

Tasmanian Tourism Snapshot

Year ending December 2008

Total Visitation to Tasmania

According to the latest results of the Tasmanian Visitor Survey (TVS), Tasmania has bucked the national trend of a softening domestic travel climate, having posted strong visitation growth rates two quarters in a row. Strong September and December quarters 2008 provided a boost to visitation levels for the 2008 calendar year. In the year ending December 2008, visitor numbers were up 9% (897,100), visitor nights were up 5% (7.37 million) and expenditure levels up 12% (\$1.48 billion) - all to record high levels. These results are consistent with reports from across Tasmania's tourism industry and signal a strong performance by Tasmania, particularly in the context of the increasing global financial turmoil.

Interstate visitation continued to dominate tourist activity in Tasmania in terms of expenditure (\$1.27 billion) and the number of nights (6.24 million) spent in the State. Intrastate visitors took the greatest number of trips, with an estimated 5.2 million day and overnight trips taken by Tasmanians in their home state in 2008, down 8% (National Visitor Survey). Interstate visitation grew by 8% to 780,800 visitors (TVS), while international visitation decreased on the previous year to 152,000 visitors (-4%) (International Visitor Survey).

Interstate Visitation (Tasmanian Visitor Survey)

There was an 8% growth in the number of interstate visitors to Tasmania during the 2008 calendar year, resulting in an estimated 780,800 visitors to the State. Of all interstate visitors, 353,200 were visiting Tasmania on a holiday, 16% more than the previous year. Visitor nights also increased 9% to 6.24 million, while the average length of stay remained the same at 8.0 nights. The average length of stay of interstate holiday visitors declined slightly to 8.8 nights (was 9.0 nights) when compared to the year ending December 2008.

An estimated \$1.27 billion was spent in Tasmania by interstate visitors, an increase of 11% compared to the 12 months to December 2007. The average spend per night increased 2% to \$204 and, given the stable length of stay, resulted in an increase in average spend per interstate visitor (+3% to \$1,630) compared to \$1,590 in the 12 months to December 2007. Notably, total expenditure by interstate visitors on a holiday in Tasmania increased significantly (+21%) to \$904.7 million.

International Visitation (International Visitor Survey)

Meanwhile, international visitor numbers to Australia remained relatively stable in 2008 (-1%) in light of the size of the expected downturn in visitors in the later part of the year due to the global financial crisis. The number of international visitors to Australia, however, continues to trend downward. Tasmania has followed the national trend with international visitor numbers declining (-4%) to 152,000. As a consequence the State maintained its 3% share of all international visitors to Australia. The trend of decreasing international visitor nights also continued in Tasmania, with nights down 3% on the previous year to 3 million. Despite a decrease in the number of visitors and nights spent in Tasmania by international visitors, an increase in the average spend per visitor (+9% to \$1,520) has resulted in a 5% increase in total expenditure compared with the previous year.

Fewer visitors from New Zealand (-19%), Japan (-35%), Other Asia (-16%) and Germany (-19%) underpinned the decline in total international visitors to Tasmania in the year ending December 2008. In contrast, there was an increase in the number of visitors from USA (+26%), the United Kingdom (+3%) and Other countries (+42%) which helped offset a greater decline in total visitor numbers for the year.

Intrastate Visitation (National Visitor Survey)

The year to December 2008 saw an 8% drop in total trips (5.2 million) taken by Tasmanians in their home state. This was due to a decrease in the number of day trips (-9%) and overnight trips (-4%) taken in 2008 compared with the previous year. Of the 5.2 million intrastate trips taken in Tasmania, 79% were day trips and the remaining 21% were overnight trips. Tasmanians spent more on overnight intrastate travel despite having taken fewer overnight trips. Total spend by overnight intrastate visitors increased by 4% to reach \$305 million. Just over half of all overnight intrastate travel (550,000 visitors) was for holiday purposes (-5%), followed by travel to visit friends and relatives (-12%), and travel for business (+16%).

Marketing Performance (Holiday Tracking Survey)

Without any prompting on advertising for holidays and travel, 16.6% of all Australians (interstate and intrastate residents) had read, seen or heard some form of Tasmanian holiday/travel advertising in the year ending December 2008, up from 15.5% of all Australians recorded in 2007. Tasmania had the second highest level of prompted advertising awareness for the year at 31.8%, following Queensland (55.4%). When asked where you would like to go on holidays in the next two years, 17.0% of all Australians had a preference to travel to/within Tasmania (no change compared with the previous year), whilst 4.4% of all Australians intended to travel to/within the State in the next two years (down from 4.7% in 2007). 13.0% of all Australians indicated they had an awareness of Tasmania's current advertising tagline 'Island of Inspiration', launched in January 2007.

Interstate Visitors to Tasmania

TABLE 1 : INTERSTATE VISITATION – SUMMARY

	12 months ending Dec 07	12 months ending Dec 08	% Change
Interstate Visitors			
Day Visitors	15,500	16,600	7
Overnight Visitors	705,600	764,200	8
Total Visitors	721,100	780,800	8
Interstate Nights			
Total Nights	5,738,800	6,238,600	9
Average Length of Stay (nights)	8.0	8.0	
Interstate Expenditure	\$1.146 billion	\$1.272 billion	11
Interstate spend per visitor	\$1,590	\$1,630	3
Interstate spend per night	\$200	\$204	2
Interstate Market Share*			
Visitors	4.0%	3.7%	
Nights	5.3%	4.7%	
Expenditure	5.3%	4.9%	
Interstate Mode of Departure			
Air Visitors	602,200	666,100	11
Sea Visitors	118,800	114,700	-3
Total Visitors	721,100	780,800	8
Purpose for visiting Tasmania			
Holiday	305,100	353,200	16
Visit friends or relatives (VFR)	206,800	227,900	10
Total leisure (Holiday & VFR)	512,000	581,100	13
Business or employment	134,700	134,900	0
Convention / conference / seminar	28,300	23,800	-16
Event / festival (incl sporting event)	34,300	26,000	-24
Other (incl medical and education)	3,100	8,400	171
No Response	8,700	6,600	-24
Total Interstate Visitors	721,100	780,800	8

Source: Tasmanian Visitor Survey, Tourism Tasmania

* Source: National Visitor Survey, Tourism Research Australia

TABLE 2 : INTERSTATE VISITORS TO TASMANIA – ORIGIN OF VISITOR

State/territory of residence	ALL VISITORS			LEISURE VISITORS*		
	12 months ending Dec 07	12 months ending Dec 08	% Change	12 months ending Dec 07	12 months ending Dec 08	% Change
Victoria	320,200	372,400	16	221,300	269,000	22
N.S.W.	152,600	132,300	-13	115,200	104,400	-9
Queensland	109,600	126,400	15	86,600	101,800	18
South Australia	49,800	60,100	21	35,100	46,800	33
Western Australia	45,700	47,400	4	32,100	39,000	21
A.C.T.	21,000	15,800	-25	13,400	10,700	-20
N.T.	7,200	5,100	-29	5,600	4,100	-27
Australia - no state given	15,200	21,300	40	2,700	5,200	93
Total Australia	721,100	780,800	8	512,000	581,100	13

Source: Tasmanian Visitor Survey, Tourism Tasmania

* Leisure Visitors: Visitors whose main purpose of visit is for a holiday or to visit friends and relatives

TABLE 3 : INTERSTATE VISITOR NIGHTS SPENT IN TASMANIA – ORIGIN OF VISITOR

State/territory of residence	ALL NIGHTS			LEISURE VISITOR* NIGHTS		
	12 months ending Dec 07	12 months ending Dec 08	% Change	12 months ending Dec 07	12 months ending Dec 08	% Change
Victoria	2,010,100	2,260,000	12	1,456,900	1,676,600	15
N.S.W.	1,294,800	1,149,400	-11	1,024,800	973,200	-5
Queensland	1,166,800	1,383,800	19	1,003,600	1,173,000	17
South Australia	407,100	542,900	33	315,300	414,400	31
Western Australia	523,700	517,400	-1	382,100	459,900	20
A.C.T.	137,600	128,200	-7	106,000	105,700	0
N.T.	66,100	63,000	-5	55,700	57,200	3
Australia - no state given	132,600	193,900	46	23,500	71,200	203
Total Australia	5,738,800	6,238,600	9	4,367,900	4,931,200	13
Average Stay (nights)	8.0	8.0		8.5	8.5	

Source: Tasmanian Visitor Survey, Tourism Tasmania

* Leisure Visitors: Visitors whose main purpose of visit is for a holiday or to visit friends and relatives

TABLE 4 : INTERSTATE VISITOR EXPENDITURE IN TASMANIA – ORIGIN OF VISITOR

State/territory of residence	ALL EXPENDITURE (\$'000s)			LEISURE VISITOR* EXPENDITURE (\$'000s)		
	12 months ending Dec 07	12 months ending Dec 08	% Change	12 months ending Dec 07	12 months ending Dec 08	% Change
Victoria	\$398,800	\$490,600	23	\$325,500	\$402,100	24
N.S.W.	\$260,200	\$251,800	-3	\$218,400	\$223,800	2
Queensland	\$244,400	\$271,300	11	\$199,200	\$238,300	20
South Australia	\$82,500	\$96,400	17	\$64,100	\$84,200	31
Western Australia	\$106,400	\$111,800	5	\$80,400	\$98,000	22
A.C.T.	\$25,700	\$26,300	2	\$19,700	\$23,100	17
N.T.	\$12,400	\$8,900	-28	\$11,100	\$6,900	-38
Australia - no state given	\$15,800	\$15,600	-1	\$3,300	\$9,000	173
Total Australia	\$1,146,200	\$1,272,700	11	\$921,800	\$1,085,300	18
Average spend per visitor	\$1,590	\$1,630	3	\$1,800	\$1,868	4
Average spend per night	\$200	\$204	2	\$211	\$220	4

Source: Tasmanian Visitor Survey, Tourism Tasmania

* Leisure Visitors: Visitors whose main purpose of visit is for a holiday or to visit friends and relatives

International Visitors to Tasmania

TABLE 5 : INTERNATIONAL VISITATION – SUMMARY

	12 months ending Dec 07	12 months ending Dec 08	% Change
International Visitors	159,000	152,000	-4
International Nights	3,084,300	2,988,000	-3
Average Length of Stay (nights)	19.4	19.7	1
International expenditure *	\$221 million	\$231 million	5
Average spend per international visitor	\$1,390	\$1,520	9
Average spend per international visitor night	\$72	\$77	8
International Market Share			
Visitors	3%	3%	
Nights	2%	2%	
Expenditure	2%	1%	
International Purpose of visit			
Holiday	105,200	108,800	3
Visit friends or relatives	31,400	31,900	2
Business	22,400	10,800	-52
Education	9,900	8,700	-12
Employment	2,300	2,500	9
Other reason	np	2,300	np
Total international visitors	159,000	152,000	-4

Source: International Visitor Survey, Tourism Research Australia

* Modelled expenditure excluding package expenditure

n.p. not published due to data reliability

TABLE 6 : INTERNATIONAL VISITORS TO TASMANIA – ORIGIN OF VISITOR

ALL INTERNATIONAL VISITORS			
Country of residence	12 months ending Dec 07	12 months ending Dec 08	% Change
United Kingdom	27,500	28,200	3
New Zealand	17,400	14,100	-19
Total Asia	47,200	37,800	-20
<i>Japan</i>	9,700	6,300	-35
<i>Other Asia</i>	37,400	31,500	-16
North America	28,500	31,800	12
<i>USA</i>	18,700	23,500	26
<i>Canada</i>	9,900	8,300	-16
Total Europe	32,300	31,300	-3
<i>Germany</i>	10,400	8,400	-19
<i>Other Europe</i>	22,000	22,800	4
Other Countries	6,200	8,800	42
Total international visitors	159,000	152,000	-4

Source: International Visitor Survey, Tourism Research Australia

TABLE 7 : INTERNATIONAL VISITOR NIGHTS SPENT IN TASMANIA – ORIGIN OF VISITOR

ALL NIGHTS				
Country of residence	12 months ending Dec 07	12 months ending Dec 08	% Change	Average length of stay (nights) - Dec 08
United Kingdom	331,400	406,400	23	14.4
New Zealand	np	217,000	np	15.4
Total Asia	1,357,700	1,347,000	-1	35.6
<i>Japan</i>	<i>259,200</i>	<i>231,000</i>	<i>-11</i>	<i>36.7</i>
<i>Other Asia</i>	<i>1,098,500</i>	<i>1,116,000</i>	<i>2</i>	<i>35.4</i>
North America	380,700	238,200	-37	7.5
<i>USA</i>	<i>275,400</i>	<i>np</i>	<i>np</i>	<i>np</i>
<i>Canada</i>	<i>np</i>	<i>np</i>	<i>np</i>	<i>np</i>
Total Europe	679,900	500,800	-26	16.0
<i>Germany</i>	<i>np</i>	<i>np</i>	<i>np</i>	<i>np</i>
<i>Other Europe</i>	<i>491,700</i>	<i>348,000</i>	<i>-29</i>	<i>15.3</i>
Other Countries	np	278,700	np	31.7
Total international nights	3,084,300	2,988,000	-3	19.7

Source: International Visitor Survey, Tourism Research Australia
 n.p. not published due to data reliability

TABLE 8 : INTERNATIONAL VISITOR EXPENDITURE IN TASMANIA – ORIGIN OF VISITOR

ALL EXPENDITURE*						
Country of residence	12 mths ending Dec 07 (\$million)	12 mths ending Dec 08 (\$million)	% Change	Average spend per visitor - Dec 08	Average spend per night - Dec 08	
United Kingdom	\$23	\$30	30	\$1,064	\$74	
New Zealand	\$18	\$16	-11	\$1,135	\$74	
Total Asia	np	np	np	np	np	
<i>Japan</i>	<i>\$13</i>	<i>\$13</i>	<i>0</i>	<i>\$2,063</i>	<i>\$56</i>	
<i>Other Asia</i>	<i>np</i>	<i>np</i>	<i>np</i>	<i>np</i>	<i>np</i>	
North America	\$34	\$30	-12	\$943	\$126	
<i>USA</i>	<i>\$22</i>	<i>\$17</i>	<i>-23</i>	<i>\$723</i>	<i>np</i>	
<i>Canada</i>	<i>\$8</i>	<i>\$7</i>	<i>-13</i>	<i>\$843</i>	<i>np</i>	
Total Europe	np	np	np	np	np	
<i>Germany</i>	<i>\$16</i>	<i>\$9</i>	<i>-44</i>	<i>\$1,071</i>	<i>np</i>	
<i>Other Europe</i>	<i>np</i>	<i>np</i>	<i>np</i>	<i>np</i>	<i>np</i>	
Other Countries	np	\$19	np	\$2,159	\$68	
Total international expenditure	\$221	\$231	5	\$1,520	\$77	

Source: International Visitor Survey, Tourism Research Australia
 n.p. not published due to data reliability

* Modelled expenditure excluding package expenditure

Intrastate Travel in Tasmania

TABLE 9 : INTRASTATE TRAVEL* – SUMMARY

	12 months ending Dec 07	12 months ending Dec 08	% Change
Intrastate Visitors ('000s)			
Day Visitors	4,539	4,117	-9
Overnight Visitors	1,142	1,094	-4
Total Visitors (day + o'night visitors)	5,681	5,211	-8
Intrastate Nights ('000s)			
Total Nights	3,128	2,684	-14
Average Length of Stay (nights)	2.7	2.5	
Intrastate Expenditure			
Overnight intrastate expenditure	\$292 million	\$305 million	8
Average spend per overnight visitor	\$256	\$279	9
Average spend per night	\$93	\$114	22
Overnight Intrastate Market Share			
Visitors	2.2%	2.3%	
Nights	2.0%	1.8%	
Expenditure	1.7%	1.6%	
Purpose of Overnight Trip ('000s)			
Holiday	579	552	-5
Visit friends or relatives	337	296	-12
Business	164	191	16
Other	73	57	-22
Total Overnight Intrastate Visitors	1,142	1,094	-4

Source: National Visitor Survey, Tourism Research Australia

*Intrastate travel refers to travel undertaken in Tasmania by Tasmanian residents

Marketing Performance

TABLE 10 : MARKETING PERFORMANCE - INTERSTATE RESIDENTS

	12 months ending Dec 07	12 months ending Dec 08	% pt Change
¹ Advertising Awareness (Unprompted)	15.1	16.4	1.3
¹ Advertising Awareness (Prompted)	30.5	31.2	0.7
² Preference to visit Tasmania	16.5	16.5	0
³ Intention to visit Tasmania	4.2	3.8	-0.4
⁴ Behaviour	3.6	4.0	0.4
⁵ Tagline Awareness - 'Island of Inspiration'	n.a.	12.7	n.a.

Source: Holiday Tracking Survey, Roy Morgan Research

TABLE 11 : MARKETING PERFORMANCE - INTRASTATE RESIDENTS

	12 months ending Dec 07	12 months ending Dec 08	% pt Change
¹ Advertising Awareness (Unprompted)	32.7	25.6	-7.1
¹ Advertising Awareness (Prompted)	65.9	60.2	-5.7
² Preference to visit Tasmania	38.0	40.9	2.9
³ Intention to visit Tasmania	28.0	29.9	1.9
⁴ Behaviour	43.1	41.3	-1.8
⁵ Tagline Awareness - 'Island of Inspiration'	n.a.	21.9	n.a.

Source: Holiday Tracking Survey, Roy Morgan Research

TABLE 12 : MARKETING PERFORMANCE SUMMARY - TOTAL AUSTRALIANS

	12 months ending Dec 07	12 months ending Dec 08	% pt Change
¹ Advertising Awareness (Unprompted)	15.5	16.6	1.1
¹ Advertising Awareness (Prompted)	31.4	31.8	0.4
² Preference to visit Tasmania	17.0	17.0	0
³ Intention to visit Tasmania	4.7	4.4	-0.3
⁴ Behaviour	4.6	4.9	0.3
⁵ Tagline Awareness - 'Island of Inspiration'	n.a.	13.0	n.a.

Source: Holiday Tracking Survey, Roy Morgan Research

¹ Advertising Awareness - Percentage of Australians with un-prompted & prompted advertising awareness for holidays in Tasmania.

² Preference - Percentage of Australians that would like to visit Tasmania in the next 2 years.

³ Intention - Percentage of Australians planning or intending to visit Tasmania on their next trip.

⁴ Behaviour - Percentage of Australians that visited Tasmania in the last 12 months.

⁵ Tagline Awareness - Percentage of Australians with an awareness of Tasmania's advertising tagline 'Island of Inspiration' launched in January 2007.

Where do the Statistics come from?

The primary sources of information on visitors to Tasmania published in this document are:

- Tasmanian Visitor Survey (Tourism Tasmania) for interstate visitor figures;
- International Visitor Survey (Tourism Research Australia) for international visitor figures;
- National Visitor Survey (Tourism Research Australia) for intrastate visitor figures (travel by Tasmanians in Tasmania);
- Holiday Tracking Survey (Roy Morgan Research) for information on Tasmania's marketing performance and preference and intention of Australians to visit Tasmania.

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