

Tasmanian Tourism Snapshot

Year ending September 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 September 2013, there were just over 1 million (1 007 000) visitors, up 15 per cent from 874 400 for the previous year.
- Total nights spent by visitors in the state increased by eight per cent to 8.57 million.
- Visitor expenditure increased by 11 per cent to \$1.507 billion.
- The number of interstate visitors to Tasmania increased by 18 per cent to 884 900 (was 751 100).

Summary:

- In terms of visitor numbers from Tasmania's key markets, Victoria increased by 27 per cent, New South Wales increased by 19 per cent, and Queensland increased by five per cent.
- Holiday visitors increased by 18 per cent for the year ending September 2013, holiday nights increased by 11 per cent and holiday expenditure increased by 14 per cent.
- Those who came to visit friends and relatives (VFR) increased by 17 per cent for the year. The number of nights VFR visitors spent in Tasmania increased by three per cent while VFR expenditure increased by three per cent.
- The total number of visitors holidaying in Tasmania during the year ending September 2013 was 410 300, up 18 per cent compared to the previous year (was 349 000).
- The total number of nights spent by holiday visitors to Tasmania for the year ending September 2013 was 3.9 million, up 11 per cent from the previous year (was 3.5 million).
- Holiday visitor expenditure for the year was up 14 per cent to \$890 million (was \$777 million).
- Of all visitors, 189 700 (up nine per cent) were on business while 33 200 (showing no significant change) were travelling to attend a conference or convention.
- For the year ending September 2013, data from the TVS for the four tourism regions reported the following changes in visitor numbers: Southern, up 15 per cent; East Coast, up four per cent; Northern, up 10 per cent; Cradle Coast, up five per cent.
- For the year ending September 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 18 per cent and sea services was down 6% from the previous year.

Interstate Visitation to Tasmania (Source: Tasmanian Visitor Survey)

- The total number of interstate visitors to Tasmania for the year ending September 2013 was 884 900, up 18 per cent from 751 100 the previous year.
- The total number of nights spent by interstate visitors to Tasmania for the year ending September 2013 was 6.56 million, up seven per cent from the previous year (was 6.13 million).
- Interstate visitor expenditure increased by 12 per cent to \$1.27 billion (was \$1.14 billion in the year ending September 2012).
- Of all interstate visitors, 333 900 were on holiday (up 22 per cent), 282 300 were visiting friends or relatives (up 20 per cent), 177 300 were on business (up nine per cent), and 30 300 were travelling to attend a conference or convention (up one per cent).
- In terms of visitation to Tasmania from the key interstate markets, Victoria increased by 27 per cent to 410 200, NSW increased by 19 per cent to 216 100, and Queensland increased by five per cent to 123 800. Together, these markets accounted for 85 per cent of interstate visitation in the year ending September 2013.

International Visitation (Source: International Visitor Survey)

Summary – Australia

- A total of 5.89 million international visitors came to Australia in the year ending September 2013, up five per cent from the year ending September 2012.
- Holiday visitors to Australia increased by seven per cent to 2.64 million, while VFR visitors increased by eight per cent to 1.51 million.
- International visitor nights spent in Australia increased by four per cent to 211.8 million.
- Total expenditure by international visitors in Australia for the year ending September 2013 increased by four per cent to \$19.2 billion¹ (including package expenditure). Holiday spend was \$6.9 billion (including package expenditure) for the year, increased by 11 per cent from the year ending September 2012.
- For Australia's largest source markets, the following changes to visitor numbers to Australia were recorded: New Zealand, showing no significant change; United Kingdom, up four per cent; China, up 18 per cent and the USA, up five per cent.

Summary – Tasmania

- Tasmania received 155 100 international visitors during the year ending September 2013, up eight per cent from 143 000 the previous year.
- The number of nights international visitors spent in Tasmania decreased by eight per cent to 2.87 million, and the average length of stay decreased by 15 per cent to 18 nights.
- Expenditure by international visitors decreased by 18 per cent to \$228 million².
- Holiday visitors to Tasmania increased by 12 per cent to 1 10 400, while VFR visitors decreased by six per cent to 29 800.
- Holiday nights increased by 32 per cent to 1.46 million, while the average length of stay for holiday visitors increased by 18 per cent to 13 nights.
- Total expenditure by international holiday visitors increased by six per cent to \$126 million.
- For Tasmania's largest source markets, the following changes to visitor numbers to the State were recorded: United Kingdom, up 18 per cent; the USA, up three per cent; Hong Kong, up 67 per cent; New Zealand, up 17 per cent; and China, up 16 per cent.

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

² Modelled expenditure (includes package expenditure)

- Tasmania's share of all international visitors to Australia for the year ending September 2013 was 2.6 per cent, showing no significant change compared with 2.6 per cent for the year ending September 2012.

Intrastate Visitation³ (National Visitor Survey)

- The number of overnight intrastate holiday trips in Tasmania increased by 11 per cent, VFR increased by 10 per cent, and overnight business trips remained steady in the year ending September 2013.
- In the year ending September 2013, the number of intrastate day trips in Tasmania decreased by four per cent to 4.76 million, whilst intrastate overnight trips increased by eight per cent to 1.2 million compared to the year ending September 2012.
- Total spend by overnight intrastate visitors in Tasmania increased by 19 per cent to \$299 million for the year ending September 2013.

³ Travel undertaken by a visitor in their home state

Total Visitors to Tasmania

	YE Sep 2012	YE Sep 2013	% change	
<i>Visitors</i>				
Visitors on scheduled air and sea services	874,400	1,007,000	↑	15%

	YE Sep 2012	YE Sep 2013	% change	
<i>Visitors</i>				
Day visitors	24,700	32,500	↑	32%
Overnight visitors	849,700	974,600	↑	15%
Total visitors	874,400	1,007,000	↑	15%
<i>Nights</i>				
Nights (million)	7.94	8.57	↑	8%
Average length of stay (nights)	9.1	8.5	↓	-6%
<i>Expenditure</i>				
Expenditure (\$million)	\$1,357	\$1,507	↑	11%
Average spend per visitor	\$1,551	\$1,496	↓	-4%
Average spend per night	\$171	\$176	↑	3%
Holiday spend (\$million)	\$777	\$890	↑	14%
<i>Purpose of Visit</i>				
Holiday	349,000	410,300	↑	18%
Visit friends or relatives (VFR)	261,300	306,700	↑	17%
Total leisure (Holiday+VFR)	610,300	717,100	↑	17%
Business or employment	173,300	189,700	↑	9%
Convention/conference/seminar	33,200	33,200	→	0%
<i>Regions Visited</i>				
Southern	690,800	791,800	↑	15%
East Coast	234,100	242,400	↑	4%
Northern	482,600	529,200	↑	10%
Cradle Coast	365,900	385,700	↑	5%
<i>Mode of departure</i>				
Air visitors	763,900	903,100	↑	18%
Sea visitors	110,400	103,900	↓	-6%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

Interstate Visitors to Tasmania

Table 3. Interstate visitors to Tasmania on scheduled air and sea services				
	YE Sep 2012	YE Sep 2013		% change
Visitors				
Day visitors	24,300	32,200	↑	33%
Overnight visitors	726,900	852,700	↑	17%
Total visitors	751,100	884,900	↑	18%
Nights				
Nights (million)	6.13	6.56	↑	7%
Average length of stay (nights)	8.2	7.4	↓	-9%
Expenditure				
Expenditure (\$million)	\$1,139	\$1,270	↑	12%
Average spend per visitor	\$1,516	\$1,436	↓	-5%
Average spend per night	\$186	\$194	↑	4%
Holiday spend (\$million)	\$636	\$744	↑	17%
Purpose of Visit				
Holiday	273,800	333,900	↑	22%
Visit friends or relatives (VFR)	235,800	282,300	↑	20%
Total leisure (Holiday+VFR)	509,600	616,300	↑	21%
Business or employment	163,100	177,300	↑	9%
Convention/conference/seminar	30,100	30,300	↑	1%
Regions Visited				
Southern	583,000	684,000	↑	17%
East Coast	178,500	193,700	↑	9%
Northern	408,700	459,600	↑	12%
Cradle Coast	306,500	327,300	↑	7%
Mode of departure				
Air visitors	651,000	787,700	↑	21%
Sea visitors	100,100	97,200	↓	-3%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

	YE Sep 2012	YE Sep 2013	% change	
Victoria	323,000	410,200	↑	27%
N.S.W.	181,300	216,100	↑	19%
Queensland	117,700	123,800	↑	5%
South Australia	42,300	43,300	↑	2%
Western Australia	49,700	53,600	↑	8%
A.C.T.	23,300	23,700	↑	2%
N.T.	7,100	7,100	→	0%
Total interstate visitors	751,100	884,900	↑	18%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

International Visitors to Tasmania

	to Tasmania			to Australia		
	YE Sep 2012	YE Sep 2013	% Change	YE Sep 2012	YE Sep 2013	% Change
Visitors						
International visitors	143,000	155,100	↑ 8%	5,599,800	5,889,200	↑ 5%
Nights						
Nights ('000s)	3,111	2,869	↓ -8%	202,685	211,794	↑ 4%
Average length of stay (nights)	22	18	↓ -15%	36	36	↓ -1%
Expenditure						
Expenditure (\$million)	\$279	\$228	↓ -18%	\$18,372	\$19,168	↑ 4%
Average spend per visitor	\$1,951	\$1,471	↓ -25%	\$3,281	\$3,255	↓ -1%
Average spend per night	\$90	\$80	↓ -11%	\$91	\$91	→ 0%
Holiday spend (\$million)	\$119	\$126	↑ 6%	\$6,220	\$6,879	↑ 11%
Purpose of Visit						
Holiday	98,600	110,400	↑ 12%	2,458,300	2,639,700	↑ 7%
Visit friends or relatives (VFR)	31,500	29,800	↓ -6%	1,403,300	1,508,800	↑ 8%
Business	11,800	13,000	↑ 11%	908,200	909,500	→ 0%
Education	6,500	4,400	↓ -32%	363,100	362,100	→ 0%
Employment	2,500	3,600	↑ 44%	219,600	209,800	↓ -4%
Other Reason	400	1,100	↑ 156%	247,200	259,300	↑ 5%
Total	143,000	155,100	↑ 8%	5,599,800	5,889,200	↑ 5%

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 purpose.

** 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 Sep 2012	YE Sep 2013	% Change	YE Sep 2012	YE Sep 2013	% Point difference
<i>State/territory visited</i>	<i>Visitors</i>			<i>Market Share</i>		
New South Wales	2,834,100	2,998,000	↑ 6%	51%	51%	↑ 0.3%
Victoria	1,787,000	1,929,900	↑ 8%	32%	33%	↑ 0.9%
Queensland	1,978,200	2,064,400	↑ 4%	35%	35%	↓ -0.3%
South Australia	326,900	362,300	↑ 11%	6%	6%	↑ 0.3%
Western Australia	751,300	768,500	↑ 2%	13%	13%	↓ -0.4%
Tasmania	143,000	155,100	↑ 8%	3%	3%	→ 0.1%
Northern Territory	257,900	256,400	↓ -1%	5%	4%	↓ -0.3%
Australia Capital Territory	168,600	179,400	↑ 6%	3%	3%	→ 0.0%
Total visitors to Australia	5,599,800	5,889,200	↑ 5%	100%	100%	→ 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)

Table 7. Origin of international visitors to Tasmania

	YE Sep 2012	YE Sep 2013	% Change	YE Sep 2012	YE Sep 2013	% Point difference
Country of origin	Visitors			National Market Share		
New Zealand	13,000	15,100	↑ 17%	1.2%	1.4%	↑ 0.2%
Japan	3,500	4,200	↑ 22%	1.1%	1.4%	↑ 0.3%
Hong Kong	9,700	16,100	↑ 67%	6.1%	9.5%	↑ 3.4%
Singapore	6,200	5,800	↓ -6%	2.1%	1.8%	↓ -0.3%
Malaysia	7,500	5,800	↓ -23%	3.3%	2.3%	↓ -1.0%
Indonesia	1,200	1,000	↓ -19%	0.9%	0.7%	↓ -0.2%
Taiwan	2,400	3,600	↑ 48%	2.8%	3.7%	↑ 0.9%
Thailand	3,000	1,200	↓ -61%	4.0%	1.5%	↓ -2.5%
Korea	3,100	900	↓ -72%	1.7%	0.5%	↓ -1.2%
China	11,200	13,000	↑ 16%	2.0%	1.9%	→ 0.0%
India	900	3,900	↑ 328%	0.6%	2.4%	↑ 1.8%
Other Asia	2,900	3,500	↑ 19%	1.9%	2.1%	↑ 0.2%
USA includes Hawaii	17,700	18,200	↑ 3%	4.0%	3.9%	↓ -0.1%
Canada	7,400	3,600	↓ -51%	6.5%	3.2%	↓ -3.3%
United Kingdom	15,500	18,300	↑ 18%	2.8%	3.2%	↑ 0.4%
Germany	7,800	7,600	↓ -3%	5.3%	4.9%	↓ -0.4%
Scandinavia	5,200	3,400	↓ -34%	6.3%	4.0%	↓ -2.3%
France	5,500	6,000	↑ 9%	6.0%	6.2%	↑ 0.1%
Italy	1,900	2,100	↑ 12%	3.3%	3.3%	→ 0.0%
Netherlands	2,000	2,000	↑ 3%	4.5%	5.0%	↑ 0.4%
Switzerland	2,400	3,800	↑ 57%	6.1%	8.9%	↑ 2.8%
Other Europe	7,600	9,600	↑ 26%	4.1%	5.0%	↑ 0.9%
Other Countries	5,400	6,500	↑ 19%	1.3%	1.5%	↑ 0.2%
Total	143,000	155,100	↑ 8%	2.6%	2.6%	→ 0.1%

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 Sep 2012	YE Sep 2013	% change	YE Sep 2012	YE Sep 2013	% change
Visitors						
Overnight visitors ('000s)	1,098	1,188	↑ 8%	49,776	51,203	↑ 3%
Nights						
Nights ('000s)	2,773	2,794	↑ 1%	158,301	158,297	↔ 0%
Average length of stay (nights)	2.5	2.4	↓ -7%	3.2	3.1	↓ -3%
Expenditure						
Expenditure (\$million)	\$252	\$299	↑ 19%	\$16,008	\$16,929	↑ 6%
Spend per visitor	\$229	\$252	↑ 10%	\$322	\$331	↑ 3%
Spend per night	\$91	\$107	↑ 18%	\$101	\$107	↑ 6%
Purpose('000s)						
Holiday	541	601	↑ 11%	22,199	23,521	↑ 6%
Visit friends &/or relatives (VFR)	317	348	↑ 10%	17,919	18,005	↔ 0%
Business	173	173	↔ 0%	7,290	7,441	↑ 2%
Other reason	71	74	↑ 4%	3,034	2,814	↓ -7%
Total overnight intrastate visitors	1,098	1,188	↑ 8%	49,776	51,203	↑ 3%

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

	Tasmania			Australia		
	YE Sep 2012	YE Sep 2013	% change	YE Sep 2012	YE Sep 2013	% change
Visitor						
Day visitors ('000s)	4,945	4,762	↓ -4%	166,024	157,494	↓ -5%
Total intrastate Day+Overnight visitors ('000s)	6,043	5,950	↓ -2%	215,800	208,697	↓ -3%
Expenditure						
Expenditure (\$million)	\$503	\$506	↑ 1%	\$18,099	\$18,378	↑ 2%
Spend per visitor	\$102	\$106	↑ 4%	\$109	\$117	↑ 7%
Purpose('000s)						
Holiday	2,488	2,379	↓ -4%	78,045	75,327	↓ -3%
Visit friends &/or relatives (VFR)	1,243	1,193	↓ -4%	49,056	47,761	↓ -3%
Business	509	486	↓ -5%	17,639	15,282	↓ -13%
Other reason	706	704	↔ 0%	21,284	19,125	↓ -10%
Total day intrastate visitors	4,945	4,762	↓ -4%	166,024	157,494	↓ -5%

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

Quarter ending September 2013

The TVS reports the following key findings for visitors during the July-September 2013 quarter.

- The total number of visitors to Tasmania for the September quarter 2013 was 202 900, up 29 per cent from 157 500 the previous year (Fig. 1).
- The total number of nights spent by visitors to Tasmania for the September quarter 2013 increased by 16 per cent to 1.34 million (was 1.16 million) (Fig. 2).
- Visitor expenditure was \$243 million, up 24 per cent from the same quarter of the previous year (was \$196.4 million) (Fig. 3).
- Of all visitors for the quarter, 69 100 (up 62 per cent) were on holiday, 64 800 (up 20 per cent) were visiting friends or relatives, 50 000 (up 10 per cent) were on business, and 7 600 (up 13 per cent) were travelling to attend a conference or convention (Fig. 4).

Fig. 1. Total Visitors to Tasmania by Quarter*

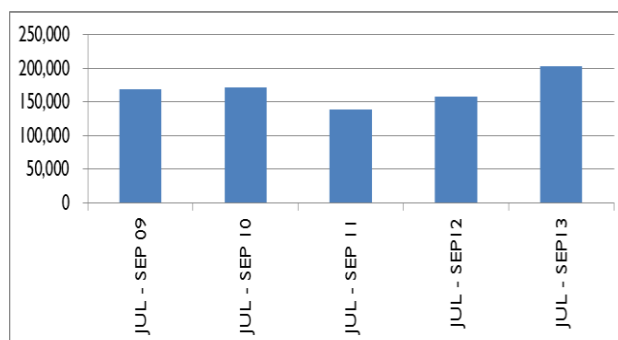


Fig. 2. Total Nights by Quarter*

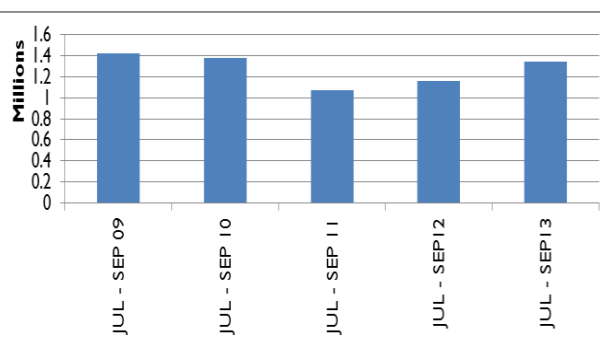


Fig. 3. Total Expenditure (\$ millions) by Quarter*

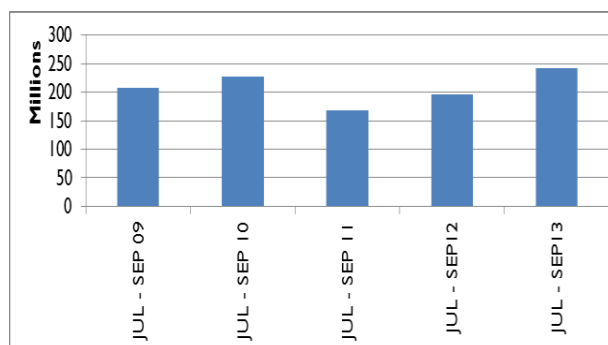
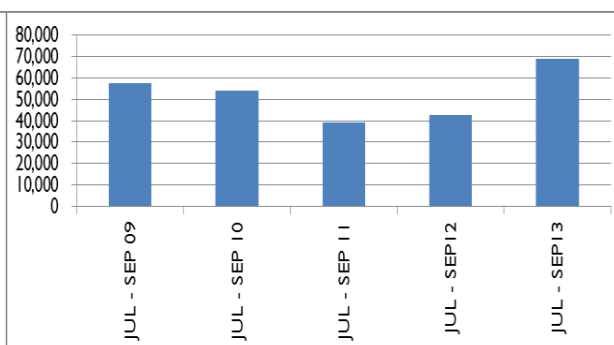


Fig. 4. Total Holiday Visitors by Quarter*



* Graphs present data for every quarter 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.tourismtasmania.com.au/research/webreporter. The webreporter 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 webreporter. 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.