

# Tasmanian Tourism Snapshot

Year ending March 2017

## 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 2017, there were 1.26 million visitors, up 7 per cent from 1.18 for the previous year.
- Total nights spent by visitors in the state increased by 5 per cent to 10.88 million.
- Visitor expenditure increased by 11 per cent to \$2.23 billion.
- The number of interstate visitors to Tasmania increased by 5 per cent to 1.06 million (was 1.01 million).

### Summary:

- The total number of visitors holidaying in Tasmania during the year ending March 2017 was 620,900, up 13 per cent compared to the previous year (was 547,100).
- The total number of nights spent by holiday visitors to Tasmania for the year ending March 2017 was 5.35 million, up 1 per cent from the previous year (was 5.31 million).
- Holiday visitor expenditure for the year was up 15 per cent to \$1.54 billion (was \$1.34 billion).
- Those who came to visit friends and relatives (VFR) increased by 6 per cent for the year. The number of nights VFR visitors spent in Tasmania increased by 8 per cent while VFR expenditure increased by 12 per cent.
- Of all visitors, 201,500 (up 1 per cent) were on business while 32,900 (down 24 per cent) were travelling to attend a conference or convention.
- For the year ending March 2017, data from the TVS for the four tourism regions reported the following changes in visitor numbers: South up 5 per cent; East Coast up 12 per cent; North up 11 per cent; Cradle Coast up 7 per cent.
- For the year ending March 2017, 89 per cent of all visitors to Tasmania travelled by scheduled air services and 11 per cent travelled by sea. The total number of visitors travelling by scheduled air was up 8 per cent and sea services was up 4 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 2017 was 1.06 million, up 5 per cent from 1.01 million the previous year.
- The total number of nights spent by interstate visitors to Tasmania for the year ending March 2017 was 8.14 million, showing no significant change from the previous year.
- Interstate visitor expenditure increased by 9 per cent to \$1.82 billion (was \$1.67 billion in the year ending March 2016).
- Of all interstate visitors, 476,300 were on holiday (up 10 per cent), 302,000 were visiting friends or relatives (up 4 per cent), 186,200 were on business (up 1 per cent), and 28,500 were travelling to attend a conference or convention (down 28 per cent).
- In terms of visitation to Tasmania from the key interstate markets, Victoria increased by 3 per cent to 453,400, NSW increased by 9 per cent to 287,100, and Queensland increased by 8 per cent to 164,000. Together, these markets accounted for 86 per cent of interstate visitation in the year ending March 2017.

## International Visitation (Source: International Visitor Survey)

### Summary – Australia

- A total of 7.72 million international visitors came to Australia in the year ending March 2017, up 9 per cent from the year ending March 2016.
- Holiday visitors to Australia increased by 14 per cent to 3.84 million, while VFR visitors increased by 3 per cent to 1.91 million.
- International visitor nights spent in Australia increased by 5 per cent to 262 million.
- Total expenditure by international visitors in Australia for the year ending March 2017 increased by 8 per cent to \$27 billion<sup>1</sup> (including package expenditure). Holiday spend was \$10 billion (including package expenditure), an increase of 6 per cent on the year ending March 2016.
- For Australia's largest source markets, the following changes to visitor numbers to Australia were recorded: New Zealand up 3 per cent; China up 12 per cent; United Kingdom up 2 per cent and the USA up 14 per cent.

### Summary – Tasmania

- Tasmania received 250,300 international visitors during the year ending March 2017, up 16 per cent from 215,600 the previous year.
- The number of night's international visitors spent in Tasmania increased by 9 per cent to 3.62 million, and the average length of stay decreased by 6 per cent to 14 nights.
- Expenditure by international visitors increased by 21 per cent to \$424 million<sup>2</sup>.
- Holiday visitors to Tasmania increased by 15 per cent to 196,400, while VFR visitors increased by 10 per cent to 37,300.
- Holiday nights increased by 14 per cent to 1.84 million, while the average length of stay for holiday visitors decreased by 1 per cent to 9 nights.
- Total expenditure by international holiday visitors increased by 24 per cent to \$257 million.
- For Tasmania's largest source markets, the following changes to visitor numbers to the state were recorded: China up 35 per cent; United Kingdom up 4 per cent; the USA up 20 per cent; New Zealand down 12 per cent; Hong Kong up 11 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 March 2017 was 3.2 per cent, up from 3.0 per cent for the year ending March 2016.

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

- In the year ending March 2017, the number of intrastate day trips in Tasmania remained steady at 5.58 million whilst intrastate overnight trips increased by 1 per cent to 1.29 million, compared to the year ending March 2016.
- The number of overnight intrastate holiday trips in Tasmania decreased by 15 per cent, VFR increased by 21 per cent, and overnight business trips increased by 32 per cent in the year ending March 2017.
- Total spend by overnight intrastate visitors in Tasmania decreased by 5 per cent to \$353 million for the year ending March 2017.

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

## Total Visitors to Tasmania

Table 1. Total visitors to Tasmania on scheduled air and sea services			
	YE Mar 2016	YE Mar 2017	% change
<i>Visitors</i>			
Visitors on scheduled air and sea services	1,176,100	1,262,100	↑ 7%

Table 2. Total visitors to Tasmania on scheduled air and sea services			
	YE Mar 2016	YE Mar 2017	% change
<i>Visitors</i>			
Day visitors	31,900	33,100	↑ 4%
Overnight visitors	1,144,200	1,228,900	↑ 7%
Total visitors	1,176,100	1,262,100	↑ 7%
<i>Nights</i>			
Nights (million)	10.36	10.88	↑ 5%
Average length of stay (nights)	8.8	8.6	↓ -2%
<i>Expenditure</i>			
Expenditure (\$million)	\$2,014	\$2,230	↑ 11%
Average spend per visitor	\$1,712	\$1,767	↑ 3%
Average spend per night	\$194	\$205	↑ 5%
Holiday spend (\$million)	\$1,342	\$1,538	↑ 15%
<i>Purpose of Visit</i>			
Holiday	547,100	620,900	↑ 13%
Visit friends or relatives (VFR)	318,600	337,500	↑ 6%
Total leisure (Holiday+VFR)	865,700	958,400	↑ 11%
Business or employment	200,100	201,500	↑ 1%
Convention/conference/seminar	43,400	32,900	↓ -24%
<i>Regions Visited</i>			
Southern	955,200	1,004,300	↑ 5%
East Coast	331,700	372,900	↑ 12%
Northern	620,300	689,000	↑ 11%
Cradle Coast	476,800	508,400	↑ 7%
<i>Mode of departure</i>			
Air visitors	1,037,700	1,118,700	↑ 8%
Sea visitors	138,400	143,400	↑ 4%

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 2016	YE Mar 2017		% change
<i>Visitors</i>				
Day visitors	30,600	31,700	↑	3%
Overnight visitors	978,600	1,024,900	↑	5%
Total visitors	1,009,200	1,056,500	↑	5%
<i>Nights</i>				
Nights (million)	8.14	8.14	→	0%
Average length of stay (nights)	8.1	7.7	↓	-4%
<i>Expenditure</i>				
Expenditure (\$million)	\$1,671	\$1,819	↑	9%
Average spend per visitor	\$1,656	\$1,722	↑	4%
Average spend per night	\$205	\$223	↑	9%
Holiday spend (\$million)	\$1,097	\$1,233	↑	12%
<i>Purpose of Visit</i>				
Holiday	432,500	476,300	↑	10%
Visit friends or relatives (VFR)	290,000	302,000	↑	4%
Total leisure (Holiday+VFR)	722,500	778,300	↑	8%
Business or employment	183,600	186,200	↑	1%
Convention/conference/seminar	39,300	28,500	↓	-28%
<i>Regions Visited</i>				
Southern	798,600	821,000	↑	3%
East Coast	252,700	275,300	↑	9%
Northern	518,800	563,100	↑	9%
Cradle Coast	393,200	408,500	↑	4%
<i>Mode of departure</i>				
Air visitors	882,200	923,900	↑	5%
Sea visitors	127,100	132,700	↑	4%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

	YE Mar 2016	YE Mar 2017	% change	
Victoria	439,300	453,400	↑	3%
N.S.W.	262,700	287,100	↑	9%
Queensland	151,900	164,000	↑	8%
South Australia	57,300	53,800	↓	-6%
Western Australia	57,300	52,300	↓	-9%
A.C.T.	24,900	30,600	↑	23%
N.T.	9,000	9,800	↑	9%
Total interstate visitors	1,009,200	1,056,500	↑	5%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

## International Visitors to Tasmania

	to Tasmania			to Australia		
	YE Mar 2016	YE Mar 2017	% Change	YE Mar 2016	YE Mar 2017	% Change
<b>Visitors</b>						
International visitors	215,600	250,300	↑ 16%	7,074,200	7,724,300	↑ 9%
<b>Nights</b>						
Nights ('000s)	3,316	3,619	↑ 9%	248,457	261,814	↑ 5%
Average length of stay (nights)	15.4	14.5	↓ -6%	35.1	33.9	↓ -3%
<b>Expenditure</b>						
Expenditure (\$million)	\$349	\$424	↑ 21%	\$25,175	\$27,225	↑ 8%
Average spend per visitor	\$1,620	\$1,693	↑ 4%	\$3,559	\$3,525	↓ -1%
Average spend per night	\$105	\$117	↑ 11%	\$101	\$104	↑ 3%
Holiday spend (\$million)	\$207	\$257	↑ 24%	\$9,099	\$9,675	↑ 6%
<b>Purpose of Visit</b>						
Holiday	170,400	196,400	↑ 15%	3,364,700	3,839,300	↑ 14%
Visit friends or relatives (VFR)	34,100	37,300	↑ 10%	1,861,700	1,913,200	↑ 3%
Business	11,200	16,300	↑ 45%	796,000	833,900	↑ 5%
Education	7,000	6,100	↓ -13%	476,200	534,800	↑ 12%
Employment	3,600	5,600	↑ 55%	297,100	292,100	↓ -2%
Other Reason	600	200	↓ -76%	278,500	311,100	↑ 12%
Total	215,600	250,300	↑ 16%	7,074,200	7,724,300	↑ 9%

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/territory.

\*\* 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.

Table 6. International visitors to States/Territories							
	YE Mar 2016	YE Mar 2017	% Change	YE Mar 2016	YE Mar 2017	% Point difference	
State/territory visited	Visitors			Market Share			
New South Wales	3,565,300	3,913,400	↑ 10%	50.4%	50.7%	↑	0.3%
Victoria	2,512,700	2,706,600	↑ 8%	35.5%	35.0%	↓	-0.5%
Queensland	2,418,400	2,582,900	↑ 7%	34.2%	33.4%	↓	-0.7%
South Australia	409,700	436,200	↑ 6%	5.8%	5.6%	↓	-0.1%
Western Australia	874,600	953,800	↑ 9%	12.4%	12.3%	↓	0.0%
Tasmania	215,600	250,300	↑ 16%	3.0%	3.2%	↑	0.2%
Northern Territory	280,900	297,500	↑ 6%	4.0%	3.9%	↓	-0.1%
ACT	199,800	214,500	↑ 7%	2.8%	2.8%	↓	0.0%
Total visitors to Australia	7,074,200	7,724,300	↑ 9%	100.0%	100.0%	→	0.0%

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	Visitors			National Market Share		
	YE Mar 2016	YE Mar 2017	% Change	YE Mar 2016	YE Mar 2017	% Point difference
New Zealand	16,500	14,500	↓ -12%	1.4%	1.2%	↓ -0.2%
Japan	5,900	9,000	↑ 52%	1.8%	2.3%	↑ 0.5%
Hong Kong	20,900	23,300	↑ 11%	9.7%	10.6%	↑ 0.9%
Singapore	11,500	13,000	↑ 12%	3.2%	3.4%	↑ 0.2%
Malaysia	7,300	14,000	↑ 92%	2.3%	4.0%	↑ 1.7%
Indonesia	2,200	2,600	↑ 21%	1.6%	1.6%	→ 0.0%
Taiwan	4,100	6,100	↑ 50%	3.1%	3.9%	↑ 0.8%
Thailand	1,700	2,700	↑ 56%	2.3%	3.1%	↑ 0.7%
Korea	2,600	4,500	↑ 76%	1.1%	1.7%	↑ 0.6%
China	23,300	31,400	↑ 35%	2.3%	2.7%	↑ 0.5%
India	4,100	5,600	↑ 36%	1.9%	2.2%	↑ 0.3%
Other Asia	3,400	5,000	↑ 50%	1.4%	1.7%	↑ 0.3%
USA includes Hawaii	30,300	36,200	↑ 20%	5.1%	5.3%	↑ 0.2%
Canada	7,700	8,000	↑ 4%	5.7%	5.4%	↓ -0.3%
United Kingdom	24,500	25,400	↑ 4%	3.7%	3.8%	↑ 0.1%
Germany	12,400	12,300	↓ -1%	6.7%	6.2%	↓ -0.5%
Scandinavia	4,100	3,400	↓ -16%	4.1%	3.4%	↓ -0.8%
France	8,800	5,100	↓ -42%	7.6%	4.4%	↓ -3.3%
Italy	2,400	3,000	↑ 25%	3.4%	4.0%	↑ 0.6%
Netherlands	3,400	3,600	↑ 7%	7.5%	7.1%	↓ -0.4%
Switzerland	4,000	3,300	↓ -18%	7.9%	6.4%	↓ -1.5%
Other Europe	7,800	9,100	↑ 17%	3.7%	4.0%	↑ 0.3%
Other Countries	6,900	9,300	↑ 34%	1.6%	1.9%	↑ 0.4%
Total	215,600	250,300	↑ 16%	3.0%	3.2%	↑ 0.2%

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 2016	YE Mar 2017	% change	YE Mar 2016	YE Mar 2017	% change
<b>Visitors</b>						
Overnight visitors ('000s)	1,280	1,294	↑ 1%	60,146	61,877	↑ 3%
<b>Nights</b>						
Nights ('000s)	3,376	3,097	↓ -8%	183,677	187,126	↑ 2%
Average length of stay (nights)	2.6	2.4	↓ -9%	3.1	3.0	↓ -1%
<b>Expenditure</b>						
Expenditure (\$million)	\$371	\$353	↓ -5%	\$24,357	\$25,447	↑ 4%
Spend per visitor	\$290	\$273	↓ -6%	\$405	\$411	↑ 2%
Spend per night	\$110	\$114	↑ 4%	\$133	\$136	↑ 3%
<b>Purpose('000s)</b>						
Holiday	662	561	↓ -15%	26,091	25,968	→ 0%
Visit friends &/or relatives (VFR)	360	435	↑ 21%	20,929	21,601	↑ 3%
Business	177	234	↑ 32%	9,913	10,835	↑ 9%
Other reason	79	71	↓ -10%	3,675	3,999	↑ 9%
Total overnight intrastate visitors	1,280	1,294	↑ 1%	60,146	61,877	↑ 3%

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

	Tasmania			Australia		
	YE Mar 2016	YE Mar 2017	% change	YE Mar 2016	YE Mar 2017	% change
<b>Visitor</b>						
Day visitors ('000s)	5,625	5,583	↓ -1%	175,636	177,553	↑ 1%
Total intrastate Day+Overnight visitors ('000s)	6,905	6,877	→ 0%	235,782	239,430	↑ 2%
<b>Expenditure</b>						
Expenditure (\$million)	\$601	\$634	↑ 5%	\$18,834	\$19,583	↑ 4%
Spend per visitor	\$107	\$114	↑ 6%	\$107	\$110	↑ 3%
<b>Purpose('000s)</b>						
Holiday	3,319	3,090	↓ -7%	88,007	87,176	↓ -1%
Visit friends &/or relatives (VFR)	1,178	1,131	↓ -4%	48,424	48,438	→ 0%
Business	481	483	→ 0%	16,062	17,637	↑ 10%
Other reason	648	879	↑ 36%	23,143	24,302	↑ 5%
Total day intrastate visitors	5,625	5,583	↓ -1%	175,636	177,553	↑ 1%

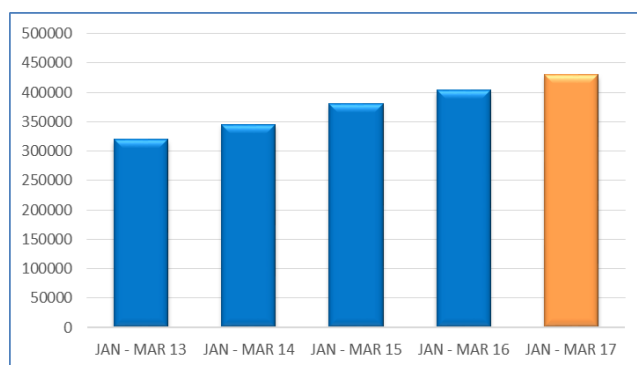
Source: National Visitor Survey (NVS), Tourism Research Australia

## Quarter ending March 2017

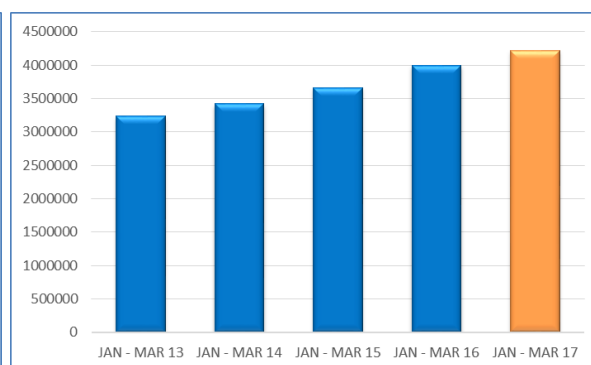
The TVS reports the following key findings for visitors during the January - March 2017 quarter.

- The total number of visitors to Tasmania for the March quarter 2017 was 429,600, up 6 per cent from 404,000 the previous year (Fig. 1).
- The total number of nights spent by visitors to Tasmania for the March quarter 2017 increased by 5 per cent to 4.22 million (was 4.00 million) (Fig. 2).
- Visitor expenditure was \$912 million, up 10 per cent from the same quarter of the previous year (was \$827 million) (Fig. 3).
- Of all visitors for the quarter, 244,300 (up 5 per cent) were on holiday, 111,900 (up 10 per cent) were visiting friends or relatives, 46,900 (up 7 per cent) were on business, and 4,600 (down 44 per cent) were travelling to attend a conference or convention (Fig. 4).

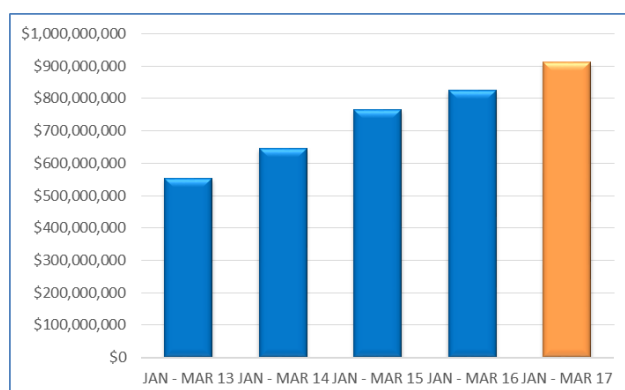
**Fig. 1. Total Visitors to Tasmania by Quarter\***



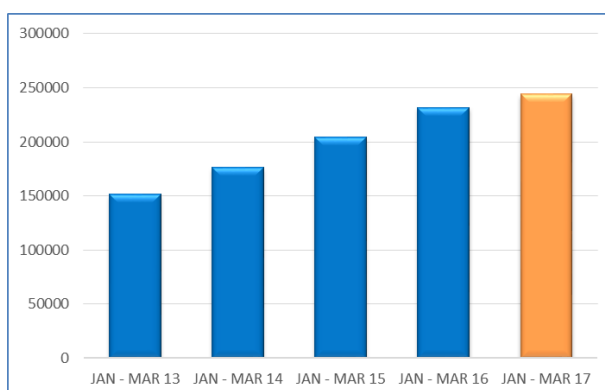
**Fig. 2. Total Nights by Quarter\***



**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 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 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.