

# Tasmanian Tourism Snapshot

Year ending December 2016

## 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 2016, there were 1.24 million visitors, up 7 per cent from 1.15 million for the previous year.
- Total nights spent by visitors in the state increased by 6 per cent to 10.66 million.
- Visitor expenditure increased by 10 per cent to \$2.14 billion.
- The number of interstate visitors to Tasmania increased by 4 per cent to 1.04 million (was 996,400).

### Summary:

- The total number of visitors holidaying in Tasmania during the year ending December 2016 was 608,300, up 17 per cent compared to the previous year (was 520,000).
- The total number of nights spent by holiday visitors to Tasmania for the year ending December 2016 was 5.5 million, up 11 per cent from the previous year (was 4.9 million).
- Holiday visitor expenditure for the year was up 15 per cent to \$1.47 billion (was \$1.27 billion).
- Those who came to visit friends and relatives (VFR) increased by 4 per cent for the year. The number of nights VFR visitors spent in Tasmania increased by 5 per cent while VFR expenditure increased by 6 per cent.
- Of all visitors, 198,600 (down 1 per cent) were on business while 36,500 (down 11 per cent) were travelling to attend a conference or convention.
- For the year ending December 2016, data from the TVS for the four tourism regions reported the following changes in visitor numbers: South up 5 per cent; East Coast up 10 per cent; North up 11 per cent; Cradle Coast up 7 per cent.
- For the year ending December 2016, 88 per cent of all visitors to Tasmania travelled by scheduled air services and 12 per cent travelled by sea. The total number of visitors travelling by scheduled air was up 7 per cent and sea visitors were up 11 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 December 2016 was 1.04 million, up 4 per cent from 996,400 the previous year.
- The total number of nights spent by interstate visitors to Tasmania for the year ending December 2016 was 8.04 million, up 1 per cent from the previous year (was 7.96 million).
- Interstate visitor expenditure increased by 6 per cent to \$1.75 billion (was \$1.64 billion in the year ending December 2015).
- Of all interstate visitors, 467,500 were on holiday (up 14 per cent), 295,300 were visiting friends or relatives (up 2 per cent), 182,200 were on business (down 2 per cent), and 32,400 were travelling to attend a conference or convention (down 13 per cent).
- In terms of visitation to Tasmania from the key interstate markets, Victoria increased by 7 per cent to 457,100, NSW increased by 6 per cent to 277,000, and Queensland decreased by 1 per cent to 156,500. Together, these markets accounted for 86 per cent of interstate visitation in the year ending December 2016.

## International Visitation (Source: International Visitor Survey)

### Summary – Australia

- A total of 7.62 million international visitors came to Australia in the year ending December 2016, up 11 per cent from the year ending December 2015.
- Holiday visitors to Australia increased by 22 per cent to 3.82 million, while VFR visitors increased by 1 per cent to 1.90 million.
- International visitor nights spent in Australia increased by 2 per cent to 253 million.
- Total expenditure by international visitors in Australia for the year ending December 2016 increased by 8 per cent to \$26 billion<sup>1</sup> (including package expenditure). Holiday spend was \$10 billion (including package expenditure) for the year, increased by 10 per cent from the year ending December 2015.
- For Australia's largest source markets, the following changes to visitor numbers to Australia were recorded: New Zealand, up 3 per cent; China, up 17 per cent; United Kingdom, up 4 per cent and the USA, up 16 per cent.

### Summary – Tasmania

- Tasmania received 235,700 international visitors during the year ending December 2016, up 11 per cent from 211,800 the previous year.
- The number of night's international visitors spent in Tasmania increased by 5 per cent to 3.42 million, and the average length of stay decreased by 5 per cent to 15 nights.
- Expenditure by international visitors increased by 8 per cent to \$378 million<sup>2</sup>.
- Holiday visitors to Tasmania increased by 16 per cent to 188,200, while VFR visitors remained steady to 35,400.
- Holiday nights increased by 12 per cent to 1.78 million, while the average length of stay for holiday visitors decreased by 3 per cent to 9 nights.
- Total expenditure by international holiday visitors increased by 17 per cent to \$240 million.
- For Tasmania's largest source markets, the following changes to visitor numbers to the State were recorded: China, down 13 per cent; United Kingdom down 7 per cent; the USA up 13 per cent; New Zealand up 1 per cent; Hong Kong up 34 per cent.

<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)

- Tasmania's share of all international visitors to Australia for the year ending December 2016 was 3.1 per cent, showing no significant change compared with the year ending December 2015.

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

**NOTE:** The National Visitor Survey figures below refer to the year ending September 2016. Due to a delay in finalising results, the year ending December 2016 statistics will not be published until March 29<sup>th</sup> 2017.

- The number of overnight intrastate holiday trips in Tasmania increased by 6 per cent, VFR trips decreased by 6 per cent, and overnight business trips decreased by 3 per cent in the year ending September 2016.
- In the year ending September 2016, the number of intrastate day trips in Tasmania increased by 2 per cent whilst intrastate overnight trips remained steady at 1.30 million compared to the year ending September 2015.
- Total spend by overnight intrastate visitors in Tasmania decreased by 6 per cent to \$369 million for the year ending September 2016.

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

## Total Visitors to Tasmania

	YE Dec 2015	YE Dec 2016	% change	
<i>Visitors</i>				
Visitors on scheduled air and sea services	1,153,300	1,236,400	↑	7%

	YE Dec 2015	YE Dec 2016	% change	
<i>Visitors</i>				
Day visitors	33,300	31,800	↓	-4%
Overnight visitors	1,120,000	1,204,500	↑	8%
Total visitors	1,153,300	1,236,400	↑	7%
<i>Nights</i>				
Nights (million)	10.02	10.66	↑	6%
Average length of stay (nights)	8.7	8.6	↓	-1%
<i>Expenditure</i>				
Expenditure (\$million)	\$1,954	\$2,145	↑	10%
Average spend per visitor	\$1,694	\$1,734	↑	2%
Average spend per night	\$195	\$201	↑	3%
Holiday spend (\$million)	\$1,274	\$1,469	↑	15%
<i>Purpose of Visit</i>				
Holiday	520,000	608,300	↑	17%
Visit friends or relatives (VFR)	315,600	327,300	↑	4%
Total leisure (Holiday+VFR)	835,600	935,700	↑	12%
Business or employment	200,800	198,600	↓	-1%
Convention/conference/seminar	40,800	36,500	↓	-11%
<i>Regions Visited</i>				
Southern	941,300	987,700	↑	5%
East Coast	321,900	352,700	↑	10%
Northern	604,200	668,900	↑	11%
Cradle Coast	471,200	502,100	↑	7%
<i>Mode of departure</i>				
Air visitors	1,023,500	1,092,800	↑	7%
Sea visitors	129,800	143,600	↑	11%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

## Interstate Visitors to Tasmania

	YE Dec 2015	YE Dec 2016		% change
<b>Visitors</b>				
Day visitors	31,700	30,200	↓	-5%
Overnight visitors	964,700	1,009,300	↑	5%
Total visitors	996,400	1,039,500	↑	4%
<b>Nights</b>				
Nights (million)	7.96	8.04	↑	1%
Average length of stay (nights)	8.0	7.7	↓	-3%
<b>Expenditure</b>				
Expenditure (\$million)	\$1,644	\$1,750	↑	6%
Average spend per visitor	\$1,650	\$1,684	↑	2%
Average spend per night	\$206	\$218	↑	5%
Holiday spend (\$million)	\$1,041	\$1,175	↑	13%
<b>Purpose of Visit</b>				
Holiday	410,100	467,500	↑	14%
Visit friends or relatives (VFR)	290,400	295,300	↑	2%
Total leisure (Holiday+VFR)	700,500	762,800	↑	9%
Business or employment	185,800	182,200	↓	-2%
Convention/conference/seminar	37,400	32,400	↓	-13%
<b>Regions Visited</b>				
Southern	790,700	815,900	↑	3%
East Coast	244,600	261,100	↑	7%
Northern	508,600	546,500	↑	7%
Cradle Coast	387,700	404,200	↑	4%
<b>Mode of departure</b>				
Air visitors	877,800	908,300	↑	3%
Sea visitors	118,600	131,100	↑	11%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

	YE Dec 2015	YE Dec 2016		% change
Victoria	427,300	457,100	↑	7%
N.S.W.	260,800	277,000	↑	6%
Queensland	157,800	156,500	↓	-1%
South Australia	55,300	51,800	↓	-6%
Western Australia	56,900	53,600	↓	-6%
A.C.T.	24,600	26,600	↑	8%
N.T.	7,200	10,600	↑	48%
Total interstate visitors	996,400	1,039,500	↑	4%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

## International Visitors to Tasmania

	to Tasmania			to Australia		
	YE Dec 2015	YE Dec 2016	% Change	YE Dec 2015	YE Dec 2016	% Change
<b>Visitors</b>						
International visitors	211,800	235,700	↑ 11%	6,859,000	7,624,700	↑ 11%
<b>Nights</b>						
Nights ('000s)	3,248	3,418	↑ 5%	248,107	252,969	↑ 2%
Ave Length of stay (nights)	15.3	14.5	↓ -5%	36.2	33.2	↓ -8%
<b>Expenditure</b>						
Expenditure (\$million)	\$351	\$378	↑ 8%	\$24,252	\$26,217	↑ 8%
Average spend per visitor	\$1,656	\$1,603	↓ -3%	\$3,536	\$3,438	↓ -3%
Average spend per night	\$108	\$111	↑ 2%	\$98	\$104	↑ 6%
Holiday spend (\$million)	\$206	\$240	↑ 17%	\$8,734	\$9,619	↑ 10%
<b>Purpose</b>						
Holiday	162,500	188,200	↑ 16%	3,133,200	3,821,000	↑ 22%
Visit friends & relatives (VFR)	35,400	35,400	→ 0%	1,881,500	1,902,000	↑ 1%
Business	13,000	13,400	↑ 3%	794,800	813,700	↑ 2%
Education	6,700	6,600	↓ -1%	458,600	495,200	↑ 8%
Employment	3,200	5,600	↑ 76%	309,000	278,800	↓ -10%
Other Reason	500	200	↓ -59%	282,000	314,000	↑ 11%
<b>Total</b>	<b>211,800</b>	<b>235,700</b>	<b>↑ 11%</b>	<b>6,859,000</b>	<b>7,624,700</b>	<b>↑ 11%</b>

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

Notes: Modelled expenditure includes 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. The total expenditure in Australia does not include small amounts that cannot be allocated to a particular state/territory.

State/territory visited	Visitors			Market Share		
	YE Dec 2015	YE Dec 2016	% Change	YE Dec 2015	YE Dec 2016	% Point difference
New South Wales	3,420,900	3,872,000	↑ 13%	49.9%	50.8%	↑ 0.9%
Victoria	2,422,600	2,673,900	↑ 10%	35.3%	35.1%	↓ -0.3%
Queensland	2,336,600	2,574,400	↑ 10%	34.1%	33.8%	↓ -0.3%
South Australia	408,400	432,000	↑ 6%	6.0%	5.7%	↓ -0.3%
Western Australia	848,800	954,000	↑ 12%	12.4%	12.5%	↑ 0.1%
Tasmania	211,800	235,700	↑ 11%	3.1%	3.1%	→ 0.0%
Northern Territory	287,700	287,200	→ 0%	4.2%	3.8%	↓ -0.4%
ACT	195,100	207,900	↑ 7%	2.8%	2.7%	↓ -0.1%
<b>Total visitors to Australia</b>	<b>6,859,000</b>	<b>7,624,700</b>	<b>↑ 11%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>→ 0.0%</b>

Source: International Visitor Survey, 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	Visitors to Tasmania			National Market Share		% Point difference
	YE Dec 2015	YE Dec 2016	% Change	YE Dec 2015	YE Dec 2016	
New Zealand	15,200	15,400	↑ 1%	1.3%	1.3%	→ 0.0%
Japan	6,200	8,600	↑ 38%	2.0%	2.2%	↑ 0.2%
Hong Kong	17,400	23,300	↑ 34%	8.7%	10.3%	↑ 1.6%
Singapore	10,600	13,700	↑ 29%	3.1%	3.6%	↑ 0.5%
Malaysia	7,800	13,400	↑ 71%	2.6%	3.9%	↑ 1.3%
Indonesia	1,900	2,900	↑ 53%	1.4%	1.9%	↑ 0.5%
Taiwan	4,900	5,300	↑ 9%	4.0%	3.4%	↓ -0.5%
Thailand	1,600	2,800	↑ 72%	2.2%	3.3%	↑ 1.0%
Korea	1,700	3,900	↑ 133%	0.8%	1.5%	↑ 0.7%
China	27,600	24,000	↓ -13%	2.9%	2.2%	↓ -0.8%
India	4,000	6,000	↑ 53%	1.8%	2.5%	↑ 0.7%
Other Asia	3,600	4,100	↑ 14%	1.5%	1.5%	↓ -0.1%
United States of America	28,000	31,700	↑ 13%	4.9%	4.7%	↓ -0.1%
Canada	7,400	7,000	↓ -5%	5.5%	4.9%	↓ -0.6%
United Kingdom	26,800	25,000	↓ -7%	4.1%	3.7%	↓ -0.4%
Germany	11,400	9,700	↓ -15%	6.2%	5.0%	↓ -1.3%
Scandinavia	3,900	4,300	↑ 10%	4.1%	4.3%	↑ 0.2%
France	6,400	7,400	↑ 15%	5.6%	6.3%	↑ 0.7%
Italy	1,800	3,700	↑ 108%	2.6%	5.1%	↑ 2.5%
Netherlands	3,200	3,500	↑ 10%	7.2%	7.1%	↓ -0.1%
Switzerland	3,600	3,700	↑ 3%	6.9%	7.2%	↑ 0.3%
Other Europe	7,700	9,300	↑ 20%	3.7%	4.1%	↑ 0.4%
Other Countries	9,000	6,800	↓ -24%	2.1%	1.5%	↓ -0.6%
<b>Total</b>	<b>211,800</b>	<b>235,700</b>	<b>↑ 11%</b>	<b>3.1%</b>	<b>3.1%</b>	<b>→ 0.0%</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)

**NOTE:** The intrastate travel figures below refer to the year ending September 2016. Due to a delay in finalising results, the year ending December 2016 statistics will not be published until March 29<sup>th</sup> 2017.

## Intrastate Visitors

	Tasmania			Australia		
	YE Sept 2015	YE Sept 2016	% change	YE Sept 2015	YE Sept 2016	% change
<b>Visitors</b>						
Overnight visitors ('000s)	1,298	1,299	→ 0%	57,549	60,315	↑ 5%
<b>Nights</b>						
Nights ('000s)	3,107	3,469	↑ 12%	179,473	185,427	↑ 3%
Average length of stay (nights)	2.4	2.7	↑ 12%	3.1	3.1	↓ -1%
<b>Expenditure</b>						
Expenditure (\$million)	\$391	\$369	↓ -6%	\$23,330	\$24,696	↑ 6%
Spend per visitor	\$301	\$284	↓ -6%	\$405	\$409	↑ 1%
Spend per night	\$126	\$106	↓ -16%	\$130	\$133	↑ 2%
<b>Purpose('000s)</b>						
Holiday	579	613	↑ 6%	24,143	25,827	↑ 7%
Visit friends &/or relatives (VFR)	451	426	↓ -6%	20,701	21,153	↑ 2%
Business	202	195	↓ -3%	9,806	10,132	↑ 3%
Other reason	70	77	↑ 10%	3,306	3,681	↑ 11%
Total overnight intrastate visitors	1,298	1,299	→ 0%	57,549	60,315	↑ 5%

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

	Tasmania			Australia		
	YE Sept 2015	YE Sept 2016	% change	YE Sept 2015	YE Sept 2016	% change
<b>Visitor</b>						
Day visitors ('000s)	5,397	5,496	↑ 2%	165,715	178,205	↑ 8%
Total intrastate Day+Overnight visitors ('000s)	6,695	6,795	↑ 1%	223,264	238,520	↑ 7%
<b>Expenditure</b>						
Expenditure (\$million)	\$579	\$594	↑ 2%	\$19,052	\$19,329	↑ 1%
Spend per visitor	\$107	\$108	↑ 1%	\$115	\$108	↓ -6%
<b>Purpose('000s)</b>						
Holiday	2,753	3,023	↑ 10%	76,102	86,617	↑ 14%
Visit friends &/or relatives (VFR)	1,251	1,219	↓ -3%	49,764	49,008	↓ -2%
Business	592	548	↓ -7%	16,503	18,477	↑ 12%
Other reason	801	706	↓ -12%	23,345	24,104	↑ 3%
Total day intrastate visitors	5,397	5,496	↑ 2%	165,715	178,205	↑ 8%

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

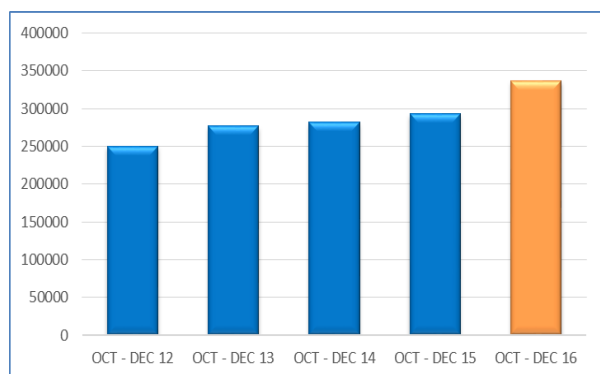


## Quarter ending December 2016

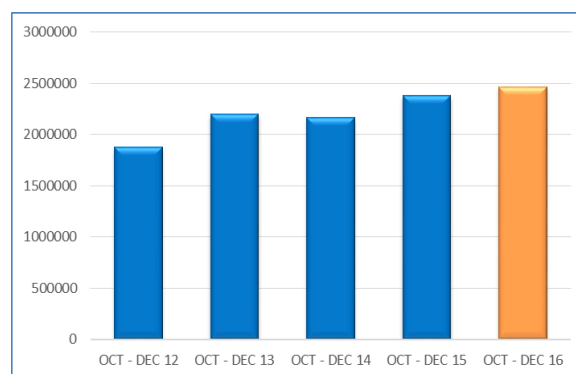
The TVS reports the following key findings for visitors during the October - December 2016 quarter.

- The total number of visitors to Tasmania for the December quarter 2016 was 337,200, up 15 per cent from 292,800 the previous year (Fig. 1).
- The total number of nights spent by visitors to Tasmania for the December quarter 2016 increased by 4 per cent to 2.47 million (was 2.38 million) (Fig. 2).
- Visitor expenditure was \$570 million, up 14 per cent from the same quarter of the previous year (was \$499 million) (Fig. 3).
- Of all visitors for the quarter, 164,500 (up 27 per cent) were on holiday, 93,700 (up 30 per cent) were visiting friends or relatives, 50,600 (down 5 per cent) were on business, and 13,500 (down 36 per cent) were travelling to attend a conference or convention (Fig. 4).

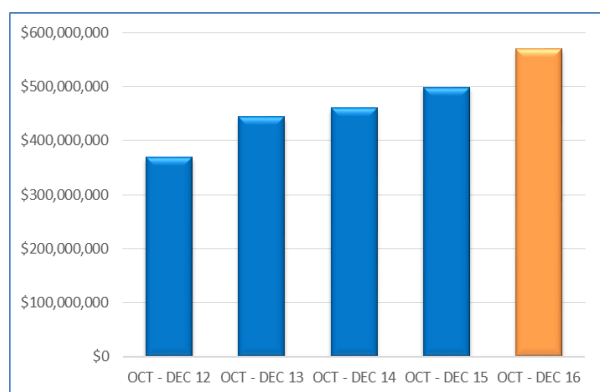
**Fig. 1. Total Visitors to Tasmania by Quarter\***



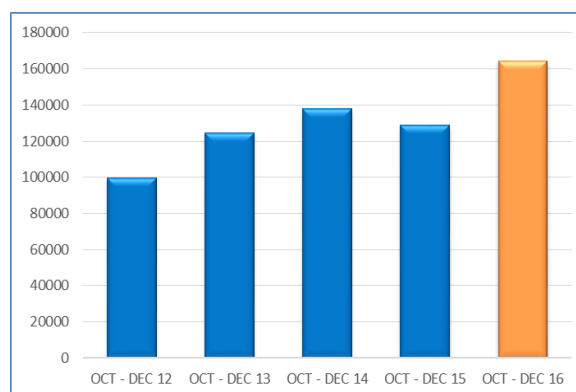
**Fig. 2. Total Nights by Quarter\***



**Fig. 3. Total Expenditure by Quarter\***



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



\* Graphs present data 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.tvsanalyser.com.au](http://www.tvsanalyser.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 international airports across Australia.

### **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 per cent 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.