

# Tasmanian Tourism Snapshot

## Year ending September 2008

### Australian Tourism Outlook<sup>1</sup>

Since September 2008 the global financial crisis has created massive turmoil on world financial markets, leading to falls in consumer confidence. Lower world economic growth in 2009 is predicted to have a negative impact on Australian tourism, although several factors will partly offset the impact, including:

- The fall in the Australian dollar will improve the competitiveness of Australian inbound tourism against other destinations, and the competitiveness of domestic tourism against outbound travel. Asian destinations will, however, always remain competitive with Australia due to lower operational, infrastructure and pricing structures.
- The fall in Australian fuel prices will enhance the price competitiveness of Australian domestic (especially drive) tourism.
- The number of international airline seats into Australia is expected to grow strongly in the first 10 months of 2009.

Despite these positive factors, the Tourism Forecasting Committee forecast that in 2009:

- Inbound tourist arrivals will fall by 4.1%, but rebound to 5.3% in 2010;
- Domestic tourism nights will fall by 0.9% in 2009 and increase by 1% in 2010; and
- Outbound Australian tourism departures will fall by 2.9% in 2009 but increase by 5.9% in 2010.

### Total Visitation to Tasmania

While the full impact of the financial crisis on Tasmanian tourism is yet to unfold, in the year ending September 2008, visitation to Tasmania continued its strong growth, with 965,500 (+11%) people visiting the State on scheduled air and sea services, cruise and navy ships. According to the Tasmanian Visitor Survey (TVS), total visitors arriving on scheduled air and sea services increased 8% to reach 878,500. The number of nights they spent in Tasmania increased marginally, with 7.26 million nights (+1%) spent in the state over the period. Expenditure continued to climb, with scheduled air and sea visitors spending a total of \$1.42 billion in Tasmania during the 12 months to September 2008, an increase of 7% on the corresponding period in 2007.

Interstate visitation continued to dominate tourist activity in Tasmania in terms of expenditure (\$1.24 billion) and the number of nights (6.1 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 over the period, down six per cent (National Visitor Survey). Interstate visitation grew by 10 per cent to 769,500 visitors (TVS), while international visitation decreased marginally (-2%) on the previous year (International Visitor Survey). In addition, there were 81,700 cruise ship visitors (43%) and 4,000 navy ship visitors to Tasmania over the year (Tasmanian Ports Corporation, Navy HQ Tasmania).

### Interstate Visitation (Tasmanian Visitor Survey)

There was a 10% growth in the number of interstate visitors to Tasmania during the 12 months ending September 2008, resulting in an estimated 769,500 visitors to the State. Of these visitors, 337,500 were visiting Tasmania on a holiday, 10% more than the previous year. Visitor nights also increased 5% to 6.1 million, however the average length of stay of interstate visitors declined slightly to 7.9 nights (was 8.3). Similarly, the average length of stay of interstate holiday visitors declined slightly to 8.8 nights (was 9.2 nights) when compared to the year ending September 2007.

An estimated \$1.24 billion was spent in Tasmania by interstate visitors, an increase of 8% compared to the 12 months to September 2007. Despite an increase in the average spend per night (+3% to \$203), the shorter length of stay recorded during the year to September 2008 resulted in a decrease in the average spend per interstate visitor (-1% to \$1,611). Significantly, total expenditure by interstate visitors on a holiday in Tasmania increased by 14% to \$865.3 million.

<sup>1</sup>Forecast 2008 Issue 2, Tourism Forecasting Committee, Tourism Research Australia.



### **International Visitation (International Visitor Survey)**

For the year ending September 2008, international visitor numbers to Australia remained flat (-1%) when compared with the level achieved in the year ending September 2007. Tasmania has followed the national trend with international visitor numbers declining slightly (-2%) to 158,300 and as a consequence the State maintained its three per cent share of all international visitors to Australia. The trend of decreasing international visitor nights continues, down 7% on the previous year to 3.1 million nights. Despite a decrease in the number of nights spent in Tasmania by international visitors, an increase in the average spend per visitor to \$1,535 (+8%) has resulted in a 6% increase in total expenditure compared with the previous year.

Fewer visitors from New Zealand (-20%), Japan (-14%), Other Asia (-11%) and Germany (-15%) underpinned the small decline in total international visitors to Tasmania in the year ending September 2008. In contrast to the declines seen in these markets there was an increase in the number of visitors from Canada (+52%) and Other countries (+82%) which helped stabilise total visitor numbers for the year.

### **Intrastate Visitation (National Visitor Survey)**

The year to September 2008 saw a 6% 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 taken (-8%), as the number of overnight trips remained unchanged from the previous year. Of the 5.2 million intrastate trips taken in Tasmania, 78% were day trips and the remaining 22% were overnight trips. Tasmanians are spending more on overnight intrastate travel despite not taking more overnight trips. Total spend by overnight intrastate visitors increased by 8% to reach \$308 million. Just over half of all overnight intrastate travel (570,000 visitors) was for holiday purposes (+2%), followed by 30% of travel to visit friends and relatives (+3%), and 16% of travel for business (-20%).

### **Cruise And Navy Ship Visitation (Tasports, Navy Headquarters – Tasmania)**

The number of cruise ship visitors to Tasmania in the year ending September 2008 grew by 43% to 81,700 visitors, whilst the number of navy ship visitors increased from 1,700 visitors to 4,000 visitors over the same period.

### **Marketing Performance (Holiday Tracking Survey)**

Without any prompting on advertising for holidays and travel, 18% of Australians had read, seen or heard some form of Tasmanian holiday/travel advertising in the year ending September 2008, a 2.4 percentage point increase compared to the same period last year. Tasmania had the second highest level of prompted advertising awareness for the year at 32%, following Queensland (56%). When asked where you would like to go on holidays in the next two years, 17% of Australians had a preference to travel to Tasmania, whilst 5% of Australians intended to travel to the State in the next two years. 13% of 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 Sept 07	12 months ending Sept 08	% Change
<b>Interstate Visitors</b>			
Day Visitors	16,000	16,800	5
Overnight Visitors	686,400	752,700	10
Total Visitors	702,400	769,500	10
<b>Interstate Nights</b>			
Total Nights	5,820,500	6,094,500	5
Average Length of Stay (nights)	8.3	7.9	
<b>Interstate Expenditure</b>	\$1.144 billion	\$1.240 billion	8
Interstate spend per visitor	\$1,629	\$1,611	-1
Interstate spend per night	\$197	\$203	3
<b>Interstate Market Share*</b>			
Visitors	3.8%	3.9%	
Nights	4.8%	5.0%	
Expenditure	4.8%	5.2%	
<b>Interstate Mode of Departure</b>			
Air	584,500	655,700	12
Sea	117,900	113,800	-3
Total	702,400	769,500	10
<b>Interstate Purpose of Visit</b>			
Holiday	306,900	337,500	10
Visit friends or relatives (VFR)	195,800	227,900	16
Total leisure (Holiday & VFR)	502,700	565,400	12
Business or employment	124,400	138,000	11
Convention / conference / seminar	26,500	23,400	-12
Event / festival (incl sporting event)	36,700	27,000	-26
Other (incl medical and education)	4,000	8,000	100
No Response	8,100	7,700	-5
<b>Total Interstate Visitors</b>	<b>702,400</b>	<b>769,500</b>	<b>10</b>

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 Sept 07	12 months ending Sept 08	% Change	12 months ending Sept 07	12 months ending Sept 08	% Change
Victoria	308,700	360,500	17	215,900	258,400	20
N.S.W.	155,300	130,300	-16	118,300	100,400	-15
Queensland	108,500	123,600	14	84,200	99,000	18
South Australia	44,300	60,700	37	30,700	47,200	54
Western Australia	43,800	48,100	10	30,300	39,500	30
A.C.T.	20,600	19,100	-7	13,900	12,300	-12
N.T.	6,700	5,200	-22	5,300	4,100	-23
Australia - no state given	14,700	22,000	50	4,100	4,500	10
<b>Total Australia</b>	<b>702,400</b>	<b>769,500</b>	<b>10</b>	<b>502,700</b>	<b>565,400</b>	<b>12</b>

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 Sept 07	12 months ending Sept 08	% Change	12 months ending Sept 07	12 months ending Sept 08	% Change
Victoria	1,910,300	2,225,900	17	1,399,400	1,654,600	18
N.S.W.	1,411,900	1,071,500	-24	1,076,200	904,000	-16
Queensland	1,201,600	1,357,900	13	1,006,000	1,149,700	14
South Australia	396,900	520,700	31	281,600	422,600	50
Western Australia	549,800	525,700	-4	361,600	463,700	28
A.C.T.	143,200	137,800	-4	115,000	108,900	-5
N.T.	68,200	58,400	-14	58,200	51,200	-12
Australia - no state given	138,600	196,600	42	35,200	61,200	74
<b>Total Australia</b>	<b>5,820,500</b>	<b>6,094,500</b>	<b>5</b>	<b>4,333,100</b>	<b>4,815,800</b>	<b>11</b>
Average Stay (nights)	8.3	7.9		8.6	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 Sept 07	12 months ending Sept 08	% Change	12 months ending Sept 07	12 months ending Sept 08	% Change
Victoria	\$381,300	\$460,500	21	\$311,100	\$381,400	23
N.S.W.	\$283,000	\$235,000	-17	\$237,100	\$205,800	-13
Queensland	\$236,300	\$287,500	22	\$201,500	\$238,600	18
South Australia	\$86,300	\$87,100	1	\$66,500	\$76,900	16
Western Australia	\$108,600	\$118,100	9	\$77,800	\$102,300	31
A.C.T.	\$24,800	\$26,600	7	\$18,800	\$22,900	22
N.T.	\$10,900	\$9,300	-15	\$8,700	\$8,400	-3
Australia - no state given	\$13,400	\$15,800	18	\$3,600	\$6,800	89
<b>Total Australia</b>	<b>\$1,144,400</b>	<b>\$1,240,000</b>	<b>8</b>	<b>\$925,300</b>	<b>\$1,043,100</b>	<b>13</b>
Average spend per visitor	\$1,629	\$1,611		\$1,841	\$1,845	
Average spend per night	\$197	\$203		\$214	\$217	

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 Sept 07	12 months ending Sept 08	% Change
<b>International Visitors</b>	161,000	158,300	-2
<b>International Nights</b>	3,317,900	3,090,200	-7
Average Length of Stay (nights)	20.6	19.5	-5
<b>International expenditure *</b>	\$229 million	\$243 million	6
Average spend per international visitor	\$1,422	\$1,535	8
Average spend per international visitor night	\$69	\$79	14
<b>International Market Share</b>			
Visitors	3%	3%	
Nights	2%	2%	
Expenditure	2%	2%	
<b>International Purpose of visit</b>			
Holiday	108,900	106,700	-2
Visit friends or relatives	30,000	33,800	13
Business	20,100	18,400	-8
Education	9,500	8,800	-7
Employment	2,700	np	np
Other reason	np	2,000	np
<b>Total international visitors</b>	<b>161,000</b>	<b>158,300</b>	<b>-2</b>

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 Sept 07	12 months ending Sept 08	% Change
United Kingdom	28,000	28,300	1
New Zealand	18,400	14,800	-20
Total Asia	49,200	43,400	-12
<i>Japan</i>	9,500	8,200	-14
<i>Other Asia</i>	39,700	35,200	-11
North America	27,800	30,700	10
<i>USA</i>	21,200	20,700	-2
<i>Canada</i>	6,600	10,000	52
Total Europe	32,700	32,100	-2
<i>Germany</i>	10,200	8,700	-15
<i>Other Europe</i>	22,500	23,300	4
Other Countries	5,000	9,100	82
<b>Total international visitors</b>	<b>161,000</b>	<b>158,300</b>	<b>-2</b>

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 Sept 07	12 months ending Sept 08	% Change	Average length of stay (nights) - Sept 08
United Kingdom	311,600	390,600	25	13.8
New Zealand	303,000	np	np	np
Total Asia	1,460,700	1,461,700	4	33.7
<i>Japan</i>	<i>244,100</i>	<i>290,200</i>	<i>19</i>	<i>35.4</i>
<i>Other Asia</i>	<i>1,216,600</i>	<i>1,171,500</i>	<i>-4</i>	<i>33.3</i>
North America	331,300	299,700	-10	9.8
<i>USA</i>	<i>261,500</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	765,100	508,200	-34	15.8
<i>Germany</i>	<i>224,800</i>	<i>np</i>	<i>np</i>	<i>np</i>
<i>Other Europe</i>	<i>540,300</i>	<i>336,100</i>	<i>-38</i>	<i>14.4</i>
Other Countries	np	277,500	np	30.5
Total international nights	3,317,900	3,090,200	-7	19.5

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 Sept 07 (\$million)	12 mths ending Sept 08 (\$million)	% Change	Average spend per visitor - Sept 08	Average spend per night - Sept 08
United Kingdom	\$26	\$27	4	\$954	\$69
New Zealand	\$23	\$15	-35	\$1,014	\$98
Total Asia	np	np	np	np	np
<i>Japan</i>	<i>\$12</i>	<i>\$15</i>	<i>25</i>	<i>\$1,829</i>	<i>\$52</i>
<i>Other Asia</i>	<i>np</i>	<i>np</i>	<i>np</i>	<i>np</i>	<i>np</i>
North America	\$27	\$26	-4	\$847	\$87
<i>USA</i>	<i>\$21</i>	<i>\$16</i>	<i>-24</i>	<i>\$773</i>	<i>\$96</i>
<i>Canada</i>	<i>\$6</i>	<i>\$10</i>	<i>67</i>	<i>\$1,000</i>	<i>\$75</i>
Total Europe	np	np	np	np	np
<i>Germany</i>	<i>\$19</i>	<i>\$10</i>	<i>-47</i>	<i>\$1,149</i>	<i>\$58</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	\$2,088	\$68
Total international expenditure	\$229	\$243	6	\$1,535	\$79

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 Sept 07	12 months ending Sept 08	% Change
<b>Intrastate Visitors ('000s)</b>			
Day Visitors	4,441	4,103	-8
Overnight Visitors	1,133	1,137	0
Total Visitors (day + o'night visitors)	5,574	5,240	-6
<b>Intrastate Nights ('000s)</b>			
Total Nights	2,937	2,937	0
Average Length of Stay (nights)	2.6	2.6	
<b>Intrastate Expenditure</b>			
Overnight intrastate expenditure	\$284 million	\$308 million	8
Average spend per overnight visitor	\$251	\$271	8
Average spend per night	\$97	\$105	8
<b>Overnight Intrastate Market Share</b>			
Visitors	2.2%	2.3%	
Nights	1.9%	1.9%	
Expenditure	1.6%	1.7%	
<b>Purpose of Overnight Trip ('000s)</b>			
Holiday	573	576	1
Visit friends or relatives	319	324	2
Business	177	183	3
Other	76	61	-20
<b>Total Overnight Intrastate Visitors</b>	<b>1,133</b>	<b>1,137</b>	<b>0</b>

Source: National Visitor Survey, Tourism Research Australia

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

## CRUISE & NAVY SHIP VISITORS TO TASMANIA

TABLE 10 : CRUISE AND NAVY SHIP VISITORS TO TASMANIA – SUMMARY

	12 months ending Sept 07	12 months ending Sept 08	% Change
Cruise ship visitors (passengers and crew)*	57,200	81,700	43
Navy ship visitors**	1,700	4,000	135

\*Source: Tasmanian Ports Corporation. Revised by Tourism Tasmania, 14 January 2009

\*\*Source: Navy Headquarters - Tasmania

TABLE 11 : MARKETING PERFORMANCE SUMMARY

	12 months ending Sept 07	12 months ending Sept 08	% Point Change
	per cent	per cent	
<sup>1</sup> Advertising Awareness (Unprompted)	15.7	18.1	2.4
<sup>1</sup> Advertising Awareness (Prompted)	30.3	32.1	1.8
<sup>2</sup> Preference to visit Tasmania	16.9	17.0	0.1
<sup>3</sup> Intention to visit Tasmania	4.4	4.6	0.2
<sup>4</sup> Behaviour	4.6	4.9	0.3
<sup>5</sup> Tagline Awareness - 'Island of Inspiration'	n.a.	13.0	n.a.

Source: *Holiday Tracking Survey, Roy Morgan Research*

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

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

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

<sup>4</sup> Behaviour - Percentage of Australians that visited Tasmania in the last 12 months.

<sup>5</sup> 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;
- Tasmanian Ports Corporation for cruise ship visitor figures;
- Navy Head Quarters Tasmania for navy ship visitor figures.

### For further information please contact:

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