

# Tasmanian Tourism Snapshot

Year ending June 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 June 2013, there were 961 600 visitors, up 12 per cent from 855 200 for the previous year.
- Total nights increased by seven per cent to 8.39 million.
- Visitor expenditure increased by 10 per cent to \$1.508 billion.
- The number of interstate visitors to Tasmania increased by 14 per cent to 839 300 (was 736 000).

### Summary:

- In terms of visitor numbers from Tasmania's key markets, Victoria increased by 21 per cent, New South Wales increased by 18 per cent, and Queensland decreased by five per cent.
- Holiday visitors increased by 11 per cent for the year ending June 2013, holiday nights increased by seven per cent and holiday expenditure increased by nine per cent.
- Those who came to visit friends and relatives (VFR) increased by 18 per cent for the year. The number of nights VFR visitors spent in Tasmania increased by two per cent while VFR expenditure increased by five per cent.
- The total number of visitors holidaying in Tasmania during the year ending June 2013 was 383 900, up 11 per cent compared to the previous year (was 345 700).
- The total number of nights spent by holiday visitors to Tasmania for the year ending June 2013 was 3.7 million, up seven per cent from the previous year (was 3.5 million).
- Holiday visitor expenditure for the year was up nine per cent to \$956 million (was \$874 million).
- Of all visitors, 185 000 (up 10 per cent) were on business while 32 300 (up one per cent) were travelling to attend a conference or convention.
- For the year ending June 2013, data from the TVS for the four tourism regions reported the following changes in visitor numbers: Southern, up 14 per cent; East Coast, down one per cent; Northern, up five per cent; Cradle Coast, up four per cent.
- For the year ending June 2013, 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 16 per cent and sea services was down nine 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 June 2013 was 839 300, up 14 per cent from 736 000 the previous year.
- The total number of nights spent by interstate visitors to Tasmania for the year ending June 2013 was 6.40 million, up five per cent from the previous year (was 6.11 million).
- Interstate visitor expenditure increased by 10 per cent to \$1.26 billion (was \$1.15 billion in the year ending June 2012).
- Of all interstate visitors, 309 600 were on holiday (up 14 per cent), 270 800 were visiting friends or relatives (up 19 per cent), 173 000 were on business (up 10 per cent), and 29 200 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 21 per cent to 384 800, NSW increased by 18 per cent to 204 000, and Queensland decreased by five per cent to 116 100. Together, these markets accounted for 84 per cent of interstate visitation in the year ending June 2013.

## International Visitation (Source: International Visitor Survey)

### Summary – Australia

- A total of 5.82 million international visitors came to Australia in the year ending June 2013, up five per cent from the year ending June 2012.
- Holiday visitors to Australia increased by seven per cent to 2.60 million, while VFR visitors increased by seven per cent to 1.47 million.
- International visitor nights spent in Australia increased by eight per cent to 212.6 million.
- Total expenditure by international visitors in Australia for the year ending June 2013 increased by six per cent to \$19.0 billion<sup>1</sup> (including package expenditure). Holiday spend was \$6.8 billion (including package expenditure) for the year, increased by nine per cent from the year ending June 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 two per cent; China, up 17 per cent and the USA, up six per cent.

### Summary – Tasmania

- Tasmania received 156 000 international visitors during the year ending June 2013, up 10 per cent from 141 200 the previous year.
- The number of nights international visitors spent in Tasmania increased by 11 per cent to 3.18 million, and the average length of stay remained steady at 20 nights.
- Expenditure by international visitors increased by four per cent to \$258 million<sup>2</sup>.
- Holiday visitors to Tasmania increased by four per cent to 105,200, while VFR visitors increased by one per cent to 30 800.
- Holiday nights increased by 29 per cent to 1.41 million, while the average length of stay for holiday visitors increased by 24 per cent to 13 nights.
- The average spend per international visitor (including package expenditure) in Tasmania decreased by six per cent to \$1 656 (was \$1 760) during the year ending June 2013, while spend per night decreased by six per cent to \$81 (was \$87).
- For Tasmania's largest source markets, the following changes to visitor numbers to the State were recorded: United Kingdom, up 10 per cent; New Zealand, up 24 per cent; the USA, down eight per cent; and China, up 21 per cent.

<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)

- Tasmania's share of all international visitors to Australia for the year ending June 2013 was 2.7 per cent, compared with 2.6 per cent for the year ending June 2012.

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

- The number of overnight intrastate holiday trips in Tasmania increased by three per cent, VFR decreased by two per cent, and overnight business trips increased by six per cent in the year ending June 2013.
- In the year ending June 2013, the number of intrastate day trips in Tasmania remained steady at 4.87 million, whilst intrastate overnight trips increased by four per cent to 1.2 million compared to the year ending June 2012.
- Total spend by overnight intrastate visitors in Tasmania increased by 13 per cent to \$293 million for the year ending June 2013.

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<sup>3</sup> Travel undertaken by a visitor in their home state

## Total Visitors to Tasmania

	YE Jun 2012	YE Jun 2013	% change	
<i>Visitors</i>				
Visitors on scheduled air and sea services	855,200	961,600	↑	12%

	YE Jun 2012	YE Jun 2013	% change	
<i>Visitors</i>				
Day visitors	23,400	27,800	↑	19%
Overnight visitors	831,800	933,800	↑	12%
Total visitors	855,200	961,600	↑	12%
<i>Nights</i>				
Nights (million)	7.86	8.39	↑	7%
Average length of stay (nights)	9.2	8.7	↓	-5%
<i>Expenditure</i>				
Expenditure (\$million)	\$1,372	\$1,508	↑	10%
Average spend per visitor	\$1,605	\$1,568	↓	-2%
Average spend per night	\$175	\$180	↑	3%
Holiday spend (\$million)	\$874	\$956	↑	9%
<i>Purpose of Visit</i>				
Holiday	345,700	383,900	↑	11%
Visit friends or relatives (VFR)	250,700	295,900	↑	18%
Total leisure (Holiday+VFR)	596,400	679,700	↑	14%
Business or employment	167,800	185,000	↑	10%
Convention/conference/seminar	31,900	32,300	↑	1%
<i>Regions Visited</i>				
Southern	675,900	771,700	↑	14%
East Coast	253,500	251,800	↓	-1%
Northern	490,000	514,000	↑	5%
Cradle Coast	371,000	386,200	↑	4%
<i>Mode of departure</i>				
Air visitors	742,800	859,800	↑	16%
Sea visitors	112,400	101,800	↓	-9%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

## Interstate Visitors to Tasmania

Table 3. Interstate visitors to Tasmania on scheduled air and sea services				
	YE Jun 2012	YE Jun 2013		% change
<b>Visitors</b>				
Day visitors	23,100	27,600	↑	19%
Overnight visitors	712,900	811,700	↑	14%
Total visitors	736,000	839,300	↑	14%
<b>Nights</b>				
Nights (million)	6.11	6.40	↑	5%
Average length of stay (nights)	8.3	7.6	↓	-8%
<b>Expenditure</b>				
Expenditure (\$million)	\$1,152	\$1,263	↑	10%
Average spend per visitor	\$1,566	\$1,505	↓	-4%
Average spend per night	\$189	\$197	↑	5%
Holiday spend (\$million)	\$717	\$795	↑	11%
<b>Purpose of Visit</b>				
Holiday	271,000	309,600	↑	14%
Visit friends or relatives (VFR)	227,000	270,800	↑	19%
Total leisure (Holiday+VFR)	498,000	580,400	↑	17%
Business or employment	157,500	173,000	↑	10%
Convention/conference/seminar	28,800	29,200	↑	1%
<b>Regions Visited</b>				
Southern	565,100	657,500	↑	16%
East Coast	193,400	198,500	↑	3%
Northern	412,600	439,200	↑	6%
Cradle Coast	308,200	323,500	↑	5%
<b>Mode of departure</b>				
Air visitors	633,700	744,200	↑	17%
Sea visitors	102,300	95,000	↓	-7%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

	YE Jun 2012	YE Jun 2013	% change	
Victoria	317,500	384,800	↑	21%
N.S.W.	173,400	204,000	↑	18%
Queensland	122,200	116,100	↓	-5%
South Australia	39,400	43,700	↑	11%
Western Australia	48,200	52,800	↑	10%
A.C.T.	21,700	23,600	↑	9%
N.T.	6,500	7,700	↑	20%
Total interstate visitors	736,000	839,300	↑	14%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

## International Visitors to Tasmania

	to Tasmania			to Australia		
	YE Jun 2012	YE Jun 2013	% Change	YE Jun 2012	YE Jun 2013	% Change
<b>Visitors</b>						
International visitors	141,200	156,000	↑ 10%	5,537,000	5,817,300	↑ 5%
<b>Nights</b>						
Nights ('000s)	2,869	3,180	↑ 11%	197,241	212,567	↑ 8%
Average length of stay (nights)	20	20	→ 0%	36	37	↑ 3%
<b>Expenditure</b>						
Expenditure (\$million)	\$249	\$258	↑ 4%	\$17,962	\$19,046	↑ 6%
Average spend per visitor	\$1,760	\$1,656	↓ -6%	\$3,244	\$3,274	↑ 1%
Average spend per night	\$87	\$81	↓ -6%	\$91	\$90	↓ -2%
Holiday spend (\$million)	\$122	\$123	↑ 1%	\$6,237	\$6,773	↑ 9%
<b>Purpose of Visit</b>						
Holiday	100,900	105,200	↑ 4%	2,436,200	2,595,200	↑ 7%
Visit friends or relatives (VFR)	30,400	30,800	↑ 1%	1,380,700	1,473,800	↑ 7%
Business	10,200	16,300	↑ 60%	897,900	915,700	↑ 2%
Education	5,500	6,600	↑ 19%	360,500	359,500	→ 0%
Employment	1,900	3,600	↑ 93%	213,500	216,800	↑ 2%
Other Reason	400	1,000	↑ 121%	248,200	256,200	↑ 3%
Total	141,200	156,000	↑ 10%	5,537,000	5,817,300	↑ 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.

	YE Jun 2012	YE Jun 2013	% Change	YE Jun 2012	YE Jun 2013	% Point difference
<i>State/territory visited</i>	<i>Visitors</i>			<i>Market Share</i>		
New South Wales	2,795,000	2,960,200	↑ 6%	50%	51%	↑ 0.4%
Victoria	1,776,800	1,880,500	↑ 6%	32%	32%	↑ 0.2%
Queensland	1,950,600	2,065,200	↑ 6%	35%	36%	↑ 0.3%
South Australia	331,700	361,400	↑ 9%	6%	6%	↑ 0.2%
Western Australia	741,600	763,900	↑ 3%	13%	13%	↓ -0.3%
Tasmania	141,200	156,000	↑ 10%	3%	3%	↑ 0.1%
Northern Territory	262,700	263,500	→ 0%	5%	5%	↓ -0.2%
Australia Capital Territory	163,400	180,400	↑ 10%	3%	3%	→ 0.2%
Total visitors to Australia	5,537,000	5,817,300	↑ 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

Country of origin	YE Jun 2012	YE Jun 2013	% Change	YE Jun 2012	YE Jun 2013	% Point difference
	Visitors			National Market Share		
New Zealand	12,700	15,700	↑ 24%	1.2%	1.4%	↑ 0.3%
Japan	3,300	4,400	↑ 35%	1.0%	1.4%	↑ 0.4%
Hong Kong	9,100	16,400	↑ 81%	5.9%	9.9%	↑ 4.0%
Singapore	6,500	5,200	↓ -20%	2.3%	1.6%	↓ -0.7%
Malaysia	6,800	6,200	↓ -10%	3.1%	2.6%	↓ -0.6%
Indonesia	1,000	1,000	→ 0%	0.8%	0.8%	→ 0.0%
Taiwan	2,500	3,200	↑ 28%	2.9%	3.3%	↑ 0.4%
Thailand	2,900	1,000	↓ -66%	3.8%	1.2%	↓ -2.6%
Korea	3,300	800	↓ -75%	1.8%	0.5%	↓ -1.3%
China	10,600	12,800	↑ 21%	1.9%	2.0%	↑ 0.1%
India	700	3,900	↑ 434%	0.5%	2.5%	↑ 2.0%
Other Asia	2,200	3,800	↑ 73%	1.4%	2.3%	↑ 0.9%
USA includes Hawaii	18,700	17,200	↓ -8%	4.3%	3.7%	↓ -0.6%
Canada	6,900	4,400	↓ -37%	6.1%	3.9%	↓ -2.2%
United Kingdom	17,100	18,800	↑ 10%	3.0%	3.3%	↑ 0.2%
Germany	7,300	8,200	↑ 12%	5.0%	5.4%	↑ 0.4%
Scandinavia	5,400	4,000	↓ -26%	6.6%	4.7%	↓ -1.8%
France	5,100	5,700	↑ 11%	5.6%	5.9%	↑ 0.3%
Italy	2,100	1,900	↓ -10%	3.9%	3.1%	↓ -0.8%
Netherlands	1,700	2,100	↑ 25%	3.8%	5.1%	↑ 1.3%
Switzerland	2,600	3,700	↑ 44%	6.5%	8.7%	↑ 2.2%
Other Europe	7,400	9,000	↑ 21%	4.1%	4.7%	↑ 0.6%
Other Countries	5,500	6,700	↑ 23%	1.3%	1.6%	↑ 0.3%
Total	141,200	156,000	↑ 10%	2.6%	2.7%	→ 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 Jun 2012	YE Jun 2013	% change	YE Jun 2012	YE Jun 2013	% change
<b>Visitors</b>						
Overnight visitors ('000s)	1,141	1,185	↑ 4%	50,021	50,592	↑ 1%
<b>Nights</b>						
Nights ('000s)	2,830	2,822	↔ 0%	159,937	159,960	↔ 0%
Average length of stay (nights)	2.5	2.4	↓ -4%	3.2	3.2	↓ -1%
<b>Expenditure</b>						
Expenditure (\$million)	\$259	\$293	↑ 13%	\$15,987	\$16,699	↑ 4%
Spend per visitor	\$227	\$247	↑ 9%	\$320	\$330	↑ 3%
Spend per night	\$91	\$104	↑ 13%	\$100	\$104	↑ 4%
<b>Purpose('000s)</b>						
Holiday	565	582	↑ 3%	22,069	23,217	↑ 5%
Visit friends &/or relatives (VFR)	341	335	↓ -2%	18,037	17,747	↓ -2%
Business	176	187	↑ 6%	7,573	7,371	↓ -3%
Other reason	66	85	↑ 29%	3,010	2,832	↓ -6%
Total overnight intrastate visitors	1,141	1,185	↑ 4%	50,021	50,592	↑ 1%

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

	Tasmania			Australia		
	YE Jun 2012	YE Jun 2013	% change	YE Jun 2012	YE Jun 2013	% change
<b>Visitor</b>						
Day visitors ('000s)	4,870	4,872	↔ 0%	160,164	160,069	↔ 0%
Total intrastate Day+Overnight visitors ('000s)	6,011	6,057	↑ 1%	210,185	210,661	↔ 0%
<b>Expenditure</b>						
Expenditure (\$million)	\$469	\$517	↑ 10%	\$17,544	\$18,065	↑ 3%
Spend per visitor	\$96	\$106	↑ 10%	\$110	\$113	↑ 3%
<b>Purpose('000s)</b>						
Holiday	2,470	2,343	↓ -5%	74,923	76,196	↑ 2%
Visit friends &/or relatives (VFR)	1,200	1,251	↑ 4%	46,783	48,573	↑ 4%
Business	544	486	↓ -11%	17,868	15,621	↓ -13%
Other reason	656	793	↑ 21%	20,590	19,679	↓ -4%
Total day intrastate visitors	4,870	4,872	↔ 0%	160,164	160,069	↔ 0%

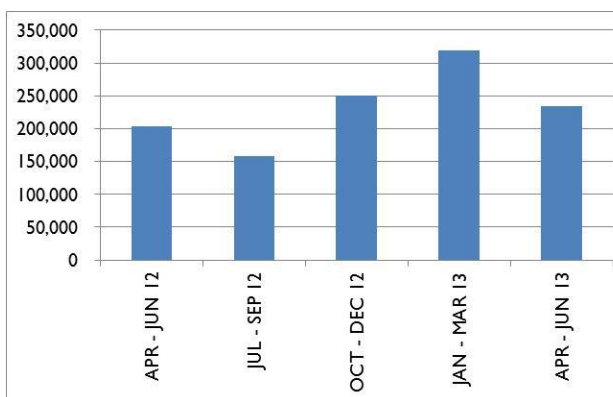
Source: National Visitor Survey (NVS), Tourism Research Australia

## Quarter ending June 2013

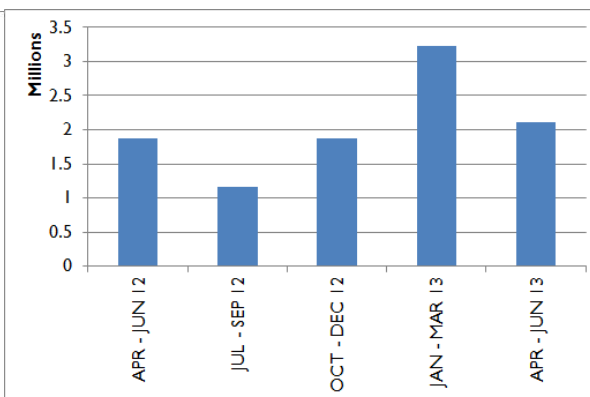
The TVS reports the following key findings for visitors during the April-June 2013 quarter.

- The total number of visitors to Tasmania for the June quarter 2013 was 234 200, up 15 per cent from 203 600 the previous year (Fig. 1).
- The total number of nights spent by visitors to Tasmania for the June quarter 2013 increased by 13 per cent to 2.12 million (was 1.87 million) (Fig. 2).
- Visitor expenditure was \$358 million, up 14 per cent from the same quarter of the previous year (was \$314.2 million) (Fig. 3).
- Of all visitors for the quarter, 90 100 (up 18 per cent) were on holiday, 75 900 (up 27 per cent) were visiting friends or relatives, 47 300 (down three per cent) were on business, and 8 100 (up 16 per cent) were travelling to attend a conference or convention (Fig. 4).

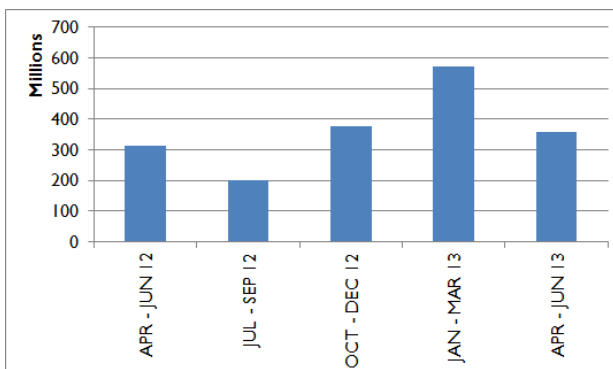
**Fig. 1. Total Visitors to Tasmania by Quarter\***



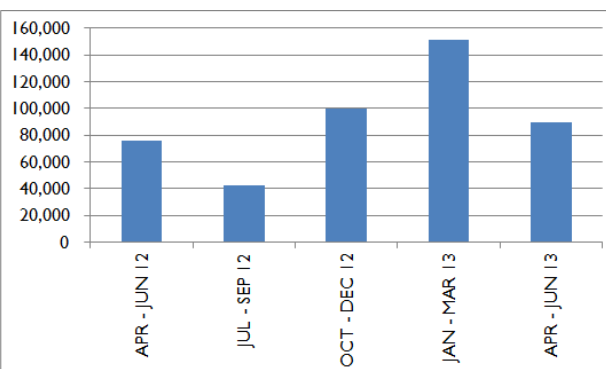
**Fig. 2. Total Nights by Quarter\***



**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](http://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.