

# Tasmanian Tourism Snapshot

Year ending September 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 September 2017, there were 1.28 million visitors, up 8 per cent from 1.19 million for the previous year.
- Total nights spent by visitors in the state increased by 1 per cent to 10.73 million.
- Visitor expenditure increased by 11 per cent to \$2.30 billion.
- The number of interstate visitors to Tasmania increased by 6 per cent to 1.07 million (was 1.01 million).

### Summary:

- The total number of visitors holidaying in Tasmania during the year ending September 2017 was 628,800, up 10 per cent compared to the previous year (was 572,900).
- The total number of nights spent by holiday visitors to Tasmania for the year ending September 2017 was 5.41 million, up 4 per cent from the previous year (was 5.22 million).
- Holiday visitor expenditure for the year was up 10 per cent to \$1.55 billion (was \$1.40 billion).
- Those who came to visit friends and relatives (VFR) increased by 16 per cent for the year. The number of nights VFR visitors spent in Tasmania increased by 8 per cent while VFR expenditure increased by 17 per cent.
- Of all visitors, 192,600 (down 4 per cent) were on business while 37,800 (down 14 per cent) were travelling to attend a conference or convention.
- For the year ending September 2017, data from the TVS for the four tourism regions reported the following changes in visitor numbers: Southern, up 7 per cent; East Coast, up 10 per cent; Northern, up 11 per cent; Cradle Coast, up 3 per cent.
- For the year ending September 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 3 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 2017 was 1.07 million, up 6 per cent from 1.01 million the previous year.

- The total number of nights spent by interstate visitors to Tasmania for the year ending September 2017 was 8.16 million, up 1 per cent from the previous year (was 8.05 million).
- Interstate visitor expenditure increased by 10 per cent to \$1.87 billion (was \$1.70 billion in the year ending September 2016).
- Of all interstate visitors, 479,800 were on holiday (up 7 per cent), 319,100 were visiting friends or relatives (up 16 per cent), 178,100 were on business (down 4 per cent), and 32,600 were travelling to attend a conference or convention (down 17 per cent).
- In terms of visitation to Tasmania from the key interstate markets, Victoria increased by 3 per cent to 447,500, NSW increased by 14 per cent to 302,700, and Queensland increased by 11 per cent to 170,600. Together, these markets accounted for 86 per cent of interstate visitation in the year ending September 2017.

## International Visitation (Source: International Visitor Survey)

### Summary – Australia

- A total of 7.99 million international visitors came to Australia in the year ending September 2017, up 7 per cent from the year ending September 2016.
- Holiday visitors to Australia increased by 5 per cent to 3.91 million, while VFR visitors increased by 11 per cent to 2.06 million.
- International visitor nights spent in Australia increased by 7 per cent to 268 million.
- Total expenditure by international visitors in Australia for the year ending September 2017 increased by 10 per cent to \$28 billion<sup>1</sup> (including package expenditure). Holiday spend was \$10 billion (including package expenditure) for the year, increased by 4 per cent from the year ending September 2016.
- For Australia's largest source markets, the following changes to visitor numbers to Australia were recorded: New Zealand, up 1 per cent; China, up 12 per cent; United Kingdom, up 1 per cent and the USA, up 10 per cent.

### Summary – Tasmania

- Tasmania received 266,500 international visitors during the year ending September 2017, up 17 per cent from 228,500 the previous year.
- The number of nights international visitors spent in Tasmania increased by 33 per cent to 4.49 million, and the average length of stay increased by 14 per cent to 17 nights.
- Expenditure by international visitors increased by 33 per cent to \$484 million<sup>2</sup>.
- Holiday visitors to Tasmania increased by 17 per cent to 211,600, while VFR visitors increased by 12 per cent to 40,700.
- Holiday nights increased by 19 per cent to 2.15 million, while the average length of stay for holiday visitors increased by 1 per cent to 10 nights.
- Total expenditure by international holiday visitors increased by 27 per cent to \$285 million.
- For Tasmania's largest source markets, the following changes to visitor numbers to the State were recorded: China, up 40 per cent; United Kingdom, up 9 per cent; the USA, up 25 per cent; New Zealand, up 24 per cent; Hong Kong, up 33 per cent.
- Tasmania's share of all international visitors to Australia for the year ending September 2017 was 3.3 per cent, compared with 3.1 per cent for the year ending September 2016.

<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)

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

- The number of overnight intrastate holiday trips in Tasmania increased by 5 per cent, VFR increased by 6 per cent, and overnight business trips increased by 14 per cent in the year ending September 2017.
- In the year ending September 2017, the number of intrastate day trips in Tasmania decreased by 1 per cent whilst intrastate overnight trips increased by 14 per cent to 1.47 million compared to the year ending September 2016.
- Total spend by overnight intrastate visitors in Tasmania increased by 27 per cent to \$437 million for the year ending September 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 Sept 2016	YE Sept 2017	% change	
<i>Visitors</i>				
Visitors on scheduled air and sea services	1,191,900	1,283,600	↑	8%

Table 2. Total visitors to Tasmania on scheduled air and sea services				
	YE Sept 2016	YE Sept 2017	% change	
<i>Visitors</i>				
Day visitors	32,900	30,600	↓	-7%
Overnight visitors	1,159,000	1,253,000	↑	8%
Total visitors	1,191,900	1,283,600	↑	8%
<i>Nights</i>				
Nights (million)	10.58	10.73	↑	1%
Average length of stay (nights)	8.9	8.4	↓	-6%
<i>Expenditure</i>				
Expenditure (\$million)	\$2,074	\$2,299	↑	11%
Average spend per visitor	\$1,740	\$1,791	↑	3%
Average spend per night	\$196	\$214	↑	9%
Holiday spend (\$million)	\$1,403	\$1,550	↑	10%
<i>Purpose of Visit</i>				
Holiday	572,900	628,800	↑	10%
Visit friends or relatives (VFR)	305,700	353,600	↑	16%
Total leisure (Holiday+VFR)	878,600	982,300	↑	12%
Business or employment	201,000	192,600	↓	-4%
Convention/conference/seminar	44,200	37,800	↓	-14%
<i>Regions Visited</i>				
Southern	959,400	1,025,000	↑	7%
East Coast	342,600	377,600	↑	10%
Northern	631,000	700,200	↑	11%
Cradle Coast	485,800	502,000	↑	3%
<i>Mode of departure</i>				
Air visitors	1,052,900	1,140,500	↑	8%
Sea visitors	139,000	143,100	↑	3%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

## Interstate Visitors to Tasmania

Table 3. Interstate visitors to Tasmania on scheduled air and sea services				
	YE Sept 2016	YE Sept 2017		% change
<i>Visitors</i>				
Day visitors	31,300	29,400	↓	-6%
Overnight visitors	978,800	1,045,000	↑	7%
Total visitors	1,010,100	1,074,400	↑	6%
<i>Nights</i>				
Nights (million)	8.05	8.16	↑	1%
Average length of stay (nights)	8.0	7.6	↓	-5%
<i>Expenditure</i>				
Expenditure (\$million)	\$1,705	\$1,871	↑	10%
Average spend per visitor	\$1,688	\$1,741	↑	3%
Average spend per night	\$212	\$229	↑	8%
Holiday spend (\$million)	\$1,133	\$1,227	↑	8%
<i>Purpose of Visit</i>				
Holiday	447,100	479,800	↑	7%
Visit friends or relatives (VFR)	275,500	319,100	↑	16%
Total leisure (Holiday+VFR)	722,500	799,000	↑	11%
Business or employment	184,600	178,100	↓	-4%
Convention/conference/seminar	39,300	32,600	↓	-17%
<i>Regions Visited</i>				
Southern	794,500	836,000	↑	5%
East Coast	259,300	273,000	↑	5%
Northern	520,700	570,100	↑	9%
Cradle Coast	393,700	406,000	↑	3%
<i>Mode of departure</i>				
Air visitors	883,800	939,800	↑	6%
Sea visitors	126,300	134,700	↑	7%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

	YE Sept 2016	YE Sept 2017	% change	
Victoria	436,200	447,500	↑	3%
N.S.W.	265,000	302,700	↑	14%
Queensland	153,400	170,600	↑	11%
South Australia	56,800	56,400	↓	-1%
Western Australia	55,700	51,500	↓	-8%
A.C.T.	25,700	31,400	↑	22%
N.T.	10,200	8,500	↓	-17%
Total interstate visitors	1,010,100	1,074,400	↑	6%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

## International Visitors to Tasmania

	to Tasmania			to Australia		
	YE Sept 2016	YE Sept 2017	% Change	YE Sept 2016	YE Sept 2017	% Change
<b>Visitors</b>						
International visitors	228,500	266,500	↑ 17%	7,444,700	7,987,300	↑ 7%
<b>Nights</b>						
Nights ('000s)	3,383	4,486	↑ 33%	250,997	267,605	↑ 7%
Average length of stay (nights)	14.8	16.8	↑ 14%	33.7	33.5	↓ -1%
<b>Expenditure</b>						
Expenditure (\$million)	\$363	\$484	↑ 33%	\$25,815	\$28,339	↑ 10%
Average spend per visitor	\$1,587	\$1,815	↑ 14%	\$3,468	\$3,548	↑ 2%
Average spend per night	\$107	\$108	↑ 1%	\$103	\$106	↑ 3%
Holiday spend (\$million)	\$224	\$285	↑ 27%	\$9,564	\$9,939	↑ 4%
<b>Purpose of Visit</b>						
Holiday	180,700	211,600	↑ 17%	3,721,000	3,910,000	↑ 5%
Visit friends or relatives (VFR)	36,500	40,700	↑ 12%	1,858,400	2,062,400	↑ 11%
Business	13,500	15,100	↑ 12%	808,100	879,200	↑ 9%
Education	6,800	6,400	↓ -7%	487,600	562,200	↑ 15%
Employment	4,300	5,200	↑ 21%	272,100	284,900	↑ 5%
Other Reason	200	300	↑ 89%	297,500	288,600	↓ -3%
Total	228,500	266,500	↑ 17%	7,444,700	7,987,300	↑ 7%

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

\*\* 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 Sept 2016	YE Sept 2017	% Change	YE Sept 2016	YE Sept 2017	% Point difference
State/territory visited	Visitors			Market Share		
New South Wales	3,760,400	4,095,500	↑ 9%	50.5%	51.3%	↑ 0.8%
Victoria	2,630,100	2,814,900	↑ 7%	35.3%	35.2%	↓ -0.1%
Queensland	2,551,300	2,628,300	↑ 3%	34.3%	32.9%	↓ -1.4%
South Australia	429,500	441,700	↑ 3%	5.8%	5.5%	↓ -0.2%
Western Australia	921,400	947,200	↑ 3%	12.4%	11.9%	↓ -0.5%
Tasmania	228,500	266,500	↑ 17%	3.1%	3.3%	↑ 0.3%
Northern Territory	293,000	288,600	↓ -2%	3.9%	3.6%	↓ -0.3%
ACT	206,900	228,000	↑ 10%	2.8%	2.9%	→ 0.1%
Total visitors to Australia	7,444,700	7,987,300	↑ 7%	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)

Table 7. Origin of international visitors to Tasmania						
	YE Sept 2016	YE Sept 2017	% Change	YE Sept 2016	YE Sept 2017	% Point difference
Country of origin	Visitors			National Market Share		
New Zealand	14,200	17,600	↑ 24%	1.2%	1.4%	↑ 0.3%
Japan	6,400	8,200	↑ 28%	1.7%	2.1%	↑ 0.3%
Hong Kong	21,100	27,900	↑ 33%	9.6%	11.2%	↑ 1.6%
Singapore	12,600	14,000	↑ 11%	3.3%	3.7%	↑ 0.4%
Malaysia	11,400	13,800	↑ 21%	3.4%	3.9%	↑ 0.5%
Indonesia	3,300	2,000	↓ -40%	2.3%	1.1%	↓ -1.1%
Taiwan	5,200	5,200	→ 0%	3.5%	3.2%	↓ -0.3%
Thailand	2,000	3,400	↑ 68%	2.4%	3.7%	↑ 1.3%
Korea	2,800	3,800	↑ 38%	1.1%	1.4%	↑ 0.3%
China	24,700	34,600	↑ 40%	2.3%	2.8%	↑ 0.6%
India	4,400	5,400	↑ 24%	1.9%	2.0%	↑ 0.1%
Other Asia	4,400	6,200	↑ 43%	1.6%	1.9%	↑ 0.3%
USA includes Hawaii	31,800	39,900	↑ 25%	4.9%	5.6%	↑ 0.7%
Canada	8,200	8,900	↑ 9%	5.9%	5.8%	↓ -0.1%
United Kingdom	23,900	26,000	↑ 9%	3.6%	3.8%	↑ 0.3%
Germany	11,000	14,100	↑ 29%	5.8%	7.0%	↑ 1.3%
Scandinavia	5,100	3,200	↓ -37%	5.1%	3.1%	↓ -2.0%
France	8,500	5,900	↓ -31%	7.3%	4.9%	↓ -2.5%
Italy	3,100	2,500	↓ -18%	4.3%	3.5%	↓ -0.8%
Netherlands	4,000	3,200	↓ -21%	8.5%	6.0%	↓ -2.6%
Switzerland	4,200	3,100	↓ -28%	8.3%	5.9%	↓ -2.4%
Other Europe	9,100	7,300	↓ -20%	4.2%	3.2%	↓ -1.0%
Other Countries	7,500	10,600	↑ 42%	1.6%	2.2%	↑ 0.5%
Total	228,500	266,500	↑ 17%	3.1%	3.3%	↑ 0.3%

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 Sept 2016	YE Sept 2017	% change	YE Sept 2016	YE Sept 2017	% change
<b>Visitors</b>						
Overnight visitors ('000s)	1,286	1,467	↑ 14%	60,406	64,817	↑ 7%
<b>Nights</b>						
Nights ('000s)	3,470	3,616	↑ 4%	183,895	196,925	↑ 7%
Average length of stay (nights)	2.7	2.5	↓ -9%	3.0	3.0	→ 0%
<b>Expenditure</b>						
Expenditure (\$million)	\$346	\$437	↑ 27%	\$24,551	\$26,678	↑ 9%
Spend per visitor	\$269	\$298	↑ 11%	\$406	\$412	↑ 1%
Spend per night	\$100	\$121	↑ 21%	\$134	\$135	↑ 1%
<b>Purpose('000s)</b>						
Holiday	26,808	28,148	↑ 5%	25,948	27,249	↑ 5%
Visit friends &/or relatives (VFR)	21,349	22,654	↑ 6%	20,992	22,237	↑ 6%
Business	10,430	11,923	↑ 14%	10,139	11,695	↑ 15%
Other reason	3,867	4,275	↑ 11%	3,800	4,208	↑ 11%
Total overnight intrastate visitors	62,177	66,772	↑ 7%	60,406	64,817	↑ 7%

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

	Tasmania			Australia		
	YE Sept 2016	YE Sept 2017	% change	YE Sept 2016	YE Sept 2017	% change
<b>Visitor</b>						
Day visitors ('000s)	5,637	5,604	↓ -1%	179,065	181,932	↑ 2%
Total intrastate Day+Overnight visitors ('000s)	6,923	7,071	↑ 2%	239,471	246,749	↑ 3%
<b>Expenditure</b>						
Expenditure (\$million)	\$595	\$659	↑ 11%	\$19,213	\$20,420	↑ 6%
Spend per visitor	\$106	\$118	↑ 12%	\$107	\$112	↑ 5%
<b>Purpose('000s)</b>						
Holiday	3,182	2,990	↓ -6%	88,506	90,152	↑ 2%
Visit friends &/or relatives (VFR)	1,250	1,176	↓ -6%	48,040	51,198	↑ 7%
Business	531	429	↓ -19%	18,341	16,254	↓ -11%
Other reason	675	1,009	↑ 49%	24,178	24,329	↑ 1%
Total day intrastate visitors	5,637	5,604	↓ -1%	179,065	181,932	↑ 2%

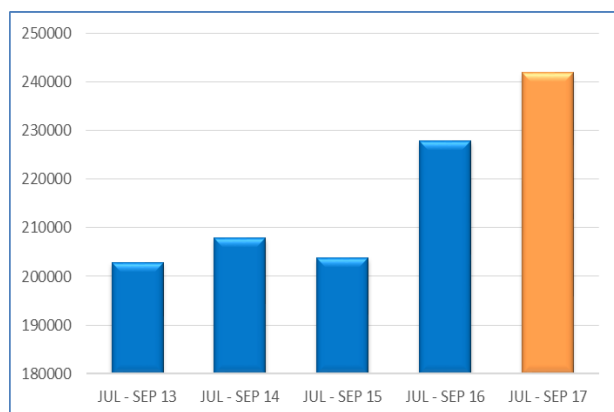
Source: National Visitor Survey (NVS), Tourism Research Australia

## Quarter ending September 2017

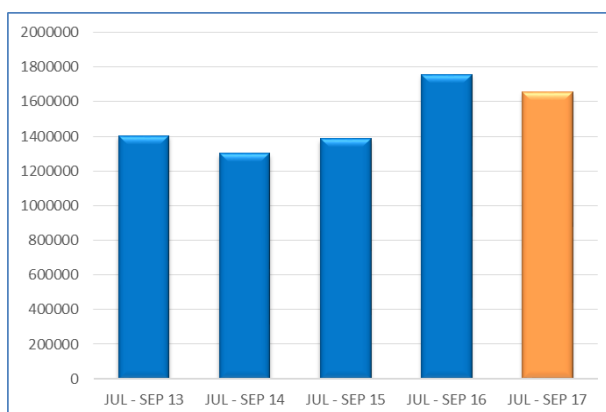
The TVS reports the following key findings for visitors during the June - September 2017 quarter.

- The total number of visitors to Tasmania for the September quarter 2017 was 241,900, up 6 per cent from 227,900 the previous year (Fig. 1).
- The total number of nights spent by visitors to Tasmania for the September quarter 2017 decreased by 6 per cent to 1.66 million (was 1.76 million) (Fig. 2).
- Visitor expenditure was \$341 million, up 11 per cent from the same quarter of the previous year (was \$306 million) (Fig. 3).
- Of all visitors for the quarter, 94,900 (up 6 per cent) were on holiday, 73,100 (up 17 per cent) were visiting friends or relatives, 47,800 (down 17 per cent) were on business, and 10,300 (up 29 per cent) were travelling to attend a conference or convention (Fig. 4).

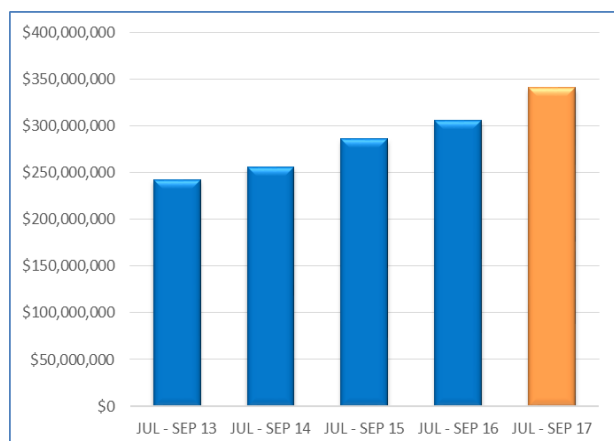
**Fig. 1. Total Visitors to Tasmania by Quarter\***



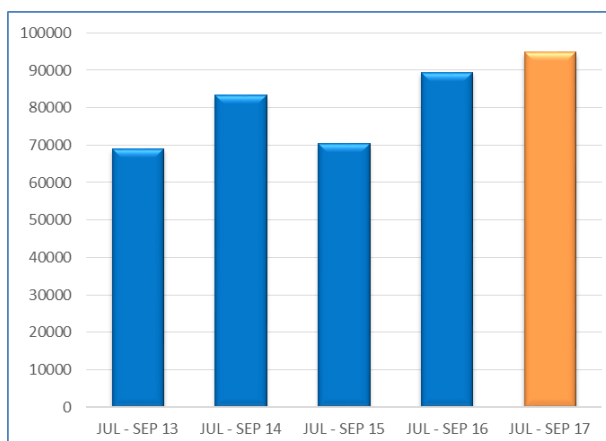
**Fig. 2. Total Nights by Quarter\***



**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% 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.