

# Tasmanian Tourism Snapshot

Year ending December 2013

## 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 December 2013, there were 1.03 million (1 033 600) visitors, up 14 per cent from 904,800 for the previous year.
- Total nights spent by visitors in the state increased by 10 per cent to 8.84 million.
- Visitor expenditure increased by 13 per cent to \$1.582 billion.
- The number of interstate visitors to Tasmania increased by 14 per cent to 897,200 (was 785,000).
- The total number of visitors to Tasmania during the December 2013 quarter increased by 11 per cent.

### Summary:

- In terms of visitor numbers from Tasmania's key markets, Victoria increased by 14 per cent, New South Wales increased by 24 per cent, and Queensland increased by 9 per cent.
- Holiday visitors increased by 21 per cent for the year ending December 2013, holiday nights increased by 15 per cent and holiday expenditure increased by 24 per cent.
- Those who came to visit friends and relatives (VFR) increased by 14 per cent for the year. The number of nights VFR visitors spent in Tasmania increased by 5 per cent while VFR expenditure increased by 3 per cent.
- Of all visitors, 191,700 (up 5 per cent) were on business while 33,200 (up 8 per cent) were travelling to attend a conference or convention.
- For the year ending December 2013, data from the TVS for the four tourism regions reported the following changes in visitor numbers: Southern, up 13 per cent; East Coast, up 16 per cent; Northern, up 14 per cent; Cradle Coast, up 9 per cent.
- For the year ending December 2013, 90 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 16 per cent and sea services showed no significant change from the previous year.

## Interstate Visitation to Tasmania (Source: Tasmanian Visitor Survey)

- The total number of interstate visitors to Tasmania for the year ending December 2013 was 897,200, up 14 per cent from 785,000 the previous year.
- The total number of nights spent by interstate visitors to Tasmania for the year ending December 2013 was 6.79 million, up 9 per cent from the previous year (was 6.20 million).

- Interstate visitor expenditure increased by 10 per cent to \$1.31 billion (was \$1.19 billion in the year ending December 2012).
- Of all interstate visitors, 343,800 were on holiday (up 19 per cent), 284,600 were visiting friends or relatives (up 16 per cent), 179,700 were on business (up 5 per cent), and 30,000 were travelling to attend a conference or convention (up 9 per cent).
- In terms of visitation to Tasmania from the key interstate markets, Victoria increased by 14 per cent to 399,900, NSW increased by 24 per cent to 229,300, and Queensland increased by 9 per cent to 131,300. Together, these markets accounted for 85 per cent of interstate visitation in the year ending December 2013.

## International Visitation (Source: International Visitor Survey)

### Summary – Australia

- A total of 5.90 million international visitors came to Australia in the year ending December 2013, up 6 per cent from the year ending December 2012.
- Holiday visitors to Australia increased by 8 per cent to 2.64 million, while VFR visitors increased by 9 per cent to 1.59 million.
- International visitor nights spent in Australia increased by 4 per cent to 216.7 million.
- Total expenditure by international visitors in Australia for the year ending December 2013 increased by 5 per cent to \$19.4 billion<sup>1</sup> (including package expenditure). Holiday spend was \$7.0 billion (including package expenditure) for the year, increased by 11 per cent from the year ending December 2012.
- 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 8 per cent; and the USA, up 6 per cent.

### Summary – Tasmania

- Tasmania received 159,300 international visitors during the year ending December 2013, up 14 per cent from 140,400 the previous year.
- The number of nights international visitors spent in Tasmania increased by 1 per cent to 2.91 million, and the average length of stay decreased by 11 per cent to 18 nights.
- Expenditure by international visitors decreased by 2 per cent to \$242 million<sup>2</sup>.
- Holiday visitors to Tasmania increased by 20 per cent to 114,000, while VFR visitors remained steady at 20,500.
- Holiday nights increased by 36 per cent to 1.44 million, while the average length of stay for holiday visitors increased by 14 per cent to 13 nights.
- Total expenditure by international holiday visitors increased by 34 per cent to \$139 million.
- For Tasmania's largest source markets, the following changes to visitor numbers to the State were recorded: USA, up 14 per cent; the United Kingdom, up 8 per cent; New Zealand, up 45 per cent; Hong Kong, up 27 per cent; and China, up 24 per cent.
- Tasmania's share of all international visitors to Australia for the year ending December 2013 was 2.7 per cent, up from 2.6 per cent for the year ending December 2012.

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

<sup>2</sup> Modelled expenditure (includes package expenditure)

### Intrastate Visitation<sup>3</sup> (National Visitor Survey)

- The number of overnight intrastate holiday trips in Tasmania increased by 1 per cent, VFR decreased by 3 per cent, and overnight business trips increased by 5 per cent in the year ending December 2013.
- In the year ending December 2013, the number of intrastate day trips in Tasmania decreased by 3 per cent to 4.75 million, whilst intrastate overnight trips decreased by 1 per cent to 1.1 million compared to the year ending December 2012.
- Total spend by overnight intrastate visitors in Tasmania increased by 21 per cent to \$377 million for the year ending December 2013.

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<sup>3</sup> Travel undertaken by a visitor in their home state

## Total Visitors to Tasmania

	YE Dec 2012	YE Dec 2013	% change	
<i>Visitors</i>				
Visitors on scheduled air and sea services	904,800	1,033,600	↑	14%

	YE Dec 2012	YE Dec 2013	% change	
<i>Visitors</i>				
Day visitors	25,900	34,100	↑	31%
Overnight visitors	878,800	999,500	↑	14%
Total visitors	904,800	1,033,600	↑	14%
<i>Nights</i>				
Nights (million)	8.03	8.84	↑	10%
Average length of stay (nights)	8.9	8.6	↓	-4%
<i>Expenditure</i>				
Expenditure (\$million)	\$1,395	\$1,582	↑	13%
Average spend per visitor	\$1,542	\$1,530	↓	-1%
Average spend per night	\$174	\$179	↑	3%
Holiday spend (\$million)	\$779	\$968	↑	24%
<i>Purpose of Visit</i>				
Holiday	359,200	435,100	↑	21%
Visit friends or relatives (VFR)	272,100	309,200	↑	14%
Total leisure (Holiday+VFR)	631,300	744,300	↑	18%
Business or employment	182,100	191,700	↑	5%
Convention/conference/seminar	30,600	33,200	↑	8%
<i>Regions Visited</i>				
Southern	718,800	811,400	↑	13%
East Coast	232,700	271,000	↑	16%
Northern	489,300	555,900	↑	14%
Cradle Coast	370,800	405,300	↑	9%
<i>Mode of departure</i>				
Air visitors	797,700	926,200	↑	16%
Sea visitors	107,000	107,400	→	0%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

## Interstate Visitors to Tasmania

Table 3. Interstate visitors to Tasmania on scheduled air and sea services				
	YE Dec 2012	YE Dec 2013		% change
<i>Visitors</i>				
Day visitors	25,700	33,800	↑	32%
Overnight visitors	759,300	863,400	↑	14%
Total visitors	785,000	897,200	↑	14%
<i>Nights</i>				
Nights (million)	6.20	6.79	↑	9%
Average length of stay (nights)	7.9	7.6	↓	-4%
<i>Expenditure</i>				
Expenditure (\$million)	\$1,194	\$1,308	↑	10%
Average spend per visitor	\$1,521	\$1,458	↓	-4%
Average spend per night	\$192	\$193	→	0%
Holiday spend (\$million)	\$652	\$787	↑	21%
<i>Purpose of Visit</i>				
Holiday	287,800	343,800	↑	19%
Visit friends or relatives (VFR)	246,300	284,600	↑	16%
Total leisure (Holiday+VFR)	534,000	628,400	↑	18%
Business or employment	170,800	179,700	↑	5%
Convention/conference/seminar	27,700	30,000	↑	9%
<i>Regions Visited</i>				
Southern	618,100	685,100	↑	11%
East Coast	183,300	207,600	↑	13%
Northern	420,400	472,500	↑	12%
Cradle Coast	314,200	338,200	↑	8%
<i>Mode of departure</i>				
Air visitors	687,000	796,900	↑	16%
Sea visitors	98,000	100,300	↑	2%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

	YE Dec 2012	YE Dec 2013		% change
Victoria	350,000	399,900	↑	14%
N.S.W.	184,700	229,300	↑	24%
Queensland	120,100	131,300	↑	9%
South Australia	42,700	45,900	↑	8%
Western Australia	51,900	53,600	↑	3%
A.C.T.	22,300	24,200	↑	9%
N.T.	7,100	6,300	↓	-11%
Total interstate visitors	785,000	897,200	↑	14%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

## International Visitors to Tasmania

	to Tasmania			to Australia		
	YE Dec 2012	YE Dec 2013	% Change	YE Dec 2012	YE Dec 2013	% Change
<i>Visitors</i>						
International visitors	140,400	159,300	↑ 14%	5,589,200	5,903,100	↑ 6%
<i>Nights</i>						
Nights ('000s)	2,881	2,912	↑ 1%	207,950	216,690	↑ 4%
Average length of stay (nights)	21	18	↓ -11%	37	37	↓ -1%
<i>Expenditure</i>						
Expenditure (\$million)	\$246	\$242	↓ -2%	\$18,414	\$19,392	↑ 5%
Average spend per visitor	\$1,753	\$1,518	↓ -13%	\$3,295	\$3,285	↔ 0%
Average spend per night	\$85	\$83	↓ -3%	\$89	\$89	↑ 1%
Holiday spend (\$million)	\$104	\$139	↑ 34%	\$6,297	\$7,002	↑ 11%
<i>Purpose of Visit</i>						
Holiday	95,200	114,000	↑ 20%	2,446,000	2,643,000	↑ 8%
Visit friends or relatives (VFR)	30,700	30,500	↔ 0%	1,463,400	1,591,300	↑ 9%
Business	12,900	11,200	↓ -13%	826,000	813,300	↓ -2%
Education	5,500	5,200	↓ -5%	366,100	370,400	↑ 1%
Employment	2,700	3,600	↑ 36%	234,200	226,800	↓ -3%
Other Reason	400	1,100	↑ 146%	253,400	258,300	↑ 2%
Total	140,400	159,300	↑ 14%	5,589,200	5,903,100	↑ 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 state/

\*\* 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 Dec 2012	YE Dec 2013	% Change	YE Dec 2012	YE Dec 2013	% Point difference
<i>State/territory visited</i>	<i>Visitors</i>			<i>Market Share</i>		
New South Wales	2,843,000	3,004,900	↑ 6%	51%	51%	→ 0.0%
Victoria	1,775,800	1,958,400	↑ 10%	32%	33%	↑ 1.4%
Queensland	1,998,200	2,033,800	↑ 2%	36%	34%	↓ -1.3%
South Australia	333,800	377,700	↑ 13%	6%	6%	↑ 0.4%
Western Australia	749,100	764,500	↑ 2%	13%	13%	↓ -0.5%
Tasmania	140,400	159,300	↑ 13%	3%	3%	↑ 0.2%
Northern Territory	256,900	260,400	↑ 1%	5%	4%	↓ -0.2%
Australia Capital Territory	161,900	181,700	↑ 12%	3%	3%	→ 0.2%
<b>Total visitors to Australia</b>	<b>5,589,200</b>	<b>5,903,100</b>	<b>↑ 6%</b>	<b>100%</b>	<b>100%</b>	<b>→ 0.0%</b>

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**

	YE Dec 2012	YE Dec 2013	% Change	YE Dec 2012	YE Dec 2013	% Point difference
Country of origin	Visitors			National Market Share		
New Zealand	12,500	18,100	↑ 45%	1.2%	1.7%	↑ 0.5%
Japan	3,400	5,500	↑ 60%	1.1%	1.8%	↑ 0.8%
Hong Kong	11,300	14,500	↑ 27%	7.7%	8.6%	↑ 1.0%
Singapore	3,800	7,100	↑ 85%	1.5%	2.4%	↑ 0.9%
Malaysia	5,300	7,000	↑ 33%	2.4%	2.8%	↑ 0.5%
Indonesia	800	800	↑ 1%	0.7%	0.7%	→ 0.0%
Taiwan	2,000	3,900	↑ 101%	2.2%	3.9%	↑ 1.7%
Thailand	2,300	1,000	↓ -54%	3.4%	1.5%	↓ -1.9%
Korea	3,100	1,300	↓ -57%	1.6%	0.7%	↓ -0.9%
China	11,300	14,100	↑ 24%	1.9%	2.1%	↑ 0.2%
India	2,200	2,600	↑ 18%	1.5%	1.6%	↑ 0.1%
Other Asia	3,200	2,800	↓ -13%	2.0%	1.6%	↓ -0.4%
USA includes Hawaii	17,200	19,600	↑ 14%	3.9%	4.2%	↑ 0.3%
Canada	6,000	4,400	↓ -28%	5.1%	3.6%	↓ -1.4%
United Kingdom	17,400	18,800	↑ 8%	3.0%	3.0%	→ 0.0%
Germany	7,600	8,400	↑ 10%	5.0%	5.2%	↑ 0.2%
Scandinavia	4,500	2,400	↓ -46%	5.0%	2.7%	↓ -2.4%
France	5,500	5,900	↑ 7%	5.6%	5.6%	→ 0.0%
Italy	1,900	2,100	↑ 14%	3.0%	3.1%	↑ 0.1%
Netherlands	2,100	2,000	↓ -5%	4.8%	4.6%	↓ -0.1%
Switzerland	3,700	3,100	↓ -16%	8.4%	6.8%	↓ -1.7%
Other Europe	7,900	6,600	↓ -16%	4.1%	3.3%	↓ -0.8%
Other Countries	5,400	7,200	↑ 34%	1.4%	1.8%	↑ 0.4%
<b>Total</b>	<b>140,400</b>	<b>159,300</b>	<b>↑ 14%</b>	<b>2.5%</b>	<b>2.7%</b>	<b>→ 0.2%</b>

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 Dec 2012	YE Dec 2013	% change	YE Dec 2012	YE Dec 2013	% change
<b>Visitors</b>						
Overnight visitors ('000s)	1,144	1,138	↓ -1%	50,591	51,281	↑ 1%
<b>Nights</b>						
Nights ('000s)	2,796	2,770	↓ -1%	160,381	160,254	→ 0%
Average length of stay (nights)	2.4	2.4	→ 0%	3.2	3.1	↓ -1%
<b>Expenditure</b>						
Expenditure (\$million)	\$310	\$377	↑ 21%	\$20,798	\$21,413	↑ 3%
Spend per visitor	\$271	\$331	↑ 22%	\$411	\$418	↑ 2%
Spend per night	\$111	\$136	↑ 23%	\$130	\$134	↑ 3%
<b>Purpose('000s)</b>						
Holiday	574	582	↑ 1%	22,615	23,653	↑ 5%
Visit friends &/or relatives (VFR)	324	315	↓ -3%	18,252	17,831	↓ -2%
Business	169	177	↑ 5%	7,388	7,383	→ 0%
Other reason	81	72	↓ -11%	2,983	3,004	↑ 1%
Total overnight intrastate visitors	1,144	1,138	↓ -1%	50,591	51,281	↑ 1%

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

	Tasmania			Australia		
	YE Dec 2012	YE Dec 2013	% change	YE Dec 2012	YE Dec 2013	% change
<b>Visitor</b>						
Day visitors ('000s)	4,876	4,745	↓ -3%	165,931	155,465	↓ -6%
Total intrastate Day+Overnight visitors ('000s)	6,020	5,883	↓ -2%	216,522	206,746	↓ -5%
<b>Expenditure</b>						
Expenditure (\$million)	\$509	\$497	↓ -2%	\$18,200	\$18,276	→ 0%
Spend per visitor	\$104	\$105	→ 0%	\$110	\$118	↑ 7%
<b>Purpose('000s)</b>						
Holiday	2,449	2,387	↓ -3%	78,923	72,967	↓ -8%
Visit friends &/or relatives (VFR)	1,180	1,205	↑ 2%	49,670	47,866	↓ -4%
Business	530	469	↓ -12%	16,684	15,366	↓ -8%
Other reason	716	683	↓ -5%	20,655	19,266	↓ -7%
Total day intrastate visitors	4,876	4,745	↓ -3%	165,931	155,465	↓ -6%

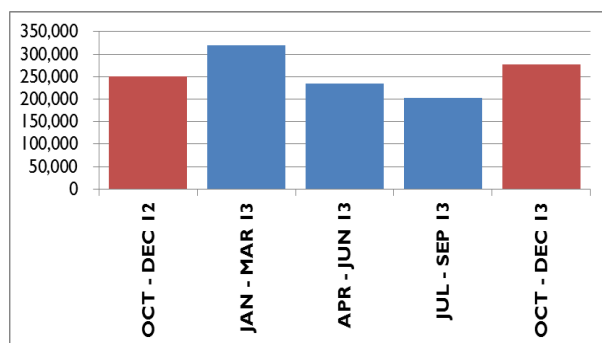
Source: National Visitor Survey (NVS), Tourism Research Australia

## Quarter ending December 2013

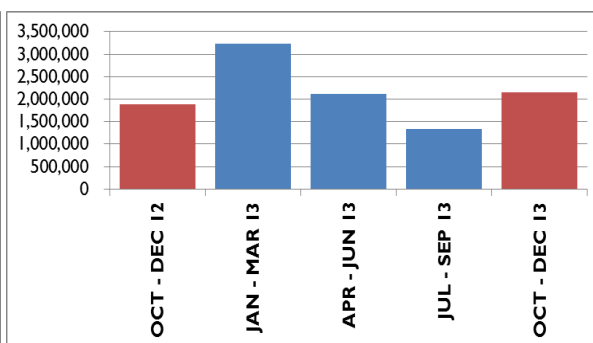
The TVS reports the following key findings for visitors during the October - December 2013 quarter.

- The total number of visitors to Tasmania for the December quarter 2013 was 276,900, up 11% from 250,300 the previous year (Fig. 1).
- The total number of nights spent by visitors to Tasmania for the December quarter 2013 increased by 14% to 2.15 million (was 1.88 million) (Fig. 2).
- Visitor expenditure was \$445 million, up 20% from the same quarter of the previous year (was \$369.5 million) (Fig. 3).
- Of all visitors for the quarter, 124,600 (up 25%) were on holiday, 79,000 (up 3%) were visiting friends or relatives, 46,600 (up 5%) were on business, and 12,400 (showing no significant change) were travelling to attend a conference or convention (Fig. 4).

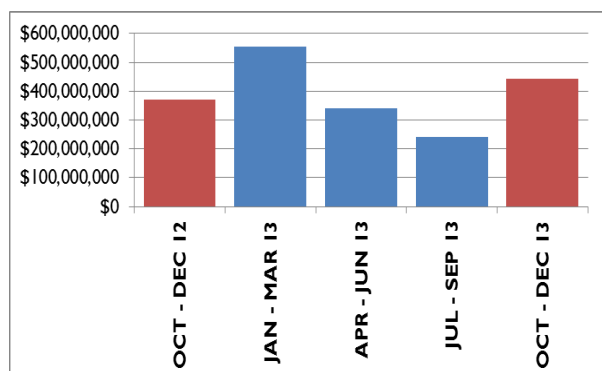
**Fig. 1. Total Visitors to Tasmania by Quarter\***



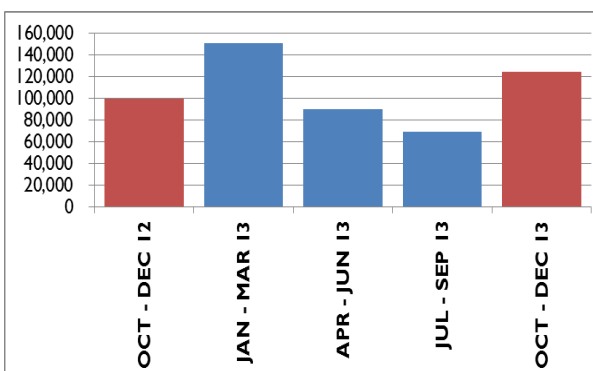
**Fig. 2. Total Nights by Quarter\***



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



**Fig. 4. Total Holiday Visitors by Quarter\***



\*Graphs present data for last five quarters, 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](http://www.tourismtasmania.com.au). 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.