

Tasmanian Tourism Snapshot

Year ending September 2014

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 2014, there were 1,062,700 visitors, up 6 per cent from 1,007,000 for the previous year.
- Total nights spent by visitors in the state increased by 8 per cent to 9.35 million.
- Visitor expenditure increased by 15 per cent to \$1.74 billion.
- The number of interstate visitors to Tasmania increased by 3 per cent to 914,700 (was 884,900).

Summary:

- In terms of visitor numbers from Tasmania's key markets, Victoria decreased by 2 per cent, New South Wales increased by 5 per cent, and Queensland increased by 20 per cent.
- Holiday visitors increased by 20 per cent for the year ending September 2014, holiday nights increased by 18 per cent and holiday expenditure increased by 25 per cent.
- Those who came to visit friends and relatives (VFR) decreased by one per cent for the year. The number of nights VFR visitors spent in Tasmania decreased by one per cent while VFR expenditure increased by 19 per cent.
- The total number of visitors holidaying in Tasmania during the year ending September 2014 was 491,400, up 20 per cent compared to the previous year (was 410,300).
- The total number of nights spent by holiday visitors to Tasmania for the year ending September 2014 was 4.6 million, up 18 per cent from the previous year (was 3.9 million).
- Holiday visitor expenditure for the year was up 25 per cent to \$1.1 billion (was \$890 million).
- Of all visitors, 177,900 (down 6 per cent) were on business while 31,800 (down 4 per cent) were travelling to attend a conference or convention.
- For the year ending September 2014, data from the TVS for the four tourism regions reported the following changes in visitor numbers: Southern, up 7 per cent; East Coast, up 18 per cent; Northern, up 6 per cent; Cradle Coast, up 9 per cent.
- For the year ending September 2014, 89 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 5 per cent and sea services was up 10 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 September 2014 was 914,700, up 3 per cent from 884,900 the previous year.
- The total number of nights spent by interstate visitors to Tasmania for the year ending September 2014 was 7.15 million, up 8 per cent from the previous year (was 6.62 million).
- Interstate visitor expenditure increased by 14 per cent to \$1.45 billion (was \$1.27 billion in the year ending September 2013).
- Of all interstate visitors, 385,200 were on holiday (up 15 per cent), 277,500 were visiting friends or relatives (down 2 per cent), 168,900 were on business (down 5 per cent), and 29,000 were travelling to attend a conference or convention (down 4 per cent).
- In terms of visitor numbers from the key interstate markets, Victoria decreased by 2 per cent to 403,500, NSW increased by 5 per cent to 226,700, and Queensland increased by 20 per cent to 148,500. Together, these markets accounted for 85 per cent of interstate visitation in the year ending September 2014.

International Visitation (Source: International Visitor Survey)

Summary – Australia

- A total of 6 million international visitors came to Australia in the year ending September 2014, up 8 per cent from the year ending September 2013.
- Holiday visitors to Australia increased by 9 per cent to 2.84 million, while VFR visitors increased by 14 per cent to 1.74 million.
- International visitor nights spent in Australia increased by 3 per cent to 221 million.
- Total expenditure by international visitors in Australia for the year ending September 2014 increased by 5 per cent to \$20 billion¹ (including package expenditure). Holiday spend was \$7 billion (including package expenditure) for the year, an increase of 8 per cent from the year ending September 2013.
- For Australia's largest source markets, the following changes to visitor numbers to Australia were recorded: New Zealand, up 4 per cent; China, up 10 per cent; United Kingdom, up 6 per cent and the USA, up 11 per cent.

Summary – Tasmania

- Tasmania received 167,800 international visitors during the year ending September 2014, up 8 per cent from 155,300 the previous year.
- The number of nights international visitors spent in Tasmania increased by 2 per cent to 2.98 million, and the average length of stay decreased by 6 per cent to 18 nights.
- Expenditure by international visitors in Tasmania increased by 13 per cent to \$254 million².
- International holiday visitor numbers to Tasmania increased by 13 per cent to 125,100, while VFR visitors increased by 6 per cent to 31,600.
- International holiday nights in Tasmania decreased by 3 per cent to 1.44 million, while the average length of stay for international holiday visitors decreased by 14 per cent to 12 nights.
- Total expenditure by international holiday visitors increased by 16 per cent to \$144 million.
- For Tasmania's largest source markets, the following changes to visitor numbers to the State were recorded: China, up 61 per cent; United Kingdom, up 6 per cent; the USA, up 3 per cent; New Zealand, up 14 per cent; Hong Kong, up 5 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 2014 was 2.7 per cent, showing no significant change compared with 2.7 per cent for the year ending September 2013.

Intrastate Visitation³ (National Visitor Survey)

- The number of overnight intrastate holiday trips taken in Tasmania increased by one per cent, VFR decreased by 7 per cent, and overnight business trips increased by 2 per cent in the year ending September 2014
- In the year ending September 2014, the number of intrastate day trips taken in Tasmania decreased by 7 per cent to 4.42 million, whilst intrastate overnight trips for all purposes decreased by one per cent to 1.2 million compared to the year ending September 2013.
- Total spend by overnight intrastate visitors in Tasmania decreased by 12 per cent to \$326 million for the year ending September 2014.

³ Travel undertaken by a visitor in their home state

Total Visitors to Tasmania

	YE Sep 2013	YE Sep 2014	% change
<i>Visitors</i>			
Visitors on scheduled air and sea services	1,007,000	1,062,700	6%

	YE Sep 2013	YE Sep 2014		% change
<i>Visitors</i>				
Day visitors	26,200	23,100	↓	-12%
Overnight visitors	980,800	1,039,500	↑	6%
Total visitors	1,007,000	1,062,700	↑	6%
<i>Nights</i>				
Nights (million)	8.63	9.35	↑	8%
Average length of stay (nights)	8.6	8.8	↑	3%
<i>Expenditure</i>				
Expenditure (\$million)	\$1,507	\$1,737	↑	15%
Average spend per visitor	\$1,496	\$1,635	↑	9%
Average spend per night	\$175	\$186	↑	6%
Holiday spend (\$million)	\$890	\$1,113	↑	25%
<i>Purpose of Visit</i>				
Holiday	410,300	491,400	↑	20%
Visit friends or relatives (VFR)	306,700	304,600	↓	-1%
Total leisure (Holiday+VFR)	717,100	796,000	↑	11%
Business or employment	189,700	177,900	↓	-6%
Convention/conference/seminar	33,200	31,800	↓	-4%
<i>Regions Visited</i>				
Southern	791,600	848,800	↑	7%
East Coast	240,000	283,200	↑	18%
Northern	529,000	561,500	↑	6%
Cradle Coast	384,800	421,300	↑	9%
<i>Mode of departure</i>				
Air visitors	903,100	948,600	↑	5%
Sea visitors	103,900	114,000	↑	10%

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 2013	YE Sep 2014		% change
Visitors				
Day visitors	26,100	22,600	↓	-13%
Overnight visitors	858,800	892,100	↑	4%
Total visitors	884,900	914,700	↑	3%
Nights				
Nights (million)	6.62	7.15	↑	8%
Average length of stay (nights)	7.5	7.8	↑	4%
Expenditure				
Expenditure (\$million)	\$1,270	\$1,449	↑	14%
Average spend per visitor	\$1,436	\$1,584	↑	10%
Average spend per night	\$192	\$203	↑	6%
Holiday spend (\$million)	\$744	\$898	↑	21%
Purpose of Visit				
Holiday	333,900	385,200	↑	15%
Visit friends or relatives (VFR)	282,300	277,500	↓	-2%
Total leisure (Holiday+VFR)	616,300	662,700	↑	8%
Business or employment	177,300	168,900	↓	-5%
Convention/conference/seminar	30,300	29,000	↓	-4%
Regions Visited				
Southern	683,900	711,800	↑	4%
East Coast	192,600	210,900	↑	10%
Northern	459,400	468,500	↑	2%
Cradle Coast	326,800	346,200	↑	6%
Mode of departure				
Air visitors	787,700	809,400	↑	3%
Sea visitors	97,200	105,300	↑	8%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

	YE Sep 2013	YE Sep 2014	% change	
Victoria	410,200	403,500	↓	-2%
N.S.W.	216,100	226,700	↑	5%
Queensland	123,800	148,500	↑	20%
South Australia	43,300	48,400	↑	12%
Western Australia	53,600	53,800	→	0%
A.C.T.	23,700	21,200	↓	-11%
N.T.	7,100	6,300	↓	-11%
Total interstate visitors	884,900	914,700	↑	3%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

International Visitors to Tasmania

	to Tasmania			to Australia		
	YE Sep 2013	YE Sep 2014	% Change	YE Sep 2013	YE Sep 2014	% Change
Visitors						
International visitors	155,300	167,800	↑ 8%	5,789,900	6,263,000	↑ 8%
Nights						
Nights ('000s)	2,924	2,980	↑ 2%	213,866	220,565	↑ 3%
Average length of stay (nights)	19	18	↓ -6%	37	35	↓ -5%
Expenditure						
Expenditure (\$million)	\$225	\$254	↑ 13%	\$19,067	\$20,091	↑ 5%
Average spend per visitor	\$1,449	\$1,512	↑ 4%	\$3,293	\$3,208	↓ -3%
Average spend per night	\$77	\$85	↑ 11%	\$89	\$91	↑ 2%
Holiday spend (\$million)	\$125	\$144	↑ 16%	\$6,878	\$7,411	↑ 8%
Purpose of Visit						
Holiday	111,000	125,100	↑ 13%	2,597,800	2,841,300	↑ 9%
Visit friends or relatives (VFR)	29,700	31,600	↑ 6%	1,523,900	1,739,000	↑ 14%
Business	12,200	11,200	↓ -8%	811,700	835,200	↑ 3%
Education	4,700	5,300	↑ 11%	368,700	367,300	→ 0%
Employment	3,700	3,300	↓ -11%	225,600	223,900	↓ -1%
Other Reason	1,200	1,400	↑ 18%	262,100	256,300	↓ -2%
Total	155,300	167,800	↑ 8%	5,789,900	6,263,000	↑ 8%

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.

	YE Sep 2013	YE Sep 2014	% Change	YE Sep 2013	YE Sep 2014	% Point difference	
State/territory visited	Visitors			Market Share			
New South Wales	2,959,500	3,156,200	↑ 7%	51%	50%	↓	-1%
Victoria	1,900,300	2,098,200	↑ 10%	33%	34%	↑	1%
Queensland	2,046,800	2,120,600	↑ 4%	35%	34%	↓	-1%
South Australia	363,000	390,300	↑ 8%	6%	6%	→	0%
Western Australia	751,000	807,000	↑ 7%	13%	13%	→	0%
Tasmania	155,300	167,800	↑ 8%	3%	3%	→	0%
Northern Territory	258,300	280,100	↑ 8%	4%	4%	→	0%
Australia Capital Territory	177,000	180,700	↑ 2%	3%	3%	→	0%
Total visitors to Australia	5,789,900	6,263,000	↑ 8%	100%	100%	→	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	YE Sep 2013	YE Sep 2014	% Change	YE Sep 2013	YE Sep 2014	% Point difference
	Visitors			National Market Share		
New Zealand	14,900	16,900	↑	14%	1%	2% → 0%
Japan	4,400	6,600	↑	49%	1%	2% ↑ 1%
Hong Kong	15,400	16,300	↑	5%	10%	9% ↓ -1%
Singapore	5,200	8,500	↑	61%	2%	3% ↑ 1%
Malaysia	5,500	7,000	↑	25%	2%	2% → 0%
Indonesia	900	400	↓	-57%	1%	0% → 0%
Taiwan	3,800	4,200	↑	9%	4%	4% → 0%
Thailand	1,100	1,700	↑	59%	2%	2% ↑ 1%
Korea	900	1,900	↑	115%	0%	1% ↑ 1%
China	12,900	20,800	↑	61%	2%	3% ↑ 1%
India	3,800	1,900	↓	-51%	2%	1% ↓ -1%
Other Asia	3,400	1,600	↓	-52%	2%	1% ↓ -1%
USA includes Hawaii	18,400	19,000	↑	3%	4%	4% → 0%
Canada	3,900	5,200	↑	34%	3%	4% ↑ 1%
United Kingdom	18,800	20,000	↑	6%	3%	3% → 0%
Germany	7,900	8,500	↑	7%	5%	5% → 0%
Scandinavia	3,500	1,500	↓	-56%	4%	2% ↓ -2%
France	6,300	4,700	↓	-25%	6%	4% ↓ -2%
Italy	2,300	2,700	↑	16%	4%	4% → 0%
Netherlands	2,200	1,700	↓	-23%	5%	4% ↓ -1%
Switzerland	4,000	2,800	↓	-29%	9%	6% ↓ -3%
Other Europe	9,900	6,100	↓	-38%	5%	3% ↓ -2%
Other Countries	6,000	8,100	↑	37%	2%	2% → 0%
Total	155,300	167,800	↑	8%	3%	3% → 0%

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 2013	YE Sep 2014	% change	YE Sep 2013	YE Sep 2014	% change
Visitors						
Overnight visitors ('000s)	1,188	1,176	↓ -1%	51,203	54,186	↑ 6%
Nights						
Nights ('000s)	2,794	2,927	↑ 5%	158,297	174,949	↑ 11%
Average length of stay (nights)	2.4	2.5	↑ 6%	3.1	3.2	↑ 4%
Expenditure						
Expenditure (\$million)	\$372	\$326	↓ -12%	\$21,310	\$22,520	↑ 6%
Spend per visitor	\$313	\$277	↓ -11%	\$416	\$416	→ 0%
Spend per night	\$133	\$111	↓ -16%	\$135	\$129	↓ -4%
Purpose('000s)						
Holiday	601	608	↑ 1%	23,521	23,315	↓ -1%
Visit friends &/or relatives (VFR)	348	322	↓ -7%	18,005	19,802	↑ 10%
Business	173	177	↑ 2%	7,441	8,417	↑ 13%
Other reason	74	72	↓ -3%	2,814	3,225	↑ 15%
Total overnight intrastate visitors	1,188	1,176	↓ -1%	51,203	54,186	↑ 6%

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

	Tasmania			Australia		
	YE Sep 2013	YE Sep 2014	% change	YE Sep 2013	YE Sep 2014	% change
Visitor						
Day visitors ('000s)	4,762	4,420	↓ -7%	157,494	154,243	↓ -2%
Total intrastate Day+Overnight visitors ('000s)	5,950	5,596	↓ -6%	208,697	208,429	→ 0%
Expenditure						
Expenditure (\$million)	\$506	\$473	↓ -7%	\$18,378	\$17,629	↓ -4%
Spend per visitor	\$106	\$107	↑ 1%	\$117	\$114	↓ -2%
Purpose('000s)						
Holiday	2,379	2,239	↓ -6%	77,783	72,200	↓ -7%
Visit friends &/or relatives (VFR)	1,193	1,108	↓ -7%	48,996	48,073	↓ -2%
Business	486	442	↓ -9%	16,198	15,450	↓ -5%
Other reason	704	631	↓ -10%	19,781	19,719	→ 0%
Total day intrastate visitors	4,762	4,420	↓ -7%	162,757	155,441	↓ -4%

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

Quarter ending June 2014

The TVS reports the following key findings for visitors during the July - September 2014 quarter.

- The total number of visitors to Tasmania for the September quarter 2014 was 208,000, up 2 per cent from 202,900 the previous year (Fig. 1).
- The total number of nights spent by visitors to Tasmania for the September quarter 2014 decreased by 7 per cent to 1.30 million (was 1.40 million) (Fig. 2).
- Visitor expenditure was \$257 million, up 6 per cent from the same quarter of the previous year (was \$242.5 million) (Fig. 3).
- Of all visitors for the quarter, 83,300 (up 21 per cent) were on holiday, 62,600 (down 3 per cent) were visiting friends or relatives, 47,000 (down 6 per cent) were on business, and 4,800 (down 38 per cent) were travelling to attend a conference or convention (Fig. 4).

Fig. 1. Total Visitors to Tasmania by Quarter*

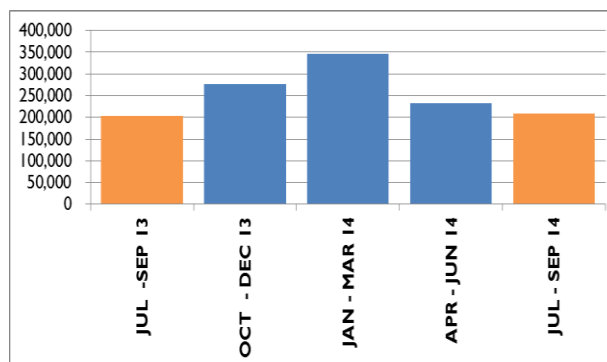


Fig. 2. Total Nights by Quarter*

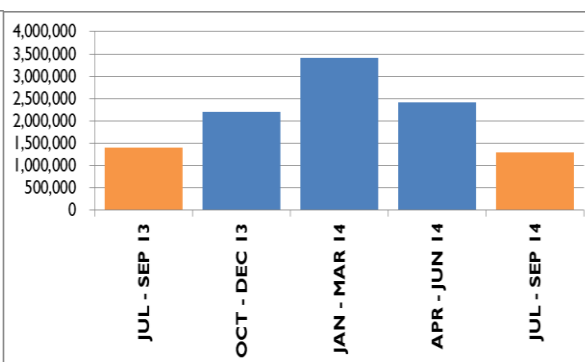


Fig. 3. Total Expenditure (\$ millions) by Quarter*

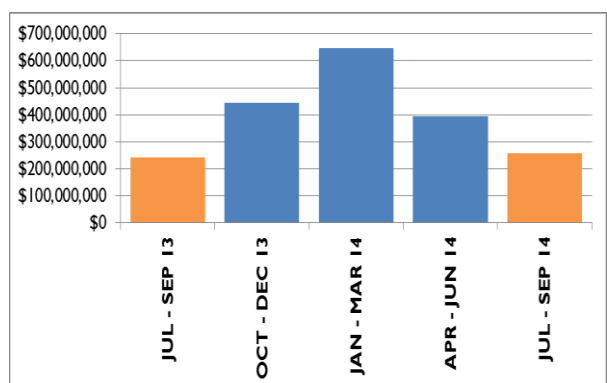
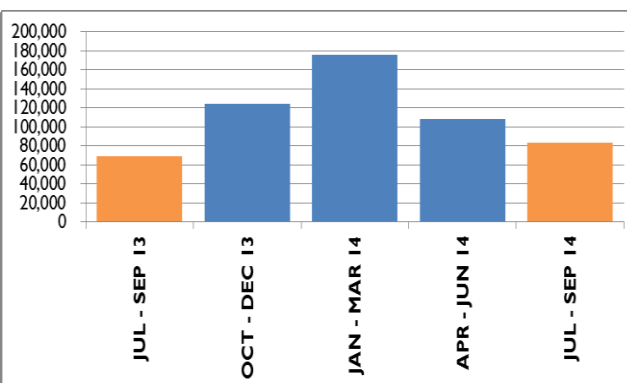


Fig. 4. Total Holiday Visitors by Quarter*



* Graphs present data for the last five quarters, 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. 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.