 364,100 (down 7%) were on holiday, 247,900 (down 5%) were visiting friends or relatives, 158,700 (down 8%) were on business, and 28,700 (down 12%) were travelling to attend a conference or convention.
- For the year ending September 2011, data from the TVS for the five marketing zones reported the following changes in visitor numbers: Hobart and Surrounds, down 9%; Launceston, Tamar Valley and the North, down 1%; Western Wilderness, down 7%; North West, down 9%; and East Coast, down 6%.
- For the year ending September 2011, 85% of all visitors to Tasmania travelled by scheduled air services and 15% travelled by sea. The total number of visitors travelling by scheduled air and sea services were both down 6% from the previous year.

Interstate Visitation to Tasmania (Source: Tasmanian Visitor Survey)

- The total number of interstate visitors to Tasmania for the year ending September 2011 was 743,400, down 6% from 793,900 the previous year.
- The total number of nights spent by interstate visitors to Tasmania for the year ending September 2011 was 6.14 million, down 6% from the previous year (was 6.56 million).
- Interstate visitor expenditure decreased by 3% to \$1.27 billion (was \$1.31 billion in the year ending September 2010).
- Of all interstate visitors, 287,800 were on holiday (down 9%), 225,900 were visiting friends or relatives (down 5%), 147,400 were on business (down 9%), and 25,700 were travelling to attend a conference or convention (down 14%).
- In terms of visitation to Tasmania from the key interstate markets, Victoria decreased by 6% to 331,400, NSW decreased by 6% to 175,000, and Queensland increased by 3% to 116,300 (Fig. 5). Together, these markets accounted for 84% of interstate visitation in the year ending September 2011.

International Visitation (Source: International Visitor Survey)

Summary – Australia:

- A total of 5.43 million international visitors visited the country in the year ending September 2011, up 1% from the year ending September 2010.
- Holiday visitors to Australia decreased by 2% to 2.41 million, while VFR visitors increased by 1% to 1.34 million.
- International visitor nights spent in Australia increased by 4% to 191.6 million.
- Total expenditure by international visitors in Australia for the year ending September 2011 increased by 4% to 18.1 billion¹ (including package expenditure). Holiday spend was \$6.1 billion (including package expenditure) for the year, down 3% from the year ending September 2010.
- For Australia's three largest source markets, the following changes to visitor numbers to Australia were recorded: New Zealand, up 2%; United Kingdom, down 2%; and the USA, down 5%.

Summary – Tasmania:

- Tasmania received 147,300 international visitors during the year ending September 2011, up 4% from 141,800 the previous year.
- The number of nights international visitors spent in Tasmania decreased by 9% to 2.70 million.
- Expenditure by international visitors decreased by 14% to \$237 million².
- Holiday visitors to Tasmania increased by 10% to 103,500, while VFR visitors decreased by 15% to 28,400.
- Visitor nights decreased by 9% to 2.70 million, and the average length of stay for international visitors in Tasmania decreased by 12% to 18 nights. Holiday nights increased by 21% to 1.10 million, while the average length of stay for holiday visitors increased by 10% to 11 nights.
- The average spend per international visitor (including package expenditure) in Tasmania decreased by 18% to \$1,609 (was \$1,953) during the year ending September 2011, while spend per night decreased by 6% to \$88 (was \$94).
- For Tasmania's three largest source markets, the following changes to visitor numbers to the State were recorded: United Kingdom, up 17%; New Zealand, down 6%; and the USA, showing no significant change.
- Tasmania's share of all international visitors to Australia for the year ending September 2011 was 2.7%, up from 2.6% for the year ending September 2010.

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)

Intrastate Visitation³ (National Visitor Survey)

- In the year ending September 2011, the number of intrastate day trips in Tasmania decreased by 8% to 4.15 million, whilst intrastate overnight trips increased by 7% to 1.1 million compared to the same period in the previous year.
- The number of overnight intrastate holiday trips in Tasmania increased by 5%, VFR increased by 7%, and overnight business trips increased by 15% in the year ending September 2011.
- Total spend by overnight intrastate visitors in Tasmania increased by 6% to \$313 million for the year ending September 2011.

³ Travel undertaken by a visitor in their home state

Total Visitors to Tasmania

	YE Sep 2010	YE Sep 2011	% change	
<i>Visitors</i>				
Visitors on scheduled air and sea services	912,800	861,900	↓	-6%

	YE Sep 2010	YE Sep 2011	% change	
<i>Visitors</i>				
Day visitors	23,900	21,900	↓	-8%
Overnight visitors	888,800	839,900	↓	-6%
Total visitors	912,800	861,900	↓	-6%
<i>Nights</i>				
Nights (million)	8.45	7.74	↓	-8%
Length of stay (nights)	9.3	9.0	↓	-3%
<i>Expenditure</i>				
Expenditure (\$million)	\$1,530	\$1,496	↓	-2%
Average spend per visitor	\$1,676	\$1,735	↑	4%
Average spend per night	\$181	\$193	↑	7%
Holiday spend (\$million)	\$1,005	\$989	↓	-2%
<i>Purpose of Visit</i>				
Holiday	390,100	364,100	↓	-7%
Visit friends or relatives (VFR)	260,200	247,900	↓	-5%
Total leisure (Holiday+VFR)	650,300	612,100	↓	-6%
Business or employment	173,200	158,700	↓	-8%
Convention/conference/seminar	32,700	28,700	↓	-12%
<i>Regions Visited</i>				
Hobart & Surrounds	731,600	667,900	↓	-9%
Launceston, Tamar Valley & North	543,200	535,900	↓	-1%
Western Wilderness	260,700	242,200	↓	-7%
North West	389,400	356,100	↓	-9%
East Coast	296,500	277,600	↓	-6%
<i>Mode of departure</i>				
Air visitors	778,400	735,400	↓	-6%
Sea visitors	134,300	126,500	↓	-6%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

Interstate Visitors to Tasmania

Table 3. Interstate visitors to Tasmania on scheduled air and sea services			
	YE Sep 2010	YE Sep 2011	% change
Visitors			
Day visitors	23,600	21,400	↓ -9%
Overnight visitors	770,300	722,000	↓ -6%
Total visitors	793,900	743,400	↓ -6%
Nights			
Nights (million)	6.56	6.14	↓ -6%
Length of stay (nights)	8.3	8.3	→ 0%
Expenditure			
Expenditure (\$million)	\$1,306	\$1,265	↓ -3%
Average spend per visitor	\$1,646	\$1,702	↑ 3%
Average spend per night	\$199	\$206	↑ 4%
Holiday spend (\$million)	\$837	\$828	↓ -1%
Purpose of Visit			
Holiday	315,000	287,800	↓ -9%
Visit friends or relatives (VFR)	237,800	225,900	↓ -5%
Total leisure (Holiday+VFR)	552,800	513,700	↓ -7%
Business or employment	162,600	147,400	↓ -9%
Convention/conference/seminar	30,000	25,700	↓ -14%
Regions Visited			
Hobart & Surrounds	621,400	555,600	↓ -11%
Launceston, Tamar Valley & North	465,800	451,400	↓ -3%
Western Wilderness	204,800	184,200	↓ -10%
North West	339,000	300,600	↓ -11%
East Coast	231,900	214,500	↓ -7%
Mode of departure			
Air visitors	667,100	626,500	↓ -6%
Sea visitors	126,800	116,900	↓ -8%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

Table 4. Origin of interstate visitors to Tasmania

	YE Sep 2010	YE Sep 2011	% change	
Victoria	352,700	331,400	↓	-6%
N.S.W.	186,100	175,000	↓	-6%
Queensland	112,400	116,300	↑	3%
South Australia	55,300	41,000	↓	-26%
Western Australia	42,800	43,700	↑	2%
A.C.T.	22,100	20,000	↓	-10%
N.T.	9,100	7,300	↓	-19%
Total interstate visitors	793,900	743,400	↓	-6%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

International Visitors to Tasmania

Table 5. International visitors

	to Tasmania			to Australia		
	YE Sep 2010	YE Sep 2011	% Change	YE Sep 2010	YE Sep 2011	% Change
<i>Visitors</i>						
International visitors	141,800	147,300	↑ 4%	5,381,500	5,434,100	↑ 1%
<i>Nights</i>						
Nights ('000s)	2,951	2,700	↓ -9%	184,921	191,588	↑ 4%
Ave Length of stay (nights)	20.8	18.3	↓ -12%	34.4	35.3	↑ 3%
<i>Expenditure</i>						
Expenditure (\$million)	\$277	\$237	↓ -14%	\$17,424	\$18,102	↑ 4%
Average spend per visitor	\$1,953	\$1,609	↓ -18%	\$3,238	\$3,331	↑ 3%
Average spend per night	\$94	\$88	↓ -6%	\$94	\$94	→ 0%
Holiday spend (\$million)	\$94	\$114	↑ 21%	\$6,340	\$6,134	↓ -3%
<i>Purpose of Visit</i>						
Holiday	93,700	103,500	↑ 10%	2,467,000	2,410,300	↓ -2%
Visit friends or relatives (VFR)	33,400	28,400	↓ -15%	1,318,000	1,337,500	↑ 1%
Business	9,400	12,800	↑ 36%	840,400	897,900	↑ 7%
Education	8,600	7,500	↓ -12%	430,200	431,100	→ 0%
Employment	2,900	2,700	↓ -7%	122,000	132,700	↑ 9%
Other Reason	2,400	3,300	↑ 34%	203,900	224,600	↑ 10%
Total	141,800	147,300	↑ 4%	5,381,500	5,434,100	↑ 1%

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

* Modelled expenditure including package expenditure

** 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 Sep 2010	YE Sep 2011	% Change	YE Sep 2010	YE Sep 2011	% Point difference
<i>State/territory visited</i>	<i>Visitors</i>			<i>Market Share</i>		
New South Wales	2,835,000	2,778,300	↓ -2%	52.7%	51.1%	↓ -1.6%
Victoria	1,597,400	1,743,300	↑ 9%	29.7%	32.1%	↑ 2.4%
Queensland	2,012,500	1,943,400	↓ -3%	37.4%	35.8%	↓ -1.6%
South Australia	364,000	362,200	↓ 0%	6.8%	6.7%	↓ -0.1%
Western Australia	680,800	736,700	↑ 8%	12.7%	13.6%	↑ 0.9%
Tasmania	141,800	147,300	↑ 4%	2.6%	2.7%	→ 0.1%
Northern Territory	316,500	297,400	↓ -6%	5.9%	5.5%	↓ -0.4%
Australia Capital Territory	155,400	165,100	↑ 6%	2.9%	3.0%	↑ 0.2%
Total visitors to Australia	5,381,500	5,434,100	↑ 1%	100%	100%	

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)

Table 7. Origin of international visitors to Tasmania

Country of origin	YE Sep 2010	YE Sep 2011	% Change		YE Sep 2010	YE Sep 2011	% Point difference
	Visitors			National Market Share			
New Zealand	14,800	13,800	↓	-6%	1.4%	1.3%	↓ -0.1%
Japan	5,500	5,800	↑	5%	1.5%	1.8%	↑ 0.3%
Hong Kong	6,300	11,300	↑	79%	4.3%	7.5%	↑ 3.1%
Singapore	5,200	6,600	↑	26%	2.0%	2.4%	↑ 0.4%
Malaysia	6,100	6,800	↑	11%	3.0%	3.1%	↑ 0.1%
Indonesia	np	np		np	0.4%	2.3%	↑ 1.9%
Taiwan	np	np		np	2.8%	3.0%	↑ 0.2%
Thailand	np	np		np	4.1%	3.0%	↓ -1.1%
Korea	3,500	4,100	↑	15%	1.9%	2.2%	↑ 0.3%
China	7,900	7,600	↓	-3%	1.9%	1.6%	↓ -0.4%
India	np	np		np	1.2%	1.6%	↑ 0.4%
Other Asia	np	np		np	1.2%	1.0%	↓ -0.1%
USA includes Hawaii	16,900	16,900	→	0%	3.7%	4.0%	↑ 0.2%
Canada	4,100	7,100	↑	70%	3.5%	6.3%	↑ 2.8%
United Kingdom	19,500	22,800	↑	17%	3.2%	3.8%	↑ 0.6%
Germany	9,100	7,600	↓	-16%	5.8%	5.0%	↓ -0.7%
Scandinavia	6,500	2,700	↓	-59%	7.7%	3.3%	↓ -4.4%
France	4,800	4,000	↓	-16%	5.2%	4.6%	↓ -0.6%
Italy	np	np		np	6.0%	3.9%	↓ -2.1%
Netherlands	3,200	2,200	↓	-30%	6.6%	4.9%	↓ -1.7%
Switzerland	np	np		np	4.9%	6.8%	↑ 1.9%
Other Europe	5,500	4,200	↓	-23%	3.1%	2.5%	↓ -0.6%
Other Countries	8,400	7,600	↓	-9%	2.1%	1.9%	↓ -0.2%
Total	141,800	147,300	↑	4%	2.6%	2.7%	↑ 0.1%

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 Sep 2010	YE Sep 2011	% change	YE Sep 2010	YE Sep 2011	% change
Visitors						
Overnight visitors ('000s)	1,015	1,086	↑ 7%	43,824	46,310	↑ 6%
Nights						
Nights ('000s)	2,629	2,762	↑ 5%	141,315	145,873	↑ 3%
Length of stay (nights)	2.6	2.5	↓ -2%	3.2	3.1	↓ -2%
Expenditure						
Expenditure (\$million)	\$295	\$313	↑ 6%	\$17,291	\$18,154	↑ 5%
Spend per visitor	\$291	\$288	↓ -1%	\$395	\$392	↓ -1%
Spend per night	\$112	\$113	↑ 1%	\$122	\$124	↑ 2%
Purpose('000s)						
Holiday	512	538	↑ 5%	20,621	21,035	↑ 2%
Visit friends &/or relatives (VFR)	279	299	↑ 7%	14,574	15,573	↑ 7%
Business	157	181	↑ 15%	6,647	7,321	↑ 10%
Other reason	68	77	↑ 13%	2,474	2,869	↑ 16%
Total overnight intrastate visitors	1,015	1,086	↑ 7%	43,824	46,310	↑ 6%

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

	Tasmania			Australia		
	YE Sep 2010	YE Sep 2011	% change	YE Sep 2010	YE Sep 2011	% change
Visitor						
Day visitors ('000s)	4,489	4,150	↓ -8%	143,455	144,850	↑ 1%
Total intrastate Day+Overnight visitors ('000s)	5,504	5,236	↓ -5%	187,279	191,160	↑ 2%
Expenditure						
Expenditure (\$million)	\$442	\$411	↓ -7%	\$15,520	\$15,195	↓ -2%
Spend per visitor	\$98	\$99	↑ 1%	\$108	\$105	↓ -3%
Purpose('000s)						
Holiday	2,401	2,141	↓ -11%	71,026	68,417	↓ -4%
Visit friends &/or relatives (VFR)	1,106	981	↓ -11%	41,644	43,551	↑ 5%
Business	413	397	↓ -4%	13,949	14,468	↑ 4%
Other reason	568	630	↑ 11%	16,837	18,414	↑ 9%
Total day intrastate visitors	4,489	4,150	↓ -8%	143,455	144,850	↑ 1%

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

Quarter ending September 2011

The TVS reports the following key findings for visitors during the July-September 2011 quarter.

- The total number of visitors to Tasmania for the September quarter 2011 was 138,400, down 20% from 171,900 the previous year (Fig. 1).
- The total number of nights spent by visitors to Tasmania for the September quarter 2011 decreased by 22% to 1.07 million (was 1.38 million) (Fig. 2).
- Visitor expenditure was \$173.5 million, down 26% from the same quarter of the previous year (was \$235.7 million) (Fig. 3).
- Of all visitors for the quarter, 39,300 (down 28%) were on holiday, 43,300 (down 20%) were visiting friends or relatives, 39,900 (down 9%) were on business, and 5,500 (down 48%) were travelling to attend a conference or convention (Fig. 4).

Fig. 1. Total Visitors to Tasmania by Quarter*

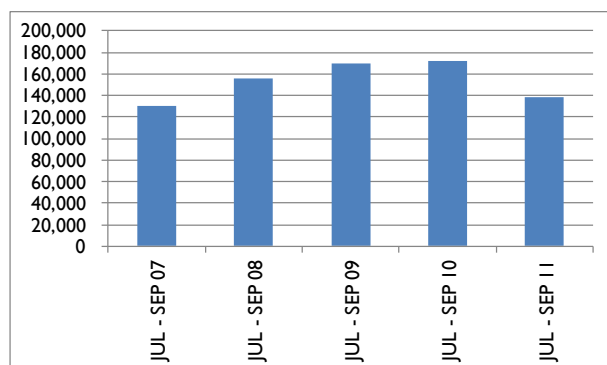


Fig. 2. Total Nights by Quarter*

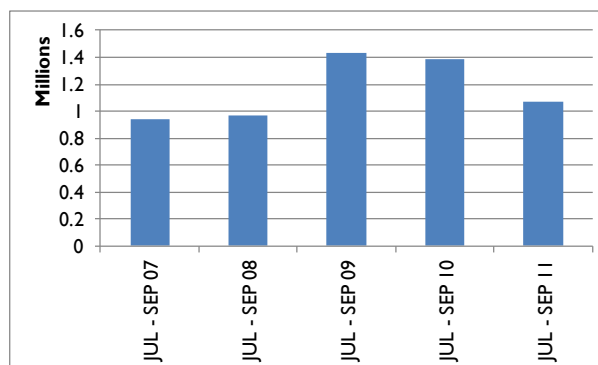


Fig. 3. Total Expenditure (\$ millions) by Quarter*

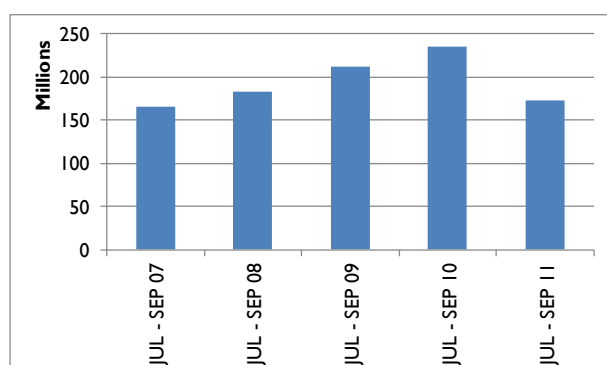
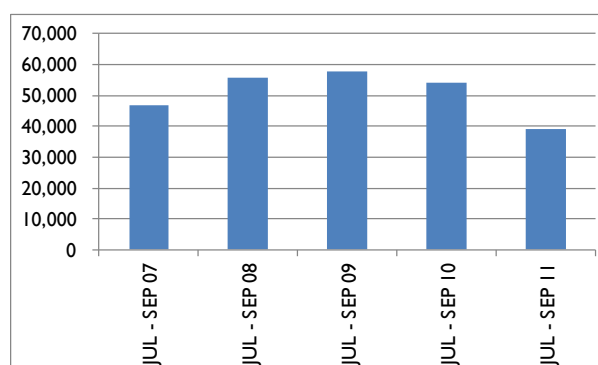


Fig. 4. Total Holiday Visitors by Quarter*



* 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 www.tourismtasmania.com.au/research/webreporter. The webreporter 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 webreporter. 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.