



# Flinders Island

## Visitor Survey Report 2014

# Background and Methodology

During the twelve months to January 2014 Roy Morgan Research, in cooperation with Tourism Tasmania, undertook research to deliver the 2013-14 Flinders Island Visitor Survey results and report. The last study on the visitation to Flinders Island was conducted over the first six months of 2009.

The main objectives of the 2013-14 survey were to provide information to:

- Assist with tracking visitation activity in response to marketing initiatives undertaken
- Provide background information for marketing and promotional initiatives
- Highlight opportunities for industry development

Face-to-face interviewing of passengers was undertaken within the Whitemark Airport departure lounge during the 12 months to January 2014, where 1364 interviews were conducted with travellers departing Flinders Island (515 resident and 792 visitors over 14 years of age). 669 visitors completed the questionnaire provided. This included a short intercept survey conducted with all travellers departing Flinders Island, followed by a self-completion questionnaire for visitors only. The survey responses have been weighted to reflect all passengers who travelled via the main airline during the 12 months ending in January 2014. The survey results are therefore exclusive of visitors who exited the island via other methods, such as private and charter aircraft or via sea transport.

Previous analysis of data gathered from a past Flinders Island Community Survey (commissioned by Tourism Research Australia), Flinders Island businesses and from the Whitemark airport, showed that the regular airline service accounts for 85 – 90 per cent of travel activity to and from Flinders Island.

The sample for the survey was therefore selected from flights departing from Whitemark airport on Flinders Island to either Essendon or Launceston airports. Currently, Sharp Airlines is the only carrier operating commercial flights from Flinders Island and their Metroliner aircraft can carry up to 19 passengers.

## Summary of Survey Findings:

- A total of 5,692 travelled to Flinders Island during the 12 months ending January 2014.
- Visitors stayed a total of 34,500 nights on Flinders Island with an average length of stay of 6 nights.
- Visitors spent an estimated \$3.1 million whilst on Flinders Is. (excluding airfares) with an average expenditure of \$546 per person.
- Visitors taking a holiday were the most common purpose of visit accounting for 36 per cent of total visitors, followed by business/work travellers at 31 per cent then those visiting friends or relatives at 27 per cent and the remaining 6 per cent for some other reason.
- Over 96 per cent of visitors were from Australia with the remainder from Overseas. Residents of mainland Tasmania accounted for 53 per cent of all visitors, then those from Victoria at 21 per cent, and NSW at 13 per cent.

## 2014 Results Compared with Previous 2008-09 Survey

- The previous survey covering visitation for the year to June 2009 found 50 per cent or 4319 of all passengers interviewed departing Flinders Island were visitors.
- The latest results for the year to January 2014 found 55 per cent or 5,692 of all passengers were visitors. This represents an increase of 24 per cent or 1,373 visitors.
- The total number of nights increased from 25,000 to 34,500, an increase of 28 per cent from the 2009 estimates.
- Total visitor expenditure increased by 2 per cent from \$3.05 million to \$3.1 million (excluding airfares)
- The proportion of holiday visitors remained steady at 36 per cent, compared with 35 per cent for the 2009 study.

*Note: The 2009 survey findings were based on 6 months of data to estimate a 12 month total. Therefore caution should be exercised when interpreting comparisons between the two surveys.*



# Detailed Findings

## Total Visitation to Flinders Island

A total of 10,239 passengers departed Flinders Island on the scheduled airline service during the 12 months to January 2014. Of these, an estimated 5,692 or about 55 per cent were visitors aged 14 years or older. Less than two per cent of passengers were classified as infants.

### Purpose of Visit:

- Holiday or Leisure was the most common reason people visited Flinders Island. An estimated 36 per cent or over 2,000 adult visitors travelled to Flinders Island for a holiday during the 12 months to January 2014 (Figure 1).
- Visitors travelling for business or employment engagements on the island were the next most popular reason for travel, at an estimated 31 per cent of all visitors.
- An estimated 27 per cent of all visitors came to spend time with family or friends who are residents of Flinders Island. A small proportion of trips (4.2%) to Flinders Island were made by people pursuing a special interest activity, or for some other reasons (about 2.3%).

Figure 1: Purpose of visit to Flinders Island



## Total Nights and Length of Stay

Visitors spent approximately 34,500 nights on Flinders Island during the year ending in January 2014. Holiday visitors and those visiting friends or relatives (VFR) shared the majority of all nights spent at 40 per cent and 33 per cent respectively (Table 1). The average length of stay of holiday visitors at 6.7 nights was less than that of VFR visitors, at 7.5 nights per trip. Business or employment trips tended to be somewhat shorter, at an average of just over 4 nights.

Table 1: Estimated Visitors and Nights, Purpose of Visit to Flinders Island					
Year Ending January 2014	Holiday	Visiting friends / relatives	Business / employment	Special interest	Total Visitors
Estimated Visitors (aged 14+)	2,056	1,501	1,765	240	<b>5,692</b>
% share of total visitors	36%	27%	31%	4%	
Estimated Visitor Nights	13,671	11,211	8,246	836	<b>34,500</b>
Average Length of stay (nights)	6.7	7.5	4.7	3.5	
% share of total nights	40%	33%	24%	2%	
Unweighted count, n=	293	179	149	32	669

## Origin of Total Visitors

Australians were found to account for 97 per cent or 5,497 of total visitors, with the remaining 3 per cent (195) from overseas.

Residents of mainland Tasmania accounted for 53 per cent or 3,010 of the total visitors to Flinders Island. Visitors from Victoria were the next most common at 21 per cent (1,188) and those from NSW at 13 per cent (724).

## Origin of Holiday Visitors

Of the estimated 2,056 holiday visitors to Flinders Island, those travelling from both Tasmania and Victoria hold the majority of the share, both at 33 per cent (Table 2) each. Significantly, more than half (58%) of all visitors from Victoria were on a holiday, compared to only 23 per cent of visitors from Tasmania.

State of Residence	Number of Total visitors	Percentage of Total Visitors	Number of Holiday Visitors	Percentage of Holiday Visitors	Unweighted count, n=
Tasmania	3,010	53%	680	33%	246
Victoria	1,188	21%	684	33%	229
N.S.W./A.C.T.	724	13%	452	22%	93
Queensland	228	4%	78	4%	32
South Australia / Northern Territory	142	3%	35	2%	25
Western Australia	125	2%	22	1%	16
Overseas	195	3%	91	4%	18
Total Visitors	5,692		2,056		669

## Month of Visit

The months of January and March were the most popular for visitors (Figure 2). These two months accounted for 31 per cent of the annual total and 43 per cent of holiday visitors for the year.

Figure 2: Purpose of visit to Flinders Island



## Visitor Expenditure

Total expenditure by visitors to Flinders Island during the year to January 2014 is estimated at almost \$5.1 million dollars (including airfares to and from Flinders Island). Over 50 per cent of all expenditure was spent by holiday visitors (\$2.6 million), who spent approximately \$1,269 per person during their trip (Table 3). When looking at the total visitors (all purposes, not just holiday visitors) it was found that those who departed Flinders Island to Essendon have a higher average spend per person compared to those travelling to Launceston, at an estimated \$1,157 and \$786 per person respectively. Airfares accounted for an estimated 39 per cent of total visitor expenditure.

Year Ending January 2014	Average spend per visitor	Total expenditure	Share of expenditure
Total visitor spend	\$900	\$5,122,716	
<b>By purpose of visit:</b>			
Holiday/leisure	\$1,269	\$2,608,816	51%
Visit friends/relatives	\$679	\$1,019,923	20%
Business/employment	\$654	\$1,154,057	23%
Special interest	\$987	\$236,872	5%
<b>By destination:</b>			
Essendon	\$1,157	\$2,018,374	39%
Launceston	\$786	\$3,104,342	61%

Base: Total visitors, Unweighted count, n = 669

Visitor expenditure estimates excluding airfares came to a total of just over \$3 million dollars for the year (Table 4). Visitors spent an average of \$169 each on Flinders Island on accommodation and meals, \$112 each on transport used while on the island and \$191 each on other expenses such as entertainment and gifts. Holiday visitors contributed approximately \$1.7 million during the year ending January 2014 and have the highest average spend per person at \$843 each. Adult visitors departing for Essendon (represented only 31 per cent of all visitors) accounted for approximately 41 per cent of expenditure on Flinders Island (excluding airfares). Essendon bound visitors were higher yielding than visitors departing on flights to Launceston.

Year Ending January 2014	Average spend per visitor	Total expenditure	Share of expenditure
Total visitor spend	\$546	\$3,107,883	
<b>By purpose of visit:</b>			
Holiday/leisure	\$843	\$1,733,723	56%
Visit friends/relatives	\$286	\$429,944	14%
Business/employment	\$404	\$712,180	23%
Special interest	\$711	\$170,663	6%
<b>By destination:</b>			
Essendon	\$734	\$1,280,069	41%
Launceston	\$463	\$1,827,813	59%

Base: Total visitors, Unweighted count, n = 669

## First Time and Repeat Visitation

An estimated 36 per cent of all visitors to Flinders Island were first time visitors during the 12 months to January 2014, and 40 per cent stated they had visited within the past 12 months (Table 5). The majority of holiday visitors were on their first visit (55%), while 13 per cent of holiday visitors had been to Flinders Island two or more years previously. VFR travellers had a somewhat higher repeat visitation (compared to holiday visitors), with 35 per cent coming to the island within the previous 12 months. Those who made trips for business or employment also have a high repeat trip estimate of more than 60 per cent within the past 12 months.

**Table 5: Previous Visitation**

Have you previously visited Flinders Island?	Total	Purpose of Visit			Destination	
		Holiday/leisure	Visit friends/relatives	Business/employment	Essendon Airport	Launceston Airport
Yes, within 12 months	40%	22%	35%	64%	26%	46%
Yes, between 1 and 2 years ago	9%	9%	14%	3%	10%	8%
Yes, more than 2 years ago	14%	13%	23%	6%	14%	14%
No	36%	55%	25%	26%	49%	31%
<i>Unweighted count, n=</i>	<i>669</i>	<i>293</i>	<i>179</i>	<i>149</i>	<i>352</i>	<i>317</i>

## Future Visitation

Visitor responses to the question 'Do you think you will return to Flinders Island' were dominated by positive results, with over 73 per cent of all visitors stating they intend to return within two years (Table 6). This included 51 per cent of holiday visitors intending to return during the next 24 months.

**Table 6: Future Visitation**

Do you think you will return to Flinders Island?	Total	Purpose of Visit			Destination	
		Holiday/leisure	Visit friends/relatives	Business/employment	Essendon Airport	Launceston Airport
Yes, within 2 years	73%	51%	86%	91%	57%	81%
Yes, in more than 2 years' time	8%	14%	6%	1%	12%	6%
Unlikely to return/no intention to return	3%	7%	2%	-	7%	2%
Don't know/unsure	14%	26%	5%	7%	22%	10%
<i>Unweighted count, n=</i>	<i>669</i>	<i>293</i>	<i>179</i>	<i>149</i>	<i>352</i>	<i>317</i>



## Types of Accommodation Used

The number of nights spent in the homes of friends or relatives on Flinders Island represents the largest share of total visitor nights due to the tendency for VFR trips to be longer in duration than visits for other purposes (Table 7). Of the commercial accommodation establishments, self-contained cottages took the largest share of visitor nights.

**Table 7: Types of Accommodation used**

Accommodation type	Percentage of Total Nights	Estimated Number of Nights
Friend's/relative's place	45%	15,368
Self-contained cottage	22%	7,713
Own house/farm	6%	2,185
Hotel/motel	6%	2,107
Employer supplied/ work accommodation	6%	1,910
Guest house/B&B	4%	1,217
Holiday flat/unit	2%	583
Caravan park/cabin park	3%	893
Camping in National park/public land	2%	688
Total nights		34,500

Base: Total visitors, Unweighted count, n = 669

## Main Form of Transport Used

Thirty three per cent of all visitors used friends or relatives' vehicles to move around the island. Visitors on a holiday or business-related trip mainly relied on a rental vehicle (Table 8).

**Table 8: Main forms of transport used**

While on Flinders Island, which form of transport did you use for the greatest length of time?	Purpose of Visit				Destination	
	Total	Holiday/leisure	Visit friends/relatives	Business/employment	Essendon Airport	Launceston Airport
Friend's/relative's vehicle	33%	15%	85%	13%	34%	33%
Rental car	30%	53%	9%	25%	32%	29%
Rental bus	5%	9%	2%	2%	6%	5%
Employer's transport/vehicle	14%	N.P.	1%	44%	2%	20%
Bicycle	N.P.	-	-	1%	-	N.P.
Taxi	2%	2%	-	2%	1%	2%
Tour bus	4%	10%	-	N.P.	15%	-
Walking or hitch-hiking	2%	2%	-	3%	1%	2%
Some other	10%	10%	2%	11%	10%	10%
Unweighted count, n=	669	293	179	149	352	317

N.P. = Not publishable due to small sample size

## Activities and Places Visited

Outdoor activities and beach visits have proved to be popular activities among visitors, with swimming/time at the beach, recreational walks and bushwalking enjoyed by 40 per cent, 38 per cent and 28 per cent respectively (Table 9). Fishing was undertaken by 26 per cent of visitors. While the majority of visitors spent time in the town centres of Whitemark and Lady Barron, other recreational locations were also well represented.

In which of the following activities did you participate during this visit?	Percentage of Total Visitors	Which of the following places did you visit during this trip?	Percentage of Total Visitors
Swimming/time at the beach	40%	Whitemark	84%
Recreational walks	38%	Lady Barron	69%
Bushwalking	28%	Killiecrankie	50%
Fishing	26%	Trousers Point Beach	48%
Some other activity	21%	North East River	41%
Boating/sailing	16%	Allports	31%
Off road tours	10%	Wybalenna	31%
Diving/snorkelling	8%	Mt Strezelecki	28%
Gem fossicking	7%	Museum	26%
Hunting	6%	Walkers Lookout	26%
Bus tours	5%	Sawyers Bay	24%
Organised sport	2%	Yellow Beach	23%
		Other	23%
		Furneaux Lookout	22%

Base: Total visitors, Unweighted count, n = 669

## Demographics of Visitors

Overall, male visitors were more common than female visitors, with this trend continuing among the visitors on holiday (Table 10). When aggregated, the age groups between 50 and 64 years represented 33 per cent of all visitors to the island. This was more dominant among holiday visitors, where about 72 per cent of holiday visitors were aged 50 years or more. Travel group sizes remained small, with an average of 3.2 people per group, and slightly higher for holiday visitors. The majority of visitors were married or in defacto relationships, with 50 per cent of all holiday visitors in a marriage relationship.

Gender:	Total Visitors	Holiday Visitors
Female	42%	48%
Male	57%	51%
Age Group:		
14-19	4%	2%
20-24	5%	1%
25-29	9%	5%
30-34	6%	6%
35-39	4%	2%
40-44	11%	9%
45-49	7%	3%
50-54	11%	10%
55-59	11%	11%
60-64	11%	16%
65-69	9%	13%
70+	11%	22%
Travel Group Size (average)	3.2 people	3.9 people
Marital status:		
Married	43%	50%
Defacto/Living with partner but not married	14%	16%
Single (never married)	11%	8%
Unweighted count, n=	669	293



## Profile of Visitors

The majority of visitors were either employed or retired from work (Table 11), coinciding with the dominance of visitors in older age groups. Most of the main income earners relating to the household of each respondent were professionals. Of the holiday visitors, 39 per cent were in full time work while a third had retired from work. For holiday visitors, the main income earners salary tended toward the mid-range incomes by comparison to the overall results, with almost 23 per cent of holiday visitors indicating the \$36,400 - \$77,000 salary ranges.

Table 11: Visitor Profile		
	Total Visitors	Holiday Visitors
<b>Employment of respondent:</b>		
Full time	52%	39%
Part time	15%	17%
Retired	18%	33%
Student	3%	2%
Looking for work	1%	N.P.
Home duties	2%	3%
Does not work	3%	5%
<b>Main income earner's occupation</b>		
Professional	20%	25%
Other Professional	17%	18%
Manager/Business owner	15%	15%
Sales Person, Shop Worker, Office Worker	7%	6%
Skilled/ Semi-skilled Worker	14%	6%
Other Manual Worker	4%	3%
Other or never been employed	5%	6%
<b>Main earner's income (AUD)</b>		
Under \$15.6K	2%	3%
\$15.6K to \$25K	2%	4%
\$26K to \$36.3K	5%	3%
\$36.4K to \$51K	8%	11%
\$52K to \$77K	14%	12%
\$78K to \$103K	15%	8%
\$104K to \$129K	8%	8%
\$130K to \$149K	3%	3%
\$150K to \$174K	2%	2%
\$175K to \$199K	1%	2%
\$200K +	5%	9%
<i>Unweighted count, n=</i>	669	293

N.P. = Not publishable due to small sample size



## Information Sources and Booking Methods

Slightly less than half of visitors to Flinders Island (47%) sought suggestions from friends or relatives to assist in the planning of their visit (Table 12). Travel agents and travel literature (maps/books/brochures) were used by between 9 and 11 per cent of visitors. Typically holiday visitors were the most active in seeking information, using both travel agents and literature at a higher proportion than other visitors. This trend continued among website usage results, with an estimated 22 per cent of holiday visitors had used the visit-flinders-island website and this was the most popular online information source used by holiday visitors.

The internet was also the most popular method for booking reservations by visitors, with more than 50 per cent of visitors to make a booking over the internet using their computer or tablet. The traditional methods of telephone and making a face-to-face booking were used by 35 per cent and 4 per cent of all visitors respectively.

**Table 12: Information & Booking sources**

	Total Visitors	Holiday Visitors
<b>Information sources:</b>		
Friend or relative suggestion	47%	42%
Travel agent	9%	17%
Map/book/brochures	11%	21%
Tasmanian Travelways	N.P.	N.P.
TV travel shows	N.P.	N.P.
Male	57%	51%
<b>Websites:</b>		
visitflindersisland.com.au	12%	22%
discovertasmania.com.au	3%	5%
Some other source	19%	21%
<b>Booking methods:</b>		
Internet/Website via computer/tablet	52%	53%
Telephone call	35%	46%
Internet/Website via mobile phone	5%	6%
In person	4%	7%
Email	7%	13%
Some other method	5%	4%
<i>Unweighted count, n=</i>	669	293

N.P. = Not publishable due to small sample size



## Visitor Feedback

Overall, visitors held positive impressions of the services and experiences they enjoyed on Flinders Island, particularly the customer service and the attractions and activities (Table 13).

**Table 13: Satisfaction of Total Visitors**

How do you rate the following aspects of Flinders Island	Availability of services	Attractions and activities	Quality of accommodation	Customer service	Availability of transport to Flinders Island	Availability of local produce	Availability of cafés, restaurants, take-away outlets
Very Good	13%	35%	29%	39%	24%	19%	13%
Good	46%	42%	36%	42%	40%	38%	39%
Average	25%	8%	14%	8%	19%	22%	28%
Poor	3%	1%	1%	1%	4%	6%	7%
Very Poor	1%	N.P.	-	N.P.	N.P.	1%	2%
Unweighted count, n=	669	669	669	669	669	669	669

N.P. = Not publishable due to small sample size

In comparison to total visitors, those who were holidaying on Flinders Island were significantly more positive in their ratings of services and experiences offered by Flinders Island (Table 14).

**Table 14: Satisfaction of Holiday / Leisure Visitors**

How do you rate the following aspects of Flinders Island	Availability of services	Attractions and activities	Quality of accommodation	Customer service	Availability of transport to Flinders Island	Availability of local produce	Availability of cafés, restaurants, take-away outlets
Very Good	16%	49%	41%	48%	28%	20%	13%
Good	38%	35%	33%	35%	37%	32%	32%
Average	30%	6%	12%	8%	18%	26%	35%
Poor	3%	1%	2%	1%	5%	8%	8%
Very Poor	N.P.	N.P.	-	-	1%	1%	1%
Unweighted count, n=	293	293	293	293	293	293	293

N.P. = Not publishable due to small sample size

Irrespective of their experiences on Flinders Island, visitors were positive about their likelihood to recommend a holiday to the island to others (Table 15). 83 per cent of total visitors indicated they were very likely or likely to recommend, whilst only 4 per cent were unlikely or very unlikely. There was no significant differences in these findings between the different purposes of travel.

**Table 15: Satisfaction of Holiday / Leisure Visitors**

How likely to recommend Flinders Island as holiday destination to others?	Total Visitors	Visiting friends/ relatives	Holiday/ Leisure	Business or employment
Very likely to recommend	48%	54%	51%	40%
Likely to recommend	35%	31%	34%	39%
<b>TOTAL LIKELY OR VERY LIKELY TO RECOMMEND</b>	<b>83%</b>	<b>85%</b>	<b>85%</b>	<b>79%</b>
Neither likely nor unlikely to recommend	5%	2%	3%	11%
unlikely to recommend	1%	-	1%	2%
Very unlikely to recommend	3%	4%	4%	1%
<b>TOTAL UNLIKELY OR VERY UNLIKELY TO RECOMMEND</b>	<b>4%</b>	<b>4%</b>	<b>5%</b>	<b>3%</b>
Unweighted count, n=	669	179	293	149

N.P. = Not publishable due to small sample size





## Contact Us

Research Unit, Tourism Tasmania – Level 2, 22 Elizabeth Street, Hobart, 7000

**Email:** [statistics@tourism.tas.gov.au](mailto:statistics@tourism.tas.gov.au)

[www.tourismtasmania.com.au](http://www.tourismtasmania.com.au)

