

Tasmanian Tourism Snapshot

Year ending June 2010

Total Visitation to Tasmania (Tasmanian Visitor Survey)

Key Messages:

- In the year ending June 2010 total visitor numbers to Tasmania on scheduled air and sea services remained steady at 910,200 (was 907,300).
- When combined with navy and cruise ship visitors (-23% to 82,000), the total number of visitors to Tasmania decreased by 2% to just under one million visitors (992,200).
- The TVS reports an increase in the number of interstate visitors (+2%) to the State during the year to June 2010.
- The average length of stay lifted to 9.3 nights (was 8.7) and is the highest average recorded since year ending March 2004.
- The average length of stay for holiday visitors increased to 9.6 nights during the year to June 2010, after a dip the previous year (8.8 nights).
- For the June quarter 2010, the TVS reported the second quarterly decline in total visitation since the September quarter 2007 (-1% to 210,700). Both nights (-10%) and expenditure (-8%) also declined.

TVS SUMMARY

- In the year ending June 2010 total visitor numbers to Tasmania on scheduled air and sea services remained steady at 910,200 (was 907,300).
- The total number of nights spent by visitors in Tasmania was 8.50 million nights (+8%), and the average length of stay rose to 9.3 nights (was 8.7). The increase in nights was largely driven by growth in overall business (+35%), convention (+11%) nights and VFR¹ (+7%).
- Visitor expenditure in Tasmania grew marginally to \$1.50 billion (+4%). An increase in nights (+8%) contributed to the average spend per night decreasing (-4%) to \$177 per night. Despite this, the average spend per visitor increased (+4% to \$1,655).
- In terms of visitor numbers Tasmania's largest market, holiday travel, decreased (-11%) over the year, while VFR (+11%) and business travel (+21%) performed strongly helping to offset the decline in holiday travel. Travel for conventions/conferences/seminars declined over the period (-16%).
- While the number of Leisure (Holiday + VFR) visitors declined (-3% to 653,900) during the year to June 2010, compared to the previous year, the number of night spent in the state (+1%) and expenditure remained steady.
- All Zones recorded a decrease in visitor numbers except for the North West Coast (+1%). Declines were recorded in Hobart and Surrounds (-1%), East Coast (-1%), Western Wilderness (-7%) whilst Launceston, Tamar Valley and the North remained stable during the year to June 2010.

Interstate Visitation to Tasmania (Tasmanian Visitor Survey)

Key Messages:

- Interstate visitor numbers increased to 786,800 (+2%) for the year ending June 2010.
- Interstate visitor nights increased (+5%) to 6.55 million, with the average length of stay increasing from 8.1 to 8.3 nights for the year ending June 2010.
- Expenditure by interstate visitors also increased to \$1.28 billion (+5%) for the year ending June 2010.

¹ VFR – visiting friends and/or relatives

- Furthermore, the average spend by each interstate visitor increased by 3% to \$1,632; although the average spend per night remained steady at \$196 (was \$195).

Summary:

- Interstate visitor numbers grew by 2% over the year, with increases from Victoria (+1%), Queensland (+3%) Western Australia (+8%) and the ACT (+12%), only New South Wales (-6%) recorded a decline.
- The number of interstate visitors on holiday declined (-10%), while VFR increased (+12%). Business or employment visitors from interstate have increased by (+20%) although convention/conference visitors decreased (-16%) for the year.
- The improving trend toward travel on the Spirit of Tasmania by interstate visitors has continued with an increase of (+6%) to 123,200 for the year to June 2010. Interstate visitors departing by air also increased, albeit by (+1%) representing 663,600 visitors.
- In regards to Interstate visitors the North West Coast (+2%) and the Launceston, Tamar Valley and the North Zone (+1%) were the only zones to record increases. Hobart and Surrounds remained steady whereas the East Coast (-2%) and Western Wilderness (-7%) were the only Zones to record a decline in the year ending June 2010.

International Visitation (International Visitor Survey)

Key Messages:

- According to the latest results of the International Visitor Survey, international visitor arrivals to Australia in the year ending June 2010 increased 3% on the previous year.
- A total of 5.28 million international tourists visited the country in the year ending June 2010.
- The number of nights international travellers spent in Australia grew (+5%), while international visitor expenditure² increased 1% over the same period.
- In contrast, international visitor arrivals into Tasmania continued to decline, with arrivals down 10% to 134,500 and nights down (-6%) to 2.7 million, expenditure by international visitors also declined (-2%) to \$263 million³.

SUMMARY – TASMANIA

- Tasmania received 134,500 international visitors in the year ending June 2010, 10% fewer visitors than in the previous year.
- Visitor nights spent in Tasmania decreased (-6%), although the length of stay increased slightly from 19.1 nights to 19.8 nights.
- With the drop in visitor numbers and nights, the total amount spent by international visitors in Tasmania also decreased by 2% to \$263 million (including package expenditure).
- The average spend per international visitor in Tasmania grew from \$1,793 to \$1,955 in the year ending June 2010. Similarly, spend per night increased to \$99 (was \$94) (including package expenditure).
- Only the VFR market (+17%) and education (+9%) recorded an increase in international visitors over the year. Declines were recorded in the holiday (-16%), business (-33%), and the employment market (-27%).
- In regards to nights spent in Tasmania, Education (+7%) and Employment (+21%) recorded increases. There were decreases in Holiday (-20%), VFR (-5%) and Business nights (-31%) which were largely responsible for the decrease in the total number of nights spent in the state by international visitors in Tasmania (-6%).

² Modelled expenditure Includes package expenditure

³ Modelled expenditure Includes package expenditure

- There was an increase in visitors from China (+34%), Hong Kong (+32%), Korea (+24%) Scandinavia (+66%) and France (+12%) over the year to June 2010. Smaller increases in visitor numbers were recorded out of Germany, and Malaysia.
- The greatest decrease in visitors numbers was out of the UK, reducing by 7,000 visitors (-25%) to 19,800. Other markets recording negative figures over the year to June 2010 included: USA (-21%), New Zealand (-23%), Canada (-49%), Japan (-17%) and Singapore (-15%).
- International visitors to Tasmania on a repeat visit to Australia (61% of all visitors) increased 3% over the year to June 2010, whilst the number of visitors to Tasmania on their first trip to Australia (39% of all visitors) decreased by (-3%) on the previous year.

Intrastate Visitation⁴ (National Visitor Survey)

Key Messages:

- Overnight intrastate travel remained steady at one million trips compared to the previous year. While the number of overnight intrastate trips for holiday purposes declined (-1%) in Tasmania the number of overnight intrastate VFR travel increased (+11%) during the year to June 2010 compared to the year before. Overnight intrastate business travel decreased by (-16%) over the year.
- Day trip travel in Tasmania has followed the national trend (+7%) over the year, increasing (+5%) to 4.5 million trips for Tasmania and 142.9 million nationally.
- Total spend by overnight intrastate visitors remained steady (+1%) to \$285 million for the year to June 2010.
- In contrast, total day travel expenditure reached \$439 million, up (+5%) on the previous year.

Cruise and Navy Ship Visitation

Key Messages:

- During the year to June 2010, 82,100 people visited Tasmania via cruise and navy ships, compared to 106,700 in the previous year representing a decline of 23%.
- The main contributor to this decline was a reduction in the number of cruise ship vessels which came to a Tasmanian port, down from 47 last season to 35 ships during the 12 months to June 2010. Early indications are that a similar downturn in cruise ship passenger numbers has been experienced at a national level, and particularly at Australia's south eastern ports.

Marketing Performance (Holiday Tracking Survey)

Key Messages:

- Without any prompting on advertising for holidays and travel, 15.6% of all Australians (interstate and intrastate residents) had read, seen or heard some form of Tasmanian holiday/travel advertising in the year ending June 2010, down from 16.2% of all Australians recorded in the previous year.
- When respondents (all Australian interstate and intrastate residents) were prompted about which States or Territories they had read, seen or heard some form of holiday advertising, Tasmania's performance declined to 24.5% in the 12 months to June 2010 (was 28.2% in the 12 months to June 2009).
- When asked where you would like to go on holidays in the next two years, 17% of all Australians had a preference to travel to/within Tasmania, a decrease of (-0.6%) on the previous year (was 17.6%).
- 4.5% of all Australians intend to travel to/within the State in the next two years, a decrease of (-0.1%) on the previous year.

⁴ Travel undertaken by a visitor in their home state

Total Visitors to Tasmania

Total visitors to Tasmania from all sources			
	July 2008 - June 2009	July 2009 - June 2010	% change
<i>Visitors</i>			
Cruise ship visitors	105,400	79,600	↓ -24%
Navy ship visitors	1,460	2,400	↑ 64%
Visitors on scheduled air and sea services	907,300	910,200	→ 0%
Total visitors to Tasmania from all sources	1,014,160	992,200	↓ -2%

Note: Due to enhanced procedures some Tasmanian Visitor Survey estimates (to Dec 2009) have been subject to revision to ensure comparability.

Total visitors to Tasmania on scheduled air and sea services			
	July 2008 - June 2009	July 2009 - June 2010	% change
Visitors			
Day visitors	15,600	23,200	↑ 48%
Overnight visitors	891,700	887,000	↓ -1%
Total visitors	907,300	910,200	→ 0%
Nights			
Nights (million)	7.85	8.50	↑ 8%
Length of stay (nights)	8.7	9.3	↑ 8%
Expenditure			
Expenditure (\$million)	\$1,445	\$1,507	↑ 4%
Average spend per visitor	\$1,592	\$1,655	↑ 4%
Average spend per night	\$184	\$177	↓ -4%
Holiday spend (\$million)	\$1,022	\$993	↓ -3%
Purpose			
Holiday	439,800	393,400	↓ -11%
Visit friends or relatives (VFR)	235,100	260,400	↑ 11%
Total leisure (Holiday+VFR)	674,900	653,900	↓ -3%
Business or employment	143,900	173,600	↑ 21%
Convention/conference/seminar	35,300	29,800	↓ -16%
Zones Visited*			
Hobart & Surrounds	725,600	717,300	↓ -1%
Launceston, Tamar Valley & North	503,600	503,300	→ 0%
Western Wilderness	279,500	259,400	↓ -7%
North West	345,400	347,400	↑ 1%
East Coast	293,000	291,100	↓ -1%
Mode of departure			
Air visitors	780,000	779,500	→ 0%
Sea visitors	127,300	130,700	↑ 3%

source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

* Zones are based on Tourism Tasmania's Zone Marketing Strategy

Note: Due to enhanced procedures some Tasmanian Visitor Survey estimates (to Dec 2009) have been subject to revision to ensure comparability.

Interstate Visitors to Tasmania

Interstate visitors to Tasmania on scheduled air and sea services			
	July 2008 - June 2009	July 2009 - June 2010	% change
Visitors			
Day visitors	15,200	23,000	↑ 51%
Overnight visitors	758,700	763,700	↑ 1%
Total visitors	773,900	786,800	↑ 2%
Nights			
Nights (million)	6.26	6.55	↑ 5%
Length of stay (nights)	8.1	8.3	↑ 3%
Expenditure			
Expenditure (\$million)	\$1,224	\$1,284	↑ 5%
Average spend per visitor	\$1,581	\$1,632	↑ 3%
Average spend per night	\$195	\$196	→ 0%
Holiday spend (\$million)	\$853	\$829	↓ -3%
Purpose			
Holiday	351,600	315,700	↓ -10%
Visit friends or relatives (VFR)	211,600	237,000	↑ 12%
Total leisure (Holiday+VFR)	563,300	552,600	↓ -2%
Business or employment	136,700	163,500	↑ 20%
Convention/conference/seminar	30,700	25,800	↓ -16%
Zones Visited*			
Hobart & Surrounds	604,400	604,900	→ 0%
Launceston, Tamar Valley & North	423,675	429,443	↑ 1%
Western Wilderness	219,300	203,800	↓ -7%
North West	293,446	299,905	↑ 2%
East Coast	231,800	227,000	↓ -2%
Mode of departure			
Air visitors	657,600	663,600	↑ 1%
Sea visitors	116,200	123,200	↑ 6%

source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

* Zones are based on Tourism Tasmania's Zone Marketing Strategy

Note: Due to enhanced procedures some Tasmanian Visitor Survey estimates (to Dec 2009) have been subject to revision to ensure comparability.

Origin of interstate visitors to Tasmania			
	July 2008 - June 2009	July 2009 - June 2010	% change
Victoria	354,200	356,600	↑ 1%
N.S.W.	188,300	177,600	↓ -6%
Queensland	108,800	112,100	↑ 3%
South Australia	44,000	55,800	↑ 27%
Western Australia	38,900	42,000	↑ 8%
A.C.T.	17,900	20,000	↑ 12%
N.T.	5,300	9,400	↑ 77%
Total interstate visitors	773,900	786,800	↑ 2%

source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

Note: Due to enhanced procedures some Tasmanian Visitor Survey estimates (to Dec 2009) have been subject to revision to ensure comparability.

International Visitors to Tasmania

International visitors						
	to Tasmania			to Australia		
	YE June 2009	YE June 2010	change	YE June 2009	YE June 2010	% change
Visitors						
International visitors	149,500	134,500	↓ -10%	5,120,600	5,279,700	↑ 3%
Nights						
Nights ('000s)	2,852	2,669	↓ -6%	174,160	182,677	↑ 5%
Length of stay (nights)	19.1	19.8	↑ 4%	34.0	34.6	↑ 2%
Expenditure*						
Expenditure (\$million)*	\$268	\$263	↓ -2%	\$17,077	\$17,256	↑ 1%
Average spend per visitor	\$1,793	\$1,955	↑ 9%	\$3,335	\$3,268	↓ -2%
Average spend per night	\$94	\$99	↑ 5%	\$98	\$94	↓ -4%
Holiday spend (\$million)	\$118	\$95	↓ -19%	\$6,750	\$6,344	↓ -6%
Purpose**						
Holiday	106,600	89,800	↓ -16%	2,391,700	2,408,600	↑ 1%
Visit friends or relatives (VFR)	28,000	32,700	↑ 17%	1,200,400	1,309,500	↑ 9%
Business	12,100	8,100	↓ -33%	798,500	816,400	↑ 2%
Education	7,800	8,500	↑ 9%	389,200	429,900	↑ 10%
Employment	3,000	2,200	↓ -27%	124,400	112,100	↓ -10%
Other Reason	3,600	2,200	↓ -39%	216,400	203,200	↓ -6%
Total	149,500	134,500	↓ -10%	5,120,600	5,279,700	↑ 3%

source: International Visitor Survey (IVS), Tourism Research Australia

* Modelled expenditure including package expenditure

** 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.

International visitors to States/Territories							
	YE June 2009	YE June 2010	% change		YE June 2009	YE June 2010	% point difference
<i>State/territory visited</i>	<i>Visitors</i>				<i>Market Share</i>		
New South Wales	2,712,300	2,781,900	↑ 3%		53.0%	52.7%	↓ -0.3%
Victoria	1,481,300	1,548,200	↑ 5%		28.9%	29.3%	↑ 0.4%
Queensland	2,012,300	1,969,800	↓ -2%		39.3%	37.3%	↓ -2.0%
South Australia	347,500	363,600	↑ 5%		6.8%	6.9%	↑ 0.1%
Western Australia	684,400	683,700	→ 0%		13.4%	12.9%	↓ -0.4%
Tasmania	149,500	134,500	↓ -10%		2.9%	2.5%	↓ -0.4%
Northern Territory	331,500	322,600	↓ -3%		6.5%	6.1%	↓ -0.4%
Australia Capital Territory	159,000	153,400	↓ -4%		3.1%	2.9%	↓ -0.2%
Total visitors to Australia	5,120,600	5,279,700	↑ 3%		100%	100%	

source: International Visitor Survey (IVS), Tourism Research Australia

Origin of international visitors to Tasmania							
	YE June 2009	YE June 2010	% change		YE June 2009	YE June 2010	% point difference
Country of origin	Visitors				National Market Share		
New Zealand	15,900	12,300	↓ -23%		1.6%	1.2%	↓ -0.4%
Japan	5,800	4,800	↓ -17%		1.6%	1.4%	↓ -0.1%
Hong Kong	5,000	6,600	↑ 32%		3.7%	4.7%	↑ 1.0%
Singapore	6,100	5,200	↓ -15%		2.5%	2.1%	↓ -0.5%
Malaysia	5,300	5,400	↑ 2%		3.0%	2.8%	↓ -0.2%
Indonesia	np	np	np		2.4%	0.5%	↓ -2.0%
Taiwan	np	np	np		5.0%	3.0%	↓ -2.0%
Thailand	np	np	np		2.5%	3.6%	↑ 1.1%
Korea	2,500	3,100	↑ 24%		1.4%	1.7%	↑ 0.3%
China	5,000	6,700	↑ 34%		1.5%	1.8%	↑ 0.3%
India	np	np	np		1.2%	1.3%	↑ 0.1%
Other Asia	np	np	np		0.9%	1.0%	→ 0.0%
USA includes Hawaii	20,200	15,900	↓ -21%		4.8%	3.5%	↓ -1.3%
Canada	8,400	4,300	↓ -49%		7.3%	3.7%	↓ -3.6%
United Kingdom	26,500	19,800	↓ -25%		4.3%	3.2%	↓ -1.1%
Germany	8,800	9,400	↑ 7%		5.7%	6.0%	↑ 0.2%
Scandinavia	3,800	6,300	↑ 66%		4.9%	7.5%	↑ 2.6%
France	4,200	4,700	↑ 12%		4.9%	5.0%	↑ 0.1%
Italy	np	np	np		2.8%	5.8%	↑ 3.0%
Netherlands	2,900	3,100	↑ 7%		5.8%	6.2%	↑ 0.3%
Switzerland	np	np	np		5.6%	5.6%	→ 0.0%
Other Europe	6,800	5,300	↓ -22%		3.6%	3.0%	↓ -0.6%
Other Countries	7,700	7,300	↓ -5%		2.0%	1.9%	↓ -0.2%
Total	149,500	134,500	↓ -10%		2.9%	2.5%	↓ -0.4%

Source: International Visitor Survey, Tourism Research Australia

np - not published due to data reliability.

Intrastate Visitors

Intrastate OVERNIGHT Travel						
	Tasmania			Australia		
	Year ending June 2009	Year ending June 2010	% change	Year ending June 2009	Year ending June 2010	% change
Visitors						
Overnight visitors ('000s)	1,000	1,005	↑ 1%	45,828	45,030	↓ -2%
Nights						
Nights ('000s)	2,445	2,570	↑ 5%	141,457	140,867	→ 0%
Length of stay (nights)	2.4	2.6	↑ 5%	3.1	3.1	→ 0%
Expenditure						
Expenditure (\$million)	\$281	\$285	↑ 1%	\$17,576	\$17,508	→ 0%
Spend per visitor	\$281	\$284	↑ 1%	\$384	\$389	↑ 1%
Spend per night	\$115	\$111	↓ -4%	\$124	\$124	→ 0%
Purpose('000s)						
Holiday	517	511	↓ -1%	21,240	20,793	↓ -2%
Visit friends &/or relatives (VFR)	253	281	↑ 11%	14,940	14,499	↓ -3%
Business	188	158	↓ -16%	6,459	6,454	→ 0%
Other reason	40	58	↑ 45%	2,295	2,458	↑ 7%
Total overnight intrastate visitors	1,000	1,005	↑ 1%	44,409	43,693	↓ -2%

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

Intrastate DAY Travel						
	Tasmania			Australia		
	July 2008 - June 2009	July 2009 - June 2010	% change	July 2008 - June 2009	July 2009 - June 2010	% change
Visitor						
Day visitors ('000s)	4,283	4,543	↑ 6%	134,028	142,917	↑ 7%
Total intrastate Day+Overnight visitors ('000s)	5,283	5,548	↑ 5%	179,856	187,947	↑ 4%
Expenditure						
Expenditure (\$million)	\$417	\$439	↑ 5%	\$14,566	\$15,518	↑ 7%
Spend per visitor	\$97	\$97	↓ -1%	\$109	\$109	→ 0%
Purpose('000s)						
Holiday	2,282	2,428	↑ 6%	68,549	71,718	↑ 5%
Visit friends &/or relatives (VFR)	1,015	1,082	↑ 7%	39,007	40,654	↑ 4%
Business	476	457	↓ -4%	13,251	14,091	↑ 6%
Other reason	511	577	↑ 13%	13,221	16,454	↑ 24%
Total day intrastate visitors	4,283	4,543	↑ 6%	134,028	142,917	↑ 7%

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

Marketing Performance - interstate residents			
	12 months ending June 09	12 months ending June 10	% point difference
¹ Advertising Awareness (Unprompted)	15.9	15.3	↓ -0.6%
¹ Advertising Awareness (Prompted)	27.4	23.9	↓ -3.5%
² Preference to visit Tasmania	16.9	16.3	↓ -0.6%
³ Intention to visit Tasmania	4.0	3.9	↓ -0.1%
⁴ Behaviour	4.1	4.0	↓ -0.1%

Marketing Performance - intrastate residents			
	12 months ending June 09	12 months ending June 10	% point difference
¹ Advertising Awareness (Unprompted)	30.1	28.0	↓ -2.1%
¹ Advertising Awareness (Prompted)	60.8	50.0	↓ -10.8%
² Preference to visit Tasmania	43.3	43.9	↑ 0.6%
³ Intention to visit Tasmania	31.6	31.0	↓ -0.6%
⁴ Behaviour	43.0	45.3	↑ 2.3%

Marketing Performance - total Australians			
	12 months ending June 09	12 months ending June 10	% point difference
¹ Advertising Awareness (Unprompted)	16.2	15.6	↓ -0.6%
¹ Advertising Awareness (Prompted)	28.2	24.5	↓ -3.7%
² Preference to visit Tasmania	17.6	17.0	↓ -0.6%
³ Intention to visit Tasmania	4.6	4.5	↓ -0.1%
⁴ Behaviour	5.0	4.9	↓ -0.1%

Source: Holiday Tracking Survey, Roy Morgan Research

¹ Advertising Awareness - Percentage of Australians with un-prompted & prompted advertising awareness for holidays i

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.

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 total and interstate visitor figures. Note: while the NVS provides valuable data on interstate travel at the national level, the Tasmanian Visitor Survey (TVS), conducted by Tourism Tasmania, continues to be the key source of detailed information about interstate visitation to Tasmania;
- 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.

Note

Figures in the text may vary from figures in the tables due to rounding.

For further information please contact:

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